

## Regular Meeting

Monday, May 23, 2022 6:00 PM

Carrie L. Lovejoy Child Development Center: Room D100, 256 Country Club Road, Allen, TX 75002

1. **Call to Order**

**Presenter:** Barrett Owens, President

2. **Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act**

**Presenter:** Barrett Owens, President

2.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.

2.A.1. Consultation with attorney regarding recording Board meetings

2.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.

2.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.

2.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.

2.D.1. Evaluation of employees.

2.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.

2.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the

complaint or charge is brought makes a written request for an open hearing.

2.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.

2.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.

2.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.

3. **Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session** **Presenter:** Barrett Owens, President

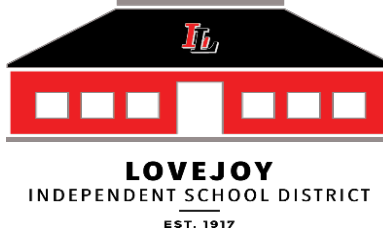
4. **Opening Exercise** **Presenter:** Barrett Owens, President

4.A. Pledges

4.B. Roll Call **Presenter:** Barrett Owens, President

5. **Recognitions** **Presenter:** Barrett Owens, President

5.A. Student Recognitions **Presenter:** Kevin Parker, Executive Director of Student Services



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23,2022
<b>Document Title</b>	Student Recognitions
<b>Presented For</b>	<input type="checkbox"/> Board Action    X Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None    X Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Kevin Parker, Executive Director of Student Services

### Executive Summary

Lovejoy ISD is proud to recognize the following for their participation and accomplishments in their State competition:

- 2022 U.S. Presidential Scholar in the Arts
- Lovejoy High School Robotics World Competition
- Willow Springs Middle School World Competition
- Lovejoy High School Track and Field
- Lovejoy High School Fishing Team
- Lovejoy High School Academic U.I.L.
- Lovejoy High School International League Press Conference (ILPC)
- WSMS International League Press Conference (ILPC)

# Lovejoy High School

## Robotics

<b>Student First Name</b>	<b>Student Last Name</b>	<b>Team</b>	<b>Recognition</b>
Abby	Carraway	1082C	State Championship Excellence Award
Daniel	Hanna	1082C	State Championship Excellence Award
Danny	Khalil	1082C	State Championship Excellence Award
Alyssa	Vaughn	1082C	State Championship Excellence Award
Kayla	Vigen	1082C	State Championship Excellence Award
Joel	Walenciak	1082C	State Championship Excellence Award
Luke	Whitfill	1082C	State Championship Excellence Award
Hannah	Schnurr	1082C	State Championship Excellence Award
Olivia	Lee	1082E	Worlds Division Quarterfinalist
Megha	Siripurapu	1082E	Worlds Division Quarterfinalist
Tucker	Ashley	1082E	Worlds Division Quarterfinalist
Fletcher	Boots	1082E	Worlds Division Quarterfinalist
Jacob	Keane	1082E	Worlds Division Quarterfinalist
Gregory	Powers	1082E	Worlds Division Quarterfinalist
Sean	Chang	1082E	Worlds Division Quarterfinalist
Alex	Tranchina	1082E	Worlds Division Quarterfinalist
Rob	Phillips	1082E	Worlds Division Quarterfinalist
David	Carias	1082K	State Championship Innovate Award
Sophie	Alcaraz Corona	1082K	State Championship Innovate Award
Tracy	Chen	1082K	State Championship Innovate Award
Jackson	Delaney	1082K	State Championship Innovate Award
Kyle	Holiman	1082K	State Championship Innovate Award
Brayden	Nelson	1082K	State Championship Innovate Award
Frankie	Portera	1082K	State Championship Innovate Award
Sharon	Chen	1082K	State Championship Innovate Award
Noah	Marsden	1082K	State Championship Innovate Award
Christian	Cazares	1082R	World Championship Qualified
Jack	Kuhn	1082R	World Championship Qualified
Apia	Okorafor	1082R	World Championship Qualified
Paari	Palani	1082R	World Championship Qualified
Robert	Schnurr	1082R	World Championship Qualified
Liam	Whittington	1082R	World Championship Qualified
Declan	Cunningham	1082X	State Championship Design Award
Isaac	Joseph	1082X	State Championship Design Award
Alec	Miksa	1082X	State Championship Design Award
Liam	Palazzolo	1082X	State Championship Design Award
Emily	Perry	1082X	State Championship Design Award
Chakrearsey	Prom	1082X	State Championship Design Award
Brielle	Taylor	1082X	State Championship Design Award
Xander	Ludwig	1082Y	State Championship Semi-Finalist
Leonna	Madrid	1082Y	State Championship Semi-Finalist
Alannah	McCraw	1082Y	State Championship Semi-Finalist
Lane	McDonald	1082Y	State Championship Semi-Finalist
Paul	Jasina	1082Y	State Championship Semi-Finalist
Clark	Koons	1082Y	State Championship Semi-Finalist

Garrett	Payne	<b>1082Y</b>	State Championship Semi-Finalist
Nicholas	Galanakis	<b>1082Y</b>	State Championship Semi-Finalist
Kylee	Thomason	<b>1082Y</b>	State Championship Semi-Finalist
Marshall	Gatlin	<b>1082Z</b>	Worlds Division Quarterfinalist
Austin	Hummel	<b>1082Z</b>	Worlds Division Quarterfinalist
Eric	Silva	<b>1082Z</b>	Worlds Division Quarterfinalist
Madeline	Coughlin	<b>1082Z</b>	Worlds Division Quarterfinalist
Grant	Rasmussen	<b>1082Z</b>	Worlds Division Quarterfinalist
Alina	Srambickal	<b>1082Z</b>	Worlds Division Quarterfinalist

## Track

Riley	McGowan	6th Place	400M
Jaxson	Lavender	3rd Place	4x400 M Relay
Parker	Livingstone	3rd Place	4x400 M Relay
Omari	Murdock	3rd Place	4x400 M Relay
Riley	McGowan	3rd Place	4x400 M Relay
Kailey		1st place in the 800 meter run with a new State Record of 2:06.21, 7th place in the 1600 meter run, 4th place in the 4x400 meter relay	
Sara	Littlefield Morefield	3rd place in the 3200 meter run	
Amy	Morefield	5th place in the 3200 meter run, 4th place in the 4x400 meter relay	
Mia	Reaugh	4th place in the 4x400 meter relay	
Leila	Ngapout	4th place in the 4x400 meter relay	

## Art

Ella	Reaugh	2022 US Presidential Scholar in the Arts
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## UIL

Hannah	Mao	5th Place State Written Computer Science Test
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## ILPC - UIL - Lovejoy Productions/Broadcast

Annabeth	Smith	Graphics- 2nd place as well as 3rd place for Promotion/Commercial/PSA
Jake	Piccirillo	Promotion/Commercial/PSA - 3rd place
Noah	Naidoo	Documentary - 3rd place
Chloe	Smith	Promotion/Commercial/PSA - 3rd place
Carder	Lewis	Promotion/Commercial/PSA - 3rd place

## ILPC - UIL - The Red Ledger

Olivia	Lauter	Portrait - 3rd place
Calla	Patino	Feature Writing - 2nd place
Eleanor	Koehn	Entertainment Review - 3rd place
Sarah	Hibberd	Feature Writing - Honorable Mention
Andrew	Hager	Portrait - Honorable Mention
Will	Doig	Sports Feature - Honorable Mention

## Fishing

Ben	Burns	3rd Place
Aidan	Abramson	3rd Place
Connor	Dunn	8th Place
Ian	Nash	8th Place
Grant	Pursifull	159th Place

Kade  
Mason  
Avery

Stubbs  
Muller  
Conn

159th Place  
245th Place  
245th Place

# Willow Springs Middle School

## WSMS Media

<b>Student First Name</b>	<b>Student Last Name</b>	<b>Recognition</b>
Avery	Gray	ILPC - General News Story - 1st Place
Zala	Batoor	ILPC - General News Story - 1st Place
Vidya	Dandona	ILPC - General News Story - 1st Place
Pablo	Duran de la Vega	ILPC - General News Story - 2nd Place
Kaitlyn	Miller	ILPC - General News Story - 2nd Place
Reagan	Wiss	ILPC - General News Writing - 1st Place
Margaret	Meehlhause	ILPC - General News Writing - 1st Place
Reagan	Wiss	ILPC - General News Writing - 2nd Place
Margaret	Meehlhause	ILPC - General News Writing - 2nd Place
Bobby	Haas	ILPC - Sports Feature Story - 1st Place
Julian	Mayfield	ILPC - Sports Feature Story - 1st Place
Ivy	Eckols	ILPC - Sports Feature Story - 1st Place
Lainey	Pierce	ILPC - Sports Feature Story - 1st Place
Sydney	Stratmeyer	ILPC - Sports Feature Story - 2nd Place
Reagan	Wiss	ILPC - Anchor Team Presentation - 1st Place
Margaret	Meehlhause	ILPC - Anchor Team Presentation - 1st Place
Julian	Mayfield	ILPC - Intro Sequence - 2nd Place
Skylar	Jackson	ILPC - Intro Sequence - 2nd Place
Addy	McCaffity	ILPC - Intro Sequence - 2nd Place
Pragna	Kotra	ILPC - Intro Sequence - 2nd Place
Nick	Amabile	ILPC - General Feature Writing - 3rd Place
Jack	Willard	ILPC - General Feature Writing - 3rd Place
WSMS News Staff		ILPC - Technical Directing - 1st Place
WSMS News Staff		ILPC - Distinguished Merit & Silver Star Award

# Willow Springs Middle School

## WSMS Robotics - Worlds Robotics Competition - Out of 504 teams

<b>Student First Name</b>	<b>Student Last Name</b>	<b>Recognition</b>
Max	Rattleff	50th Place
Zayan	Alam	50th Place
Nicholas	Amabile	50th Place
Adam	Kent	50th Place
James	Bognot	50th Place
Carson	Dykstra	50th Place
Lucas	Hersley	Semifinalist
AJ	Hersley	Semifinalist
Colt	Whitfill	Semifinalist
Jack	Vondersaar	Semifinalist
Deacon	Frauman	Semifinalist
Luke	David	Quarterfinalist
Jordan	Paulus	Quarterfinalist
Trevor	Fails	Quarterfinalist
Johnny	Godfrey	Quarterfinalist
Ethan	Adcock	Quarterfinalist
Maddox	Johnson	Quarterfinalist
Trystan	Taylor	64th Place
Brady	Gerwer	64th Place
Arthur	He	64th Place
Zane	Brown	64th Place
Nathan	Sy	64th Place
Tyler	LaGrace	64th Place
Colton	Mills	Quarterfinalist
Nolan	Hummel	Quarterfinalist
Ace	Ernst	Quarterfinalist
Ford	Edwards	Quarterfinalist
Alex	Vester	Quarterfinalist
Joshua	Liu	Quarterfinalist

5.B. Staff Recognitions

**Presenter:** Kevin  
Parker, Executive  
Director of Student  
Services



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT  
EST. 1917

## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Staff Recognitions
<b>Presented For</b>	Board Action    X Report/Review Only
<b>Supporting Documents</b>	X None    Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Anna Koenig, Executive Director of Human Resources & Communications
<b>Executive Summary</b>	
Recognize Campus Teachers of the Year and announce the Secondary and Elementary Teachers of the Year for the 2023 school year.  Puster Elementary - Amy Matteucci Hart Elementary - Laine Collins Sloan Creek Intermediate - Jennifer Waters Willow Springs - September Wheeler Giese Lovejoy High School - Annastacia Daugherty	
<b>Fiscal Implications</b>	
N/A	
<b>Administrator Recommendation</b>	
N/A	
<b>Board Priority</b>	
<b>Priority 2</b> Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and	

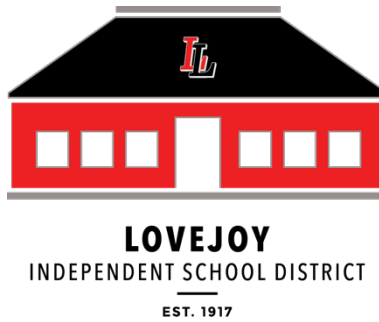
colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

#### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future

6. **Public Comments Related to May 23, 2022 Agenda  
Items**

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



# Public Comment Procedures

## Regular Meetings

### Submitting for Public Comment

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice.

Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting.

The Board will provide speakers that submit a public comment card on an agenda item the opportunity to speak prior to the Board's consideration of the item in the order in which they were received.

Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual gets one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items.

If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting.

The comments made by speakers at public comment reflect the opinions solely of the speaker and not the Board of Trustees as a governing body or the District.

### Order of Agenda and Limitations

The Board reserves the right to change the order of the agenda items on the notice of meeting and / or defer agenda items until a later date.

Each speaker will be provided up to three minutes to address the Board of Trustees unless more than 10 speakers sign up to speak, in which case, the presiding officer reserves the right to reduce the time allotted to each speaker to no less than one minute per speaker. (Board Policy BED (LOCAL)).

If at any time, in the opinion of the presiding officer, the individual speaker is attempting to address a non-agenda item in the agenda item public comment period, the presiding officer or designee may stop the speaker and defer the speaker's comments to the appropriate portion of the meeting.

Public comments relating to non-agenda items will be deferred until the end of the meeting if time permits, unless otherwise noted by the Board of Trustees.

### **Disruptive Behavior**

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement.

It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

Conduct defined by Texas Penal Code §42.01 and Board Policies BED (LEGAL) and BED (LOCAL).

Failure to yield the podium at the conclusion of the time allotted to a speaker at public comment constitutes a disruption and will be addressed accordingly.

Comments made to the Board of Trustees by meeting attendees and/or speakers outside of the designated public comment periods during a meeting constitute a disruption.

### **Board's Response to Public Comment**

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board shall not deliberate or decide regarding any subject that is not included on the agenda posted with notice of the meeting. The Board may also refer a speaker to a staff member in authority over the issue.

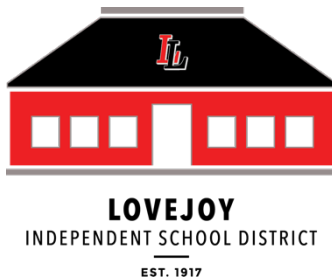
For specific complaints or concerns, speakers are encouraged to utilize the District's appropriate grievance procedures and policies set forth in Board Policies FNG (LOCAL), DGBA (LOCAL), and GF (LOCAL).

### **Special Meetings**

The procedures outlined herein apply to special called Board meetings. However, comments at special called Board meetings are limited to agenda items only.

### **Statement of Non-Discrimination**

The Board does not discriminate against speech on the basis of viewpoint.



## **School Board Public Comments Sign In May 23, 2022**

The Board of Trustees encourages public comment. All public comment at a meeting other than a regularly scheduled meeting should be limited to agenda items posted for the meeting. By signing up to provide public comment at a Board meeting, you are acknowledging and accepting the procedures for public comment available online at [lovejoyisd.net](http://lovejoyisd.net).

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice. Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting. Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual will have one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items. If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting. All speakers will be limited to no more than three minutes. The presiding officer reserves the right to reduce the number of minutes per speaker to no less than one minute per speaker in order to maintain effective meeting management. The speakers will be recognized in the order in which each person signs up. If there are more speakers than time allotted for public comment, the amount of time per speaker may be reduced, as determined appropriate by the Board of Trustees. If time does not allow for you to speak at public comment, the Board of Trustees may allot additional time for public comment or defer specific agenda items for review at a subsequent meeting in an effort to allow more public comment, as determined necessary by the Board. This public comment card will not be maintained from one meeting to the next and is only applicable to the meeting on the date in which it was submitted.

If you have a specific concern related to an employee of the District or a specific student issue, you are encouraged to utilize the District's grievance procedures provided in Board Policies DGBA (LOCAL), FNG (LOCAL), and GF (LOCAL) or applicable grievance process. Each grievance procedure allows for an individual to redress grievances with the Board of Trustees. All relevant policies are available online at [lovejoyisd.net](http://lovejoyisd.net).

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement. It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

The Board of Trustees appreciates your active participation in the school district.

**\*I wish to address the Board about an item appearing on the May 23, 2022 agenda.**

**I wish to speak about agenda item #\_\_\_\_\_ which is titled:**

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**\*I wish to participate in the open forum by speaking about the following topic:**

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**First and Last Name:**

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**Address:**

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**Phone:**

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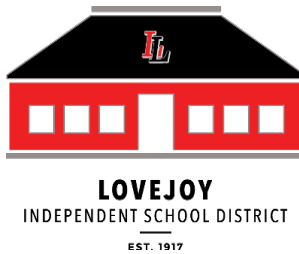
**Organization (if applicable):**

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**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT  
EST. 1917

7. Invocation	<b>Presenter:</b> Barrett Owens, President
8. Administer Oath of Office to Newly Elected Board Members	<b>Presenter:</b> Kim Steiner, Coordinator of Community Engagement and Organizational Development / Executive Assistant to the Superintendent
9. Consider and Act on 2022-2023 Board Officer Selection	<b>Presenter:</b> Barrett Owens, President
10. Consider and Act on Appointment of Board Member Liaison to the Foundation for Lovejoy Schools	<b>Presenter:</b> Barrett Owens, President
11. Board Notifications	
11.A. Notification of Resignations	<b>Presenter:</b> Anna Koenig, Executive Director of Human Resources and Communications



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Resignations
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Anna Koenig, Executive Director of Human Resources & Communications
<b>Executive Summary</b>	
Resignations are attached for board notification. This is not an action item.	
<b>Fiscal Implications</b>	
Open positions are strategically reviewed by the Superintendent, Assistant Superintendent of Finance and Operations, and Executive Director of Human Resources and Communications to determine if and how they will be replaced. Decisions are made to support the highest quality of learning experiences for students while also considering the short and long-term financial impact.	
<b>Administrator Recommendation</b>	
n/a	
<b>Board Priority</b>	
<p><b>Priority 3</b></p> <p>Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and</p>	

intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

## May Resignations

**Date: May 23, 2022**

<b>Name</b>	<b>Position</b>	<b>Location</b>	<b>Last Day</b>
Samantha Boswell	Math Teacher/Coach	WSMS	5/28/2022
Aaron Cappotelli	Journalism Teacher	LHS	5/28/2022
Bruce Coachman	Part-Time Acting Director	Transportation	6/21/2022
Diane Dahl	GT Teacher	PES	5/28/2022
William Davis	PE & Health Teacher/Coach	PES	5/28/2022
Sandra Dennis	Part-Time GT Teacher	Admin	5/28/2022
Kelly D'Souza	Choir Director	WSMS	5/28/2022
Victoria England	RLA Teacher	SCIS	5/28/2022
Jeffrey Higgins	Social Studies Teacher/Coach	SCIS	5/28/2022
Michelle Huffman	Part-Time Teacher/FTGE	PES	5/28/2022
Cathy Koziatek	Choir Director	LHS	5/28/2022
Homa Lewis	AP/GT History Teacher	LHS	5/28/2022
Marshall Locke	Social Studies Teacher	WSMS	5/28/2022
Christopher Mayfield	Principal	LHS	6/21/2022
Melodie Morris	PE Teacher/Coach	WSMS	5/28/2022
Kyle Nelson	SPED Math Teacher	SCIS	5/28/2022
Susan Powell	Part-Time Dyslexia Teacher	SCIS	5/28/2022
Traci Reagan	Science Teacher	SCIS	5/28/2022
Cera Risoli	Science Teacher/Coach	WSMS	5/28/2022

Jeffrie Sagehorn	PE & Health Teacher/Coach	SCIS	5/28/2022
Chelsea Sexton	Art Teacher	HES	5/28/2022
Kathy Stone	Counselor	WSMS	6/7/2022
Sadaf Syed	Part-Time Science Teacher	LHS	5/28/2022
Anne Tracy	Music Teacher/ Elementary Fine Arts Coordinator	PES	6/3/2022
Mary Tye	Pre-K Instructor	LCDC	05/28/2022
Eileen Wade	Speech-Language Pathologist	SCIS	5/28/2022
Shari Waites	GT Teacher	HES	5/28/2022
Gretchen Young	Nurse	WSMS	5/28/2022

12. **Consent Agenda**

**Presenter:** Barrett  
Owens, President

12.A. Consider Approval of the Minutes of the  
April 14, 2022 Board Training

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT  
EST. 1917

## **Board of Trustees Minutes of the Board Workshop Thursday, April 14, 2022**

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A Team of 8 Training for the Lovejoy Independent School District Board of Trustees was held on Thursday, April 14, 2022, beginning at 8:00 AM in Room D100 of the Carrie L. Lovejoy Child Development Center located at 256 Country Club Road, Allen, Texas 75002.

Marvin Bobo: Present  
Chad Collins: Present  
Jason Jaynes: Present  
Barrett Owens: Present  
Amy Smith: Present  
Anne Smith: Present  
Jeff Wood: Present

### **1. Call to Order**

The Meeting was Called to Order at 8:00 AM by Board President, Barrett Owens.

### **2. Opening Exercise**

#### **2.A. Roll Call**

All Board Members were Present.

### **3. Annual Team of Eight Training**

#### **Discussion Only**

Dr. Lizzy Johnson facilitated a Team of Eight continuing education and team-building session in compliance with the Texas Education Code (TEC) §11.159, Chapter §61.1. No action was taken.

### **4. Adjournment**

With there being no further business, the Board adjourned at 11:06 AM.

Respectfully submitted,

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Anne Smith, Secretary of the Board of Trustees

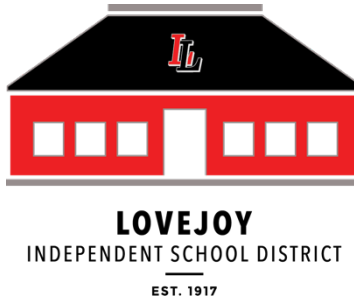
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Barrett Owens, President of the Board of Trustees

\*Agenda item details are filed in the Superintendent's Office with the Thursday, April 14, 2022 agenda packet.

12.B. Consider Approval of the Minutes of the  
April 25, 2022 Board Meeting

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



## **Board of Trustees Minutes of the Regular Meeting and Public Hearing Monday, April 25, 2022**

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A Regular Meeting and Public Hearing of the Lovejoy Independent School District Board of Trustees was held on Monday, April 25, 2022, beginning at 6:00 PM in the Carrie L. Lovejoy Child Development Center, located at 256 Country Club Road, Allen, Texas.

Marvin Bobo: Present  
Chad Collins: Present  
Jason Jaynes: Absent, participated in closed session via phone  
Barrett Owens: Present  
Amy Smith: Present  
Anne Smith: Present  
Jeff Wood: Present

### **1. Call to Order**

The Meeting was Called to Order at 6:00 PM by Board President, Barrett Owens.

### **2. Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act**

The Board retired into Closed Session at 6:00 PM in room D100.

**2.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.**

**2.A.1. Consultation and deliberation regarding Stonegate Texas Homeowners Association, Inc. petition for annexation and detachment submittal in accordance with Section 13.051 of the Texas Education Code.**

- 2.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.**
- 2.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.**
- 2.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.**
  - 2.D.1. Evaluation, duties, and employment of employees.**
- 2.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.**
- 2.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.**
- 2.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.**
- 2.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.**
- 2.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.**

**3. Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session**

The Board of Trustees returned to the Open Meeting at 7:14 PM in the Library.

**4. Opening Exercise**

**4.A. Pledges**

Courtney Halpin, Principal of Sloan Creek Intermediate School, introduced 5th grader Evan Porter who led the Pledge of Allegiance and the Texas Pledge.

#### **4.B. Roll Call**

Jason Jaynes was Present via phone for Closed Session and was Absent for Open Session. All other Board Members were Present.

### **5. Recognitions**

#### **5.A. Student Recognitions**

Jacob Hunter, Teacher at Willow Springs Middle School, introduced James Bognot and Justen Mao who were recognized for their participation and achievements in MathCounts.

#### **5.B. PTO Recognition: Outstanding Service Awards**

The Council of PTO's presented their 2021-2022 Outstanding Service Award Nominees with certificates, including: Katie Kordel, Casey Littlefield, Diana Abbott, Jess Elo, Hayley Hangartner, Debbie Nash, Star James, Lana Jasper, Courtney Beal, Julie Boardman, Christy Forte, Rachael Merrick, Kari Aguilar, and Tanya Barger.

#### **5.C. Board of Trustees Recognition**

Barrett Owens, Board President, recognized Trustee Chad Collins for 12+ years of distinguished service on the Lovejoy ISD Board of Trustees. Mr. Collins was presented with a "Lovejoy Red School House" watercolor and a Certificate of Recognition for his service.

### **6. Public Comments Related to April 25, 2022 Agenda Items**

There was 1 public comment related to the April 25, 2022 Agenda Items:

- Amy Russell, Teacher Appreciation & Administration Appreciation

### **7. Invocation**

Marvin Bobo, Trustee, led the Invocation.

### **8. Board Notifications**

#### **8.A. Notification of Resignations**

Anna Koenig, Executive Director of Human Resources and Communications, notified the Board of April resignations.

### **9. Consent Agenda**

Motion to approve the Consent Agenda. This motion, made by Chad Collins and seconded by Marvin Bobo, Passed.

Yea: 6, Nay: 0, Absent: 1

#### **9.A. Consider Approval of the Minutes of the March 28, 2022 Board Meeting**

#### **9.B. Consider Approval of the Minutes of the April 11, 2022 Board Meeting**

### **9.C. Consider Approval of Monthly Finance Report**

### **10. Annual Announcement on Continuing Education of Board Members**

Mr. Barrett Owens read the Annual Announcement of Continuing Education for Board Members. All Board Members completed their required training and exceeded the requirements for additional continuing education.

### **11. Budget Workshop**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented the April Budget Workshop.

### **12. Lovejoy Child Development Center (LCDC) Update**

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, presented an update on the Lovejoy Child Development Center.

### **13. Consider and Act on 2022-2023 Allotment and Texas Essential Knowledge and Skills (TEKS) Certification Form**

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, introduced Mary Mullen, Director of Secondary Education and Assessment and Accountability, who compiled the information for the 2022-2023 Allotment and Texas Essential Knowledge and Skills (TEKS) Certification Form.

Motion to approve the 2022-2023 Allotment and Texas Essential Knowledge and Skills Certification Form. This motion, made by Anne Smith and seconded by Amy Smith, Passed.  
Yea: 6, Nay: 0, Absent: 1

### **14. Consider and Act on Approval of Employment Agreements and Chapter 21 Employment Contracts**

Anna Koenig, Executive Director of Human Resources and Communications, presented the Board with recommendations for Employment Agreements and Chapter 21 Contracts.

Motion to approve as presented. This motion, made by Anne Smith and seconded by Jeff Wood, Passed.  
Yea: 6, Nay: 0, Absent: 1

### **15. Consider and Act on Approval of Local District of Innovation (DOI) Plan**

Anna Koenig, Executive Director of Human Resources and Communications, presented the updated District of Innovation Plan.

Motion to approve the Local District of Innovation Plan. This motion, made by Jeff Wood and seconded by Marvin Bobo, Passed.  
Yea: 6, Nay: 0, Absent: 1

### **16. Consider and Act on Approval of the TASB Risk Management Fund Interlocal Participation Agreement**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented the TASB Risk Management Fund Interlocal Participation Agreement for consideration.

Motion to approve the TASB Risk Management Interlocal Agreement as presented. This motion, made by Amy Smith and seconded by Marvin Bobo, Passed.

Yea: 6, Nay: 0, Absent: 1

#### **17. Consider and Act on Approval for Audit Engagement**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented an Audit Engagement Letter.

Motion to approve Audit Engagement. This motion, made by Anne Smith and seconded by Jeff Wood, Passed.

Yea: 6, Nay: 0, Absent: 1

#### **18. Consider and Act on Approval of the Long-Range Energy Plan**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented the District's Long-Range Energy Plan for consideration.

Motion to approve Long-Range Energy Plan. This motion, made by Marvin Bobo and seconded by Jeff Wood, Passed.

Yea: 6, Nay: 0, Absent: 1

***A Brief Recess was called from 8:53 PM – 9:00 PM.***

#### **19. Open a Public Hearing Regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD**

Board President, Barrett Owens, opened a Public Hearing at 9:00 PM regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD.

**19.A. The Board will hear and consider testimony from affected persons related to the educational interests of the current students residing, or future students expected to reside, in the affected territory and in the affected districts and the social, economic, and educational effects of the proposed boundary change.**

There were 6 public comments related to the Public Hearing:

- Stan Hermann, Stonegate Annexation into Lovejoy ISD
- Tiffany Glover, Stonegate Annexation into Lovejoy ISD
- Steven Starr, Stonegate Annexation into Lovejoy ISD
- Elwood Nolan, Stonegate Annexation into Lovejoy ISD
- Manny Ybarro, Stonegate Annexation into Lovejoy ISD
- Michael Elliot, Stonegate Annexation into Lovejoy ISD

#### **20. Close a Public Hearing Regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD**

Board President, Barrett Owens, closed the Public Hearing at 9:19 PM regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD.

## **21. Cabinet Reports**

The following Cabinet Members presented reports:

- Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations
- Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction
- Anna Koenig, Executive Director of Human Resources and Communication
- Kevin Parker, Executive Director of Student Services

## **22. Superintendent's Report**

Katie Kordel, Superintendent, spoke about her deep gratitude for everyone who has worked in collaboration to address the finance and budget issues this year. Mrs. Kordel gave a "shout out" to the Majestics for their amazing Spring Show and shared a reminder that STEM Fest is Saturday. Lastly, there are 33 days until graduation.

## **23. Public Comments Related to Non-Agenda Items**

There were no public comments related to Non-Agenda Items.

## **24. Announcements**

There were no announcements.

## **25. Adjournment**

With there being no further business, the Board adjourned at 9:45 PM.

Respectfully submitted,

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Anne Smith, Secretary of the Board of Trustees

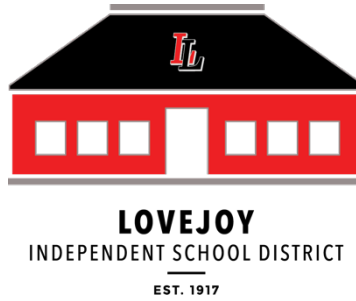
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Barrett Owens, President of the Board of Trustees

\*Agenda item details are filed in the Superintendent's Office with the Monday, April 25, 2022 agenda packet.

12.C. Consider Approval of the Minutes of the  
May 9, 2022 Board Workshop

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



## **Board of Trustees Minutes of the Board Workshop Monday, May 9, 2022**

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A Board Workshop of the Lovejoy Independent School District Board of Trustees was held on Monday, May 9, 2022, beginning at 5:30 PM in the Carrie L. Lovejoy Child Development Center, located at 256 Country Club Road, Allen, Texas.

Marvin Bobo: Present  
Chad Collins: Absent  
Jason Jaynes: Present  
Barrett Owens: Present  
Amy Smith: Present  
Anne Smith: Present  
Jeff Wood: Present

### **1. Call to Order**

The Meeting was Called to Order at 5:30 PM by Board President, Barrett Owens.

### **2. Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act**

The Board retired into Closed Session at 5:30 PM in room D100.

**2.A. 551-071 For the purpose of private consultation with the Board's attorney, in person or by phone when the Board seeks the advice of its attorney about: pending or contemplated litigation; a settlement offer; or on a matter in which the duty of the attorney to the governmental body under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with this chapter.**

**2.A.1. Consultation and deliberation regarding Stonegate Texas Homeowners Association, Inc. petition for annexation and detachment submittal in accordance with Section 13.051 of the Texas Education Code.**

- 2.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.**
- 2.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.**
- 2.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.**
  - 2.D.1. Evaluation, duties, and employment of employees.**
- 2.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.**
- 2.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.**
- 2.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.**
- 2.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.**
- 2.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.**

**3. Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session**

The Board of Trustees returned to the Open Meeting at 6:33 PM in the Library.

**4. Opening Exercise**

**4.A. Roll Call**

Chad Collins was Absent. All other Board Members were Present.

**5. Recognition of Teachers Completing Reading Academy**

## **6. Public comments related to May 9, 2022 Agenda Items**

There were no public comments related to the May 9, 2022 Agenda Items.

## **7. 2022-2023 Master Schedule Presentations**

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, introduced the following campus principals who presented updates to their campus master schedules:

- Chris Koder, Principal of Willow Springs Middle School
- Courtney Halpin, Principal of Sloan Creek Intermediate School
- Wendy Craft, Principal of Hart Elementary
- Chris Mayfield, Principal of Lovejoy High School

## **8. Financial Sustainability Committee Presentation**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, introduced the following 2021-2022 Financial Sustainability Committee Members who presented the committee's recommendations:

- Financial Sustainability Committee General: Stephanie McGowan & Matthew DuBois
- Revenue Generation: Justin Goertz & Matthew DuBois
- Efficiency Measures: Travis Shull & Anna Koenig
- Program Analysis: Rebecca May & Laurie Tinsley
- Legacy of Excellence: Courtney Claborn & Erin Goff

## **9. Power Factor Correction Project Presentation**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented information regarding a potential Power Factor Correction Project.

## **10. Indoor Air Quality Approaches Presentation**

Dr. Jennifer DuPlessis, Assistant Superintendent of Finance and Operations, presented on Indoor Air Quality Approaches.

## **11. Instructional Materials Selection Process (Advanced Quantitative Reasoning and Physical and Health Education) Presentation**

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, presented the Advanced Quantitative Reasoning and Physical and Health Education Instructional Materials Selection Process.

## **12. Lovejoy Child Development Center Presentation**

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, presented an update on the Lovejoy Child Development Center.

## **13. Consider and Act on Approval of Employee Agreements and Chapter 21 Employee Contracts**

Anna Koenig, Executive Director of Human Resources and Communications, presented the Board with recommendations for Employment Agreements and Chapter 21 Contracts.

Motion to approve as presented. This motion, made by Jeff Wood and seconded by Marvin Bobo, Passed.

Yea: 6, Nay: 0, Absent: 1

#### **14. Lovejoy Scholars Update**

Anna Koenig, Executive Director of Human Resources and Communications, presented an update on Lovejoy Scholars Enrollments.

#### **15. 2022-2023 Transportation Update**

Kevin Parker, Executive Director of Student Services, presented an update on 2022-2023 Student Transportation.

#### **16. Gym Floor Presentation**

Kevin Parker, Executive Director of Student Services, presented an update on the second gym floor at Sloan Creek Intermediate School.

#### **17. Draft 2022-2023 Board Meeting Calendar Presentation**

Katie Kordel, Superintendent of Schools, presented a draft schedule for 2022-2023 Regular and Workshop Board Meetings.

#### **18. Announcements**

Katie Kordel, Superintendent of Schools, expressed her deep gratitude for the teachers, staff, parents, and community members who served on the Financial Sustainability Committee, as well as Dr. DuPlessis, and Ceci Poe for all their work facilitating and coordinating the Financial Sustainability Committee meetings.

#### **19. Adjournment**

With there being no further business, the Board adjourned at 8:42 PM.

Respectfully submitted,

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Anne Smith, Secretary of the Board of Trustees

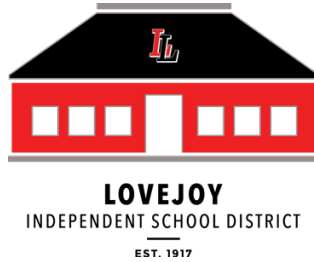
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Barrett Owens, President of the Board of Trustees

\*Agenda item details are filed in the Superintendent's Office with the Monday, May 9, 2022 agenda packet.

12.D. Consider Approval of the Minutes of the  
May 18, 2022 Special Board Meeting

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



## **Board of Trustees Minutes of the Special Board Meeting Wednesday, May 18, 2022**

---

A Special Board Meeting to Canvass the May 7, 2022 General Election was held on Wednesday, May 18, 2022, beginning at 8:00 AM in the Carrie L. Lovejoy Child Development Center Library, located at 256 Country Club Road, Allen, Texas.

Marvin Bobo:	Absent
Chad Collins:	Absent
Jason Jaynes:	Present
Barrett Owens:	Present
Amy Smith:	Present
Anne Smith:	Present
Jeff Wood:	Present

### **1. Call to Order**

The Meeting was Called to Order at 8:02 AM by Board President, Barrett Owens.

### **2. Opening Exercise**

#### **2.A. Roll Call**

Chad Collins and Marvin Bobo were Absent. All other Board Members were Present.

### **3. Public Comments Related to May 18, 2022 Agenda Items**

There were no public comments related to the May 18, 2022 Agenda Items.

### **4. Consider and Act on the Approval of the Canvass for the Lovejoy ISD May 7, 2022 General Election**

Kim Steiner, Coordinator of Community Engagement / Executive Assistant to the Superintendent, presented the official Collin County Election Results Data to the Board of Trustees.

Motion to approve the canvassing for the Board of Trustees Election held May 7, 2022 for Trustee Positions 1, 2, and 3 as certified by the Collin County Election Administrator. This motion, made by Amy Smith and seconded by Anne Smith, Passed. Yea: 5, Nay: 0, Absent: 2

**5. Certificate of Election Issued to Newly Elected Trustees**

Barrett Owens, Board President, issued a Certificate of Election to Julie McLaughlin, Amy Smith, and Jeff Wood.

**6. Announcements**

Barrett Owens, Board President, thanked the trustees for running for election.

**7. Adjournment**

With there being no further business, the Board adjourned at 8:05 AM.

Respectfully submitted,

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Anne Smith, Secretary of the Board of Trustees

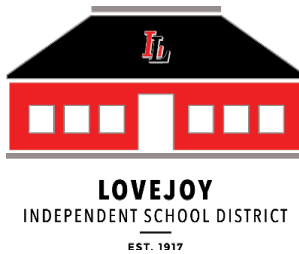
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Barrett Owens, President of the Board of Trustees

\*Agenda item details are filed in the Superintendent's Office with the Wednesday, May 18, 2022 agenda packet.

12.E. Consider Approval of the Monthly Finance  
Report

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Monthly Finance Report
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance & Operations

### Executive Summary

The finance report is typically included as a standard report in the Consent Agenda section. The report gives a monthly status report for the board of our cash and investment balances in summary form, a cumulative revenue report as compared to estimated annual revenue adopted during the budget process and an expenditure report by function for the major funds as compared to the annual budget adoption.

### Fiscal Implications

There are no direct fiscal implications of the action, as this is a monthly status report of activity previously approved by the Board.

### Administrator Recommendation

The reports are compiled and presented for approval by the Board.

### Board Priority

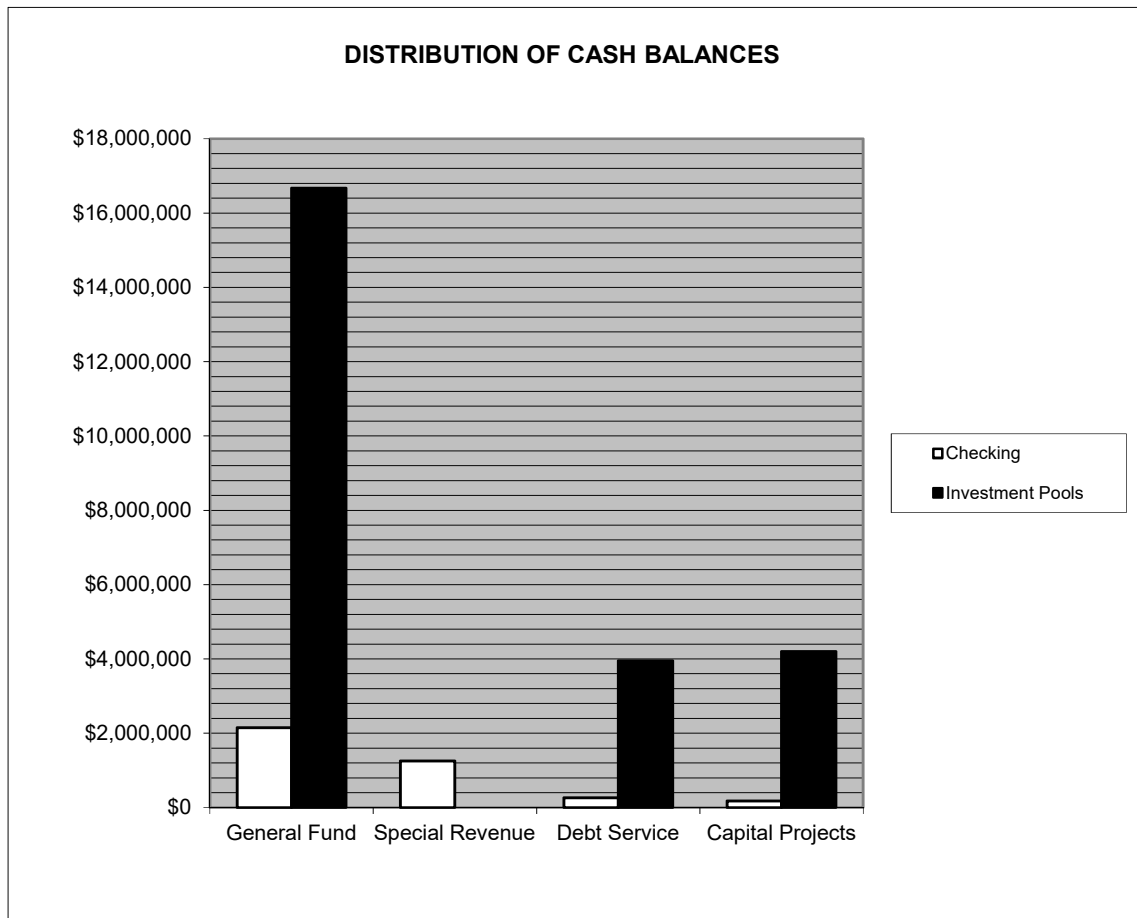
#### Priority 4

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the

Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

**Lovejoy ISD  
Cash Position by Fund  
April 30, 2022**

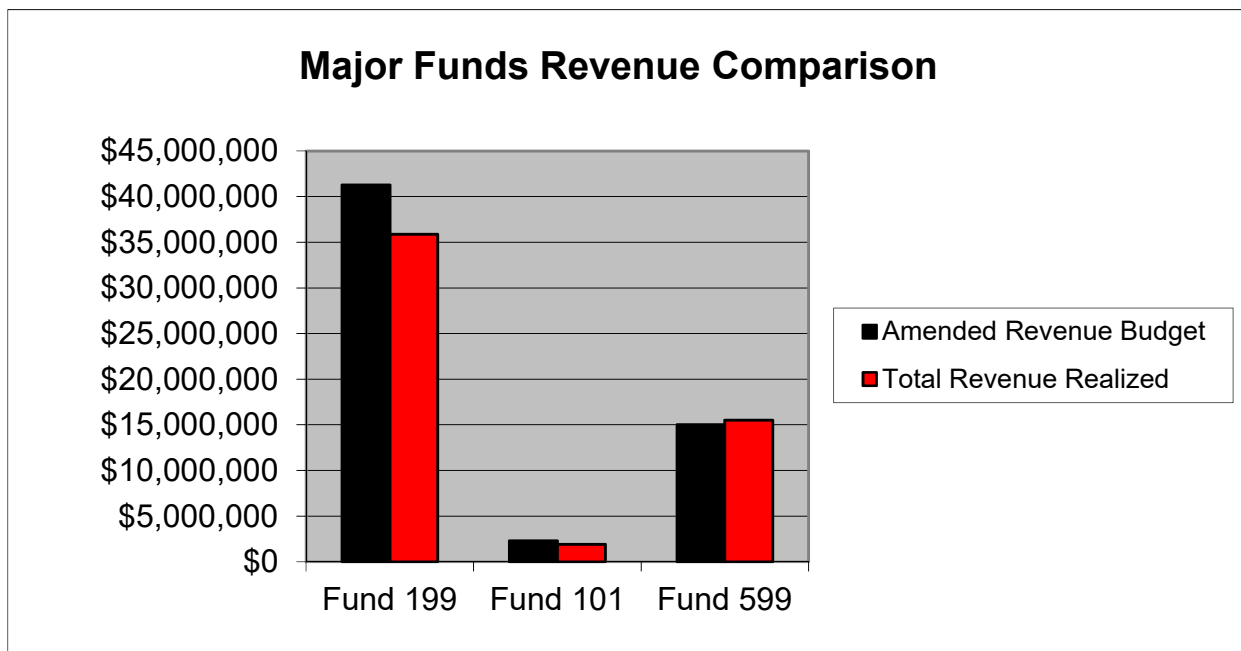
	<u>Checking</u>	<u>Investment Pools</u>	<u>Total</u>
General Fund	\$2,147,998	\$16,671,313	\$18,819,311
Special Revenue	\$1,248,695	\$0	\$1,248,695
Debt Service	\$263,952	\$3,947,824	\$4,211,776
Capital Projects	\$179,309	\$4,199,597	\$4,378,905
<b>Total</b>	<b>\$3,839,953</b>	<b>\$24,818,733</b>	<b>\$28,658,687</b>



Summary of 2021-2022

**Lovejoy ISD**  
**Comparison of Major Funds Revenue Realized to Estimated Revenue**  
**April 30, 2022**

	Fund 183- 199 General Funds	Fund 101 Child Nutrition	Fund 599 Debt Service	<u>Total</u>
<b>Adopted Budget</b>	<b>\$40,976,134</b>	<b>\$2,300,000</b>	<b>\$15,030,306</b>	<b>\$58,306,440</b>
<b>Amended Budget</b>	<b>\$41,285,078</b>	<b>\$2,300,000</b>	<b>\$15,030,306</b>	<b>\$58,615,384</b>
<b>% of Adopted Budget</b>	<b>70%</b>	<b>4%</b>	<b>26%</b>	<b>100%</b>
<b>% of Amended Budget</b>	<b>70%</b>	<b>4%</b>	<b>26%</b>	<b>100%</b>
Local Revenue	\$32,596,620	\$1,123,512	\$15,378,876	\$49,099,008
State Revenue	\$2,953,826	\$12,620	\$127,309	\$3,093,755
Federal Revenue	\$332,460	\$769,241	\$0	\$1,101,702
<b>Total Revenue Realized</b>	<b>\$35,882,906</b>	<b>\$1,905,373</b>	<b>\$15,506,185</b>	<b>\$53,294,465</b>
<b>YTD Realized % of Approved</b>	<b>88%</b>	<b>83%</b>	<b>103%</b>	<b>91%</b>
<b>YTD Realized % of Amended</b>	<b>87%</b>	<b>83%</b>	<b>103%</b>	<b>91%</b>
<b>Remaining Balance</b>	<b>\$5,402,171</b>	<b>\$394,627</b>	<b>\$0</b>	<b>\$5,320,919</b>

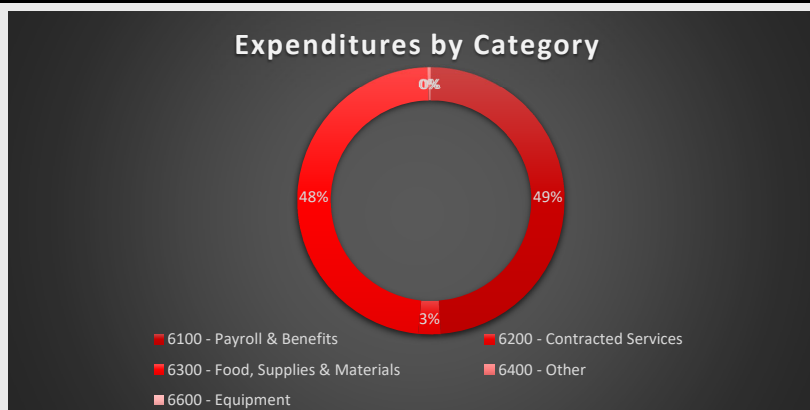
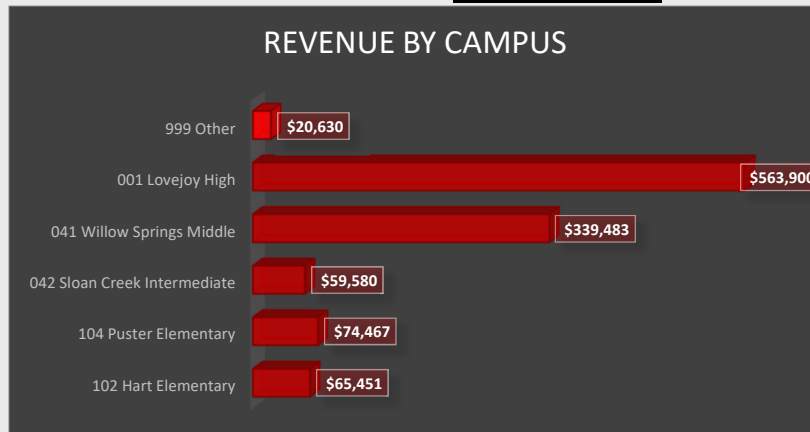


**Lovejoy ISD**  
**Comparison of Budget to Actual Expenditures**  
**April 30, 2022**

	Fund 183- 199 General Funds	Fund 101 Child Nutrition	Fund 599 Debt Service	<u>Total</u>
<b>Adopted Budget</b>	<b>\$40,906,914</b>	<b>\$2,300,000</b>	<b>\$15,030,306</b>	<b>\$58,237,220</b>
<b>Amended Budget</b>	<b>\$41,932,340</b>	<b>\$2,096,832</b>	<b>\$20,923,826</b>	<b>\$64,952,999</b>
<b>% of Adopted Budget</b>	<b>70%</b>	<b>4%</b>	<b>26%</b>	<b>100%</b>
<b>% of Amended Budget</b>	<b>65%</b>	<b>3%</b>	<b>32%</b>	<b>100%</b>
<b>Actual Expenditure by Function</b>				
11 - Instruction	\$18,315,894	\$0	\$0	\$18,315,894
12 - Library/Media	\$412,983	\$0	\$0	\$412,983
13 - Staff Development	\$1,100,439	\$0	\$0	\$1,100,439
21 - Instructional Leadership	\$260,870	\$0	\$0	\$260,870
23 - Campus Admin	\$1,866,172	\$0	\$0	\$1,866,172
31 - Guidance/Counseling	\$1,195,074	\$0	\$0	\$1,195,074
33 - Health Services	\$363,686	\$0	\$0	\$363,686
34 - Student Transportation	\$898,989	\$0	\$0	\$898,989
35 - Child Nutrition Services	\$0	\$1,474,348	\$0	\$1,474,348
36 - Extra Curricular	\$1,360,120	\$0	\$0	\$1,360,120
41 - General Administration	\$1,466,155	\$0	\$0	\$1,466,155
51 - Plant Maint & Operations	\$3,854,194	\$0	\$0	\$3,854,194
52 - Security	\$230,888	\$0	\$0	\$230,888
53 - Data Processing	\$511,979	\$0	\$0	\$511,979
61 - Community Services	\$656,429	\$0	\$0	\$656,429
71 - Debt Service	\$0	\$0	\$20,410,485	\$20,410,485
91 - Recapture	\$0	\$0	\$0	\$0
93 - Shared Services	\$28,236	\$0	\$0	\$28,236
95 - JJAEP	\$0	\$0	\$0	\$0
99 - Other Contracted Serv	\$237,004	\$0	\$0	\$237,004
<b>Total Actual Expenditures</b>	<b>\$32,759,112</b>	<b>\$1,474,348</b>	<b>\$20,410,485</b>	<b>\$54,643,946</b>
<b>% Of Budget Expended</b>	<b>78%</b>	<b>70%</b>	<b>98%</b>	
Standard % for this month	83%	89%	100%	
Variance from Standard %	-5%	-19%	-2%	
<b>Remaining Balance</b>	<b>\$9,173,228</b>	<b>\$622,484</b>	<b>\$513,341</b>	<b>\$10,309,053</b>
<b>** % of budget is calculated excluding funds for grants, special &amp; minor project funds.</b>				
<b>Summary of 2021-2022</b>				
<b>Total Revenue Realized</b>	<b>\$35,882,906</b>	<b>\$1,905,373</b>	<b>\$15,506,185</b>	<b>\$53,294,465</b>
<b>Total Expenditures</b>	<b>\$32,759,112</b>	<b>\$1,474,348</b>	<b>\$20,410,485</b>	<b>\$54,643,946</b>
<b>Net Difference</b>	<b>\$3,123,794</b>	<b>\$431,025</b>	<b>(\$4,904,300)</b>	<b>(\$1,349,481)</b>

**LOVEJOY ISD**  
**as of April 30, 2022**  
**Summary of Revenue & Expenditure Activities**  
**Student Nutrition Fund 101**

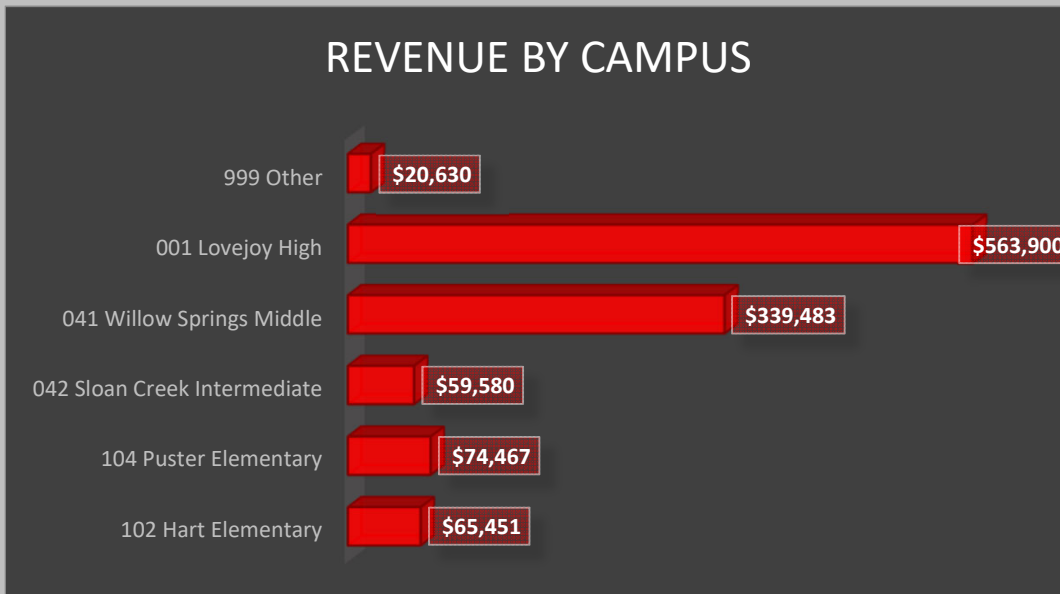
<b>Revenues:</b>	
5700 - Total Local Intermediate Sources	\$ 1,123,512
5800 - State Program Revenues	\$ 12,620
5900 - Federal Program Revenues	\$ 659,240
<b>Total Revenues</b>	<b>\$ 1,795,371</b>
 <b>Expenditures:</b>	
6100 - Payroll & Benefits	\$ 719,723
6200 - Contracted Services	\$ 39,763
6300 - Food, Supplies & Materials	\$ 709,124
6400 - Other	\$ 5,738
6600 - Equipment	\$ -
<b>Total Expenditures</b>	<b>\$ 1,474,348</b>
 <b>Net Profit (Loss) to Date</b>	 <b>\$ 321,023</b>
 <b>Fund Balance - July 1 (Beginning)</b>	 \$ -
 <b>Fund Balance Anticipated - June 30 (Ending)</b>	 <b>\$ 321,023</b>



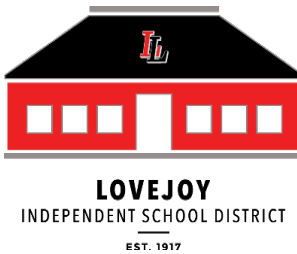
**LOVEJOY ISD**  
**as of April 30,2022**  
**Revenue by Campus**  
**Student Nutrition Fund 101**

**Sales:**

<b>102 Hart Elementary</b>	\$	<b>65,451</b>
<b>104 Puster Elementary</b>	\$	<b>74,467</b>
<b>042 Sloan Creek Intermediate</b>	\$	<b>59,580</b>
<b>041 Willow Springs Middle</b>	\$	<b>339,483</b>
<b>001 Lovejoy High</b>	\$	<b>563,900</b>
<b>999 Other</b>	\$	<b>20,630</b>
<b>Total Sales</b>	\$	<b>1,123,512</b>



12.F. Consider Approval of the Quarterly  
Investment Report



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Quarterly Investment Report
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

The Public Funds Investment Act (“PFIA”) under Government Code, Chapter 2256: Public Funds Investment, requires that each school district, not less than quarterly, prepare and submit to the Board of Trustees a report of investment transactions for all funds. The quarterly investment report includes the District’s investment transactions required by the PFIA for the quarter ended March 31, 2022.

The report is typically included in the Consent Agenda. Each quarter, the Investment Officer designated by Lovejoy ISD (Jennifer DuPlessis) provides a detailed report of all transactions performed during the quarter. These transactions include investments outside of the district’s bank depository. Actual statements are provided with the report.

The majority of the deposits made on a monthly basis come directly from the Collin County Tax Collector. Some transfer of funds between the district checking account and investment accounts occurs in order to keep the maximum amount of funds available in investment accounts that have a higher yield than the bank depository, while still providing sufficient cash flow. This report fulfills the requirement outlined in board policy CDA Legal and CDA Local.

**Fiscal Implications**

Investment earnings are noted in the report. There are no additional fiscal implications.

**Administrator Recommendation**

It is the recommendation of Administration that the Board of Trustees accept the quarterly investment report for the quarter ended March 31, 2022.

**Board Priority**

**Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.



# Lovejoy ISD

## Quarterly Report of Investment Transactions In Compliance with Policy CDA (LEGAL)

January-March 2022

**Prepared & presented by the Authorized Investment Officers  
of Lovejoy Independent School District.**

I attest to the validity and accuracy of this report which outlines the investment transactions ordered on behalf of the operations of Lovejoy ISD.

These accounts are only those outside our official depository contract with American National Bank, which is where we maintain our checking account activity.

Jennifer DuPlessis, Ph.D.  
Assistant Superintendent  
of Finance and Operations

**LOVEJOY INDEPENDENT SCHOOL DISTRICT  
 QUARTERLY INVESTMENT BALANCES BY FUND  
 2021-2022**

	JANUARY	FEBRUARY	MARCH
GENERAL FUND TEXPOOL INVESTMENTS	\$ 20,931,911	\$ 22,606,673	\$ 18,809,198
GENERAL FUND TEXAS CLASS INVESTMENTS	\$ 23,793	\$ 23,795	\$ 23,801
GENERAL FUND LONE STAR INVESTMENTS	\$ 18,715	\$ 18,715	\$ 18,717
<b>TOTAL GENERAL FUND 199</b>	<b>\$ 20,974,418</b>	<b>\$ 22,649,182</b>	<b>\$ 18,851,715</b>
DEBT SERVICE TEXAS CLASS INVESTMENTS	\$ 14,598,932	\$ 3,490,868	\$ 3,491,764
<b>TOTAL DEBT SERVICE FUND 599</b>	<b>\$ 14,598,932</b>	<b>\$ 3,490,868</b>	<b>\$ 3,491,764</b>
CONSTRUCTION 2017 TEXAS TERM INVESTMENTS	\$ 149,111	\$ 97,442	\$ 97,453
CONSTRUCTION 2015 TEXAS TERM INVESTMENTS	\$ 5,706	\$ -	\$ -
LAND PROCEEDS TEXAS CLASS INVESTMENTS	\$ 42,468	\$ 42,472	\$ 42,483
CONSTRUCTION 2018 LONE STAR INVESTMENTS	\$ 171,269	\$ 171,272	\$ 171,288
CONSTRUCTION 2019 LONE STAR INVESTMENTS	\$ 940,902	\$ 329,710	\$ 329,740
CONSTRUCTION 2021 LONE STAR INVESTMENTS	\$ 4,300,060	\$ 4,300,141	\$ 3,887,499
<b>TOTAL CONSTRUCTION FUNDS 646 &amp; 656 &amp; 676</b>	<b>\$ 5,609,516</b>	<b>\$ 4,941,037</b>	<b>\$ 4,528,464</b>
<b>TOTAL DISTRICT INVESTMENTS</b>	<b>\$ 41,182,866</b>	<b>\$ 31,081,088</b>	<b>\$ 26,871,942</b>

**QUARTERLY INVESTMENT BALANCES BY INVESTMENT POOL**

TEXAS TERM	\$ 154,817	\$ 97,442	\$ 97,453
TEXPOOL	\$ 20,931,911	\$ 22,606,673	\$ 18,809,198
TEXAS CLASS	\$ 14,665,193	\$ 3,557,136	\$ 3,558,047
LONE STAR	\$ 5,430,945	\$ 4,819,838	\$ 4,407,244
<b>TOTAL DISTRICT INVESTMENTS</b>	<b>\$ 41,182,866</b>	<b>\$ 31,081,088</b>	<b>\$ 26,871,942</b>

TexPool Participant Services  
1001 Texas Avenue, Suite 1150  
Houston, TX 77002



LOVEJOY ISD  
GENERAL FUND  
ATTN JENNIFER DUPLESSIS  
259 COUNTRY CLUB RD  
ALLEN TX 75002-7643

## Participant Statement

Statement Period 03/01/2022 - 03/31/2022

Customer Service 1-866-TEX-POOL  
Location ID [REDACTED]  
Investor ID [REDACTED]

## TexPool Update

It's spring cleaning time! Review a current listing of your authorized representatives and contact information by requesting an Account Information Report from TexConnect or the TexPool Participant Service team. Submit any change on the proper maintenance form, found under Account Documents.

### TexPool Summary

Pool Name	Beginning Balance	Total Deposits	Total Withdrawals	Total Interest	Current Balance	Average Balance
Texas Local Government Investment Pool	\$22,547,176.55	\$720,534.51	\$3,800,000.00	\$2,524.98	\$19,470,236.04	\$19,394,126.87
<b>Total Dollar Value</b>	<b>\$22,547,176.55</b>	<b>\$720,534.51</b>	<b>\$3,800,000.00</b>	<b>\$2,524.98</b>	<b>\$19,470,236.04</b>	

## Portfolio Value

Pool Name	Pool/Account	Market Value (03/01/2022)	Share Price (03/31/2022)	Shares Owned (03/31/2022)	Market Value (03/31/2022)
Texas Local Government Investment Pool	[REDACTED]	\$22,547,176.55	\$1.00	19,470,236.040	\$19,470,236.04
<b>Total Dollar Value</b>		<b>\$22,547,176.55</b>			<b>\$19,470,236.04</b>

## Interest Summary

Pool Name	Pool/Account	Month-to-Date Interest	Year-to-Date Interest
Texas Local Government Investment Pool	[REDACTED]	\$2,524.98	\$4,127.34
<b>Total</b>		<b>\$2,524.98</b>	<b>\$4,127.34</b>

## Transaction Detail

Te a Local Government Investment Pool

Participant: LOVEJOY ISD

Pool/Account: [REDACTED]

Transaction Date	Settlement Date	Transaction Description	Transaction Dollar Amount	Share Price	Shares This Transaction	Shares Owned
03/01/2022	03/01/2022	BEGINNING BALANCE	\$22,547,176.55	\$1.00		22,547,176.550
03/01/2022	03/01/2022	DIRECT DEPOSIT	\$16,039.30	\$1.00	16,039.300	22,563,215.850
03/02/2022	03/02/2022	DIRECT DEPOSIT	\$719.59	\$1.00	719.590	22,563,935.440
03/03/2022	03/03/2022	DIRECT DEPOSIT	\$42,737.20	\$1.00	42,737.200	22,606,672.640
03/03/2022	03/03/2022	WITHDRAWAL	\$3,800,000.00	\$1.00	3,800,000.000	18,806,672.640
03/04/2022	03/04/2022	DIRECT DEPOSIT	\$123,483.86	\$1.00	123,483.860	18,930,156.500
03/07/2022	03/07/2022	DIRECT DEPOSIT	\$21,993.82	\$1.00	21,993.820	18,952,150.320
03/08/2022	03/08/2022	DIRECT DEPOSIT	\$41,715.14	\$1.00	41,715.140	18,993,865.460
03/09/2022	03/09/2022	DIRECT DEPOSIT	\$55,692.05	\$1.00	55,692.050	19,049,557.510

03/10/2022	03/10/2022	DIRECT DEPOSIT	\$79,405.48	\$1.00	79,405.480	19,128,962.990
03/11/2022	03/11/2022	DIRECT DEPOSIT	\$9,975.24	\$1.00	9,975.240	19,138,938.230
03/14/2022	03/14/2022	DIRECT DEPOSIT	\$15,334.39	\$1.00	15,334.390	19,154,272.620
03/15/2022	03/15/2022	DIRECT DEPOSIT	\$29,255.09	\$1.00	29,255.090	19,183,527.710
03/16/2022	03/16/2022	DIRECT DEPOSIT	\$13,808.79	\$1.00	13,808.790	19,197,336.500
03/17/2022	03/17/2022	DIRECT DEPOSIT	\$3,429.99	\$1.00	3,429.990	19,200,766.490
03/21/2022	03/21/2022	DIRECT DEPOSIT	\$23,790.09	\$1.00	23,790.090	19,224,556.580
03/22/2022	03/22/2022	DIRECT DEPOSIT	\$18,203.84	\$1.00	18,203.840	19,242,760.420
03/23/2022	03/23/2022	DIRECT DEPOSIT	\$26,149.74	\$1.00	26,149.740	19,268,910.160
03/24/2022	03/24/2022	DIRECT DEPOSIT	\$29,514.49	\$1.00	29,514.490	19,298,424.650
03/25/2022	03/25/2022	DIRECT DEPOSIT	\$19,349.65	\$1.00	19,349.650	19,317,774.300
03/28/2022	03/28/2022	DIRECT DEPOSIT	\$42,652.64	\$1.00	42,652.640	19,360,426.940
03/29/2022	03/29/2022	DIRECT DEPOSIT	\$27,689.42	\$1.00	27,689.420	19,388,116.360
03/30/2022	03/30/2022	DIRECT DEPOSIT	\$19,215.28	\$1.00	19,215.280	19,407,331.640
03/31/2022	03/31/2022	DIRECT DEPOSIT	\$60,379.42	\$1.00	60,379.420	19,467,711.060
03/31/2022	03/31/2022	MONTHLY POSTING	\$2,524.98	\$1.00	2,524.980	19,470,236.040
<b>Account Value as of 03/31/2022</b>			<b>\$19,470,236.04</b>	<b>\$1.00</b>		<b>19,470,236.040</b>



## Account Statement - Transaction Summary

For the Month Ending February 28, 2022

Lovejoy ISD - Construction 2015 - [REDACTED]

### TexasDAILY

Opening Market Value	5,705.51
Purchases	0.03
Redemptions	(5,705.54)
Unsettled Trades	0.00
Change in Value	0.00
<b>Closing Market Value</b>	<b>\$0.00</b>
Cash Dividends and Income	0.03

### Asset Summary

	February 28, 2022	January 31, 2022
<b>TexasDAILY</b>	0.00	5,705.51
<b>Total</b>	<b>\$0.00</b>	<b>\$5,705.51</b>

### Asset Allocation



## Account Statement

For the Month Ending February 28, 2022

Lovejoy ISD - Construction 2015 - [REDACTED]

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
<b>TexasDAILY</b>					
<b>Opening Balance</b>					<b>5,705.51</b>
02/11/22	02/11/22	Redemption - Closeout Wire Redemption	1.00	(5,705.54)	(0.03)
02/11/22	02/11/22	Accrual Income Div Reinvestment - Closeout Wire Redemption	1.00	0.03	0.00
<b>Closing Balance</b>					<b>0.00</b>

	Month of February	Fiscal YTD January-February
<b>Opening Balance</b>	5,705.51	5,705.43
<b>Purchases</b>	0.03	0.11
<b>Redemptions (Excl. Checks)</b>	(5,705.54)	(5,705.54)
<b>Check Disbursements</b>	0.00	0.00
<b>Closing Balance</b>	<b>0.00</b>	<b>0.00</b>
<b>Cash Dividends and Income</b>	0.03	0.11

<b>Closing Balance</b>	0.00
<b>Average Monthly Balance</b>	2,037.68
<b>Monthly Distribution Yield</b>	0.02%



### Account Statement - Transaction Summary

For the Month Ending February 28, 2022

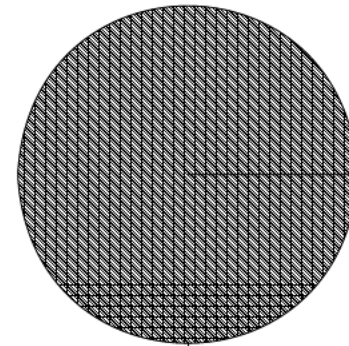
Lovejoy ISD - Construction 2017 - [REDACTED]

TexasDAILY	
Opening Market Value	149,111.35
Purchases	1.49
Redemptions	(51,671.00)
Unsettled Trades	0.00
Change in Value	0.00
<b>Closing Market Value</b>	<b>\$97,441.84</b>
Cash Dividends and Income	1.49

Asset Summary		
	February 28, 2022	January 31, 2022
<b>TexasDAILY</b>	97,441.84	149,111.35
<b>Total</b>	<b>\$97,441.84</b>	<b>\$149,111.35</b>

Asset Allocation	
TexasDAILY	100.00%





## Account Statement

For the Month Ending **February 28, 2022**

Lovejoy ISD - Construction 2017 - [REDACTED]

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
<b>TexasDAILY</b>					
<b>Opening Balance</b>					<b>149,111.35</b>
02/11/22	02/11/22	Redemption - Outgoing Wires	1.00	(51,671.00)	97,440.35
02/28/22	03/01/22	Accrual Income Div Reinvestment - Distributions	1.00	1.49	97,441.84
<b>Closing Balance</b>					<b>97,441.84</b>

	Month of February	Fiscal YTD January-February	
<b>Opening Balance</b>	149,111.35	149,109.30	<b>Closing Balance</b>
<b>Purchases</b>	1.49	3.54	<b>Average Monthly Balance</b>
<b>Redemptions (Excl. Checks)</b>	(51,671.00)	(51,671.00)	<b>Monthly Distribution Yield</b>
<b>Check Disbursements</b>	0.00	0.00	97,441.84
<b>Closing Balance</b>	<b>97,441.84</b>	<b>97,441.84</b>	115,894.33
<b>Cash Dividends and Income</b>	1.49	3.54	0.02%

TexPool Participant Services  
1001 Texas Avenue, Suite 1150  
Houston, TX 77002



LOVEJOY ISD  
GENERAL FUND  
ATTN JENNIFER DUPLESSIS  
259 COUNTRY CLUB RD  
ALLEN TX 75002-7643

## Participant Statement

Statement Period 02/01/2022 - 02/28/2022

Customer Service 1-866-TEX-POOL  
Location ID [REDACTED]  
Investor ID [REDACTED]

## TexPool Update

You can update your contact information via TexConnect Online. Enter your Location #, PIN, and Password and then click Maintenance on the menu bar to get started

### TexPool Summary

Pool Name	Beginning Balance	Total Deposits	Total Withdrawals	Total Interest	Current Balance	Average Balance
Texas Local Government Investment Pool	\$19,003,438.30	\$5,142,669.34	\$1,600,000.00	\$1,068.91	\$22,547,176.55	\$21,921,823.01
<b>Total Dollar Value</b>	<b>\$19,003,438.30</b>	<b>\$5,142,669.34</b>	<b>\$1,600,000.00</b>	<b>\$1,068.91</b>	<b>\$22,547,176.55</b>	

## Portfolio Value

Pool Name	Pool/Account	Market Value (02/01/2022)	Share Price (02/28/2022)	Shares Owned (02/28/2022)	Market Value (02/28/2022)
Texas Local Government Investment Pool	[REDACTED]	\$19,003,438.30	\$1.00	22,547,176.550	\$22,547,176.55
<b>Total Dollar Value</b>		<b>\$19,003,438.30</b>			<b>\$22,547,176.55</b>

## Interest Summary

Pool Name	Pool/Account	Month-to-Date Interest	Year-to-Date Interest
Texas Local Government Investment Pool	[REDACTED]	\$1,068.91	\$1,602.36
<b>Total</b>		<b>\$1,068.91</b>	<b>\$1,602.36</b>

## Transaction Detail

Texas Local Government Investment Pool

Participant: LOVEJOY ISD

Pool/Account: [REDACTED]

Transaction Date	Settlement Date	Transaction Description	Transaction Dollar Amount	Share Price	Shares This Transaction	Shares Owned
02/01/2022	02/01/2022	BEGINNING BALANCE	\$19,003,438.30	\$1.00		19,003,438.300
02/01/2022	02/01/2022	AUTOMATIC DEPOSIT	\$1,309,767.07	\$1.00	1,309,767.070	20,313,205.370
02/02/2022	02/02/2022	AUTOMATIC DEPOSIT	\$618,705.76	\$1.00	618,705.760	20,931,911.130
02/07/2022	02/07/2022	AUTOMATIC DEPOSIT	\$253,223.58	\$1.00	253,223.580	21,185,134.710
02/08/2022	02/08/2022	AUTOMATIC DEPOSIT	\$353,719.63	\$1.00	353,719.630	21,538,854.340
02/09/2022	02/09/2022	AUTOMATIC DEPOSIT	\$319,488.28	\$1.00	319,488.280	21,858,342.620
02/10/2022	02/10/2022	AUTOMATIC DEPOSIT	\$1,572,578.37	\$1.00	1,572,578.370	23,430,920.990
02/10/2022	02/10/2022	WITHDRAWAL	\$1,600,000.00-	\$1.00	1,600,000.000-	21,830,920.990
02/11/2022	02/11/2022	AUTOMATIC DEPOSIT	\$149,128.48	\$1.00	149,128.480	21,980,049.470
02/14/2022	02/14/2022	AUTOMATIC DEPOSIT	\$200,574.49	\$1.00	200,574.490	22,180,623.960

02/15/2022	02/15/2022	DIRECT DEPOSIT	\$1.00	\$1.00	1.000	22,180,624.960
02/15/2022	02/15/2022	AUTOMATIC DEPOSIT	\$67,843.51	\$1.00	67,843.510	22,248,468.470
02/17/2022	02/17/2022	DIRECT DEPOSIT	\$176,707.47	\$1.00	176,707.470	22,425,175.940
02/18/2022	02/18/2022	DIRECT DEPOSIT	\$21,785.42	\$1.00	21,785.420	22,446,961.360
02/22/2022	02/22/2022	DIRECT DEPOSIT	\$14,677.41	\$1.00	14,677.410	22,461,638.770
02/23/2022	02/23/2022	DIRECT DEPOSIT	\$38,194.71	\$1.00	38,194.710	22,499,833.480
02/23/2022	02/23/2022	DIRECT DEPOSIT	\$17,263.41	\$1.00	17,263.410	22,517,096.890
02/28/2022	02/28/2022	DIRECT DEPOSIT	\$29,010.75	\$1.00	29,010.750	22,546,107.640
02/28/2022	02/28/2022	MONTHLY POSTING	\$1,068.91	\$1.00	1,068.910	22,547,176.550
<b>Account Value as of 02/28/2022</b>			<b>\$22,547,176.55</b>	<b>\$1.00</b>		<b>22,547,176.550</b>



Summary Statement

February 28, 2022

Page 1 of 6

Investor ID: [REDACTED]

Lovejoy I.S.D.  
259 Country Club Road  
Allen, TX 75002

Texas CLASS

Texas CLASS

Average Monthly Yield: 0.1229%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
TX-01-0287-0002	DEBT SERVICE RESERVE	13,639,666.11	2,557,918.29	12,736,979.81	677.18	1,656.83	7,443,688.31	3,461,281.77
TX-01-0287-0003	GENERAL FUND	23,792.64	0.00	0.00	2.26	4.20	23,793.81	23,794.90
TX-01-0287-0004	CONSTRUCTION 2004	42,468.28	0.00	0.00	3.99	7.49	42,470.35	42,472.27
TX-01-0287-0008	CONSTRUCTION 2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL</b>		<b>13,705,927.03</b>	<b>2,557,918.29</b>	<b>12,736,979.81</b>	<b>683.43</b>	<b>1,668.52</b>	<b>7,509,952.47</b>	<b>3,527,548.94</b>



Account Number: [REDACTED]

**DEBT SERVICE RESERVE**

**Account Summary**

Average Monthly Yield: 0.1229%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	13,639,666.11	2,557,918.29	12,736,979.81	677.18	1,656.83	7,443,688.31	3,461,281.77

**Transaction Activity**

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
02/01/2022	Beginning Balance			13,639,666.11	
02/01/2022	Contribution	651,451.94			5525801
02/02/2022	Contribution	307,813.86			5529232
02/07/2022	Contribution	125,981.86			5539851
02/08/2022	Contribution	175,979.93			5543371
02/08/2022	Contribution	1.00			5543435
02/09/2022	Contribution	158,793.15			5546888
02/10/2022	Contribution	782,196.97			5550432
02/11/2022	Contribution	74,193.28			5554114
02/11/2022	Withdrawal		155,434.38		5550556
02/11/2022	Withdrawal		1,510,131.25		5551995
02/11/2022	Withdrawal		1,330,525.00		5553464
02/11/2022	Withdrawal		711,609.38		5553907



Account Number: [REDACTED]

**DEBT SERVICE RESERVE**

**Transaction Activity** (Continued)

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
02/11/2022	Withdrawal		1,800,243.75		5553908
02/11/2022	Withdrawal		562,875.00		5553909
02/11/2022	Withdrawal		140,250.00		5553910
02/11/2022	Withdrawal		541,818.75		5553911
02/11/2022	Withdrawal		90,571.88		5553912
02/11/2022	Withdrawal		5,893,520.42		5553913
02/14/2022	Contribution	99,788.29			5557891
02/15/2022	Contribution	33,753.02			5561416
02/17/2022	Contribution	87,800.50			5568464
02/18/2022	Contribution	10,838.52			5572008
02/22/2022	Contribution	7,302.21			5575978
02/23/2022	Contribution	19,002.33			5579652
02/23/2022	Contribution	8,588.74			5579662
02/28/2022	Contribution	14,432.69			5590713
02/28/2022	Income Dividend Reinvestment	677.18			
02/28/2022	Ending Balance			3,461,281.77	



Account Statement

February 28, 2022

Page 4 of 6

Account Number: [REDACTED]

GENERAL FUND

Account Summary

Average Monthly Yield: 0.1229%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	23,792.64	0.00	0.00	2.26	4.20	23,793.81	23,794.90

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
02/01/2022	Beginning Balance			23,792.64	
02/28/2022	Income Dividend Reinvestment	2.26			
02/28/2022	Ending Balance			23,794.90	



Account Number: [REDACTED]

CONSTRUCTION 2004

Account Summary

Average Monthly Yield: 0.1229%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	42,468.28	0.00	0.00	3.99	7.49	42,470.35	42,472.27

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
02/01/2022	Beginning Balance			42,468.28	
02/28/2022	Income Dividend Reinvestment	3.99			
02/28/2022	Ending Balance			42,472.27	



Texas CLASS

Texas CLASS

Date	Dividend Rate	Daily Yield
02/01/2022	0.00002980	0.1088%
02/02/2022	0.00002933	0.1071%
02/03/2022	0.00003030	0.1106%
02/04/2022	0.00009465	0.1151%
02/05/2022	0.00000000	0.1151%
02/06/2022	0.00000000	0.1151%
02/07/2022	0.00003260	0.1191%
02/08/2022	0.00003271	0.1194%
02/09/2022	0.00003267	0.1193%
02/10/2022	0.00003261	0.1190%
02/11/2022	0.00009738	0.1185%
02/12/2022	0.00000000	0.1185%
02/13/2022	0.00000000	0.1185%
02/14/2022	0.00003446	0.1258%
02/15/2022	0.00003339	0.1219%
02/16/2022	0.00003283	0.1198%
02/17/2022	0.00003300	0.1204%
02/18/2022	0.000013380	0.1221%
02/19/2022	0.00000000	0.1221%
02/20/2022	0.00000000	0.1221%
02/21/2022	0.00000000	0.1221%
02/22/2022	0.00003408	0.1243%
02/23/2022	0.00003602	0.1315%
02/24/2022	0.00003837	0.1401%
02/25/2022	0.000011592	0.1410%
02/26/2022	0.00000000	0.1410%
02/27/2022	0.00000000	0.1410%
02/28/2022	0.00003876	0.1415%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

Participant #: [REDACTED]

**Lone Star™** February 2022  
Investment Pool Monthly Statement

Statement Period: 02/01/2022 to 02/28/2022

Jennifer DuPlessis  
Lovejoy SD  
259 Country Club Road  
Austin, Texas 75002

**Summary of Portfolio Holdings**

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2018	Government Overnight Fund	171,272.31	1.00	171,272.31	3.55%
<b>Totals:</b>				<b>171,272.31</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2019	Government Overnight Fund	329,710.11	1.00	329,710.11	6.84%
<b>Totals:</b>				<b>329,710.11</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2021	Government Overnight Fund	4,300,140.86	1.00	4,300,140.86	89.22%
<b>Totals:</b>				<b>4,300,140.86</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
General Fund	Government Overnight Fund	18,714.87	1.00	18,714.87	0.39%
<b>Totals:</b>				<b>18,714.87</b>	

**Totals**

Fund	Yield	Share Quantity	Price Per Share	Fund Balance (USD)	% Port.
Corporate Overnight Fund	0.00 %	0.00	1.00	0.00	0.00 %
Government Overnight Fund	0.02 %	4,819,838.15	1.00	4,819,838.15	100.00 %
Corporate Overnight Plus Fund	0.00 %	0.00	1.00	0.00	0.00 %
<b>Total Value:</b>				<b>4,819,838.15</b>	<b>100.00 %</b>

**Portfolio Transactions**

**Construction 2018 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
02/01/2022	Starting Balance	171,269.07			171,269.07
02/28/2022	Interest	171,272.31	3.24	1.00	3.24
02/28/2022	Ending Balance	171,272.31			171,272.31

**Construction 2019 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
02/01/2022	Starting Balance	940,902.14			940,902.14
02/11/2022	Withdrawal	329,701.14	611,201.00	1.00	611,201.00
02/28/2022	Interest	329,710.11	8.97	1.00	8.97
02/28/2022	Ending Balance	329,710.11			329,710.11

**Construction 2021 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
02/01/2022	Starting Balance	4,300,059.57			4,300,059.57
02/28/2022	Interest	4,300,140.86	81.29	1.00	81.29
02/28/2022	Ending Balance	4,300,140.86			4,300,140.86

**General Fund - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
02/01/2022	Starting Balance	18,714.52			18,714.52
02/28/2022	Interest	18,714.87	0.35	1.00	0.35
02/28/2022	Ending Balance	18,714.87			18,714.87

**Important Information about this statement**

Please review this statement carefully, it is the official record of your account with Lone Star Investment Pool and First Public, LLC. If you disagree with any transaction, or if there are any errors or omissions in this statement please notify us promptly in writing, but no later than 10 business days after receipt of this statement. Trades pending settlement will not appear on this statement. All such trades will appear in the next monthly statement. The yield for the period is an annualized rate that reflects the relationship between the average amount of income earned and the average daily balance for the account. Please notify First Public promptly and in writing of any changes of address or phone number. Times of transactions will be furnished upon written request. The Lone Star Investment Pool Information Statement should be read carefully before investing. Investors should consider the investment objectives, risks, charges and expenses associated with municipal fund securities before investing. All transactions are no load. No remuneration has, or will be, paid to any entity in connection with this transaction. An investor may obtain an Information Statement by contacting First Public at the address and phone number identified above. An investment in Lone Star investment Pool is not insured or guaranteed by the Federal Deposit Insurance Corporation ("FDIC") or any other government agency and although Lone Star Investment Pool seeks to preserve the value of the investment at a fixed share price, it is possible to lose money by investing in municipal fund securities.



Customer Service  
PO Box 11760  
Harrisburg, PA 17108-11760

## ACCOUNT STATEMENT

For the Month Ending  
**March 31, 2022**

### Lovejoy ISD

#### Client Management Team

##### **Nathan Smith**

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##### **Ed Polansky**

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#### Contents

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Summary Statement  
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#### Accounts included in Statement

Construction 2017

#### Important Messages

Texas Range will be closed on 04/15/2022 for Good Friday.

LOVEJOY ISD  
JENNIFER DUPLESSIS  
259 COUNTRY CLUB RD  
ALLEN, TX 75002

**Online Access** [www.texas-range.com](http://www.texas-range.com)

**Customer Service** 1-866-839-8376



## Account Statement

For the Month Ending March 31, 2022

### Important Disclosures

#### Important Disclosures

This statement is for general information purposes only and is not intended to provide specific advice or recommendations. PFM Asset Management LLC ("PFMAM") is an investment adviser registered with the U.S. Securities and Exchange Commission and a subsidiary of U.S. Bancorp Asset Management, Inc. ("USBAM"). USBAM is a subsidiary of U.S. Bank National Association ("U.S. Bank"). U.S. Bank is a separate entity and subsidiary of U.S. Bancorp. U.S. Bank is not responsible for and does not guarantee the products, services or performance of PFMAM. PFMAM maintains a written disclosure statement of our background and business experience. If you would like to receive a copy of our current disclosure statement, please contact Service Operations at the address below.

**Proxy Voting** PFMAM does not normally receive proxies to vote on behalf of its clients. However, it does on occasion receive consent requests. In the event a consent request is received the portfolio manager contacts the client and then proceeds according to their instructions. PFMAM's Proxy Voting Policy is available upon request by contacting Service Operations at the address below.

**Questions About an Account** PFMAM's monthly statement is intended to detail our investment advisory activity as well as the activity of any accounts held by clients in pools that are managed by PFMAM. The custodian bank maintains the control of assets and executes (i.e., settles) all investment transactions. The custodian statement is the official record of security and cash holdings and transactions. PFMAM recognizes that clients may use these reports to facilitate record keeping and that the custodian bank statement and the PFMAM statement should be reconciled and differences resolved. Many custodians use a settlement date basis which may result in the need to reconcile due to a timing difference.

**Account Control** PFMAM does not have the authority to withdraw funds from or deposit funds to the custodian outside the scope of services provided by PFMAM. Our clients retain responsibility for their internal accounting policies; implementing and enforcing internal controls and generating ledger entries or otherwise recording transactions.

**Market Value** Generally, PFMAM's market prices are derived from closing bid prices as of the last business day of the month as supplied by Refinitiv or Bloomberg. For certain short-term investments or where prices are not available from generally recognized sources the securities are priced using a yield-based matrix system to arrive at an estimated market value. Prices that fall between data points are interpolated. Non-negotiable FDIC-insured bank certificates of deposit are priced at par. Although PFMAM believes the prices to be reliable, the values of the securities may not represent the prices at which the securities could have been bought or sold. Explanation of the valuation methods for a registered investment company or local government investment program is contained in the appropriate fund offering documentation or information statement.

**Amortized Cost** The original cost of the principal of the security is adjusted for the amount of the periodic reduction of any discount or premium from the purchase date until the date of the report. Discount or premium with respect to short term securities (those with less than one year to maturity at time of issuance) is amortized on a straightline basis. Such discount or premium with respect to longer term securities is amortized using the constant yield basis.

**Tax Reporting** Cost data and realized gains / losses are provided for informational purposes only. Please review for accuracy and consult your tax advisor to determine the tax consequences of your security transactions. PFMAM does not report such information to the IRS or other taxing authorities and is not responsible for the accuracy of such information that may be required to be reported to federal, state or other taxing authorities.

**Financial Situation** In order to better serve you, PFMAM should be promptly notified of any material change in your investment objective or financial situation.

**Callable Securities** Securities subject to redemption prior to maturity may be redeemed in whole or in part before maturity, which could affect the yield represented.

**Portfolio** The securities in this portfolio, including shares of mutual funds, are not guaranteed or otherwise protected by PFMAM, the FDIC (except for certain non-negotiable certificates of deposit) or any government agency. Investment in securities involves risks, including the possible loss of the amount invested. Actual settlement values, accrued interest, and amortized cost amounts may vary for securities subject to an adjustable interest rate or subject to principal paydowns. Any changes to the values shown may be reflected within the next monthly statement's beginning values.

**Rating** Information provided for ratings is based upon a good faith inquiry of selected sources, but its accuracy and completeness cannot be guaranteed.

Shares of some local government investment programs and TERM funds are marketed through representatives of PFMAM's affiliate, PFM Fund Distributors, Inc. which is registered with the SEC as a broker/dealer and is a member of the Financial Industry Regulatory Authority ("FINRA") and the Municipal Securities Rulemaking Board ("MSRB"). You may reach the FINRA by calling the FINRA Hotline at 1-800-289-9999 or at the FINRA website address <https://www.finra.org/investors/investor-contacts>. A brochure describing the FINRA Regulation Public Disclosure Program is also available from FINRA upon request.

#### Key Terms and Definitions

**Dividends** on local government investment program funds consist of interest earned, plus any discount ratably amortized to the date of maturity, plus all realized gains and losses on the sale of securities prior to maturity, less ratably amortization of any premium and all accrued expenses to the fund. Dividends are accrued daily and may be paid either monthly or quarterly. The monthly earnings on this statement represent the estimated dividend accrued for the month for any program that distributes earnings on a quarterly basis. There is no guarantee that the estimated amount will be paid on the actual distribution date.

**Current Yield** is the net change, exclusive of capital changes and income other than investment income, in the value of a hypothetical fund account with a balance of one share over the seven-day base period including the statement date, expressed as a percentage of the value of one share (normally \$1.00 per share) at the beginning of the seven-day period. This resulting net change in account value is then annualized by multiplying it by

365 and dividing the result by 7. The yields quoted should not be considered a representation of the yield of the fund in the future, since the yield is not fixed. **Average maturity** represents the average maturity of all securities and investments of a portfolio, determined by multiplying the par or principal value of each security or investment by its maturity (days or years), summing the products, and dividing the sum by the total principal value of the portfolio. The stated maturity date of mortgage backed or callable securities are used in this statement. However the actual maturity of these securities could vary depending on the level or prepayments on the underlying mortgages or whether a callable security has or is still able to be called.

**Monthly distribution yield** represents the net change in the value of one share (normally \$1.00 per share) resulting from all dividends declared during the month by a fund expressed as a percentage of the value of one share at the beginning of the month. This resulting net change is then annualized by multiplying it by 365 and dividing it by the number of calendar days in the month.

**YTM at Cost** The yield to maturity at cost is the expected rate of return, based on the original cost, the annual interest receipts, maturity value and the time period from purchase date to maturity, stated as a percentage, on an annualized basis.

**YTM at Market** The yield to maturity at market is the rate of return, based on the current market value, the annual interest receipts, maturity value and the time period remaining until maturity, stated as a percentage, on an annualized basis.

**Managed Account** A portfolio of investments managed discretely by PFMAM according to the client's specific investment policy and requirements. The investments are directly owned by the client and held by the client's custodian.

**Unsettled Trade** A trade which has been executed however the final consummation of the security transaction and payment has not yet taken place.

Please review the detail pages of this statement carefully. If you think your statement is wrong, missing account information, or if you need more information about a transaction, please contact PFMAM within 60 days of receipt. If you have other concerns or questions regarding your account, or to request an updated copy of PFMAM's current disclosure statement, please contact a member of your client management team at PFMAM Service Operations at the address below.

PFM Asset Management LLC  
Attn: Service Operations  
213 Market Street  
Harrisburg, PA 17101

**NOT FDIC INSURED      NO BANK GUARANTEE      MAY LOSE VALUE**



## Account Statement - Transaction Summary

For the Month Ending **March 31, 2022**

Lovejoy ISD - Construction 2017 - [REDACTED]

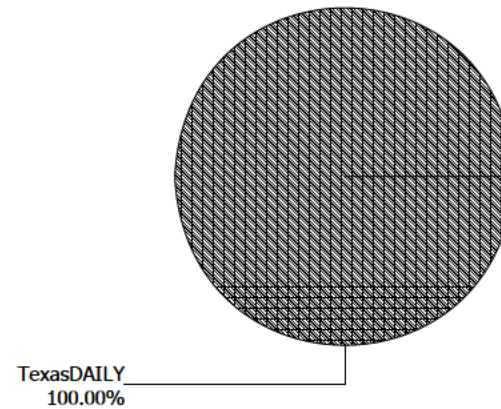
### TexasDAILY

Opening Market Value	97,441.84
Purchases	11.44
Redemptions	0.00
Unsettled Trades	0.00
Change in Value	0.00
<b>Closing Market Value</b>	<b>\$97,453.28</b>
Cash Dividends and Income	11.44

### Asset Summary

	March 31, 2022	February 28, 2022
<b>TexasDAILY</b>	97,453.28	97,441.84
<b>Total</b>	<b>\$97,453.28</b>	<b>\$97,441.84</b>

### Asset Allocation





## Account Statement

For the Month Ending **March 31, 2022**

Lovejoy ISD - Construction 2017 - [REDACTED]

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
<b>TexasDAILY</b>					
<b>Opening Balance</b>					<b>97,441.84</b>
03/31/22	04/01/22	Accrual Income Div Reinvestment - Distributions	1.00	11.44	97,453.28
<b>Closing Balance</b>					<b>97,453.28</b>

	Month of March	Fiscal YTD January-March		
<b>Opening Balance</b>	97,441.84	149,109.30	<b>Closing Balance</b>	97,453.28
<b>Purchases</b>	11.44	14.98	<b>Average Monthly Balance</b>	97,442.21
<b>Redemptions (Excl. Checks)</b>	0.00	(51,671.00)	<b>Monthly Distribution Yield</b>	0.14%
<b>Check Disbursements</b>	0.00	0.00		
<b>Closing Balance</b>	<b>97,453.28</b>	<b>97,453.28</b>		
<b>Cash Dividends and Income</b>	11.44	14.98		

Participant #: [REDACTED]

**Lone Star™** March 2022  
Investment Pool Monthly Statement

Statement Period: 03/01/2022 to 03/31/2022

Jennifer DuPlessis  
Lovejoy, SD  
259 Country Club Road  
Austin, Texas 75002



**Summary of Portfolio Holdings**

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2018	Government Overnight Fund	171,288.06	1.00	171,288.06	3.89%
<b>Totals:</b>				<b>171,288.06</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2019	Government Overnight Fund	329,740.43	1.00	329,740.43	7.48%
<b>Totals:</b>				<b>329,740.43</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2021	Government Overnight Fund	3,887,499.41	1.00	3,887,499.41	88.21%
<b>Totals:</b>				<b>3,887,499.41</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
General Fund	Government Overnight Fund	18,716.59	1.00	18,716.59	0.42%
<b>Totals:</b>				<b>18,716.59</b>	

**Totals**

Fund	Yield	Share Quantity	Price Per Share	Fund Balance (USD)	% Port.
Corporate Overnight Fund	0.00 %	0.00	1.00	0.00	0.00 %
Government Overnight Fund	0.11 %	4,407,244.49	1.00	4,407,244.49	100.00 %
Corporate Overnight Plus Fund	0.00 %	0.00	1.00	0.00	0.00 %
<b>Total Value:</b>				<b>4,407,244.49</b>	<b>100.00 %</b>

**Portfolio Transactions**

**Construction 2018 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
03/01/2022	Starting Balance	171,272.31			171,272.31
03/31/2022	Interest	171,288.06	15.75	1.00	15.75
03/31/2022	Ending Balance	171,288.06			171,288.06

**Construction 2019 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
03/01/2022	Starting Balance	329,710.11			329,710.11
03/31/2022	Interest	329,740.43	30.32	1.00	30.32
03/31/2022	Ending Balance	329,740.43			329,740.43

**Construction 2021 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
03/01/2022	Starting Balance	4,300,140.86			4,300,140.86
03/04/2022	Withdrawal	3,887,140.86	413,000.00	1.00	413,000.00
03/31/2022	Interest	3,887,499.41	358.55	1.00	358.55
03/31/2022	Ending Balance	3,887,499.41			3,887,499.41

**General Fund - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
03/01/2022	Starting Balance	18,714.87			18,714.87
03/31/2022	Interest	18,716.59	1.72	1.00	1.72
03/31/2022	Ending Balance	18,716.59			18,716.59

**Important Information about this statement**

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# Summary Statement

March 31, 2022

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Investor ID: [REDACTED]

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**Lovejoy I.S.D.**  
**259 Country Club Road**  
**Allen, TX 75002**

## Texas CLASS

### Texas CLASS

Average Monthly Yield: 0.2857%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
TX-01-0287-0002	DEBT SERVICE RESERVE	3,461,281.77	358,208.40	0.00	895.27	2,552.10	3,661,419.96	3,820,385.44
TX-01-0287-0003	GENERAL FUND	23,794.90	0.00	0.00	5.79	9.99	23,797.41	23,800.69
TX-01-0287-0004	CONSTRUCTION 2004	42,472.27	0.00	0.00	10.30	17.79	42,476.74	42,482.57
TX-01-0287-0008	CONSTRUCTION 2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL</b>		<b>3,527,548.94</b>	<b>358,208.40</b>	<b>0.00</b>	<b>911.36</b>	<b>2,579.88</b>	<b>3,727,694.11</b>	<b>3,886,668.70</b>



Account Number: [REDACTED]

DEBT SERVICE RESERVE

Account Summary

Average Monthly Yield: 0.2857%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	3,461,281.77	358,208.40	0.00	895.27	2,552.10	3,661,419.96	3,820,385.44

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
03/01/2022	Beginning Balance			3,461,281.77	
03/01/2022	Contribution	7,979.75			5594313
03/02/2022	Contribution	358.00			5597960
03/03/2022	Contribution	21,248.81			5601527
03/04/2022	Contribution	61,434.45			5605245
03/07/2022	Contribution	10,942.25			5609116
03/08/2022	Contribution	20,753.75			5612764
03/09/2022	Contribution	27,707.49			5616494
03/10/2022	Contribution	39,499.52			5620361
03/11/2022	Contribution	4,852.24			5624065
03/14/2022	Contribution	7,629.06			5628023
03/15/2022	Contribution	14,549.62			5631851
03/16/2022	Contribution	6,858.22			5635643



Account Number: [REDACTED]

**DEBT SERVICE RESERVE**

**Transaction Activity** (Continued)

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
03/17/2022	Contribution	1,708.54			5639422
03/21/2022	Contribution	11,859.41			5647197
03/22/2022	Contribution	9,056.60			5651135
03/23/2022	Contribution	13,009.02			5655062
03/24/2022	Contribution	14,673.03			5659027
03/25/2022	Contribution	9,626.62			5662934
03/28/2022	Contribution	21,220.17			5667068
03/29/2022	Contribution	13,764.52			5671035
03/30/2022	Contribution	9,559.85			5674993
03/31/2022	Contribution	29,917.48			5678926
03/31/2022	Income Dividend Reinvestment	895.27			
03/31/2022	Ending Balance			3,820,385.44	



Account Statement

March 31, 2022

Page 4 of 6

Account Number: [REDACTED]

GENERAL FUND

Account Summary

Average Monthly Yield: 0.2857%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	23,794.90	0.00	0.00	5.79	9.99	23,797.41	23,800.69

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
03/01/2022	Beginning Balance			23,794.90	
03/31/2022	Income Dividend Reinvestment	5.79			
03/31/2022	Ending Balance			23,800.69	



Account Statement

March 31, 2022

Page 5 of 6

Account Number: [REDACTED]

CONSTRUCTION 2004

Account Summary

Average Monthly Yield: 0.2857%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	42,472.27	0.00	0.00	10.30	17.79	42,476.74	42,482.57

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
03/01/2022	Beginning Balance			42,472.27	
03/31/2022	Income Dividend Reinvestment	10.30			
03/31/2022	Ending Balance			42,482.57	



## Texas CLASS

## Texas CLASS

Date	Dividend Rate	Daily Yield
03/01/2022	0.00003809	0.1390%
03/02/2022	0.00004115	0.1502%
03/03/2022	0.00004956	0.1809%
03/04/2022	0.00014736	0.1793%
03/05/2022	0.00000000	0.1793%
03/06/2022	0.00000000	0.1793%
03/07/2022	0.00004873	0.1779%
03/08/2022	0.00005671	0.2070%
03/09/2022	0.00005863	0.2140%
03/10/2022	0.00006173	0.2253%
03/11/2022	0.00018987	0.2310%
03/12/2022	0.00000000	0.2310%
03/13/2022	0.00000000	0.2310%
03/14/2022	0.00006305	0.2301%
03/15/2022	0.00006299	0.2299%
03/16/2022	0.00006629	0.2420%
03/17/2022	0.00007391	0.2698%
03/18/2022	0.00026835	0.3265%
03/19/2022	0.00000000	0.3265%
03/20/2022	0.00000000	0.3265%
03/21/2022	0.00010033	0.3662%
03/22/2022	0.00010096	0.3685%
03/23/2022	0.00010239	0.3737%
03/24/2022	0.00010585	0.3864%
03/25/2022	0.00032103	0.3906%
03/26/2022	0.00000000	0.3906%
03/27/2022	0.00000000	0.3906%
03/28/2022	0.00011161	0.4073%
03/29/2022	0.00011177	0.4080%
03/30/2022	0.00011283	0.4118%
03/31/2022	0.00013320	0.4862%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

TexPool Participant Services  
1001 Texas Avenue, Suite 1150  
Houston, TX 77002



LOVEJOY ISD  
GENERAL FUND  
ATTN JENNIFER DUPLESSIS  
259 COUNTRY CLUB RD  
ALLEN TX 75002-7643

## Participant Statement

Statement Period 01/01/2022 - 01/31/2022

Customer Service 1-866-TEX-POOL  
Location ID [REDACTED]  
Investor ID [REDACTED]

## TexPool Update

Your feedback is important in our effort to provide you with the best service possible. Click Contact Us on TexPool.com or TexConnect to send an email or call TexPool Participant Service at 866 839 7665. We look forward to hearing from you!

### TexPool Summary

Pool Name	Beginning Balance	Total Deposits	Total Withdrawals	Total Interest	Current Balance	Average Balance
Texas Local Government Investment Pool	\$13,062,247.51	\$9,440,657.34	\$3,500,000.00	\$533.45	\$19,003,438.30	\$16,535,076.26
<b>Total Dollar Value</b>	<b>\$13,062,247.51</b>	<b>\$9,440,657.34</b>	<b>\$3,500,000.00</b>	<b>\$533.45</b>	<b>\$19,003,438.30</b>	

## Portfolio Value

Pool Name	Pool/Account	Market Value (01/01/2022)	Share Price (01/31/2022)	Shares Owned (01/31/2022)	Market Value (01/31/2022)
Texas Local Government Investment Pool	[REDACTED]	\$13,062,247.51	\$1.00	19,003,438.300	\$19,003,438.30
<b>Total Dollar Value</b>		<b>\$13,062,247.51</b>			<b>\$19,003,438.30</b>

## Interest Summary

Pool Name	Pool/Account	Month-to-Date Interest	Year-to-Date Interest
Texas Local Government Investment Pool	[REDACTED]	\$533.45	\$533.45
<b>Total</b>		<b>\$533.45</b>	<b>\$533.45</b>

## Transaction Detail

Texas Local Government Investment Pool

Participant: LOVEJOY ISD

Pool/Account: [REDACTED]

Transaction Date	Settlement Date	Transaction Description	Transaction Dollar Amount	Share Price	Shares This Transaction	Shares Owned
01/01/2022	01/01/2022	BEGINNING BALANCE	\$13,062,247.51	\$1.00		13,062,247.510
01/03/2022	01/03/2022	AUTOMATIC DEPOSIT	\$422,382.08	\$1.00	422,382.080	13,484,629.590
01/04/2022	01/04/2022	AUTOMATIC DEPOSIT	\$1,813,929.79	\$1.00	1,813,929.790	15,298,559.380
01/05/2022	01/05/2022	AUTOMATIC DEPOSIT	\$354,820.71	\$1.00	354,820.710	15,653,380.090
01/06/2022	01/06/2022	AUTOMATIC DEPOSIT	\$352,856.04	\$1.00	352,856.040	16,006,236.130
01/07/2022	01/07/2022	AUTOMATIC DEPOSIT	\$600,192.84	\$1.00	600,192.840	16,606,428.970
01/10/2022	01/10/2022	AUTOMATIC DEPOSIT	\$407,619.57	\$1.00	407,619.570	17,014,048.540
01/11/2022	01/11/2022	AUTOMATIC DEPOSIT	\$762,857.33	\$1.00	762,857.330	17,776,905.870
01/12/2022	01/12/2022	AUTOMATIC DEPOSIT	\$389,161.60	\$1.00	389,161.600	18,166,067.470
01/12/2022	01/12/2022	WITHDRAWAL	\$3,500,000.00-	\$1.00	3,500,000.000-	14,666,067.470

01/13/2022	01/13/2022	AUTOMATIC DEPOSIT	\$464,860.19	\$1.00	464,860.190	15,130,927.660
01/14/2022	01/14/2022	AUTOMATIC DEPOSIT	\$644,785.39	\$1.00	644,785.390	15,775,713.050
01/18/2022	01/18/2022	AUTOMATIC DEPOSIT	\$279,847.21	\$1.00	279,847.210	16,055,560.260
01/19/2022	01/19/2022	AUTOMATIC DEPOSIT	\$302,610.94	\$1.00	302,610.940	16,358,171.200
01/20/2022	01/20/2022	AUTOMATIC DEPOSIT	\$443,483.70	\$1.00	443,483.700	16,801,654.900
01/21/2022	01/21/2022	AUTOMATIC DEPOSIT	\$276,973.50	\$1.00	276,973.500	17,078,628.400
01/24/2022	01/24/2022	AUTOMATIC DEPOSIT	\$548,698.46	\$1.00	548,698.460	17,627,326.860
01/25/2022	01/25/2022	AUTOMATIC DEPOSIT	\$162,972.38	\$1.00	162,972.380	17,790,299.240
01/26/2022	01/26/2022	AUTOMATIC DEPOSIT	\$387,846.11	\$1.00	387,846.110	18,178,145.350
01/27/2022	01/27/2022	AUTOMATIC DEPOSIT	\$272,633.87	\$1.00	272,633.870	18,450,779.220
01/28/2022	01/28/2022	AUTOMATIC DEPOSIT	\$552,125.63	\$1.00	552,125.630	19,002,904.850
01/31/2022	01/31/2022	MONTHLY POSTING	\$533.45	\$1.00	533.450	19,003,438.300
<b>Account Value as of 01/31/2022</b>			<b>\$19,003,438.30</b>	<b>\$1.00</b>		<b>19,003,438.300</b>

Participant #: XXXXXXXXXX

**Lone Star™** January 2022  
Investment Pool **Monthly Statement**

Statement Period: 01/01/2022 to 01/31/2022

Jennifer DuPlessis  
Lovejoy SD  
259 Country Club Road  
Austin, Texas 75002



**Summary of Portfolio Holdings**

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2018	Government Overnight Fund	171,269.07	1.00	171,269.07	3.15%
<b>Totals:</b>				<b>171,269.07</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2019	Government Overnight Fund	940,902.14	1.00	940,902.14	17.32%
<b>Totals:</b>				<b>940,902.14</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
Construction 2021	Government Overnight Fund	4,300,059.57	1.00	4,300,059.57	79.18%
<b>Totals:</b>				<b>4,300,059.57</b>	

Account	Fund	Number of Shares	Price Per Share	Account Balance	% Port.
General Fund	Government Overnight Fund	18,714.52	1.00	18,714.52	0.35%
<b>Totals:</b>				<b>18,714.52</b>	

**Totals**

Fund	Yield	Share Quantity	Price Per Share	Fund Balance (USD)	% Port.
Corporate Overnight Fund	0.00 %	0.00	1.00	0.00	0.00 %
Government Overnight Fund	0.01 %	5,430,945.30	1.00	5,430,945.30	100.00 %
Corporate Overnight Plus Fund	0.00 %	0.00	1.00	0.00	0.00 %
<b>Total Value:</b>				<b>5,430,945.30</b>	<b>100.00 %</b>

**Portfolio Transactions**

**Construction 2018 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
01/01/2022	Starting Balance	171,267.97			171,267.97
01/31/2022	Interest	171,269.07	1.10	1.00	1.10
01/31/2022	Ending Balance	171,269.07			171,269.07

**Construction 2019 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
01/01/2022	Starting Balance	940,896.08			940,896.08
01/31/2022	Interest	940,902.14	6.06	1.00	6.06
01/31/2022	Ending Balance	940,902.14			940,902.14

**Construction 2021 - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
01/01/2022	Starting Balance	5,000,030.80			5,000,030.80
01/12/2022	Withdrawal	4,300,030.80	700,000.00	1.00	700,000.00
01/31/2022	Interest	4,300,059.57	28.77	1.00	28.77
01/31/2022	Ending Balance	4,300,059.57			4,300,059.57

**General Fund - Government Overnight Fund**

Settle Date	Trade Type	Share Balance	Number of Shares	Price/Share	Amount (USD)
01/01/2022	Starting Balance	18,714.40			18,714.40
01/31/2022	Interest	18,714.52	0.12	1.00	0.12
01/31/2022	Ending Balance	18,714.52			18,714.52

**Important Information about this statement**

Please review this statement carefully, it is the official record of your account with Lone Star Investment Pool and First Public, LLC. If you disagree with any transaction, or if there are any errors or omissions in this statement please notify us promptly in writing, but no later than 10 business days after receipt of this statement. Trades pending settlement will not appear on this statement. All such trades will appear in the next monthly statement. The yield for the period is an annualized rate that reflects the relationship between the average amount of income earned and the average daily balance for the account. Please notify First Public promptly and in writing of any changes of address or phone number. Times of transactions will be furnished upon written request. The Lone Star Investment Pool Information Statement should be read carefully before investing. Investors should consider the investment objectives, risks, charges and expenses associated with municipal fund securities before investing. All transactions are no load. No remuneration has, or will be, paid to any entity in connection with this transaction. An investor may obtain an Information Statement by contacting First Public at the address and phone number identified above. An investment in Lone Star investment Pool is not insured or guaranteed by the Federal Deposit Insurance Corporation ("FDIC") or any other government agency and although Lone Star Investment Pool seeks to preserve the value of the investment at a fixed share price, it is possible to lose money by investing in municipal fund securities.



# Summary Statement

January 31, 2022

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Investor ID: [REDACTED]

Lovejoy I.S.D.  
259 Country Club Road  
Allen, TX 75002

## Texas CLASS

### Texas CLASS

Average Monthly Yield: 0.0965%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
TX-01-0287-0002	DEBT SERVICE RESERVE	8,945,153.40	4,693,533.06	0.00	979.65	979.65	11,794,864.37	13,639,666.11
TX-01-0287-0003	GENERAL FUND	23,790.70	0.00	0.00	1.94	1.94	23,791.67	23,792.64
TX-01-0287-0004	CONSTRUCTION 2004	42,464.78	0.00	0.00	3.50	3.50	42,466.54	42,468.28
TX-01-0287-0008	CONSTRUCTION 2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL</b>		<b>9,011,408.88</b>	<b>4,693,533.06</b>	<b>0.00</b>	<b>985.09</b>	<b>985.09</b>	<b>11,861,122.58</b>	<b>13,705,927.03</b>



# Account Statement

January 31, 2022

Page 2 of 6

Account Number: [REDACTED]

## DEBT SERVICE RESERVE

### Account Summary

Average Monthly Yield: 0.0965%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	8,945,153.40	4,693,533.06	0.00	979.65	979.65	11,794,864.37	13,639,666.11

### Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
01/01/2022	Beginning Balance			8,945,153.40	
01/03/2022	Contribution	210,140.34			5456773
01/04/2022	Contribution	902,433.65			5459980
01/05/2022	Contribution	176,527.69			5463224
01/06/2022	Contribution	175,550.30			5466502
01/07/2022	Contribution	298,603.49			5469826
01/10/2022	Contribution	202,623.98			5473430
01/11/2022	Contribution	379,334.57			5476876
01/12/2022	Contribution	193,612.67			5480313
01/13/2022	Contribution	228,660.23			5483710
01/14/2022	Contribution	320,788.72			5487108
01/18/2022	Contribution	139,221.58			5490867
01/19/2022	Contribution	150,545.03			5494263



Account Number: [REDACTED]

**DEBT SERVICE RESERVE**

**Transaction Activity** (Continued)

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
01/20/2022	Contribution	220,637.84			5497730
01/21/2022	Contribution	137,792.38			5501146
01/24/2022	Contribution	272,984.27			5504747
01/25/2022	Contribution	81,080.79			5508191
01/26/2022	Contribution	192,727.93			5511654
01/27/2022	Contribution	135,638.73			5515098
01/28/2022	Contribution	274,628.87			5518511
01/31/2022	Income Dividend Reinvestment	979.65			
01/31/2022	Ending Balance			13,639,666.11	



Account Statement

January 31, 2022

Page 4 of 6

Account Number: [REDACTED]

GENERAL FUND

Account Summary

Average Monthly Yield: 0.0965%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	23,790.70	0.00	0.00	1.94	1.94	23,791.67	23,792.64

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
01/01/2022	Beginning Balance			23,790.70	
01/31/2022	Income Dividend Reinvestment	1.94			
01/31/2022	Ending Balance			23,792.64	



Account Statement

January 31, 2022

Page 5 of 6

Account Number: [REDACTED]

CONSTRUCTION 2004

Account Summary

Average Monthly Yield: 0.0965%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
Texas CLASS	42,464.78	0.00	0.00	3.50	3.50	42,466.54	42,468.28

Transaction Activity

Transaction Date	Transaction Description	Contributions & Income Earned	Withdrawals	Balance	Transaction Number
01/01/2022	Beginning Balance			42,464.78	
01/31/2022	Income Dividend Reinvestment	3.50			
01/31/2022	Ending Balance			42,468.28	



Texas CLASS

Texas CLASS

Date	Dividend Rate	Daily Yield
01/01/2022	0.00000000	0.0655%
01/02/2022	0.00000000	0.0655%
01/03/2022	0.00001875	0.0684%
01/04/2022	0.00002080	0.0759%
01/05/2022	0.00002297	0.0838%
01/06/2022	0.00002502	0.0913%
01/07/2022	0.00007635	0.0929%
01/08/2022	0.00000000	0.0929%
01/09/2022	0.00000000	0.0929%
01/10/2022	0.00002647	0.0966%
01/11/2022	0.00002613	0.0954%
01/12/2022	0.00002714	0.0991%
01/13/2022	0.00002728	0.0996%
01/14/2022	0.00011200	0.1022%
01/15/2022	0.00000000	0.1022%
01/16/2022	0.00000000	0.1022%
01/17/2022	0.00000000	0.1022%
01/18/2022	0.00002822	0.1030%
01/19/2022	0.00002839	0.1037%
01/20/2022	0.00002816	0.1028%
01/21/2022	0.00008610	0.1047%
01/22/2022	0.00000000	0.1047%
01/23/2022	0.00000000	0.1047%
01/24/2022	0.00002889	0.1055%
01/25/2022	0.00002971	0.1084%
01/26/2022	0.00002844	0.1038%
01/27/2022	0.00002771	0.1011%
01/28/2022	0.00008544	0.1039%
01/29/2022	0.00000000	0.1039%
01/30/2022	0.00000000	0.1039%
01/31/2022	0.00002981	0.1088%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**



## Account Statement - Transaction Summary

For the Month Ending **January 31, 2022**

Lovejoy ISD - Construction 2015 - [REDACTED]

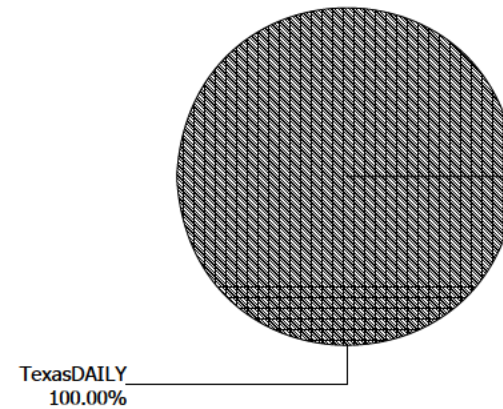
### TexasDAILY

Opening Market Value	5,705.43
Purchases	0.08
Redemptions	0.00
Unsettled Trades	0.00
Change in Value	0.00
<b>Closing Market Value</b>	<b>\$5,705.51</b>
Cash Dividends and Income	0.08

### Asset Summary

	January 31, 2022	December 31, 2021
<b>TexasDAILY</b>	5,705.51	5,705.43
<b>Total</b>	<b>\$5,705.51</b>	<b>\$5,705.43</b>

### Asset Allocation





## Account Statement

For the Month Ending **January 31, 2022**

Lovejoy ISD - Construction 2015 - [REDACTED]

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
<b>TexasDAILY</b>					
<b>Opening Balance</b>					<b>5,705.43</b>
01/31/22	02/01/22	Accrual Income Div Reinvestment - Distributions	1.00	0.08	5,705.51
<b>Closing Balance</b>					<b>5,705.51</b>

	Month of January	Fiscal YTD January-January
<b>Opening Balance</b>	5,705.43	5,705.43
<b>Purchases</b>	0.08	0.08
<b>Redemptions (Excl. Checks)</b>	0.00	0.00
<b>Check Disbursements</b>	0.00	0.00
<b>Closing Balance</b>	<b>5,705.51</b>	<b>5,705.51</b>
<b>Cash Dividends and Income</b>	0.08	0.08

<b>Closing Balance</b>	5,705.51
<b>Average Monthly Balance</b>	5,705.43
<b>Monthly Distribution Yield</b>	0.02%



## Account Statement - Transaction Summary

For the Month Ending **January 31, 2022**

Lovejoy ISD - Construction 2017 - [REDACTED]

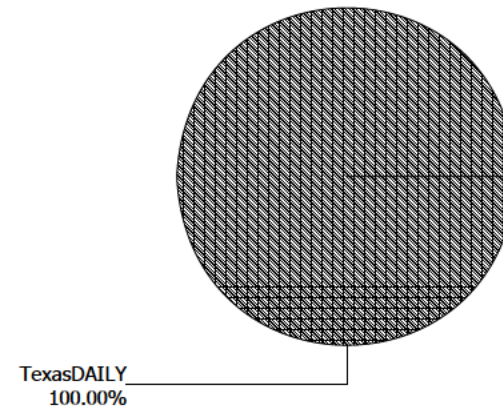
### TexasDAILY

Opening Market Value	149,109.30
Purchases	2.05
Redemptions	0.00
Unsettled Trades	0.00
Change in Value	0.00
<b>Closing Market Value</b>	<b>\$149,111.35</b>
Cash Dividends and Income	2.05

### Asset Summary

	January 31, 2022	December 31, 2021
<b>TexasDAILY</b>	149,111.35	149,109.30
<b>Total</b>	<b>\$149,111.35</b>	<b>\$149,109.30</b>

### Asset Allocation





## Account Statement

For the Month Ending **January 31, 2022**

Lovejoy ISD - Construction 2017 - [REDACTED]

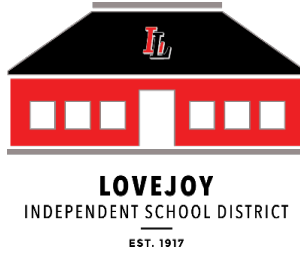
Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
<b>TexasDAILY</b>					
<b>Opening Balance</b>					<b>149,109.30</b>
01/31/22	02/01/22	Accrual Income Div Reinvestment - Distributions	1.00	2.05	149,111.35
<b>Closing Balance</b>					<b>149,111.35</b>

	Month of January	Fiscal YTD January-January
<b>Opening Balance</b>	149,109.30	149,109.30
<b>Purchases</b>	2.05	2.05
<b>Redemptions (Excl. Checks)</b>	0.00	0.00
<b>Check Disbursements</b>	0.00	0.00
<b>Closing Balance</b>	<b>149,111.35</b>	<b>149,111.35</b>
<b>Cash Dividends and Income</b>	2.05	2.05

<b>Closing Balance</b>	149,111.35
<b>Average Monthly Balance</b>	149,109.37
<b>Monthly Distribution Yield</b>	0.02%

13. **Consider and Act on Hiring the Lovejoy High School Principal**

**Presenter:** Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Consider and Act on Hiring Lovejoy High School Principal
<b>Presented For</b>	X Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input type="checkbox"/> Attached    X Provided Later
<b>Administrator Responsible</b>	Katie Kordel, Superintendent of Schools

### Executive Summary

A recommendation will be made for the hiring of the new principal of Lovejoy High School.

The name and bio of the recommendation for the new principal of Lovejoy High School will be posted on May 22, 2022.

### Fiscal Implications

This position is included in the budget.

### Administrator Recommendation

The district recommends the Board consider and take action on hiring the new principal of Lovejoy High School.

### Board Priority

#### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits.

Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### **Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

### **Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

### **Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting

the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.



**May 22, 2022**

## **Lovejoy High School Principal Announcement**

It is our honor and privilege to inform you that Dr. Travis Zambiasi is being recommended as principal of Lovejoy High School. This recommendation will be made to the Lovejoy ISD Board of Trustees at their Regular Board Meeting which will be held on Monday, May 23<sup>rd</sup>.

Dr. Zambiasi has served as a secondary campus principal in Frisco ISD for the last 4 years. He began his career in Frisco ISD in 2012 as a teacher at Frisco Wakeland High School. He had the opportunity to move to Frisco High School the next year and served as an English teacher, 10th grade team leader, and in both head and assistant coaching roles in multiple varsity sports. Dr. Zambiasi has also served as a curriculum writer and professional development facilitator. After teaching and coaching at Frisco High School for 3 years, Dr. Zambiasi became an assistant principal in 2015 at Fowler MS, opened Lawler MS as the campus principal in 2018, and currently serves as principal at Frisco Centennial High School. His bachelor's and master's degrees are from Austin College (Sherman, TX), he received his Doctor of Education in Leadership with a focus on Curriculum and Instruction in 2019 (Ed.D.) from The American College of Education (Indianapolis, IN), and recently completed his Superintendent Certification at UT Tyler (Tyler, TX). Dr. Zambiasi and his wife, Amanda, have a 3 year old daughter (Adelyn) and an 18 month old son (Zak).

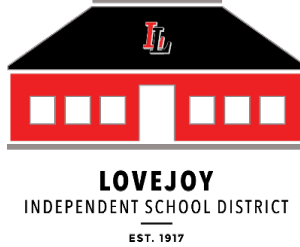
Dr. Zambiasi is extremely excited about this opportunity and looks forward to serving the students at Lovejoy High School and working to uphold the standards shared by the Lovejoy ISD community.



259 Country Club Road • Allen, Texas 75002 • 469.742.8003

14. **LOVEJOY 2030: Strategic Planning Presentation**

**Presenter:** Katie  
Kordel,  
Superintendent of  
Schools



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	LOVEJOY 2030 Strategic Plan
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input type="checkbox"/> Attached <input checked="" type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Katie Kordel, Superintendent
<b>Executive Summary</b>	
<p>Grounded in the Lovejoy ISD Mission, Core Values, and Graduate Profile LOVEJOY 2030 is our community-based strategic planning initiative aimed at taking Lovejoy ISD to the next level. The LOVEJOY 2030 Strategic Planning Committee focused on championing Lovejoy ISD's legacy of excellence, supporting future ready students, and achieving financial sustainability. A draft of the LOVEJOY 2030 Strategic Plan will be shared. This is a presentation only. The strategic plan will be placed on a future meeting agenda for consideration and action.</p>	
<b>Fiscal Implications</b>	
N/A	
<b>Administrator Recommendation</b>	
N/A	
<b>Board Priority</b>	

**Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

**Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

**Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

**Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external

stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

**Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.

# Strategic Planning

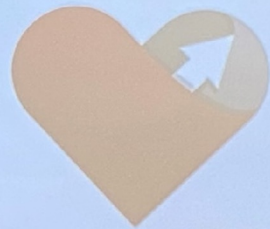
May 23, 2022  
Board Meeting



# LOVEJOY 2030

TOGETHER FOR OUR FUTURE

Thank  
You



# LOVEJOY 2030

TOGETHER FOR OUR FUTURE



# Lovejoy Independent School District

## Focus Areas

*Mission: To propel every person to personal excellence.*

### Legacy of Excellence

- *We will build upon Lovejoy ISD's legacy of excellence through a shared commitment to our mission and core values.*
- *We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students.*
- *Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.*
- *We #LiveLovejoy.*

### Future Ready Students

- *Students will personify the graduate profile by experiencing challenging and engaging learning.*
- *Research-based instructional strategies will be strategically partnered with innovation.*
- *Profound learning will develop key skills essential to thriving now and in the future.*
- *Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.*

### Financial Sustainability

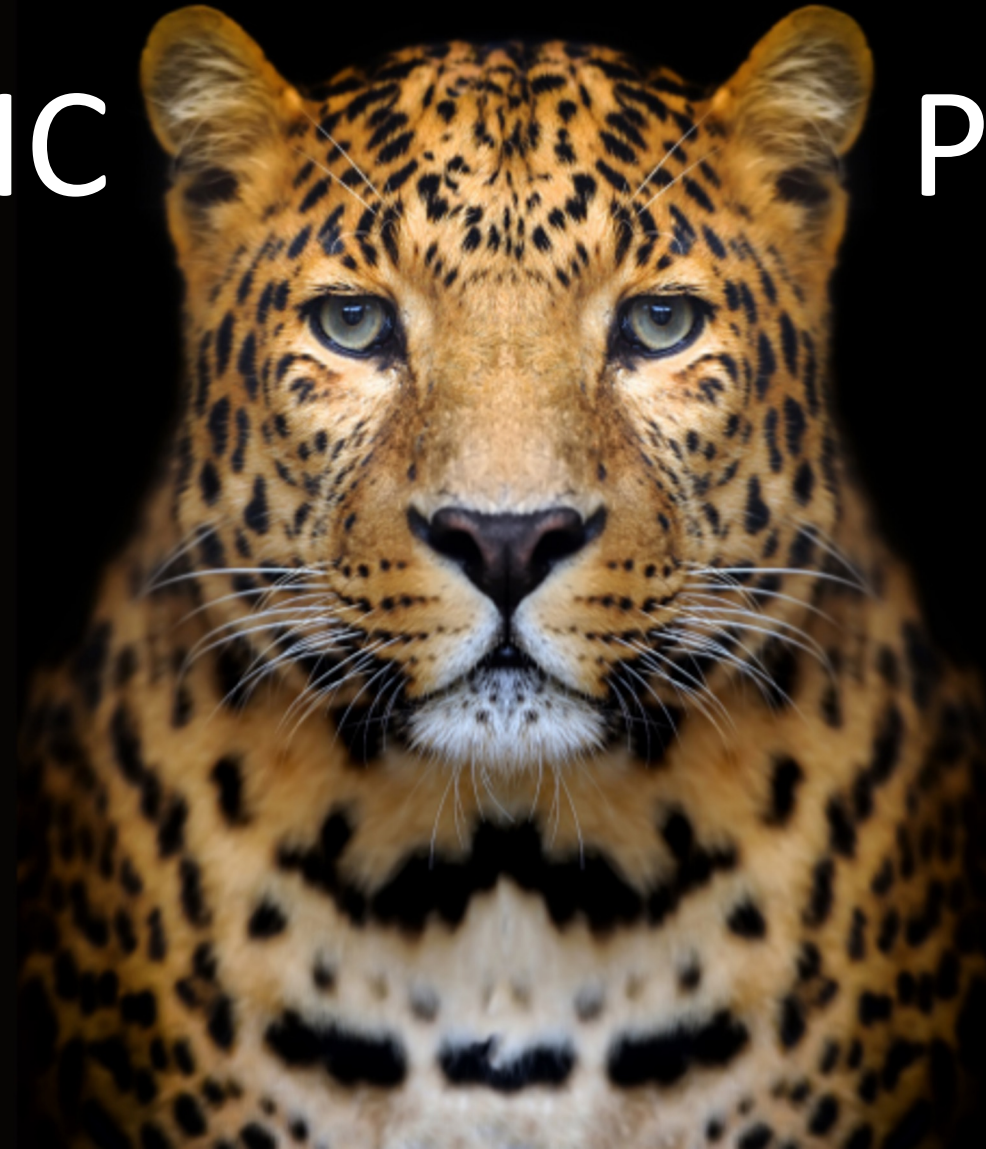
- *Lovejoy ISD will establish a plan for short and long-term financial sustainability.*
- *We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience.*
- *A financial assessment, identification of priorities, and intentional decision-making process will support strategic financial planning.*
- *Zero-based budgeting will be utilized and transparency will be prioritized.*



# LOVEJOY 2030

STRATEGIC

PLANNING



*Excellence  
by Design*

# LOVEJOY 2030

Grounded in the Lovejoy ISD Mission, Core Values, and Graduate Profile LOVEJOY 2030 is our community-based strategic planning initiative aimed at taking Lovejoy ISD to the next level.



The LOVEJOY 2030 Strategic Planning Committee will focus on championing Lovejoy ISD's legacy of excellence , supporting future ready students, and achieving financial sustainability.



# LOVEJOY 2030

## Strategic Planning Priorities



**COMMIT TO FURTHERING  
OUR LEGACY OF  
EXCELLENCE, PREPARING  
FUTURE READY  
STUDENTS, AND  
ACHIEVING FINANCIAL  
SUSTAINABILITY**



**PROVIDE A SAFE, SECURE,  
AND WELL-MAINTAINED  
LEARNING ENVIRONMENT**



**RECRUIT, RETAIN, AND  
SUPPORT AN EFFECTIVE  
TEACHER IN EVERY  
CLASSROOM AND AN  
EFFECTIVE PRINCIPAL IN  
EVERY SCHOOL**



**ENSURE ALIGNMENT WITH  
OUR CORE RESPONSIBILITY  
BY GUIDING AND  
SUPPORTING HIGH LEVELS OF  
LEARNING FOR EVERY  
LOVEJOY ISD STUDENT**



**CONTINUE TO MAXIMIZE  
STUDENT OPPORTUNITIES  
AND FULFILL OUR  
COMMITMENT TO THE  
LOVEJOY ISD GRADUATE  
PROFILE**



**LOVEJOY 2030**

# Strategic Planning Principles

Throughout the strategic planning process, our focus will be on student learning and student opportunity we will be cautious not to be short-sighted in the long-term impact of our decisions.

A successful strategic planning process, will result in a sustainable plan aligned with Lovejoy ISD's mission: To Propel every person to personal excellence.

The strategic planning process will seek inspiration and direction from our three district focus areas:

- Legacy of Excellence
- Future Ready Students
- Financial Sustainability

Lovejoy ISD will build support and investment in this initiative with staff, students, and the community by listening, encouraging input, and maintaining transparency.

# What do students **REALLY** need for their future?

“Only a quarter of executives are highly confident that they have the right workforce composition and the skill sets needed for the future.”

- Deloitte, *Industry 4.0 - are you ready?*



**LOVEJOY 2030**

Up to 65% of children entering primary schools today will ultimately work in new jobs that don't exist yet.

Technological trends will require many new roles for which employees will need **technical** *and* **social** *and* **analytical** skills.

Many existing education systems provide highly siloed training...

*World Economic Forum Report, "The Future of Jobs"*

# Student Panel



Fletcher Boots, '23



Sydney Legg, '23



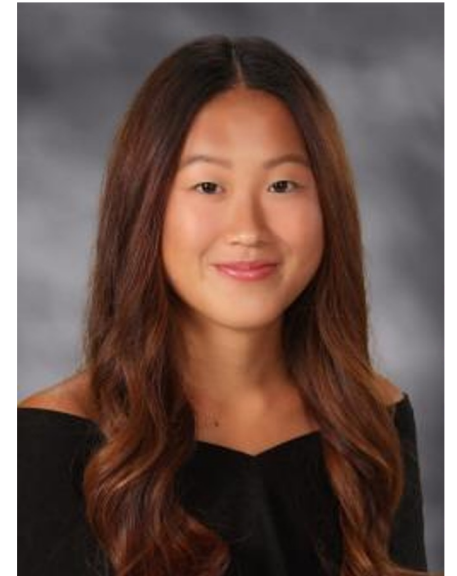
Noah Naidoo, '22



Pete Peabody, '22



Sydney Simpkins, '22



Holly Xue, '22



**LOVEJOY 2030**

**Industry,  
Business,  
and  
Education  
Leader  
Panel**



**Peter Balyta, Ph.D.**  
President of Ed Tech  
Texas Instruments



**Earl Simpkins**  
Partner  
PricewaterhouseCoopers



**Shari Childers, Ph.D.**  
Associate Dean  
UNT, New College



**Andrea Stewart Smith**  
Oil and Gas Executive



**Mackenzie Miller**  
CEO and Founder  
Mobility Outdoor Media



**LOVEJOY 2030**

# Committee Feedback on Top Future Ready Skills



**LOVEJOY 2030**

# Future Ready Skills Ranking



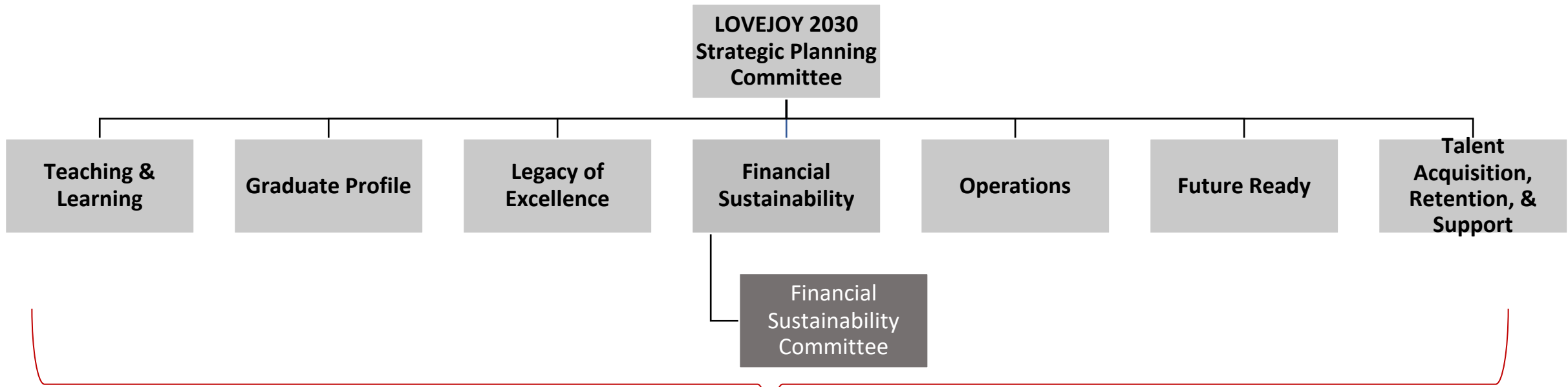
**LOVEJOY 2030**

Working  
Groups



**LOVEJOY 2030**

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## Products

Future Ready Skills  
Strategic Targets  
Strategies  
Key Indicators



**LOVEJOY 2030**

# Timeline, Process, & Products

## Meeting #1



### Friday, February 11, 2022

- 01 Introduction to LOVEJOY 2030
- 02 Role of LOVEJOY 2030 Stakeholder Committee
- 03 Business, Industry, and Educational Leader Panel
- 04 Identify Essential Future Ready Skills
- 05 Student Panel
- 06 Define Future Ready Skills

## Meeting #2



### Monday, March 21, 2022

- 01 Engage with Lovejoy ISD Focus Areas
- 02 Examine Current State and Possibilities
- 03 Examine Strengths, Weaknesses, Opportunities, and Threats
- 04 Define Scope of Strategic Targets
- 05 Create Strategic Targets
- 06 Develop Strategies

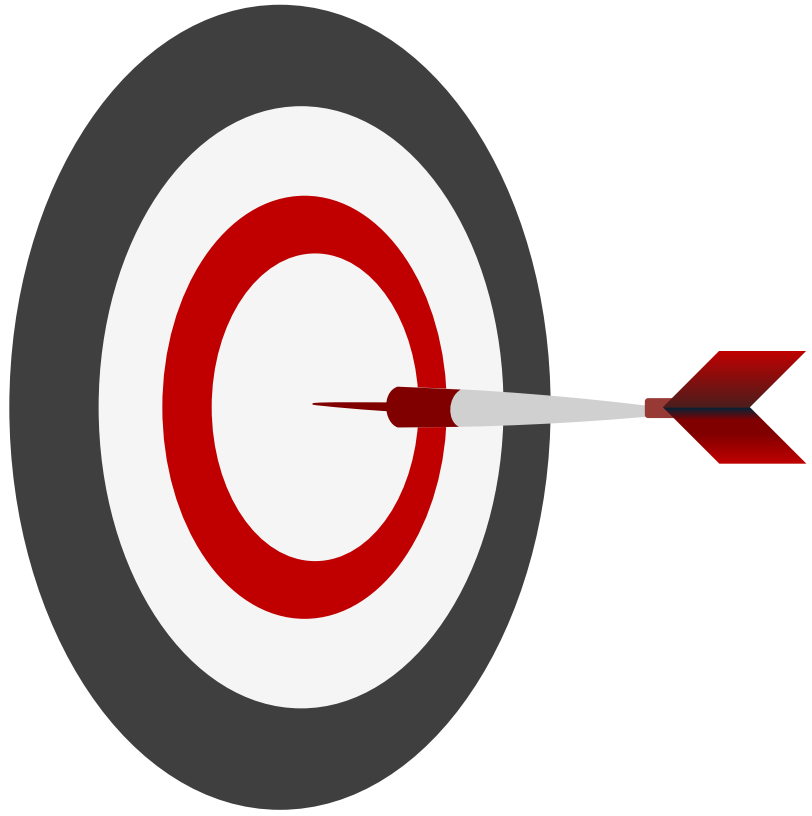
## Meeting #3



### Tuesday, April 5, 2022

- 01 Polish Strategic Targets and Strategies
- 02 Provide Feedback to Other Working Groups
- 03 Determine How We Will Measure Our Progress
- 04 Address Strategic Target, and Strategy Alignment
- 05 Review Scorecards
- 06 Discuss What Comes Next
- 07 Celebrate our Accomplishments!

# Building our Scorecards



Our **Strategic Targets** are where we want to go.

Our **Strategies** are the actions we will take to get there.

Our **Key Indicators** are how we will measure effective implementation of our **Strategies**.

# Teaching and Learning

## Teaching & Learning

**Laurie Tinsley**

**Sancy Fuller**

Charles Abraham

Greg Gibson

Hafsa Mirza

Holly Xue

Jared Glaze

Kasey Havens

Logan Pedersen

Michele Riddle

Mika Thomas

Miles Knight



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# Teaching and Learning

<b>Strategic Target 1</b>	Lovejoy ISD will ensure teachers are provided a work environment that supports their growth and provides opportunities that leads to high quality student learning experiences.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 1.1</b>	Implement professional learning communities (PLCs) systemically.	<ul style="list-style-type: none"><li>• Student Academic Growth</li><li>• Professional Development Offerings</li><li>• Master Schedules (protected time)</li><li>• Progress on PLC Continuum</li></ul>
<b>Strategy 1.2</b>	Advance teaching and learning by valuing risk-taking and innovation.	<ul style="list-style-type: none"><li>• Teacher Feedback</li><li>• Artifacts of Student Learning</li><li>• Walk-through, Observation, and Evaluation System Data</li></ul>
<b>Strategy 1.3</b>	Value the holistic nature of learning and the key role of reflection and feedback through implementation of digital student portfolios.	<ul style="list-style-type: none"><li>• Adoption of Digital Learning Platform Artifacts of Student Learning over Time</li><li>• Evidence and Support in Curriculum Documents</li></ul>

# Teaching and Learning

<b>Strategic Target 2</b>	Lovejoy ISD will enhance student learning by providing increased opportunities for enriching and exploratory experiences.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 2.1</b>	Provide opportunities for student goal setting and reflection on progress.	<ul style="list-style-type: none"> <li>● Professional Development Offerings</li> <li>● Artifacts of Student Goal Setting</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>
<b>Strategy 2.2</b>	Increase learning opportunities that are authentic, hands-on, and inquiry-based.	<ul style="list-style-type: none"> <li>● Curriculum Resources Include Authentic, Hands-on, and Inquiry-Based Learning</li> <li>● Artifacts of Student Learning</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>
<b>Strategy 2.3</b>	Develop classroom structures and processes that support instructional enhancement and enrichment.	<ul style="list-style-type: none"> <li>● Professional Development Offerings</li> <li>● Teacher Feedback and Reflection</li> <li>● Artifacts of Student Learning</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>

# Teaching and Learning

<b>Strategic Target 3</b>	Lovejoy ISD will utilize multiple assessment pathways and measures to promote student success in real world scenarios.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 3.1</b>	Systematic implementation of essential standards and common formative assessments.	<ul style="list-style-type: none"><li>● Evidence of Essential Standards in Curriculum Documents</li><li>● Professional Development Offerings</li><li>● Evidence of Development, Implementation, and Response to Common Formative Assessments</li></ul>
<b>Strategy 3.2</b>	Implementation of writing as a tool for learning in all content areas.	<ul style="list-style-type: none"><li>● Professional Development Offerings</li><li>● Student Writing Samples</li><li>● Walk-through, Observation, and Evaluation System Data</li></ul>
<b>Strategy 3.3</b>	Study current state of retest and late work guidelines, identify ideal state, and develop a plan to achieve ideal state.	<ul style="list-style-type: none"><li>● Teacher, Student, and Parent Survey Feedback</li><li>● Formation of a Committee to Study and Make Recommendations</li><li>● Committee Recommendation</li></ul>

# Graduate Profile

## Graduate Profile

**Holly Haynes**

**Chris Mayfield**

Carrie Robins

Casey Jones

Cheryl Sinacola

Fletcher Boots

Hannah Dollinger

Jeff Wood

Jerry Bowens

Josh Strickland

Kelly Cowan

Lisa Wilkins

Stephanie Kranz



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# Graduate Profile

## Strategic Target 4

Lovejoy students will take calculated risks and demonstrate resilience when faced with adversity, understanding that failure is a part of the learning process.

### Strategy

### Key Indicators

#### Strategy 4.1

Provide learning experiences and opportunities for students to develop a growth mindset.

- Development of Shared Definition of a Growth Mindset
- Implementation of Growth Mindset Guidance Lessons
- Celebration/Recognition of a Growth Mindset

#### Strategy 4.2

Emphasize the learning process as well as the product.

- Provide Students with Formative Feedback and Opportunities for Reflection During the Learning Process
- Exemplar Lessons in Curriculum Documents
- Inclusion of Rubrics in Curriculum Documents

#### Strategy 4.3

Emphasize open-ended problem solving opportunities through aligned PK-12 STEM programming.

- K-12 STEM Curriculum Adoption
- Acquisition of K-12 STEM Resources
- Professional Development Offerings
- Walk-through, Observation, and Evaluation System Data

# Graduate Profile

<b>Strategic Target 5</b>	Lovejoy ISD will implement and emphasize the PK-12 Lovejoy Graduate Profile with students, staff, parents, and community.	
	Strategy	Key Indicators
<b>Strategy 5.1</b>	PK-12 emphasis of the Lovejoy ISD Graduate Profile PK-12.	<ul style="list-style-type: none"><li>• Development and Implementation of Graduate Profile into Student Guidance Lessons</li><li>• Campus Emphasis of Profile (assemblies, awards, lesson plans, songs, presenters)</li></ul>
<b>Strategy 5.2</b>	Align Educator Profile with the Student Graduate Profile and create a Parent Profile.	<ul style="list-style-type: none"><li>• Revised Educator Profile</li><li>• Creation of Parent Profile</li><li>• Communication and Presentation of Parent Profile</li></ul>
<b>Strategy 5.3</b>	Create branding and increase community-wide communication regarding profiles.	<ul style="list-style-type: none"><li>• Launch of Branding</li><li>• Implementation of Graduate Profile Branding into Campus Communications (signage, emails, website)</li></ul>

# Graduate Profile

<b>Strategic Target 6</b>	Lovejoy ISD effectively prepare students for college and career opportunities.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 6.1</b>	Study and make recommendations regarding the Senior Project.	<ul style="list-style-type: none"> <li>● Formation of Stakeholder Committee</li> <li>● Presentation of Recommendations</li> <li>● Stakeholder Feedback on Implementation of Recommendations</li> </ul>
<b>Strategy 6.2</b>	Enhance college and career counseling for students and parents.	<ul style="list-style-type: none"> <li>● Metrics on College and Career Counseling Opportunities</li> <li>● Artifacts (e.g. newsletters, web-page, communications)</li> <li>● Stakeholder Feedback</li> </ul>
<b>Strategy 6.3</b>	Create a more informative high school course selection process.	<ul style="list-style-type: none"> <li>● Development of Student Created Course Videos</li> <li>● High School Students Integrated into Course Selection Process</li> </ul>

# Legacy of Excellence

## Legacy of Excellence

**Kevin Parker**

**Wendy Craft**

Austin Champman

Camille Simpkins

Chris Ross

Dinah Thadikonda

Fela Mathy

Lisa O'Dowd

Lynda Roundtree

Marie Cloud

Michelle Wilde

Shawn Tolleson

Terri Cunningham



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# Legacy of Excellence

<b>Strategic Target 7</b>	Lovejoy ISD will promote an engaged community with partnerships that promote the investment of time and resources.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 7.1</b>	Establish partnerships (e.g. business, industry, community, or educational) that enhance the student learning experience.	<ul style="list-style-type: none"> <li>● Number of Partnerships (Trend)</li> <li>● Artifacts of Student Learning</li> <li>● Student Opportunities</li> </ul>
<b>Strategy 7.2</b>	Create a district volunteer portal to match areas of need with community/parent expertise.	<ul style="list-style-type: none"> <li>● Identification of Tool for Portal Development</li> <li>● Communication Plan</li> <li>● Database Quality and Depth</li> <li>● Utilization of Volunteers</li> </ul>
<b>Strategy 7.3</b>	Leverage corporations and individuals to increase giving (e.g. monetary, time, and mentorships).	<ul style="list-style-type: none"> <li>● Contributions to District</li> <li>● Impact Report</li> <li>● Partner Feedback</li> </ul>

# Legacy of Excellence

<b>Strategic Target 8</b>	<i>Lovejoy ISD will enhance programs to prepare students for post-graduate success.</i>	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 8.1</b>	Implement “Adulthood 101” in grades 7-12.	<ul style="list-style-type: none"><li>● Vertically Aligned Scope and Sequence</li><li>● Parent and Community Involvement</li><li>● Stakeholder Feedback</li></ul>
<b>Strategy 8.2</b>	Provide students the opportunity to provide service and/or mentorship to younger students, our district, their schools, and our community.	<ul style="list-style-type: none"><li>● Number of Students Participating in Mentorship and Service Opportunities</li><li>● Mentor Feedback</li><li>● Mentee Feedback</li><li>● Feedback From Stakeholders</li></ul>
<b>Strategy 8.3</b>	Establish best practice protocols for student expectations, discipline, and behavior that are uniform across campuses.	<ul style="list-style-type: none"><li>● Study and Implementation of Behavior Support and Management Framework</li><li>● Processes for Consistent Documentation and Communication</li></ul>

# Legacy of Excellence

<b>Strategic Target 9</b>	Lovejoy ISD will further our legacy of excellence through connection, communication, celebration, and community.	
	Strategy	Key Indicators
<b>Strategy 9.1</b>	Build a strong alumni network.	<ul style="list-style-type: none"><li>• Updated Database of Graduates</li><li>• Two Alumni Events Held Annually</li><li>• Attendance at Alumni Events</li><li>• Alumni Engagement and Feedback</li></ul>
<b>Strategy 9.2</b>	Celebrate successes of Lovejoy ISD Alumni.	<ul style="list-style-type: none"><li>• Number of Alumni Celebrated</li><li>• Community Engagement with Alumni Campaign</li></ul>
<b>Strategy 9.3</b>	Develop a stakeholder communication and engagement strategy.	<ul style="list-style-type: none"><li>• Assessment of Current Media Channels</li><li>• Assessment of Stakeholder Engagement Opportunities</li><li>• Stakeholder Engagement Metrics</li></ul>

# Operations

## Operations

**Jennifer Duplessis**

**Courtney Halpin**

Alex Roman

Aubrey Stock

Brad Wilkerson

Christy Forte

Michel Morales

Pete Peabody

Ryan Roholmeier

Sydney Legg



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# Operations

## Strategic Target 10

Create and implement a holistic, balanced technology plan that fosters learning, accountability, innovation, and personal connection.

### Strategy

### Key Indicators

#### Strategy 10.1

Establish formal cycle of technology review and replacement.

- Technology Inventory System
- Comprehensive technology plan including cycle of review and replacement
- Update and Replacement Cycles
- Establish Funding Mechanism

#### Strategy 10.2

Provide professional development targeted at technology.

- Professional Learning Opportunities
- Walk-through, Observation, and Evaluation System Data

#### Strategy 10.3

Evaluate and Upgrade technological infrastructure, i.e. internet bandwidth.

- All Campuses Run on Fiber Optic Internet
- WI-FI Access and Internet Connectivity

# Operations

<b>Strategic Target 10</b>	Create and Implement a holistic, balanced technology plan that fosters accountability, innovation and personal connection.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 10.4</b>	Pursue potential revenue and/or cost saving opportunities.	<ul style="list-style-type: none"><li>● Realized cost savings in purchasing and maintenance of hardware.</li><li>● Increased Student Opportunity</li></ul>
<b>Strategy 10.5</b>	Determine appropriate safeguards and promote digital citizenship to protect students from harmful content and prevent overuse.	<ul style="list-style-type: none"><li>● Inclusion in Technology Plan</li><li>● Continued Implementation of Effective Software</li><li>● Inclusion in District Curriculum</li><li>● Parent Partnership Opportunities</li></ul>
<b>Strategy 10.6</b>	Create processes for approval, support, and streamlining of software.	<ul style="list-style-type: none"><li>● Inclusion in District Technology Plan</li><li>● Implementation of Processes</li><li>● Professional Development Plan</li><li>● Software Usage .</li></ul>

# Operations

<b>Strategic Target 11</b>	Fully utilize existing facility space to be more collaborative and efficient for future learning needs.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 11.1</b>	Creation of multi-use collaboration spaces.	<ul style="list-style-type: none"><li>• Tours of other schools and organizations with collaborative spaces</li><li>• Implementation and Utilization of Collaborative Spaces</li><li>• Utilization of Collaborative Space</li><li>• Stakeholder Feedback</li></ul>
<b>Strategy 11.2</b>	Tour and benchmark against out of district HS/Universities and industry partners future ready collaboration spaces and apply to other campuses.	<ul style="list-style-type: none"><li>• Completion of Tours and Benchmark Reviews</li><li>• Stakeholder Feedback, Reflections, and Recommendations</li></ul>
<b>Strategy 11.3</b>	Implementation of an Operations/Capital Improvement Committee	<ul style="list-style-type: none"><li>• Formation of Committee</li><li>• Establish Committee Charge</li><li>• Committee Recommendation</li></ul>

Future Ready

**Future Ready**

**Chris Koder**

**Mary Mullen**

Andrea Stewart  
Smith

Barrett Owens

Beth Johnson

Brie Smith

Cindy Bronson

Julie Hirsh

Mary Hurst

Noah Naidoo

Sarah Brown

Sydney Simpkins



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# Future Ready

<b>Strategic Target 12</b>	Lovejoy ISD will provide a world-class college and career preparation program to allow all students to learn, grow, and prepare for the career, vocation and/or education of their choosing.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 12.1</b>	Cultivate college and career awareness in PK-12.	<ul style="list-style-type: none"><li>● Implementation of Guidance Lessons</li><li>● Increase in Guest Speakers</li><li>● Increase in Business and industry Partnerships</li></ul>
<b>Strategy 12.2</b>	Increase opportunities for dual credit, industry certifications, and obtaining an associate's degree.	<ul style="list-style-type: none"><li>● Year over Year Increase in Student Participation</li><li>● Year over Year Increase in Industry Certifications</li><li>● Establishment of Pathway to Associate's Degree</li></ul>
<b>Strategy 12.3</b>	Establish partnerships with business, industry, and educational institutions that result in additional opportunities for students.	<ul style="list-style-type: none"><li>● List of Specific Partnerships with Impact</li><li>● Student Feedback</li></ul>

# Future Ready

<b>Strategic Target 13</b>	Lovejoy ISD will provide educational opportunities for students to develop the soft skills necessary for post secondary education and/or workforce.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 13.1</b>	Identify and develop Future Ready Skills	<ul style="list-style-type: none"> <li>● Development of Future Ready Skills Descriptors</li> <li>● Curriculum Documents</li> <li>● Professional Learning Opportunities</li> <li>● Artifacts of Student Learning</li> </ul>
<b>Strategy 13.2</b>	Increase student mentorship and internship opportunities.	<ul style="list-style-type: none"> <li>● Year over Year Mentorship Opportunities</li> <li>● Year over Year Internship Opportunities</li> </ul>
<b>Strategy 13.3</b>	Development of a college and career exploration and planning continuum (PK-12) that supports development of an individualized graduation plan.	<ul style="list-style-type: none"> <li>● College enrollment trends</li> <li>● College/university degree completion data</li> <li>● Increased PK-8 College and Career Engagement Opportunities</li> <li>● Establishment of a Parent Academy for College &amp; Career Readiness</li> </ul>

Talent,  
Acquisition,  
Retention, &  
Support

**Talent Acquisition, Retention,  
& Support**

**Anna Koenig**

**Marcy Hambrick**

Amy Smith

Christian Pruitt

Clint Porter

Conner Johnston

Hannah Gonzales

Jacob Hunter

Kim Rollins

Noah Nguyen

Sarah Quinlan



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# Talent Acquisition Retention & Support

<b>Strategic Target 14</b>	Lovejoy ISD will actively recruit and retain highly qualified, effective talent.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 14.1</b>	Create feedback loops between staff and HR to engage in collaboration for continuous improvement.	<ul style="list-style-type: none"> <li>● Satisfaction Survey</li> <li>● Prioritize Teachers on Committees and District Improvement Team</li> <li>● Continuous monitoring, adjustment and reporting back to staff</li> </ul>
<b>Strategy 14.2</b>	Establish best practices and partnerships with universities and alternative certification programs to recruit and retain talent.	<ul style="list-style-type: none"> <li>● Partner with local universities TAMUC &amp; UTD to place student teachers in internship positions</li> <li>● Measure the % of long-term employment through internships</li> </ul>
<b>Strategy 14.3</b>	Redesign Teacher-Superintendent's Connection Council to increase focus on teacher recruitment, retention, and support.	<ul style="list-style-type: none"> <li>● Teacher Input and Feedback</li> <li>● Council Recommendations</li> <li>● Stakeholder Feedback on Implementation</li> <li>● Recruitment and Retention Metrics</li> </ul>

# Talent Acquisition Retention & Support

<b>Strategic Target 15</b>	Lovejoy ISD will create an enhanced compensation plan to allow for innovative monetary and non-monetary compensation work features that reward highly effective teachers.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 15.1</b>	Involve stakeholders in creative compensation that aligns to district goals.	<ul style="list-style-type: none"> <li>● Stakeholder Feedback</li> <li>● Development and Communication of Enhanced Compensation Plan</li> </ul>
<b>Strategy 15.2</b>	Explore alternative avenues for financial rewards/incentive programs. (ex. referral bonuses, retention bonuses, and certification incentives, etc. for teachers)	<ul style="list-style-type: none"> <li>● Apply for Programs and Grants (TIA, TCLAS, grow your own based on teacher input)</li> <li>● Research Donations/Grants Through Private or Corporate Partnerships</li> </ul>
<b>Strategy 15.3</b>	Explore all options for non-monetary compensation.	<ul style="list-style-type: none"> <li>● Teacher Input and Feedback</li> <li>● Development, Implementation, and Communication of Enhanced Compensation Plan</li> </ul>

# Talent Acquisition Retention & Support

<b>Strategic Target 16</b>	Lovejoy ISD will provide multiple avenues of support to new and veteran teachers in an effort to retain and grow our current staff members.	
	Strategy	Key Indicators
<b>Strategy 16.1</b>	Restructure professional development to provide appropriate implementation time to ensure new training becomes part of best practices.	<ul style="list-style-type: none"> <li>● District Professional Learning Plan</li> <li>● Ratio of New Learning to Implementation Time</li> <li>● Teacher Feedback Surveys</li> </ul>
<b>Strategy 16.2</b>	Enhance the beginning teacher mentorship program for teachers years 1-4, by creating a structures that allow mentor teachers appropriate time to provide support.	<ul style="list-style-type: none"> <li>● Time Given to Meet Between Mentors and Mentee</li> <li>● Common Planning Periods</li> <li>● Retention Rates in Years 3 and 4</li> <li>● Mentor Survey</li> <li>● New Teacher Survey</li> </ul>
<b>Strategy 16.3</b>	Utilize updated educator profile in the interviewing and hiring process.	<ul style="list-style-type: none"> <li>● Evidence in Interview Resources</li> <li>● Evaluate Employee Profile Correlation to Retention Rates</li> </ul>

# What's Next

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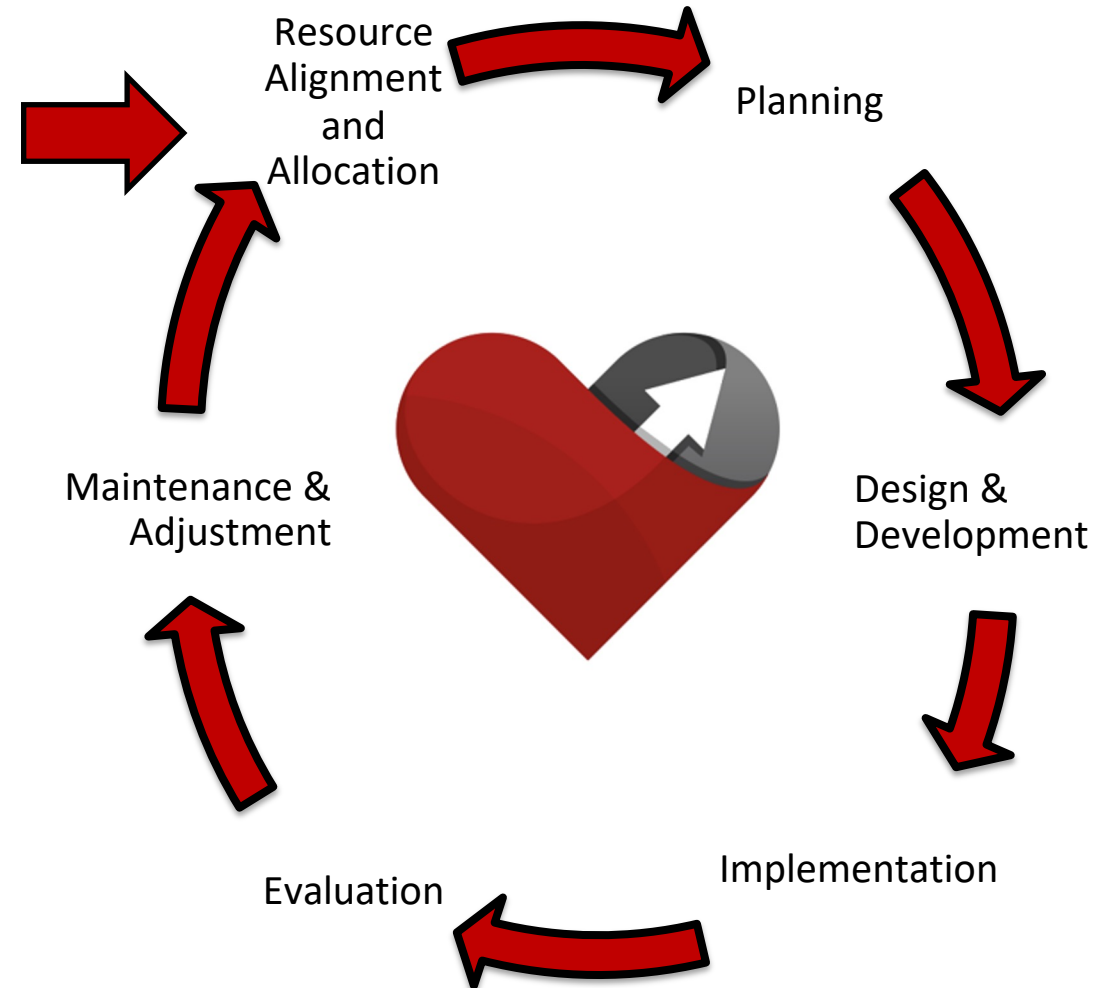
Lovejoy ISD Leadership:  
Development of Strategic Focus Areas  
Represented by our 7 Working Groups

Lovejoy 2030  
Strategic Plan

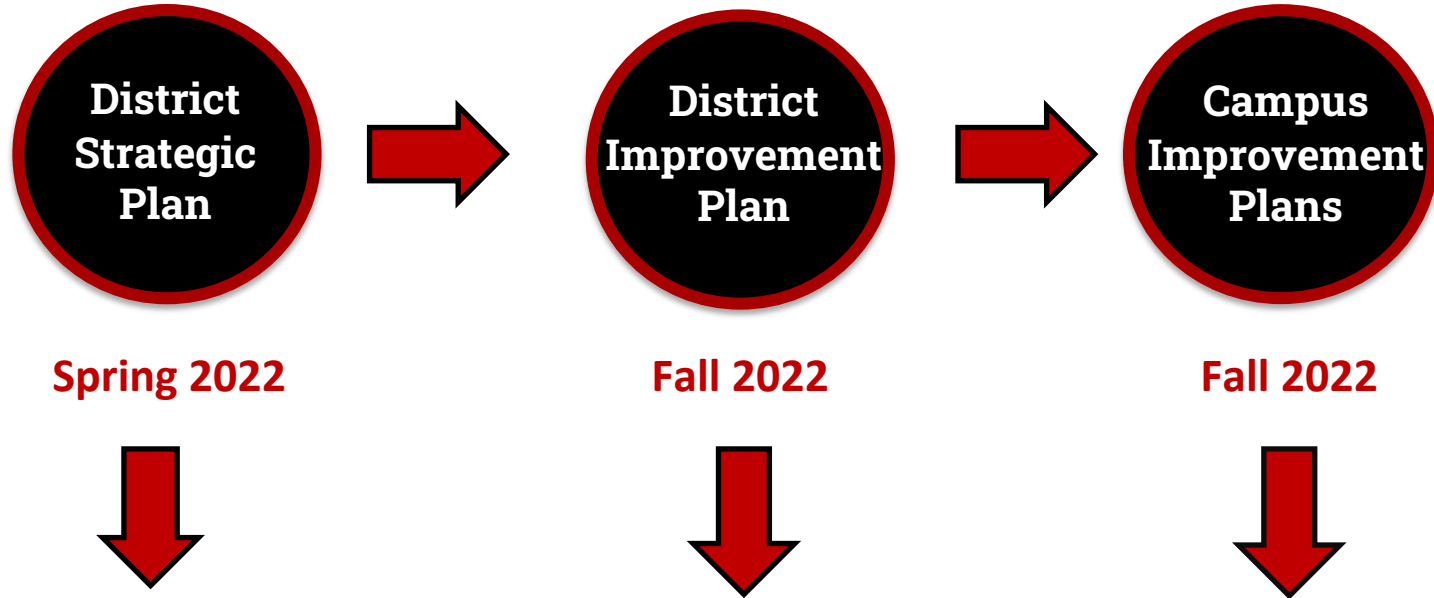
LOVEJOY 2030 Strategic Planning  
Committee: External and Internal  
Stakeholder Input

- Students
- Teachers
- Staff
- Parents/Community
- District and Campus Leaders

# Strategic Planning Process



# Strategy to Implementation



**Achievement of Lovejoy ISD's Goals**

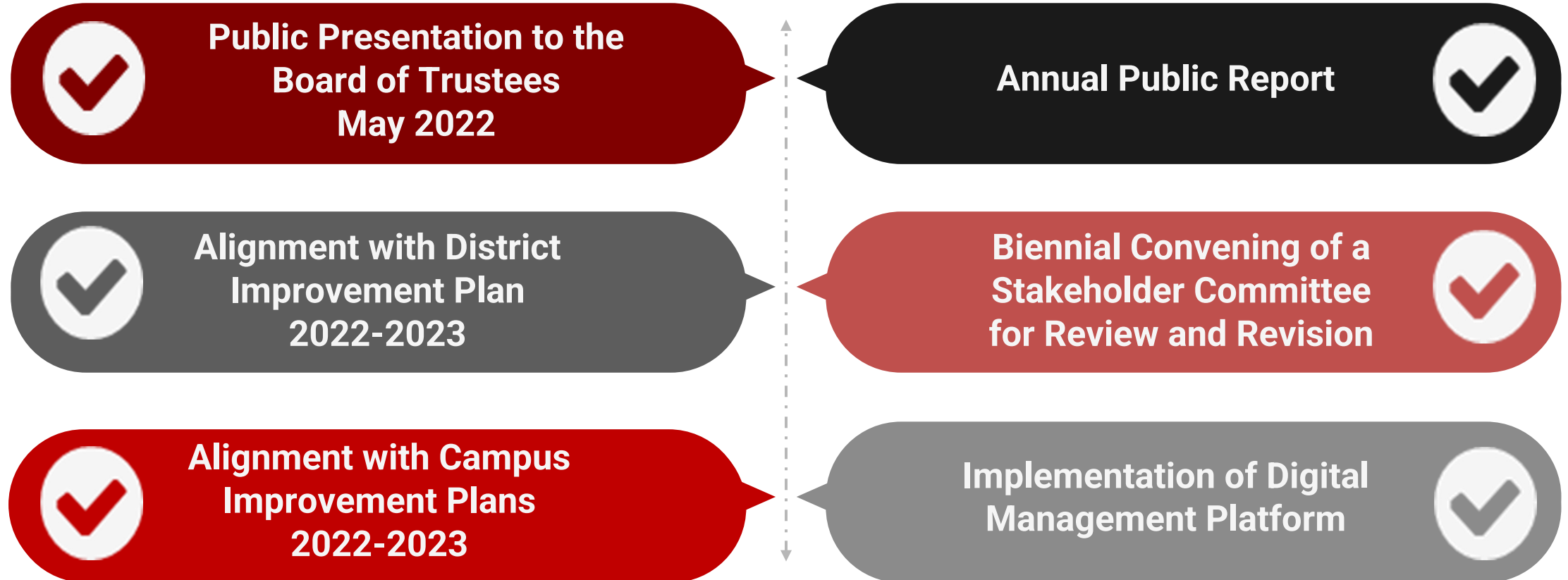


**LOVEJOY 2030**

# Strategic Plan Safeguards



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Thank  
You



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# Strategic Planning

May 23, 2022  
Board Meeting



# LOVEJOY 2030

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# Lovejoy Independent School District

## Focus Areas

*Mission: To propel every person to personal excellence.*

### Legacy of Excellence

- *We will build upon Lovejoy ISD's legacy of excellence through a shared commitment to our mission and core values.*
- *We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students.*
- *Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.*
- *We #LiveLovejoy.*

### Future Ready Students

- *Students will personify the graduate profile by experiencing challenging and engaging learning.*
- *Research-based instructional strategies will be strategically partnered with innovation.*
- *Profound learning will develop key skills essential to thriving now and in the future.*
- *Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.*

### Financial Sustainability

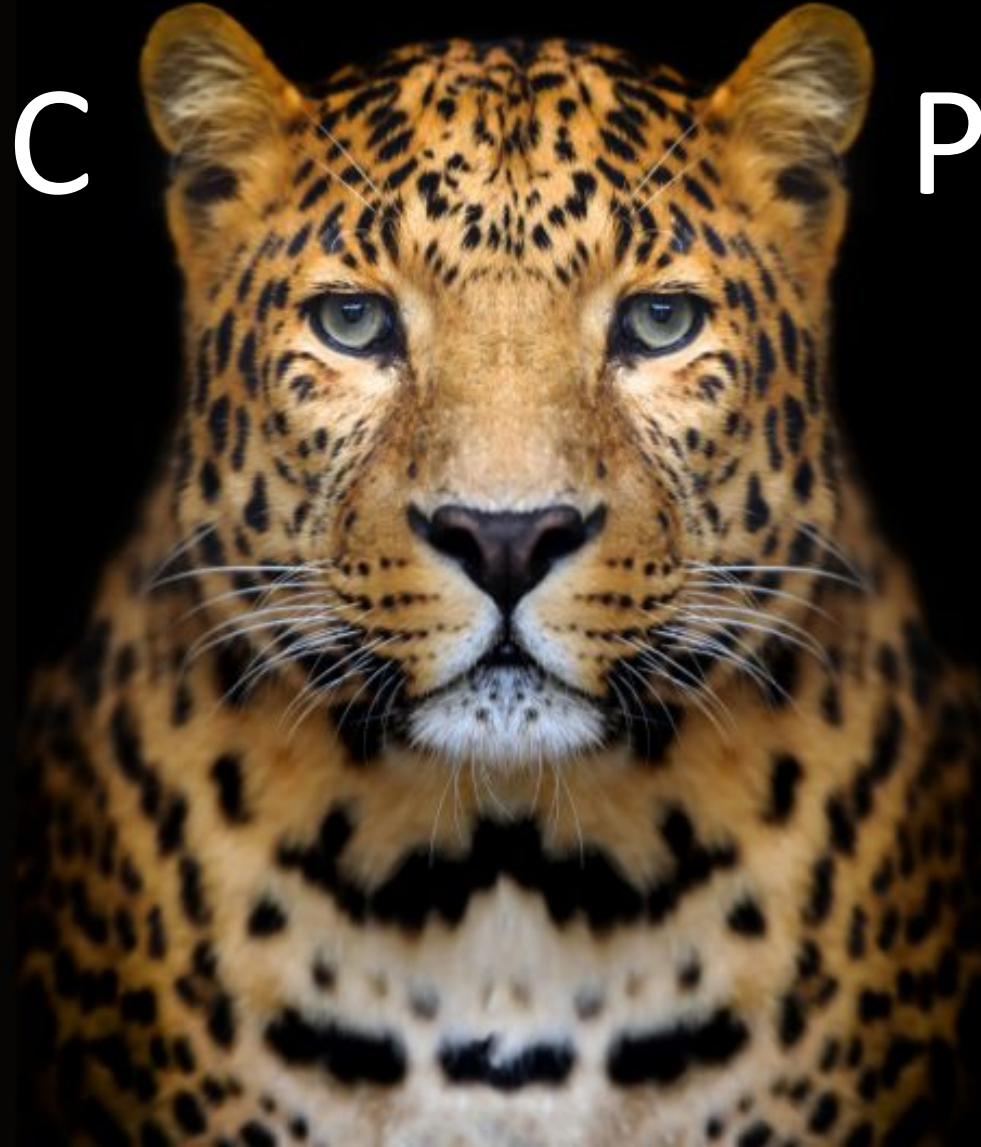
- *Lovejoy ISD will establish a plan for short and long-term financial sustainability.*
- *We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience.*
- *A financial assessment, identification of priorities, and intentional decision-making process will support strategic financial planning.*
- *Zero-based budgeting will be utilized and transparency will be prioritized.*



# LOVEJOY 2030

STRATEGIC

PLANNING



*Excellence  
by Design*

# LOVEJOY 2030

Grounded in the Lovejoy ISD Mission, Core Values, and Graduate Profile LOVEJOY 2030 is our community-based strategic planning initiative aimed at taking Lovejoy ISD to the next level.



The LOVEJOY 2030 Strategic Planning Committee will focus on championing Lovejoy ISD's legacy of excellence , supporting future ready students, and achieving financial sustainability.



# LOVEJOY 2030

## Strategic Planning Priorities



**COMMIT TO FURTHERING  
OUR LEGACY OF  
EXCELLENCE, PREPARING  
FUTURE READY  
STUDENTS, AND  
ACHIEVING FINANCIAL  
SUSTAINABILITY**



**PROVIDE A SAFE, SECURE,  
AND WELL-MAINTAINED  
LEARNING ENVIRONMENT**



**RECRUIT, RETAIN, AND  
SUPPORT AN EFFECTIVE  
TEACHER IN EVERY  
CLASSROOM AND AN  
EFFECTIVE PRINCIPAL IN  
EVERY SCHOOL**



**ENSURE ALIGNMENT WITH  
OUR CORE RESPONSIBILITY  
BY GUIDING AND  
SUPPORTING HIGH LEVELS OF  
LEARNING FOR EVERY  
LOVEJOY ISD STUDENT**



**CONTINUE TO MAXIMIZE  
STUDENT OPPORTUNITIES  
AND FULFILL OUR  
COMMITMENT TO THE  
LOVEJOY ISD GRADUATE  
PROFILE**



**LOVEJOY 2030**

# Strategic Planning Principles

Throughout the strategic planning process, our focus will be on student learning and student opportunity we will be cautious not to be short-sighted in the long-term impact of our decisions.

A successful strategic planning process, will result in a sustainable plan aligned with Lovejoy ISD's mission: To Propel every person to personal excellence.

The strategic planning process will seek inspiration and direction from our three district focus areas:

- Legacy of Excellence
- Future Ready Students
- Financial Sustainability

Lovejoy ISD will build support and investment in this initiative with staff, students, and the community by listening, encouraging input, and maintaining transparency.

# What do students **REALLY** need for their future?

“Only a quarter of executives are highly confident that they have the right workforce composition and the skill sets needed for the future.”

- Deloitte, *Industry 4.0 - are you ready?*



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Up to 65% of children entering primary schools today will ultimately work in new jobs that don't exist yet.

Technological trends will require many new roles for which employees will need **technical** *and* **social** *and* **analytical** skills.

Many existing education systems provide highly siloed training...

*World Economic Forum Report, "The Future of Jobs"*

# Student Panel



Fletcher Boots, '23



Sydney Legg, '23



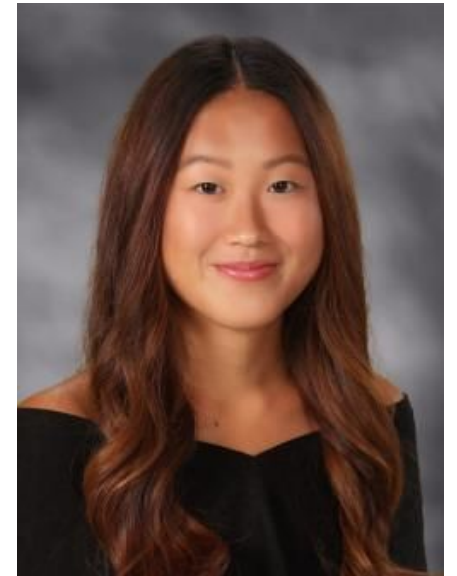
Noah Naidoo, '22



Pete Peabody, '22



Sydney Simpkins, '22



Holly Xue, '22



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# Industry, Business, and Education Leader Panel



**Peter Balyta, Ph.D.**  
President of Ed Tech  
Texas Instruments



**Earl Simpkins**  
Partner  
PricewaterhouseCoopers



**Shari Childers, Ph.D.**  
Associate Dean  
UNT, New College



**Andrea Stewart Smith**  
Oil and Gas Executive



**Mackenzie Miller**  
CEO and Founder  
Mobility Outdoor Media



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# Future Ready Skills Ranking



**LOVEJOY 2030**

Working  
Groups



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LOVEJOY 2030  
Strategic Planning  
Committee

Teaching &  
Learning

Graduate Profile

Legacy of  
Excellence

Financial  
Sustainability

Operations

Future Ready

Talent Acquisition,  
Retention, &  
Support

Financial  
Sustainability  
Committee

## Products

Future Ready Skills

Strategic Targets

Strategies

Key Indicators



**LOVEJOY 2030**

# Timeline, Process, & Products

## Meeting #1



### Friday, February 11, 2022

- 01 Introduction to LOVEJOY 2030
- 02 Role of LOVEJOY 2030 Stakeholder Committee
- 03 Business, Industry, and Educational Leader Panel
- 04 Identify Essential Future Ready Skills
- 05 Student Panel
- 06 Define Future Ready Skills

## Meeting #2



### Monday, March 21, 2022

- 01 Engage with Lovejoy ISD Focus Areas
- 02 Examine Current State and Possibilities
- 03 Examine Strengths, Weaknesses, Opportunities, and Threats
- 04 Define Scope of Strategic Targets
- 05 Create Strategic Targets
- 06 Develop Strategies

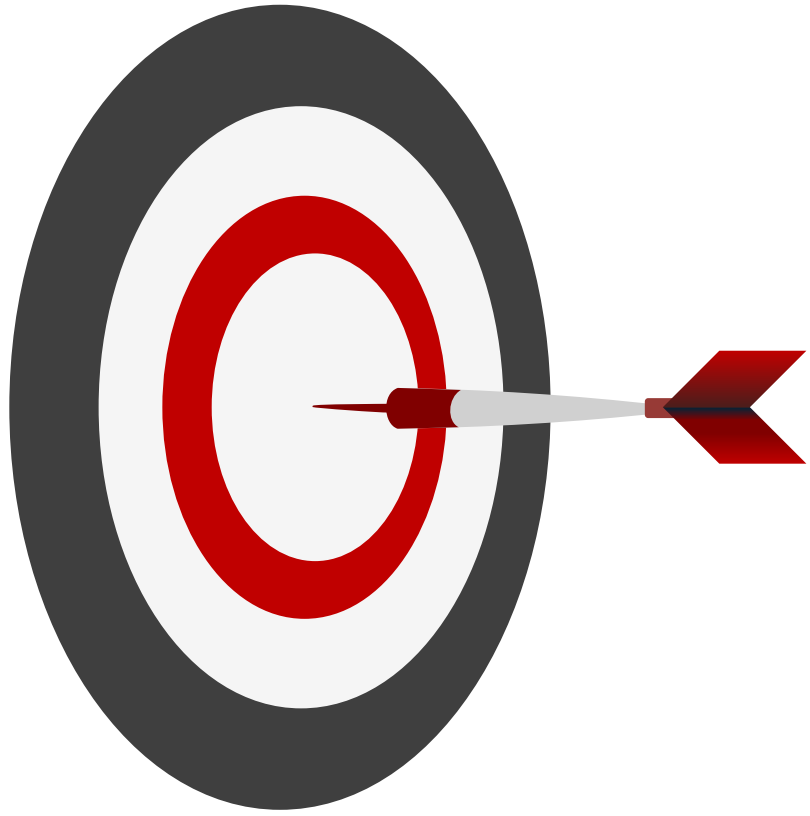
## Meeting #3



### Tuesday, April 5, 2022

- 01 Polish Strategic Targets and Strategies
- 02 Provide Feedback to Other Working Groups
- 03 Determine How We Will Measure Our Progress
- 04 Address Strategic Target, and Strategy Alignment
- 05 Review Scorecards
- 06 Discuss What Comes Next
- 07 Celebrate our Accomplishments!

# Building our Scorecards



Our **Strategic Targets** are where we want to go.

Our **Strategies** are the actions we will take to get there.

Our **Key Indicators** are how we will measure effective implementation of our **Strategies**.

# Teaching and Learning

## Teaching & Learning

**Laurie Tinsley**

**Sancy Fuller**

Charles Abraham

Greg Gibson

Hafsa Mirza

Holly Xue

Jared Glaze

Kasey Havens

Logan Pedersen

Michele Riddle

Mika Thomas

Miles Knight



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# Teaching and Learning

<b>Strategic Target 1</b>	Lovejoy ISD will ensure teachers are provided a work environment that supports their growth and provides opportunities that leads to high quality student learning experiences.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 1.1</b>	Implement professional learning communities (PLCs) systemically.	<ul style="list-style-type: none"> <li>● Student Academic Growth</li> <li>● Professional Development Offerings</li> <li>● Master Schedules (protected time)</li> <li>● Progress on PLC Continuum</li> </ul>
<b>Strategy 1.2</b>	Advance teaching and learning by valuing risk-taking and innovation.	<ul style="list-style-type: none"> <li>● Teacher Feedback</li> <li>● Artifacts of Student Learning</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>
<b>Strategy 1.3</b>	Value the holistic nature of learning and the key role of reflection and feedback through implementation of digital student portfolios.	<ul style="list-style-type: none"> <li>● Adoption of Digital Learning Platform Artifacts of Student Learning over Time</li> <li>● Evidence and Support in Curriculum Documents</li> </ul>

# Teaching and Learning

<b>Strategic Target 2</b>	Lovejoy ISD will enhance student learning by providing increased opportunities for enriching and exploratory experiences.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 2.1</b>	Provide opportunities for student goal setting and reflection on progress.	<ul style="list-style-type: none"> <li>● Professional Development Offerings</li> <li>● Artifacts of Student Goal Setting</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>
<b>Strategy 2.2</b>	Increase learning opportunities that are authentic, hands-on, and inquiry-based.	<ul style="list-style-type: none"> <li>● Curriculum Resources Include Authentic, Hands-on, and Inquiry-Based Learning</li> <li>● Artifacts of Student Learning</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>
<b>Strategy 2.3</b>	Develop classroom structures and processes that support instructional enhancement and enrichment.	<ul style="list-style-type: none"> <li>● Professional Development Offerings</li> <li>● Teacher Feedback and Reflection</li> <li>● Artifacts of Student Learning</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>

# Teaching and Learning

<b>Strategic Target 3</b>	Lovejoy ISD will utilize multiple assessment pathways and measures to promote student success in real world scenarios.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 3.1</b>	Systematic implementation of essential standards and common formative assessments.	<ul style="list-style-type: none"><li>● Evidence of Essential Standards in Curriculum Documents</li><li>● Professional Development Offerings</li><li>● Evidence of Development, Implementation, and Response to Common Formative Assessments</li></ul>
<b>Strategy 3.2</b>	Implementation of writing as a tool for learning in all content areas.	<ul style="list-style-type: none"><li>● Professional Development Offerings</li><li>● Student Writing Samples</li><li>● Walk-through, Observation, and Evaluation System Data</li></ul>
<b>Strategy 3.3</b>	Study current state of retest and late work guidelines, identify ideal state, and develop a plan to achieve ideal state.	<ul style="list-style-type: none"><li>● Teacher, Student, and Parent Survey Feedback</li><li>● Formation of a Committee to Study and Make Recommendations</li><li>● Committee Recommendation</li></ul>

# Graduate Profile

## Graduate Profile

**Holly Haynes**

**Chris Mayfield**

Carrie Robins

Casey Jones

Cheryl Sinacola

Fletcher Boots

Hannah Dollinger

Jeff Wood

Jerry Bowens

Josh Strickland

Kelly Cowan

Lisa Wilkins

Stephanie Kranz



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# Graduate Profile

<p><b>Strategic Target 4</b></p>	<p>Lovejoy students will take calculated risks and demonstrate resilience when faced with adversity, understanding that failure is a part of the learning process.</p>	
	<p><b>Strategy</b></p>	<p><b>Key Indicators</b></p>
<p><b>Strategy 4.1</b></p>	<p>Provide learning experiences and opportunities for students to develop a growth mindset.</p>	<ul style="list-style-type: none"> <li>● Development of Shared Definition of a Growth Mindset</li> <li>● Implementation of Growth Mindset Guidance Lessons</li> <li>● Celebration/Recognition of a Growth Mindset</li> </ul>
<p><b>Strategy 4.2</b></p>	<p>Emphasize the learning process as well as the product.</p>	<ul style="list-style-type: none"> <li>● Provide Students with Formative Feedback and Opportunities for Reflection During the Learning Process</li> <li>● Exemplar Lessons in Curriculum Documents</li> <li>● Inclusion of Rubrics in Curriculum Documents</li> </ul>
<p><b>Strategy 4.3</b></p>	<p>Emphasize open-ended problem solving opportunities through aligned PK-12 STEM programming.</p>	<ul style="list-style-type: none"> <li>● K-12 STEM Curriculum Adoption</li> <li>● Acquisition of K-12 STEM Resources</li> <li>● Professional Development Offerings</li> <li>● Walk-through, Observation, and Evaluation System Data</li> </ul>

# Graduate Profile

<b>Strategic Target 5</b>	Lovejoy ISD will implement and emphasize the PK-12 Lovejoy Graduate Profile with students, staff, parents, and community.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 5.1</b>	PK-12 emphasis of the Lovejoy ISD Graduate Profile PK-12.	<ul style="list-style-type: none"><li>• Development and Implementation of Graduate Profile into Student Guidance Lessons</li><li>• Campus Emphasis of Profile (assemblies, awards, lesson plans, songs, presenters)</li></ul>
<b>Strategy 5.2</b>	Align Educator Profile with the Student Graduate Profile and create a Parent Profile.	<ul style="list-style-type: none"><li>• Revised Educator Profile</li><li>• Creation of Parent Profile</li><li>• Communication and Presentation of Parent Profile</li></ul>
<b>Strategy 5.3</b>	Create branding and increase community-wide communication regarding profiles.	<ul style="list-style-type: none"><li>• Launch of Branding</li><li>• Implementation of Graduate Profile Branding into Campus Communications (signage, emails, website)</li></ul>

# Graduate Profile

<b>Strategic Target 6</b>	Lovejoy ISD effectively prepare students for college and career opportunities.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 6.1</b>	Study and make recommendations regarding the Senior Project.	<ul style="list-style-type: none"><li>• Formation of Stakeholder Committee</li><li>• Presentation of Recommendations</li><li>• Stakeholder Feedback on Implementation of Recommendations</li></ul>
<b>Strategy 6.2</b>	Enhance college and career counseling for students and parents.	<ul style="list-style-type: none"><li>• Metrics on College and Career Counseling Opportunities</li><li>• Artifacts (e.g. newsletters, web-page, communications)</li><li>• Stakeholder Feedback</li></ul>
<b>Strategy 6.3</b>	Create a more informative high school course selection process.	<ul style="list-style-type: none"><li>• Development of Student Created Course Videos</li><li>• High School Students Integrated into Course Selection Process</li></ul>

# Legacy of Excellence

## Legacy of Excellence

**Kevin Parker**

**Wendy Craft**

Austin Champman

Camille Simpkins

Chris Ross

Dinah Thadikonda

Fela Mathy

Lisa O'Dowd

Lynda Roundtree

Marie Cloud

Michelle Wilde

Shawn Tolleson

Terri Cunningham



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# Legacy of Excellence

<b>Strategic Target 7</b>	Lovejoy ISD will promote an engaged community with partnerships that promote the investment of time and resources.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 7.1</b>	Establish partnerships (e.g. business, industry, community, or educational) that enhance the student learning experience.	<ul style="list-style-type: none"><li>● Number of Partnerships (Trend)</li><li>● Artifacts of Student Learning</li><li>● Student Opportunities</li></ul>
<b>Strategy 7.2</b>	Create a district volunteer portal to match areas of need with community/parent expertise.	<ul style="list-style-type: none"><li>● Identification of Tool for Portal Development</li><li>● Communication Plan</li><li>● Database Quality and Depth</li><li>● Utilization of Volunteers</li></ul>
<b>Strategy 7.3</b>	Leverage corporations and individuals to increase giving (e.g. monetary, time, and mentorships).	<ul style="list-style-type: none"><li>● Contributions to District</li><li>● Impact Report</li><li>● Partner Feedback</li></ul>

# Legacy of Excellence

## Strategic Target 8

*Lovejoy ISD will enhance programs to prepare students for post-graduate success.*

### Strategy

### Key Indicators

#### Strategy 8.1

Implement “Adulthood 101” in grades 7-12.

- Vertically Aligned Scope and Sequence
- Parent and Community Involvement
- Stakeholder Feedback

#### Strategy 8.2

Provide students the opportunity to provide service and/or mentorship to younger students, our district, their schools, and our community.

- Number of Students Participating in Mentorship and Service Opportunities
- Mentor Feedback
- Mentee Feedback
- Feedback From Stakeholders

#### Strategy 8.3

Establish best practice protocols for student expectations, discipline, and behavior that are uniform across campuses.

- Study and Implementation of Behavior Support and Management Framework
- Processes for Consistent Documentation and Communication

# Legacy of Excellence

<b>Strategic Target 9</b>	Lovejoy ISD will further our legacy of excellence through connection, communication, celebration, and community.	
	Strategy	Key Indicators
<b>Strategy 9.1</b>	Build a strong alumni network.	<ul style="list-style-type: none"><li>• Updated Database of Graduates</li><li>• Two Alumni Events Held Annually</li><li>• Attendance at Alumni Events</li><li>• Alumni Engagement and Feedback</li></ul>
<b>Strategy 9.2</b>	Celebrate successes of Lovejoy ISD Alumni.	<ul style="list-style-type: none"><li>• Number of Alumni Celebrated</li><li>• Community Engagement with Alumni Campaign</li></ul>
<b>Strategy 9.3</b>	Develop a stakeholder communication and engagement strategy.	<ul style="list-style-type: none"><li>• Assessment of Current Media Channels</li><li>• Assessment of Stakeholder Engagement Opportunities</li><li>• Stakeholder Engagement Metrics</li></ul>

# Operations

## Operations

**Jennifer Duplessis**

**Courtney Halpin**

Alex Roman

Aubrey Stock

Brad Wilkerson

Christy Forte

Michel Morales

Pete Peabody

Ryan Roholmeier

Sydney Legg



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# Operations

<b>Strategic Target 10</b>	Create and implement a holistic, balanced technology plan that fosters learning, accountability, innovation, and personal connection.	
	Strategy	Key Indicators
<b>Strategy 10.1</b>	Establish formal cycle of technology review and replacement.	<ul style="list-style-type: none"><li>• Technology Inventory System</li><li>• Comprehensive technology plan including cycle of review and replacement</li><li>• Update and Replacement Cycles</li><li>• Establish Funding Mechanism</li></ul>
<b>Strategy 10.2</b>	Provide professional development targeted at technology.	<ul style="list-style-type: none"><li>• Professional Learning Opportunities</li><li>• Walk-through, Observation, and Evaluation System Data</li></ul>
<b>Strategy 10.3</b>	Evaluate and Upgrade technological infrastructure, i.e. internet bandwidth.	<ul style="list-style-type: none"><li>• All Campuses Run on Fiber Optic Internet</li><li>• WI-FI Access and Internet Connectivity</li></ul>

# Operations

<b>Strategic Target 10</b>	Create and Implement a holistic, balanced technology plan that fosters accountability, innovation and personal connection.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 10.4</b>	Pursue potential revenue and/or cost saving opportunities.	<ul style="list-style-type: none"> <li>● Realized cost savings in purchasing and maintenance of hardware.</li> <li>● Increased Student Opportunity</li> </ul>
<b>Strategy 10.5</b>	Determine appropriate safeguards and promote digital citizenship to protect students from harmful content and prevent overuse.	<ul style="list-style-type: none"> <li>● Inclusion in Technology Plan</li> <li>● Continued Implementation of Effective Software</li> <li>● Inclusion in District Curriculum</li> <li>● Parent Partnership Opportunities</li> </ul>
<b>Strategy 10.6</b>	Create processes for approval, support, and streamlining of software.	<ul style="list-style-type: none"> <li>● Inclusion in District Technology Plan</li> <li>● Implementation of Processes</li> <li>● Professional Development Plan</li> <li>● Software Usage .</li> </ul>

# Operations

<b>Strategic Target 11</b>	Fully utilize existing facility space to be more collaborative and efficient for future learning needs.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 11.1</b>	Creation of multi-use collaboration spaces.	<ul style="list-style-type: none"><li>• Tours of other schools and organizations with collaborative spaces</li><li>• Implementation and Utilization of Collaborative Spaces</li><li>• Utilization of Collaborative Space</li><li>• Stakeholder Feedback</li></ul>
<b>Strategy 11.2</b>	Tour and benchmark against out of district HS/Universities and industry partners future ready collaboration spaces and apply to other campuses.	<ul style="list-style-type: none"><li>• Completion of Tours and Benchmark Reviews</li><li>• Stakeholder Feedback, Reflections, and Recommendations</li></ul>
<b>Strategy 11.3</b>	Implementation of an Operations/Capital Improvement Committee	<ul style="list-style-type: none"><li>• Formation of Committee</li><li>• Establish Committee Charge</li><li>• Committee Recommendation</li></ul>

**Future Ready**

**Future Ready**

**Chris Koder**

**Mary Mullen**

Andrea Stewart  
Smith

Barrett Owens

Beth Johnson

Brie Smith

Cindy Bronson

Julie Hirsh

Mary Hurst

Noah Naidoo

Sarah Brown

Sydney Simpkins



**LOVEJOY 2030**

TOGETHER FOR OUR FUTURE

# Future Ready

## Strategic Target 12

Lovejoy ISD will provide a world-class college and career preparation program to allow all students to learn, grow, and prepare for the career, vocation and/or education of their choosing.

### Strategy

### Key Indicators

#### Strategy 12.1

Cultivate college and career awareness in PK-12.

- Implementation of Guidance Lessons
- Increase in Guest Speakers
- Increase in Business and industry Partnerships

#### Strategy 12.2

Increase opportunities for dual credit, industry certifications, and obtaining an associate's degree.

- Year over Year Increase in Student Participation
- Year over Year Increase in Industry Certifications
- Establishment of Pathway to Associate's Degree

#### Strategy 12.3

Establish partnerships with business, industry, and educational institutions that result in additional opportunities for students.

- List of Specific Partnerships with Impact
- Student Feedback

# Future Ready

<p><b>Strategic Target 13</b></p>	<p>Lovejoy ISD will provide educational opportunities for students to develop the soft skills necessary for post secondary education and/or workforce.</p>	
	<p><b>Strategy</b></p>	<p><b>Key Indicators</b></p>
<p><b>Strategy 13.1</b></p>	<p>Identify and develop Future Ready Skills</p>	<ul style="list-style-type: none"> <li>● Development of Future Ready Skills Descriptors</li> <li>● Curriculum Documents</li> <li>● Professional Learning Opportunities</li> <li>● Artifacts of Student Learning</li> </ul>
<p><b>Strategy 13.2</b></p>	<p>Increase student mentorship and internship opportunities.</p>	<ul style="list-style-type: none"> <li>● Year over Year Mentorship Opportunities</li> <li>● Year over Year Internship Opportunities</li> </ul>
<p><b>Strategy 13.3</b></p>	<p>Development of a college and career exploration and planning continuum (PK-12) that supports development of an individualized graduation plan.</p>	<ul style="list-style-type: none"> <li>● College enrollment trends</li> <li>● College/university degree completion data</li> <li>● Increased PK-8 College and Career Engagement Opportunities</li> <li>● Establishment of a Parent Academy for College &amp; Career Readiness</li> </ul>

**Talent,  
Acquisition,  
Retention, &  
Support**

**Talent Acquisition, Retention,  
& Support**

**Anna Koenig**

**Marcy Hambrick**

Amy Smith

Christian Pruitt

Clint Porter

Conner Johnston

Hannah Gonzales

Jacob Hunter

Kim Rollins

Noah Nguyen

Sarah Quinlan



**LOVEJOY 2030**

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# Talent Acquisition Retention & Support

<b>Strategic Target 14</b>	Lovejoy ISD will actively recruit and retain highly qualified, effective talent.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 14.1</b>	Create feedback loops between staff and HR to engage in collaboration for continuous improvement.	<ul style="list-style-type: none"> <li>● Satisfaction Survey</li> <li>● Prioritize Teachers on Committees and District Improvement Team</li> <li>● Continuous monitoring, adjustment and reporting back to staff</li> </ul>
<b>Strategy 14.2</b>	Establish best practices and partnerships with universities and alternative certification programs to recruit and retain talent.	<ul style="list-style-type: none"> <li>● Partner with local universities TAMUC &amp; UTD to place student teachers in internship positions</li> <li>● Measure the % of long-term employment through internships</li> </ul>
<b>Strategy 14.3</b>	Redesign Teacher-Superintendent's Connection Council to increase focus on teacher recruitment, retention, and support.	<ul style="list-style-type: none"> <li>● Teacher Input and Feedback</li> <li>● Council Recommendations</li> <li>● Stakeholder Feedback on Implementation</li> <li>● Recruitment and Retention Metrics</li> </ul>

# Talent Acquisition Retention & Support

<b>Strategic Target 15</b>	Lovejoy ISD will create an enhanced compensation plan to allow for innovative monetary and non-monetary compensation work features that reward highly effective teachers.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 15.1</b>	Involve stakeholders in creative compensation that aligns to district goals.	<ul style="list-style-type: none"> <li>● Stakeholder Feedback</li> <li>● Development and Communication of Enhanced Compensation Plan</li> </ul>
<b>Strategy 15.2</b>	Explore alternative avenues for financial rewards/incentive programs. (ex. referral bonuses, retention bonuses, and certification incentives, etc. for teachers)	<ul style="list-style-type: none"> <li>● Apply for Programs and Grants (TIA, TCLAS, grow your own based on teacher input)</li> <li>● Research Donations/Grants Through Private or Corporate Partnerships</li> </ul>
<b>Strategy 15.3</b>	Explore all options for non-monetary compensation.	<ul style="list-style-type: none"> <li>● Teacher Input and Feedback</li> <li>● Development, Implementation, and Communication of Enhanced Compensation Plan</li> </ul>

# Talent Acquisition Retention & Support

<b>Strategic Target 16</b>	Lovejoy ISD will provide multiple avenues of support to new and veteran teachers in an effort to retain and grow our current staff members.	
	<b>Strategy</b>	<b>Key Indicators</b>
<b>Strategy 16.1</b>	Restructure professional development to provide appropriate implementation time to ensure new training becomes part of best practices.	<ul style="list-style-type: none"> <li>● District Professional Learning Plan</li> <li>● Ratio of New Learning to Implementation Time</li> <li>● Teacher Feedback Surveys</li> </ul>
<b>Strategy 16.2</b>	Enhance the beginning teacher mentorship program for teachers years 1-4, by creating a structures that allow mentor teachers appropriate time to provide support.	<ul style="list-style-type: none"> <li>● Time Given to Meet Between Mentors and Mentee</li> <li>● Common Planning Periods</li> <li>● Retention Rates in Years 3 and 4</li> <li>● Mentor Survey</li> <li>● New Teacher Survey</li> </ul>
<b>Strategy 16.3</b>	Utilize updated educator profile in the interviewing and hiring process.	<ul style="list-style-type: none"> <li>● Evidence in Interview Resources</li> <li>● Evaluate Employee Profile Correlation to Retention Rates</li> </ul>

# What's Next

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**LOVEJOY 2030**

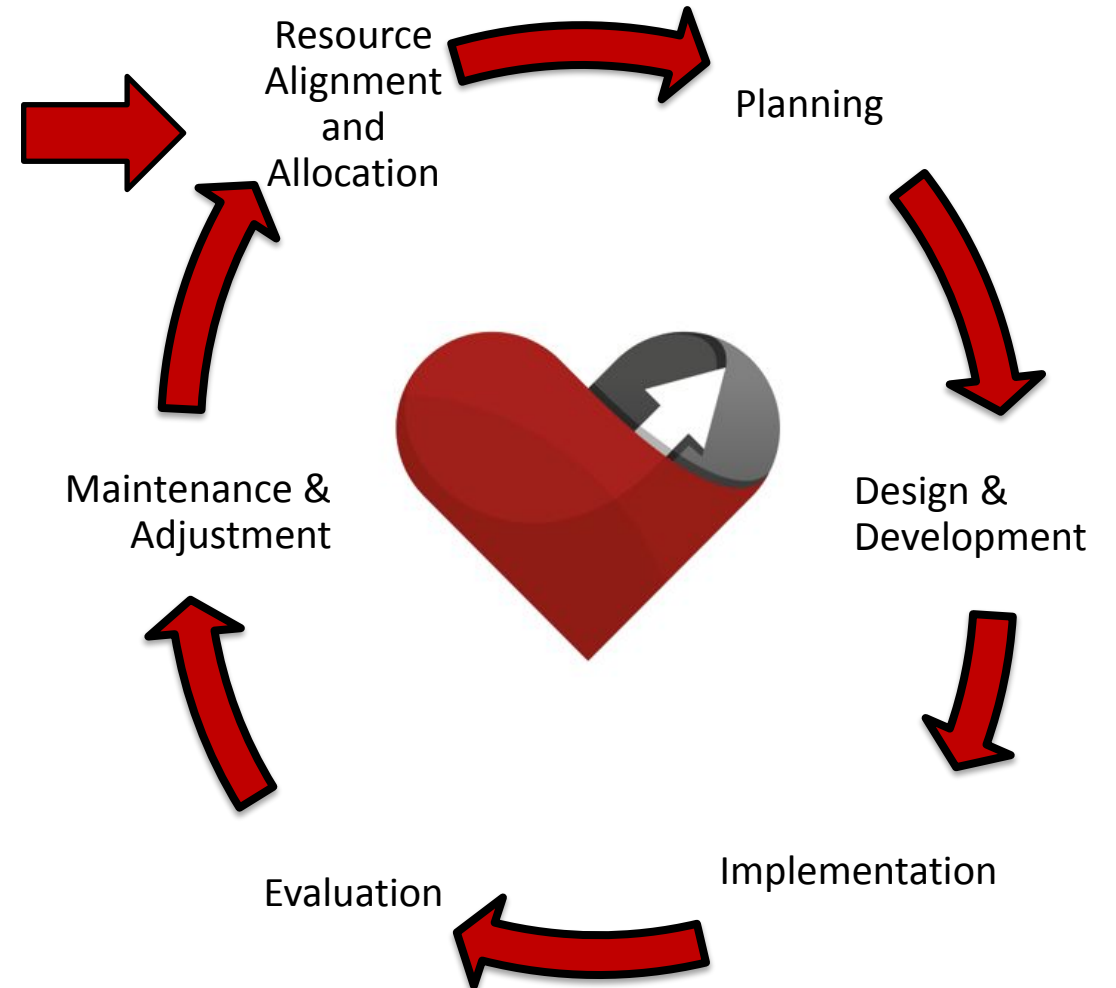
Lovejoy ISD Leadership:  
Development of Strategic Focus Areas  
Represented by our 7 Working Groups

Lovejoy 2030  
Strategic Plan

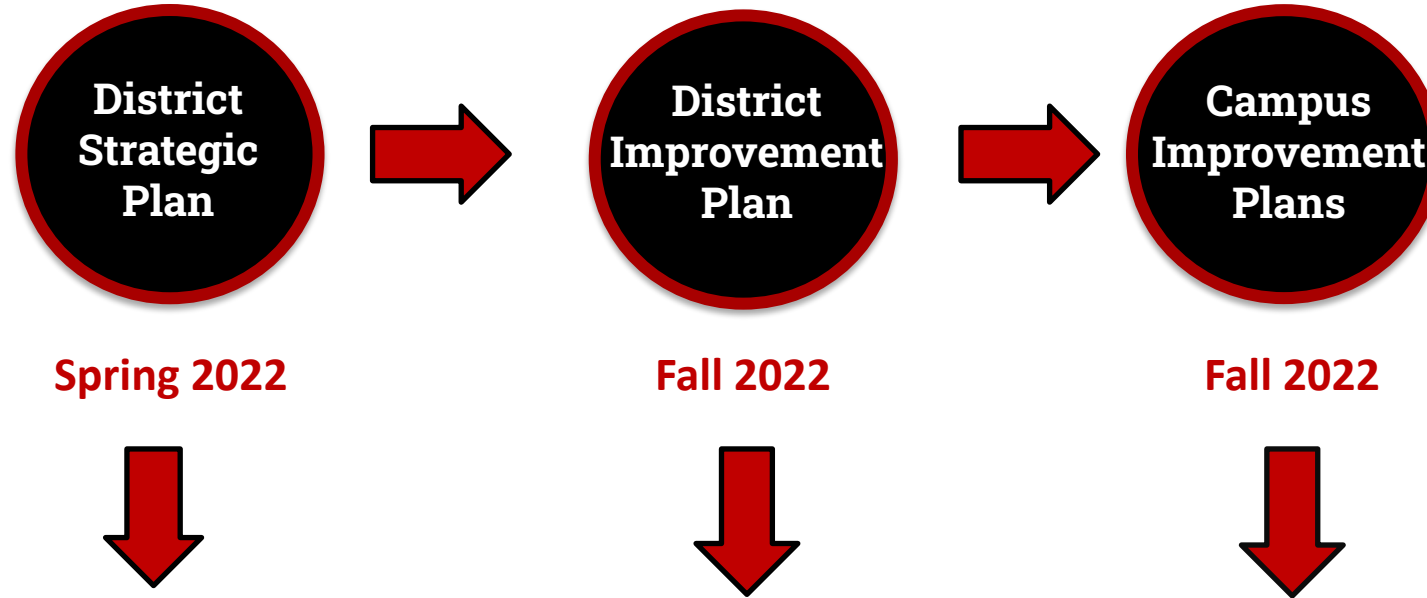
LOVEJOY 2030 Strategic Planning  
Committee: External and Internal  
Stakeholder Input

- Students
- Teachers
- Staff
- Parents/Community
- District and Campus Leaders

# Strategic Planning Process



# Strategy to Implementation



**Achievement of Lovejoy ISD's Goals**

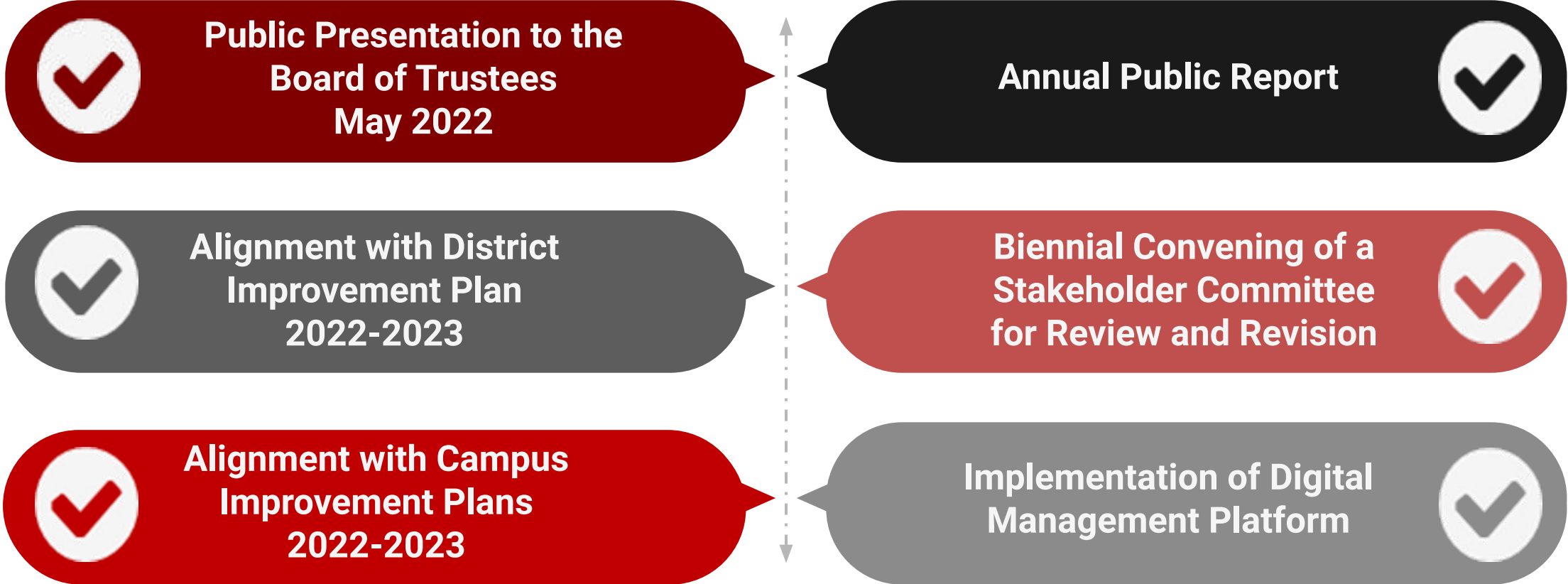


**LOVEJOY 2030**

# Strategic Plan Safeguards



**LOVEJOY 2030**



**Thank  
You**

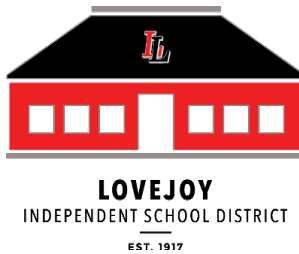


**LOVEJOY 2030**

TOGETHER FOR OUR FUTURE

15. **Consider and Act on Resolution Regarding the  
Petition to Detach and Annex McKinney ISD  
Territory (Stonegate) into Lovejoy ISD**

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Consider and Act on Resolution Regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input type="checkbox"/> Attached <input checked="" type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Kim Steiner, Coordinator of Community Engagement and Organizational Development / Executive Assistant to the Superintendent
<b>Executive Summary</b>	
<p>Lovejoy ISD has received a petition from residents of the Stonegate neighborhood of Lucas, Texas who wish to petition McKinney Independent School District for detachment and the Lovejoy Independent School District for annexation. Lovejoy ISD published notice of a public hearing in the Allen American on April 7, 2022 and Celina Record on April 11, 2022. At the public hearing on April 25, 2022, the Board heard and considered testimony from affected persons related to the educational interests of the current students residing, or future students expected to reside, in the affected territory and in the affected districts and the social, economic, and educational effects of the proposed boundary change.</p>	
<b>Fiscal Implications</b>	
N/A	
<b>Administrator Recommendation</b>	
<p>Administration recommends consideration and action on a Resolution Regarding the Petition to Detach and Annex McKinney ISD Territory (Stonegate) into Lovejoy ISD. This resolution should include the Board's findings related to the educational interests of the current students</p>	

residing, or future students expected to reside, in the affected territory and in the affected districts and the social, economic, and educational effects of the proposed boundary change.

## **Board Priority**

### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### **Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

### **Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

**Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

**Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.

**RESOLUTION OPPOSING ANNEXATION AND DETACHMENT OF TERRITORY  
FROM THE MCKINNEY INDEPENDENT SCHOOL DISTRICT TO THE LOVEJOY  
INDEPENDENT SCHOOL DISTRICT**

STATE OF TEXAS

§

COUNTY OF COLLIN

§

§

**WHEREAS**, the Lovejoy Independent School District (“Lovejoy ISD” or “District”) on or about June 2, 2021, received a petition to detach the area identified and platted as the “Stonegate” subdivision, more specifically described in Exhibit A attached hereto (the “Area”) within the City of Lucas and the McKinney Independent School District (“McKinney ISD”) from the McKinney ISD and annex the Area to the Lovejoy ISD (the “Petition”);

**WHEREAS**, the Board finds the District provided proper public notice by publication in the Allen American on April 7, 2022, for the public hearing on the Petition on April 25, 2022;

**WHEREAS**, a hearing was held during the Board’s meeting on April 25, 2022 at 6:00 p.m., at the Carrie L. Lovejoy Child Development Center: Room D100 (Closed Session) & Library (Open Session) 256 Country Club Road, Allen, Texas 75002;

**WHEREAS**, the Lovejoy ISD recognizes, and will comply with, the requirements imposed under Texas Education Code Section 13.051 regarding petitions for detachment and annexation presented to the Lovejoy ISD;

**WHEREAS**, the Board finds that all statutory requirements outlined in Texas Education Code, Sections 13.051 for the Petition were met to allow for legal detachment or annexation of the Area to Lovejoy ISD from McKinney ISD;

**WHEREAS**, at its hearing on April 25, 2022, the Board considered the educational interests of the current students residing, or future students expected to reside, in the Area and in the Lovejoy ISD and McKinney ISD, as well as the social, economic, and educational effects of the proposed boundary change;

**WHEREAS**, the Lovejoy ISD recognizes and applauds the efforts of the cities within the Lovejoy ISD territory for the development of Comprehensive Land Use Plans for such cities’ respective jurisdictions that conform to, and compliment, the lifestyles of their residents;

**WHEREAS**, such Comprehensive Land Use Plans have been relied upon by Lovejoy ISD and McKinney ISD in developing the enrollment model used by Lovejoy ISD and McKinney ISD to construct long-term planning;

**WHEREAS**, changes in the boundaries of the Lovejoy ISD through the detachment and annexation requested in the Petition could potentially disrupt and alter such enrollment to the ultimate detriment of Lovejoy ISD and the cities within its territory;

**WHEREAS**, granting the Petition could create an expectation from other communities bordering the Lovejoy ISD that the District would grant additional requests for detachment from a bordering district and annexation to Lovejoy ISD, placing Lovejoy ISD at risk for costly and burdensome litigation as well as enrollment beyond its capacity;

**WHEREAS**, as of the date of passage of this Resolution, the Lovejoy ISD Board of Trustees believes that approving the Petition is not in the best educational, social, and economic interests of the residents and students, current and expected both within the Area and/or within the Lovejoy ISD;

**WHEREAS**, the Board finds the residents of the Area purchased their homes with the full knowledge the homes were located within the McKinney ISD and understood the attendant travel times to / from McKinney ISD schools and activities;

**WHEREAS**, residents of the Lovejoy ISD take first priority for the Board, whether in availability of services, campus space, or other District resources;

**WHEREAS**, Lovejoy ISD permits interdistrict transfers through the Lovejoy Scholars program such that residents of the Area may choose to apply for a transfer to Lovejoy ISD, subject to availability of services, classroom space, District resources, staff, and/or other factors;

**WHEREAS**, the District’s mission to propel every person to personal excellence could be compromised by approving the Petition, thereby limiting current residents of the Lovejoy ISD of the services and resources provided for Lovejoy ISD students.

**NOW, THEREFORE, BE IT RESOLVED**, that the Lovejoy ISD Board of Trustees that:

SECTION 1: The execution of this Resolution shall evidence the concurrence of the Lovejoy ISD Board of Trustees with the facts set forth of the preamble hereof as being true and correct.

SECTION 2: The execution of this Resolution shall evidence the expression of the Lovejoy ISD Board of Trustees that it is opposed to the approval of the Petition for detachment of the Area from the McKinney ISD and annexation of the Area to the Lovejoy ISD.

SECTION 3: This Resolution shall take effect immediately upon its passage in accordance with applicable laws and regulations.

SECTION 4: The Findings of Fact attached hereto as Exhibit A, and incorporated fully herein, are adopted as Lovejoy ISD Board of Trustees Findings of Fact in conjunction with the Petition.

SECTION 5: The Petition requesting that the Area particularly described by the metes and bounds attached hereto as Exhibit B and generally described as within both the McKinney ISD and the City of Lucas, be detached from McKinney ISD and annexed to the Lovejoy ISD is denied.

**PASSED AND APPROVED** this \_ day of \_\_\_\_, 2022.

\_\_\_\_\_  
President, Board of Trustees

\_\_\_\_\_  
Secretary, Board of Trustees

\_\_\_\_\_  
Vice-President, Board of Trustees

\_\_\_\_\_  
Member, Board of Trustees

\_\_\_\_\_  
Member, Board of Trustees

\_\_\_\_\_  
Member, Board of Trustees

\_\_\_\_\_  
Member, Board of Trustees

**Exhibit A**

**Petition with Exhibits Including  
Legal Description of the Area**

## **Exhibit B**

### **Findings of Fact**

The Lovejoy Independent School District (“Lovejoy ISD” or “District”) on or about June 2, 2021, received a petition to detach the area identified and platted as the “Stonegate” subdivision, more specifically described in Exhibit A attached hereto (the “Area”) within the City of Lucas and the McKinney Independent School District (“McKinney ISD”) from the McKinney ISD and annex the Area to the Lovejoy ISD (the “Petition”). In conjunction with the Petition, the Board of Trustees (“Board”) held a public hearing on the Petition on April 25, 2022, which was properly noticed by publication in the Allen American on April 7, 2022, for the public hearing on the Petition on April 25, 2022. The hearing was held during the Lovejoy ISD Board’s meeting on April 25, 2022 at 6:00 p.m., at the Carrie L. Lovejoy Child Development Center: Room D100 (Closed Session) & Library (Open Session) 256 Country Club Road, Allen, Texas 75002.

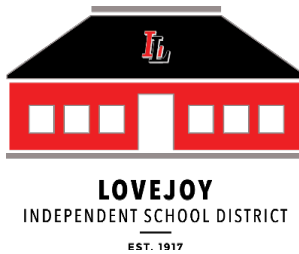
Based on the information shared in the public hearing and related evidence, the Lovejoy ISD Board carefully evaluated the Petition and issues the following findings of fact (“Findings”) with regard to the Petition:

1. Lovejoy ISD recognized, and complied with, the requirements imposed under Texas Education Code Section 13.051 regarding petitions for detachment and annexation presented to the Lovejoy ISD.
2. The Petition met all statutory requirements outlined in Texas Education Code, Sections 13.051 to request legal detachment or annexation of the Area from the McKinney ISD to the Lovejoy ISD.
3. The District expanded the Lovejoy Scholars program for the 2021-2022 school year and, therefore, students in the Area were permitted to transfer to the Lovejoy ISD during this school year and were not in any manner negatively impacted by the postponement of the Board’s consideration of the Petition. Stonegate Texas HOA, Inc., did not pursue the Petition with the District, however, the District is modifying the structure and enrollment guidelines for the Lovejoy Scholars program for the 2022-2023 school year. Therefore, the District chose to move forward with the public hearing on April 25, 2022 to assure the Petition was properly heard and considered prior to the change in the Lovejoy Scholars program.
4. Following the hearing on April 25, 2022, the Board considered the educational interests of the current students residing, or future students expected to reside, in the Area and in both the Lovejoy ISD and McKinney ISD. The Board also considered the social, economic, and educational effects of the proposed boundary change on the identified group and the Lovejoy ISD.
5. The Area shares only one boundary with the Lovejoy ISD on the west side of the Area. The surrounding areas on the north, east, and south of the Area are all within the McKinney ISD. Granting the Petition would result in a “carve out” of McKinney ISD territory for a single development that is inconsistent with the McKinney ISD and Lovejoy ISD existing boundaries.

6. The Lovejoy ISD Board finds the cities within the Lovejoy ISD territory developed comprehensive land use plans for such cities' respective jurisdictions that conform to, and compliment, the lifestyles of their residents.
7. The Lovejoy ISD Board finds such comprehensive land use plans have been relied upon by Lovejoy ISD and McKinney ISD in developing the enrollment model used by Lovejoy ISD and McKinney ISD to construct long-term planning.
8. The requested changes in the Petition to alter the boundaries of the Lovejoy ISD through detachment and annexation could potentially disrupt and alter such enrollment and long-term planning to the ultimate detriment of Lovejoy ISD.
9. Granting the Petition could create an expectation from other communities bordering the Lovejoy ISD that the District would grant additional requests for detachment from a bordering district and annexation to Lovejoy ISD, placing Lovejoy ISD at risk for costly and burdensome litigation as well as enrollment beyond its capacity.
10. Residents of the Lovejoy ISD are the Board's first priority in assuring the availability of services, campus space, and/or other District resources.
11. The residents of the Area that submitted the Petition purchased their homes with the full knowledge the homes were located within the McKinney ISD and understood the attendant travel times to / from McKinney ISD schools and activities. To the extent there has been change in the commute time to McKinney ISD schools, proximity of the Area's students to students from their home schools in McKinney ISD, and/or access to student activities, these factors have improved for the students in the Area.
12. Lovejoy ISD permits interdistrict transfers through the Lovejoy Scholars program such that residents of the Area may choose to apply for a transfer to Lovejoy ISD, subject to availability of services, classroom space, District resources, staff, and/or other factors.
13. The District's mission to propel every person to personal excellence could be compromised by approving the Petition, thereby limiting current residents of the Lovejoy ISD of access to the services and resources provided for Lovejoy ISD students.
14. Approving the Petition is not in the best educational, social, and economic interests of the residents and students, current and expected, both within the Area and/or within the Lovejoy ISD.
15. The Board will execute a Resolution evidencing the concurrence of the Lovejoy ISD Board of Trustees, with these Findings included as an exhibit to the Resolution.
16. The approval of these Findings and execution of a Resolution incorporating the Findings shall evidence the expression of the Lovejoy ISD Board of Trustees that, the Lovejoy ISD Board of Trustees denies the Petition for detachment of the Area from the McKinney ISD and annexation of the Area to the Lovejoy ISD.

16. **Budget Workshop**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Budget Workshop
<b>Presented For</b>	Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

Administration will provide another Budget Workshop. Budget Workshops are designed to support development of the 2022-2023 budget for Board approval in June.

### Fiscal Implications

Ongoing development of 2022-2023 budget.

### Administrator Recommendation

N/A: Report Only

### Board Priority

#### Priority 1

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound

learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### **Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

### **Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

### **Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.

# May Budget Workshop

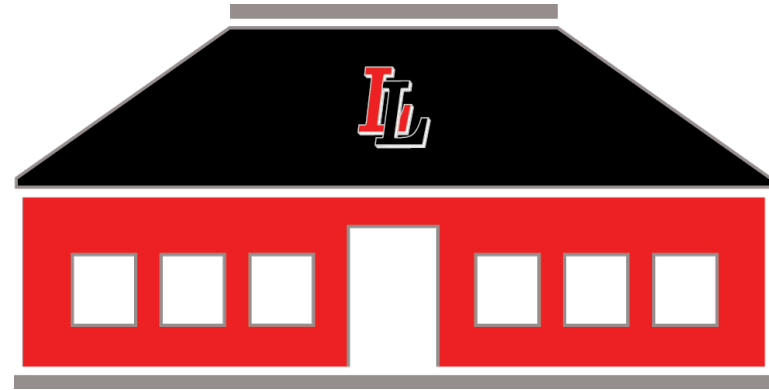
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**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT

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EST. 1917

# Topics

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- Current Year Projection Update
- 2022-2023 Budget Considerations
- Updated Projection through FY 25

# 2022-2023: Reframing Our Story

Lovejoy Independent School District

## Focus Areas

*Mission: To propel every person to personal excellence.*

### Legacy of Excellence

- We will build upon Lovejoy ISD's legacy of excellence through a shared commitment to our mission and core values.
- We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students.
- Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.
- We #LiveLovejoy.

### Future Ready Students

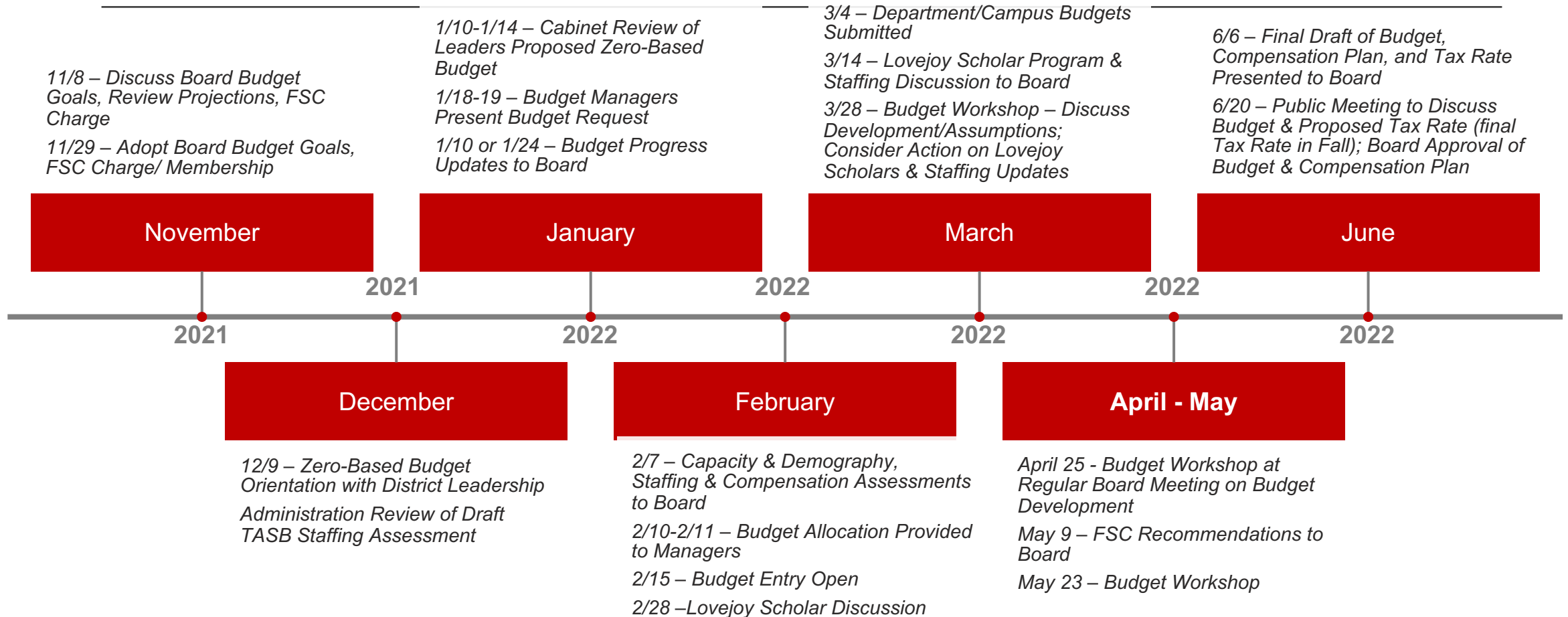
- Students will personify the graduate profile by experiencing challenging and engaging learning.
- Research-based instructional strategies will be strategically partnered with innovation.
- Profound learning will develop key skills essential to thriving now and in the future.
- Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### Financial Sustainability

- Lovejoy ISD will establish a plan for short and long-term financial sustainability.
- We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience.
- A financial assessment, identification of priorities, and intentional decision-making process will support strategic financial planning.
- Zero-based budgeting will be utilized and transparency will be prioritized.



# 2022-2023 Budget Development

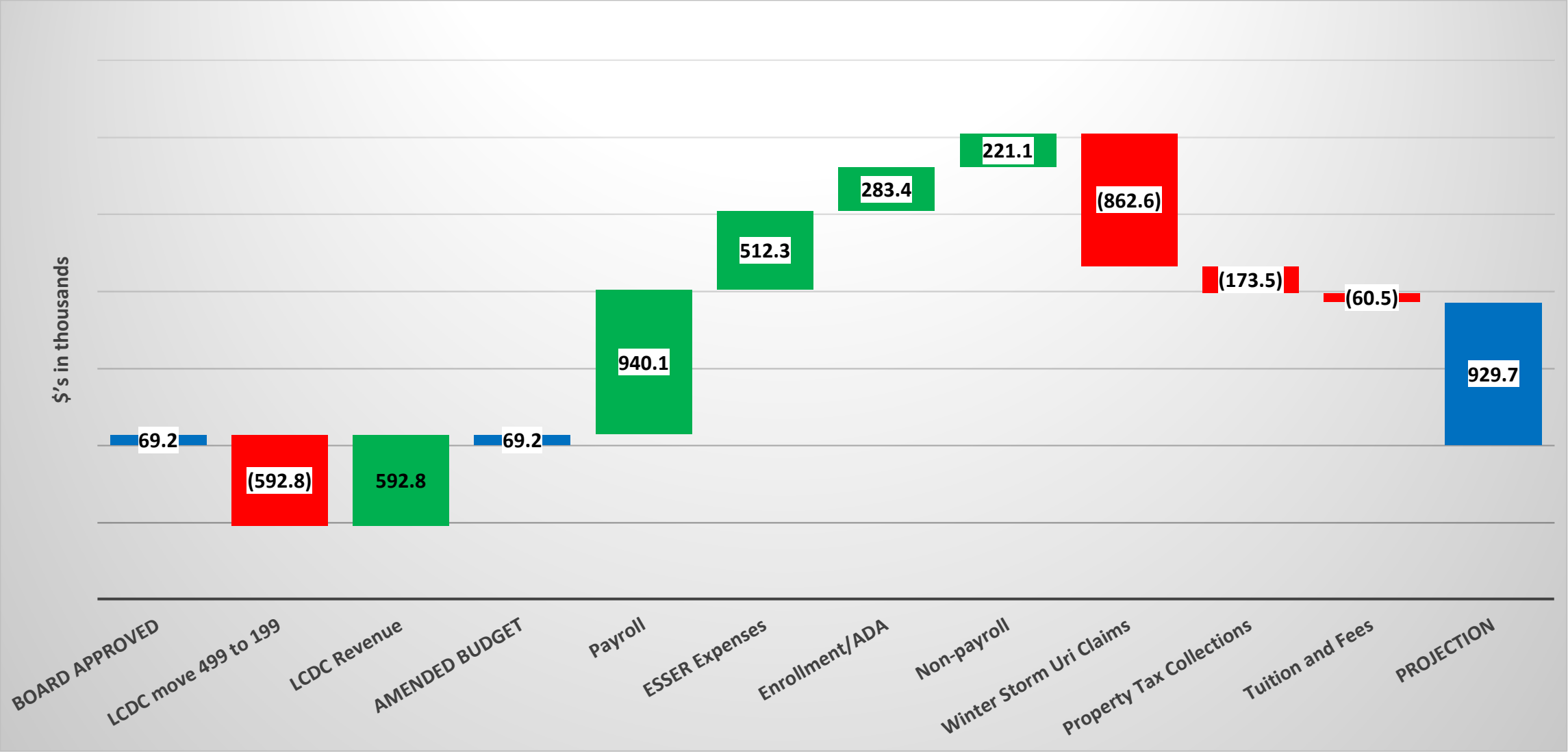


# Projection Updates

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- Current Year
- Assumptions
- 5-Year Model

# 2021-22 Budget Milestones



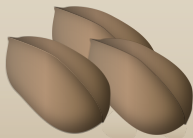
# 2021-22 Financial Projection Detail

	Revenue	Expenses	Net
<b>Board Approved Budget</b>	\$ 40,976,134	\$ (40,906,914)	\$ 69,220
<b>AMENDMENT #1</b>			
Student Nutrition move	\$ 2,300,000	\$ (2,300,000)	\$ -
<b>AMENDMENT #2</b>			
LCDC move from 499 to 199	\$ 283,906	\$ (876,705)	\$ (592,799)
<b>AMENDMENT #3</b>			
LCDC Revenue	\$ 592,799		\$ 592,799
<b>REVISED BUDGET</b>	\$ 44,152,839	\$ (44,083,619)	\$ 69,220
<b>PROJECTIONS</b>			
Enrollment/ADA	\$ 317,245	\$ (33,804)	\$ 283,441
Property Tax Collections	\$ (173,450)		\$ (173,450)
Tuition and Fees	\$ (60,451)		\$ (60,451)
Winter Storm Uri Claims	\$ 232,445	\$ (1,095,000)	\$ (862,555)
Payroll		\$ 940,115	\$ 940,115
ESSER Expenses		\$ 512,309	\$ 512,309
Non-payroll		\$ 221,074	\$ 221,074
<b>Projected YE</b>	\$ 44,468,628	\$ (43,538,925)	\$ 929,703
Change	\$ 3,492,494	\$ (2,632,011)	\$ 860,483



*\*Actual Transactiond through April 30, 2022*

# Building the 2022-2023 Budget



November - February



March



April



May



June

# Assumptions

---

- Updated to Include Appraisal District Preliminary Values with Historical Reduction to Certified Values
- Demographer's Projection of Low to Moderate Enrollment Growth
- TPAR-Adjusted 96.54% Attendance for 1st 4 6 weeks of 21-22; 94.87% (actual) for 5th 6 weeks; 95% for 6th 6 weeks; 95.5% Attendance for 2022-2023; and 96% Beyond
- \$1.4M in Staffing Efficiency Savings and maintaining efficient staffing model
- '22-'23 Approved Lovejoy Scholar Program

# Assumptions

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- Teacher, Librarians, and Nurses: Roll '21-'22 Supplemental Step Increase into Salary; Add additional step @ 1% Increase for '22-'23
- All Other Staff: 1% Increase for '22-'23
- Compensation adjustments for equity and market comparisons
- 2% compensation increase for '23-'24 and beyond
- Retaining New Zero-Based Budget Level

# 5-Year Baseline Projection for General Fund (excluding Student Nutrition)

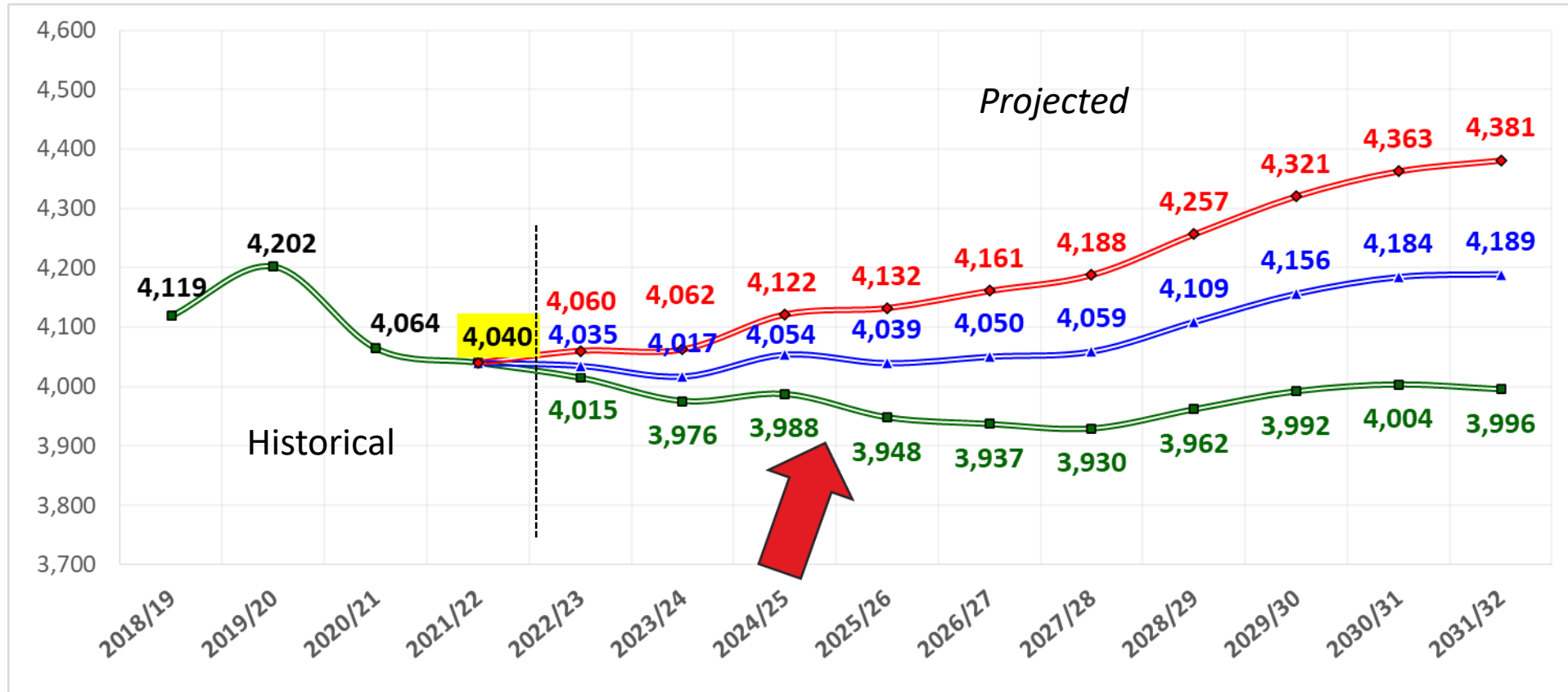
*Base Draft Projection as of 5/23/2022*

	PROJECTED BUDGETS				
	FINAL ACTUAL FY21	FY22	FY23	FY24	FY25
Student Enrollment	4,206	4,343	4,210	4,181	4,206
Increase/(Decrease)		137	(133)	(29)	25
Average Daily Attendance (ADA) (Actual, '20-'21 HH was 4,257)	4,041	4,084	4,020	4,013	4,037
Attendance Rate	96.0%	94.0%	95.5%	96.0%	96.0%
State Certified Property Value ("T2" value) @ \$40K Exemption	\$ 2,880,725,454	\$ 3,099,539,061	\$ 3,548,972,225	\$ 3,832,890,003	\$ 4,139,521,203
% Increase Property Value	3.1%	7.6%	14.5%	8.0%	8.0%
% Increase in Tax Collections		3.1%	7.4%	5.6%	5.7%
Maintenance & Operations (M&O) Tax Rate	\$ 1.0547	\$ 1.0050	\$ 0.9429	\$ 0.9285	\$ 0.9144
Interest & Sinking (I&S) Tax Rate	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000
Total Tax Rate	\$ 1.5547	\$ 1.5050	\$ 1.4429	\$ 1.4285	\$ 1.4144
Excess Revenue (Recapture)	\$ 248,599	\$ 364,804	\$ 663,913	\$ 2,288,619	\$ 4,278,636
Total Revenue/Other Resources	\$ 41,874,271	\$ 42,168,628	\$ 42,471,864	\$ 43,357,628	\$ 45,082,914
Total Expenditures/Other Uses	\$ 42,386,677	\$ 41,238,925	\$ 40,832,227	\$ 43,448,797	\$ 46,175,431
Net Surplus/(Deficit)	\$ (512,406)	\$ 929,703	\$ 1,639,637	\$ (91,169)	\$ (1,092,518)
Beginning Fund Balance	\$ 9,152,348	\$ 8,639,942	\$ 10,205,247	\$ 11,844,885	\$ 11,753,716
Prior Period Adjustments		\$ 635,602			
Ending Fund Balance	\$ 8,639,942	\$ 10,205,247	\$ 11,844,885	\$ 11,753,716	\$ 10,661,198
Day of Operating Expenses in Fund Balance	74	90	106	99	84
Rev Inc/Exp dec to get to 75 Days of Op Ex in Fund Balance	\$ (69,649)	\$ -	\$ -	\$ -	\$ -
Rev Inc/Exp dec to get to 90 Days of Op Ex in Fund Balance	\$ (1,811,567)	\$ -	\$ -	\$ -	\$ (724,525)
Rev Inc/Exp dec to get to 120 Days of Op Ex in Fund Balance	\$ (5,295,404)	\$ (3,352,756)	\$ (1,579,409)	\$ (2,530,820)	\$ (4,519,766)





# DISTRICT ENROLLMENT PROJECTIONS RESIDENT STUDENTS ONLY



# 5-Year Baseline Projection for General Fund thru FY25-26 (excluding Student Nutrition)

Base Draft Projection as of 5/23/2022

	PROJECTED BUDGETS					
	FINAL ACTUAL FY21	FY22	FY23	FY24	FY25	FY26
Student Enrollment	4,206	4,343	4,210	4,181	4,206	4,179
Increase/(Decrease)		137	(133)	(29)	25	(27)
Average Daily Attendance (ADA) (Actual, '20-'21 HH was 4,257)	4,041	4,084	4,020	4,013	4,037	4,012
Attendance Rate	96.0%	94.0%	95.5%	96.0%	96.0%	96.0%
State Certified Property Value ("T2" value) @ \$40K Exemption	\$ 2,880,725,454	\$ 3,099,539,061	\$ 3,548,972,225	\$ 3,832,890,003	\$ 4,139,521,203	\$ 4,470,682,899
% Increase Property Value	3.1%	7.6%	14.5%	8.0%	8.0%	8.0%
% Increase in Tax Collections		3.1%	7.4%	5.6%	5.7%	5.7%
Maintenance & Operations (M&O) Tax Rate	\$ 1.0547	\$ 1.0050	\$ 0.9429	\$ 0.9285	\$ 0.9144	\$ 0.9006
Interest & Sinking (I&S) Tax Rate	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000
Total Tax Rate	\$ 1.5547	\$ 1.5050	\$ 1.4429	\$ 1.4285	\$ 1.4144	\$ 1.4006
Excess Revenue (Recapture)	\$ 248,599	\$ 364,804	\$ 663,913	\$ 2,288,619	\$ 4,278,636	\$ 6,448,053
Total Revenue/Other Resources	\$ 41,874,271	\$ 42,168,628	\$ 42,471,864	\$ 43,357,628	\$ 45,082,914	\$ 46,965,710
Total Expenditures/Other Uses	\$ 42,386,677	\$ 41,238,925	\$ 40,832,227	\$ 43,448,797	\$ 46,175,431	\$ 49,137,573
Net Surplus/(Deficit)	\$ (512,406)	\$ 929,703	\$ 1,639,637	\$ (91,169)	\$ (1,092,518)	\$ (2,171,862)
Beginning Fund Balance	\$ 9,152,348	\$ 8,639,942	\$ 10,205,247	\$ 11,844,885	\$ 11,753,716	\$ 10,661,198
Prior Period Adjustments		\$ 635,602				
Ending Fund Balance	\$ 8,639,942	\$ 10,205,247	\$ 11,844,885	\$ 11,753,716	\$ 10,661,198	\$ 8,489,336
Day of Operating Expenses in Fund Balance	74	90	106	99	84	63
Rev Inc/Exp dec to get to 75 Days of Op Ex in Fund Balance	\$ (69,649)	\$ -	\$ -	\$ -	\$ -	\$ (1,607,426)
Rev Inc/Exp dec to get to 90 Days of Op Ex in Fund Balance	\$ (1,811,567)	\$ -	\$ -	\$ -	\$ (724,525)	\$ (3,626,778)
Rev Inc/Exp dec to get to 120 Days of Op Ex in Fund Balance	\$ (5,295,404)	\$ (3,352,756)	\$ (1,579,409)	\$ (2,530,820)	\$ (4,519,766)	\$ (7,665,483)



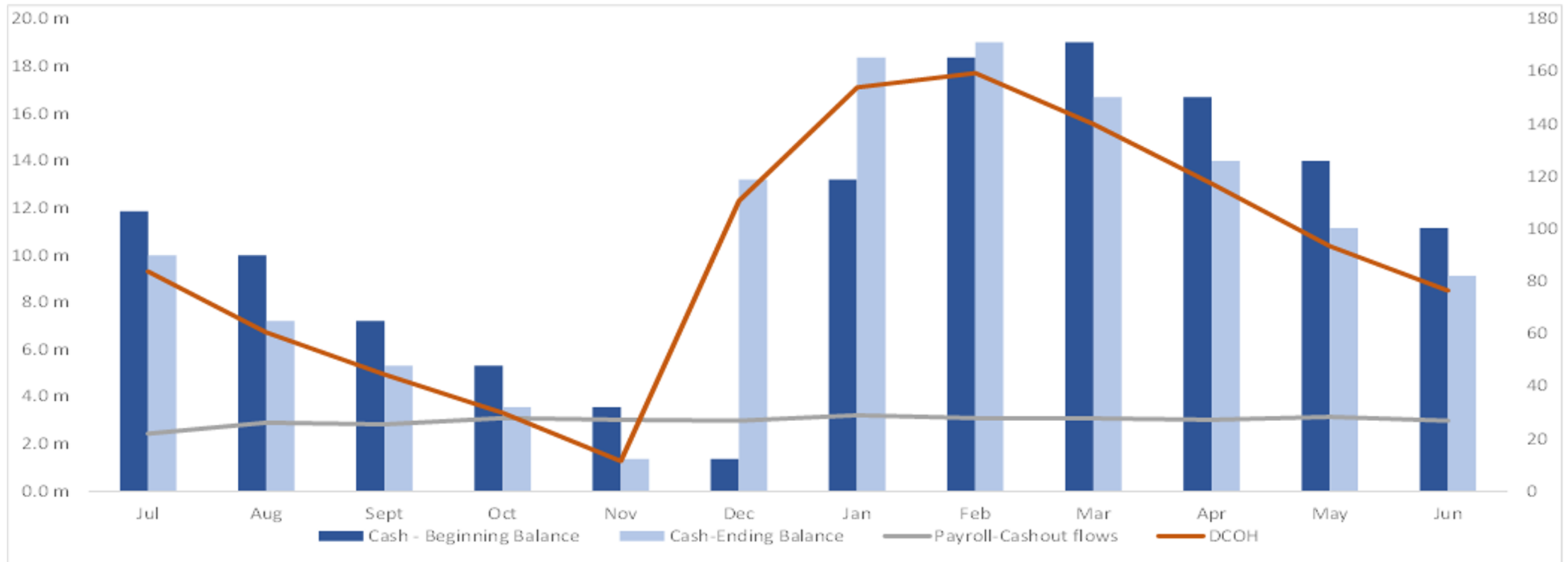
# General Fund Cash Flow

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PROJECTED AS OF NOVEMBER 2021

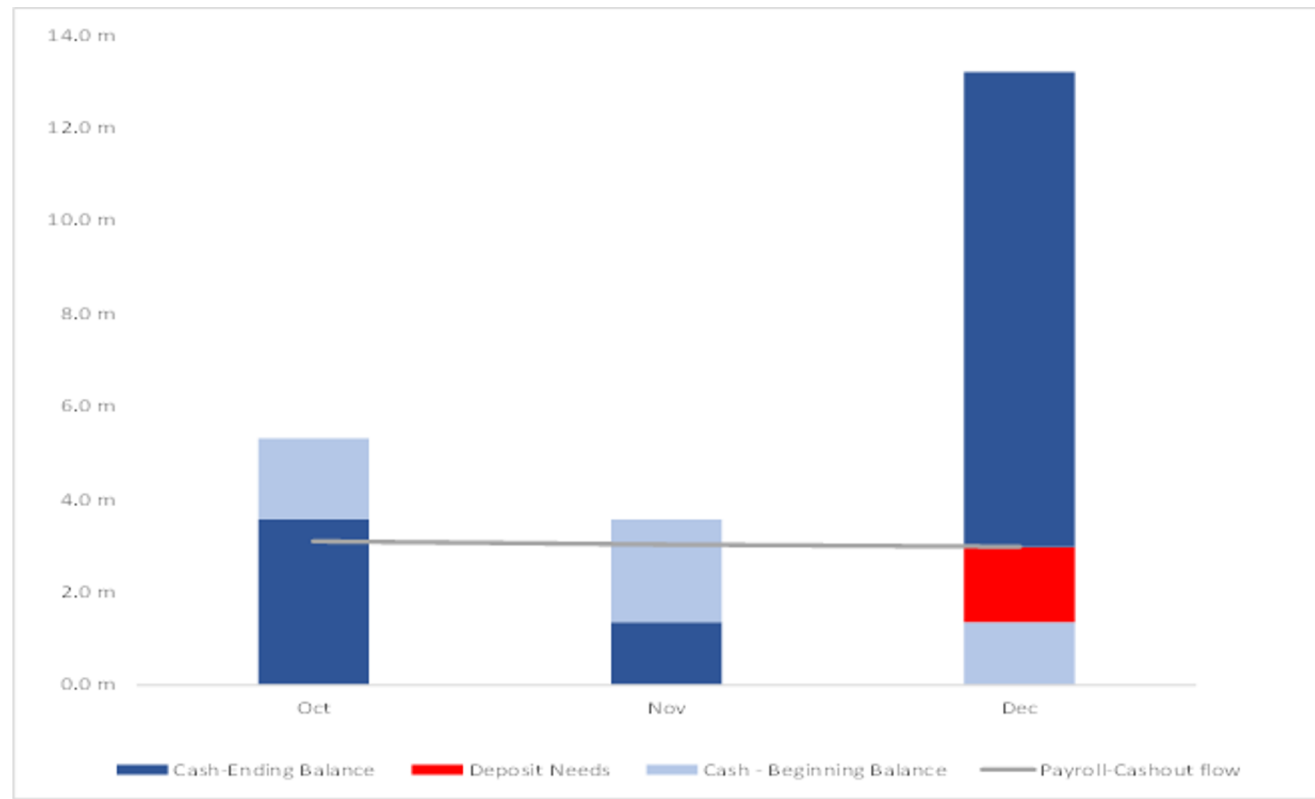
# Monthly Payroll vs. Monthly Cash Balance

*We will end the month of November with 11 days of General Fund Cash on Hand if we are unable to collect/deposit the remaining \$1.3m projected (in the month of November we have collected ~\$0.8m.)*



# Monthly Payroll vs. Monthly Cash Balance

*If we do not receive any further collections in excess of the \$0.8m in the month of November, then we will need to collect/deposit \$1.6m before December 14 to make December payroll.*



# 5-Year VATRE Projection for General Fund

## (excluding Student Nutrition)

VATRE Draft Projection as of 5/23/2022

	FINAL ACTUAL	PROJECTED BUDGETS				
	FY21	FY22	FY23	FY24	FY25	FY26
Student Enrollment	4,206	4,343	4,210	4,181	4,206	4,179
Increase/(Decrease)		137	(133)	(29)	25	(27)
Average Daily Attendance (ADA) (Actual, '20-'21 HH was 4,257)	4,041	4,084	4,020	4,013	4,037	4,012
Attendance Rate	96.0%	94.0%	95.5%	96.0%	96.0%	96.0%
State Certified Property Value ("T2" value) @ \$40K Exemption	\$ 2,880,725,454	\$ 3,099,539,061	\$ 3,548,972,225	\$ 3,832,890,003	\$ 4,139,521,203	\$ 4,470,682,899
% Increase Property Value	3.1%	7.6%	14.5%	8.0%	8.0%	8.0%
% Increase in Tax Collections		3.1%	10.4%	5.7%	5.7%	5.8%
Maintenance & Operations (M&O) Tax Rate	\$ 1.0547	\$ 1.0050	\$ 0.9746	\$ 0.9602	\$ 0.9461	\$ 0.9323
Interest & Sinking (I&S) Tax Rate	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 1.5000
Total Tax Rate	\$ 1.5547	\$ 1.5050	\$ 1.4746	\$ 1.4602	\$ 1.4461	\$ 2.4323
Excess Revenue (Recapture)	\$ 248,599	\$ 364,804	\$ 663,913	\$ 2,288,619	\$ 4,278,636	\$ 6,448,053
Total Revenue/Other Resources	\$ 41,874,271	\$ 42,168,628	\$ 43,462,421	\$ 44,399,712	\$ 46,199,155	\$ 48,169,947
Total Expenditures/Other Uses	\$ 42,386,677	\$ 41,238,925	\$ 40,860,826	\$ 43,483,119	\$ 46,215,905	\$ 49,182,085
Net Surplus/(Deficit)	\$ (512,406)	\$ 929,703	\$ 2,601,595	\$ 916,593	\$ (16,750)	\$ (1,012,138)
Beginning Fund Balance	\$ 9,152,348	\$ 8,639,942	\$ 10,205,247	\$ 12,806,842	\$ 13,723,435	\$ 13,706,686
Prior Period Adjustments		\$ 635,602				
Ending Fund Balance	\$ 8,639,942	\$ 10,205,247	\$ 12,806,842	\$ 13,723,435	\$ 13,706,686	\$ 12,694,548
Day of Operating Expenses in Fund Balance	74	90	114	115	108	94
Rev Inc/Exp dec to get to 75 Days of Op Ex in Fund Balance	\$ (69,649)	\$ -	\$ -	\$ -	\$ -	\$ -
Rev Inc/Exp dec to get to 90 Days of Op Ex in Fund Balance	\$ (1,811,567)	\$ -	\$ -	\$ -	\$ -	\$ -
Rev Inc/Exp dec to get to 120 Days of Op Ex in Fund Balance	\$ (5,295,404)	\$ (3,352,756)	\$ (626,854)	\$ (572,385)	\$ (1,487,584)	\$ (3,474,904)



# Non-Personnel Inflationary Increase Sensitivity

## \$ Increase in Non-Personnel Expenses

	FY23	FY24	FY25	FY26
2%	\$100,443	\$208,394	\$318,505	\$431,630
3%	\$150,664	\$312,591	\$477,757	\$647,446
4%	\$200,885	\$416,788	\$637,009	\$863,261
5%	\$251,107	\$520,985	\$796,262	\$1,079,076

## Change in Days of Fund Balance

	FY23	FY24	FY25	FY26
2%	(1)	(2)	(3)	(3)
3%	(1)	(3)	(4)	(5)
4%	(2)	(3)	(5)	(6)
5%	(2)	(4)	(6)	(8)

## Base Model Total Days of Fund Balance

	FY23	FY24	FY25	FY26
2%	105	97	82	60
3%	105	96	81	58
4%	104	95	79	57
5%	104	94	78	55

## VATRE Model Total Days of Fund Balance

	FY23	FY24	FY25	FY26
2%	114	113	106	91
3%	113	113	105	89
4%	113	112	103	88
5%	112	111	102	86

# Budget Projection Highlights

---

- ❑ Efficiencies Implemented in Current Year and in Projection for '22-'23 Total \$2.8M
- ❑ Current Base Projection Results in Deficit Budget in FY24, 84 Days of Fund Balance in FY25, and 63 Days in FY26 (payroll hardship)
- ❑ VATRE Projection Results in Deficit Budget in FY25-26 & Fund Balance Above 90 Days through FY26
- ❑ A 1% Decrease in Projected Attendance Generates Additional ~\$285k in Annual Need
- ❑ Property Values Increasing Results in Increases in the Yield of Enrichment Pennies; Combined with Enrollment Decreasing Results in small increases in Recapture

# Lovejoy ISD

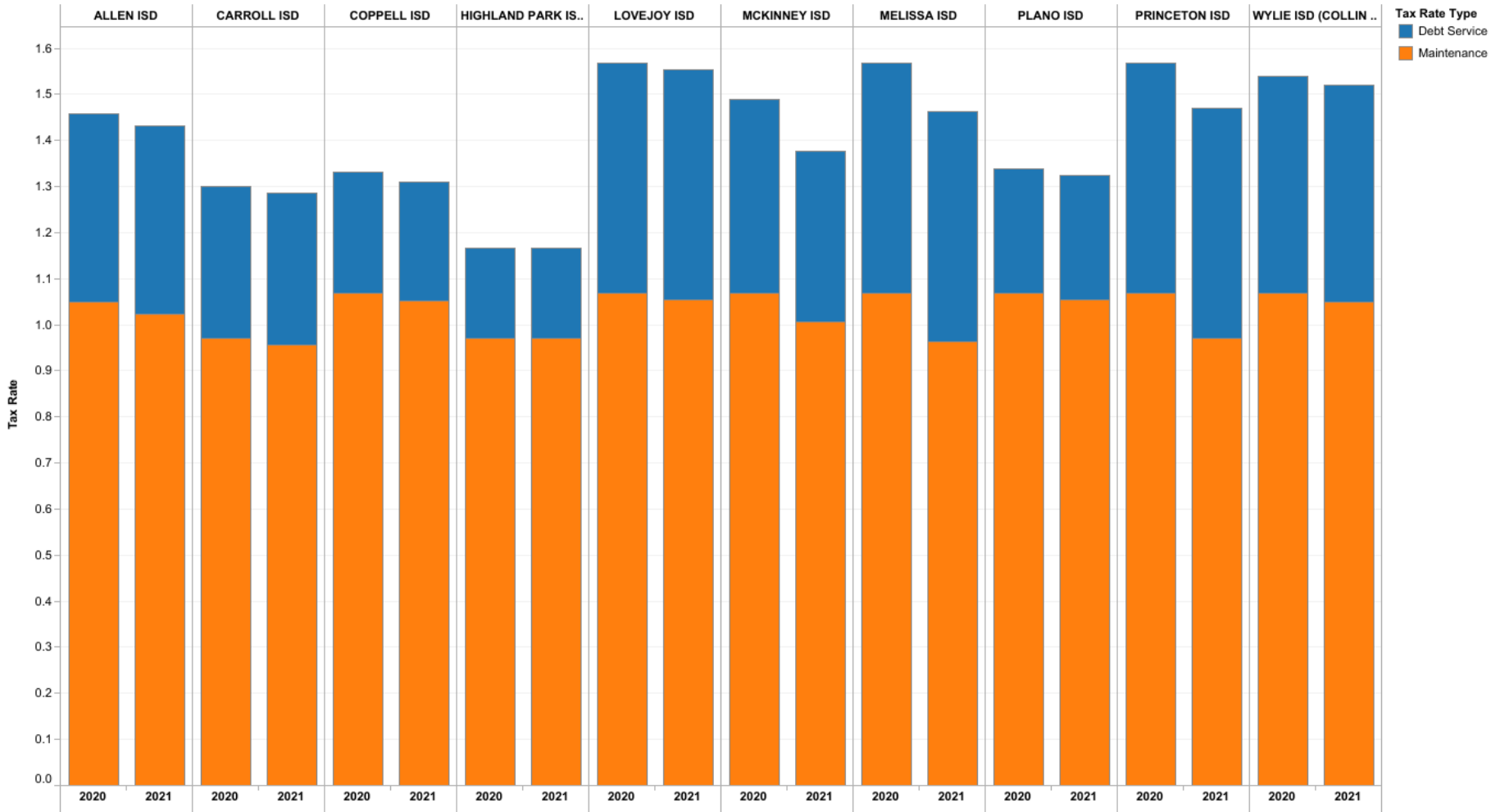
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TAX INFORMATION

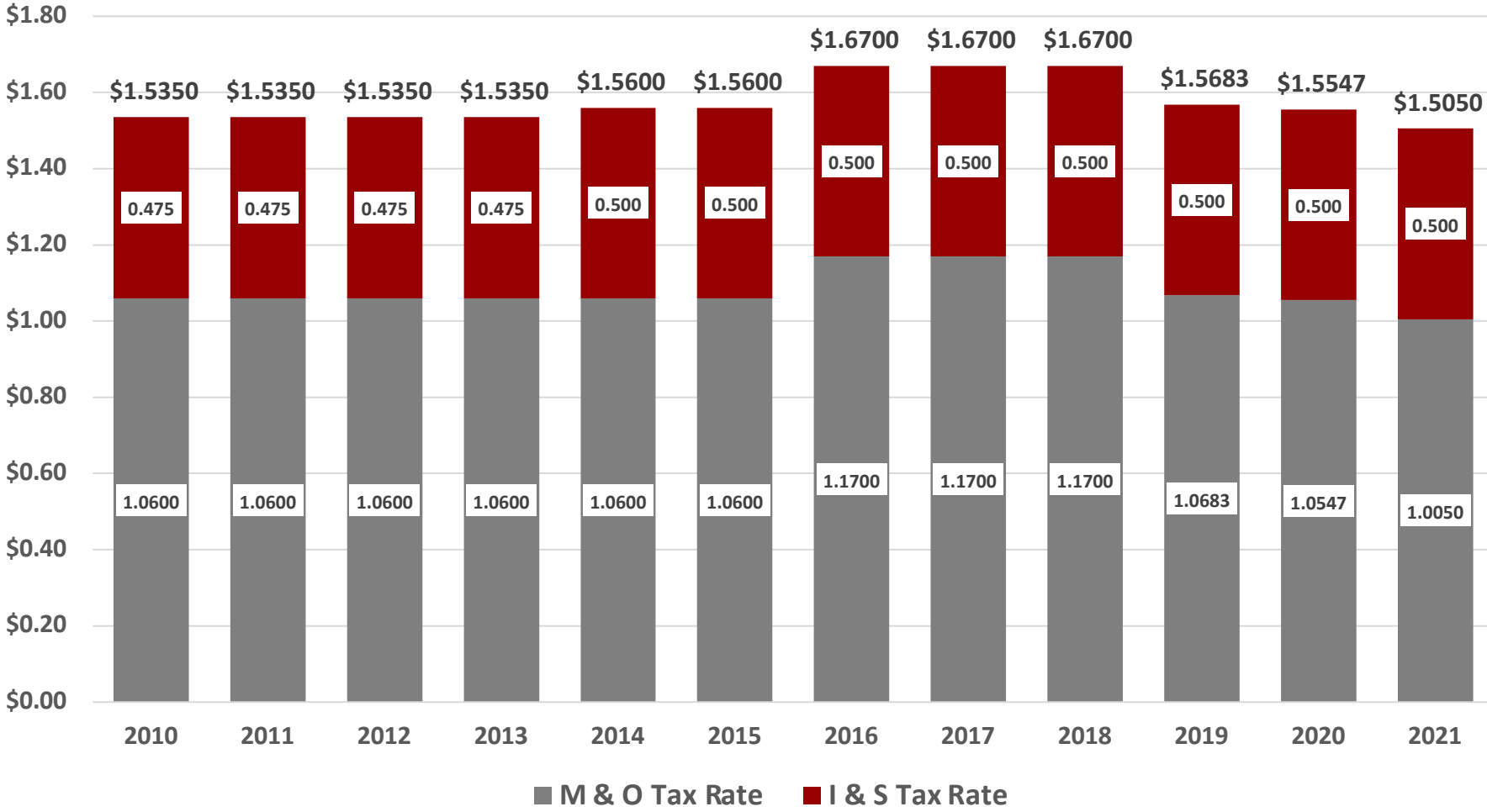
# Tax Rate Comparison

Tax Rates by District

Source: TEA GASB 34 Schedule J1



# Lovejoy ISD Historical Tax Rate



# Tax Rate Components

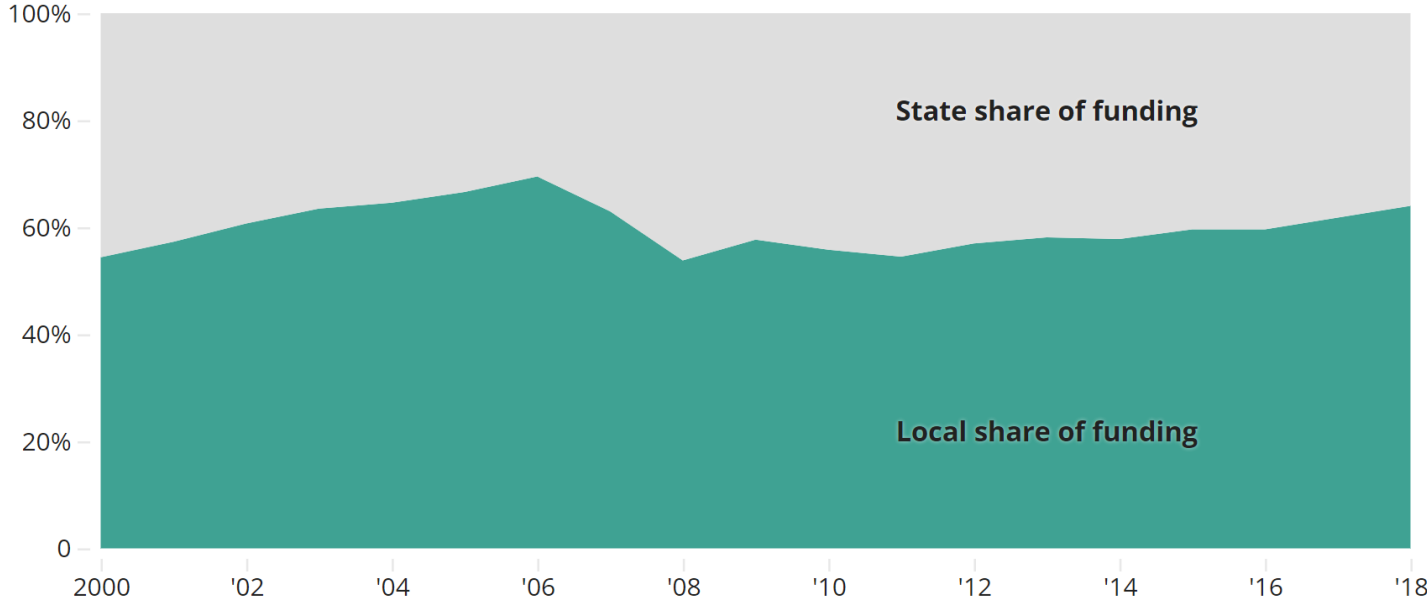
- **Maximum Compressed Tax Rate (MCR):** A district's maximum compressed tax rate is defined as the tax rate for the current tax year per \$100 of valuation of taxable property at which the district must levy a maintenance and operations tax to receive the full amount of the tier one allotment.
- **Enrichment Tax Rate (DTR):** A district's enrichment tax rate is defined as any M&O tax effort in excess of the district's MCR and less than \$0.17. The enrichment tax rate is divided into golden pennies and copper pennies. School districts can claim up to 8 golden pennies, not subject to compression, and 9 copper pennies which are subject to compression with any increases in the guaranteed yield.
- **Debt Rate:** The debt tax rate includes the debt service necessary to pay the school district's debt payments in the coming year. This rate accounts for principal and interest on bonds and other debt secured by property tax revenue.

# Lovejoy ISD Tax Rate Breakdown



## As Texas' economy booms, local property taxes fund a bigger share of public education

Lawmakers voted to compress local tax rates in 2006, which meant the state increased its share of funding for public education. But over time, local property values shot up again.



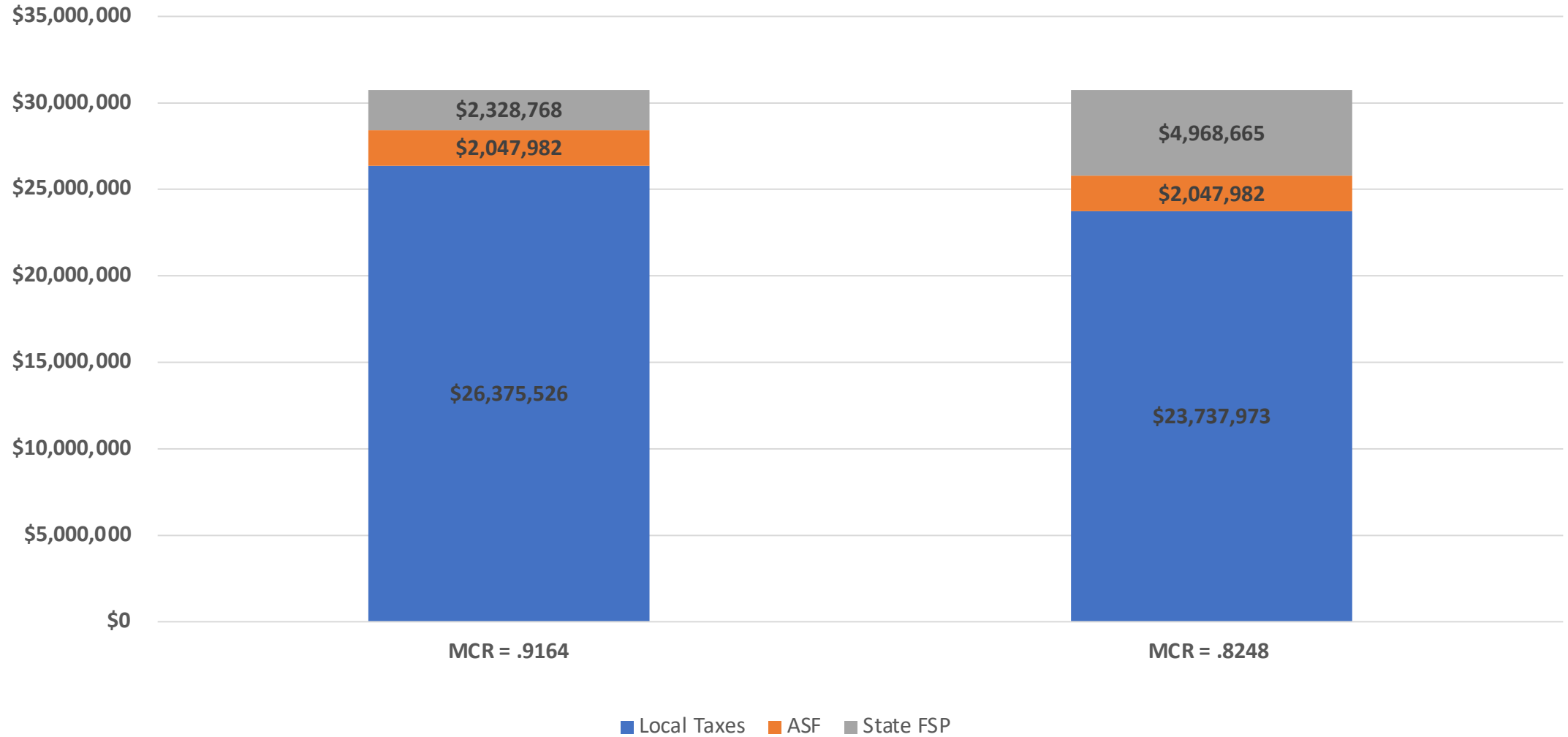
Source: Texas Comptroller of Public Accounts

Credit: Ryan Murphy

# Impact of Tier 1 Tax Rate Compression

- All other things being equal, when the Tier 1 tax rate falls:
  - Local tax collections fall
  - The local share of the program falls
  - State aid increases
  - The district is largely left with the same overall Tier 1 revenue

## Estimated 2021 Tier 1 Revenue at Various Tier 1 Tax Rates



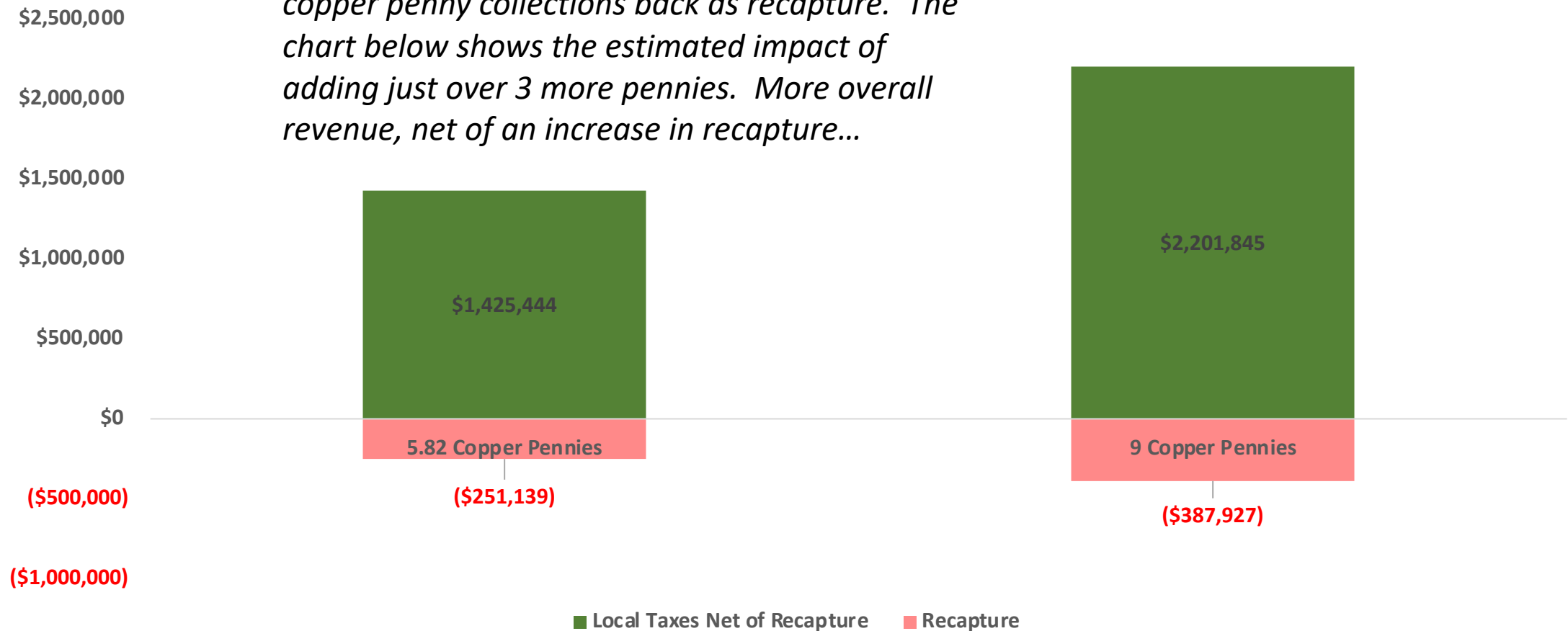
*Nets virtually the same total revenue of \$30.75M*

# Tier 2 Enrichment Options

- TY2019 HB3 provided additional enrichment opportunities
- Lovejoy ISD has capped out at all 8 available golden pennies (2 copper turned gold w/HB3)
- HB3 reduced the number of copper pennies achievable to 9 (was 11)
- HB3 increased the copper penny yield to .8% of basic allotment
- Copper pennies are subject to recapture
- Reducing our tax rate does not necessarily increase state aid or appreciably reduce recapture. It would net a more substantial decrease in revenue the district receives in local tax collections for M&O.

# Impact of Increased Tier 2 Tax Rate

*For 2020-2021, the district paid about 15% of copper penny collections back as recapture. The chart below shows the estimated impact of adding just over 3 more pennies. More overall revenue, net of an increase in recapture...*



# Lovejoy ISD Tier 2 Enrichment Rate

- By increasing the Tier 2 Enrichment rate to include the additional allowable 3.17 copper pennies in '21-'22, the district would have:
  - Increased revenue by ~\$775k
  - Increased recapture payment to state of ~\$135k
  - **Netted ~\$640k more in revenue**
- **2022-2023 Projections Indicate a Net Increase in Revenue of \$640k-760k, dependent on enrollment/attendance**
- **If the state increases the Tier 1 basic allotment, this amount would increase**

*Further information on HB3 Tax Rate Changes available at:*

<https://tea.texas.gov/sites/default/files/HB3-Video-Series-Tax-Rates.pdf>

<https://tea.texas.gov/sites/default/files/HB3-Video-Series-Tax-Rates-Part-2.pdf>

# How do Districts Get the Copper Penny Funding?

- Increase our Enrichment Rate by Passing a (VATRE)
  - Proceed under disaster declaration before expiration in February 2023 or conduct an independent external efficiency audit
  - Adopt budget and tax rate
  - File for election in August
  - Hold Election on November (2022) uniform election date

# Why Would the District Call a VATRE?

- More funds for operating the district to be used at local discretion for:
  - Teacher Pay
  - Staff Pay
  - Student Needs
- If the state increases the Tier 1 basic allotment, the estimated net revenue increase to Lovejoy ISD would increase



# Election Results



Election  
Results

- Voters **did not approve 55 percent** of school bond propositions on the ballot.
- Approved **\$5.2 billion** worth of bonds, roughly 60 percent.
- Stadiums/natatoriums saw low levels of support (<30 percent passage rates). Technology propositions saw almost 90 percent passage rate.
- **85 percent** of VATREs passed.

# What Would it Cost the Homeowners?

- Average Taxable Home Value in 2021 of \$639,557
- All else the same, increasing Copper Pennies/Tax Rate 3.17 cents would:
  - increase ISD tax bill for average home in Lovejoy ISD from \$9,249 to \$9,444
    - \$195 per year increase as a result of increase to school M&O tax rate
  - the increase in homestead exemption from \$25k to \$40k approved on the May ballot would return a reduction of \$231 per year
  - this could be a virtually neutral effect, except for increases in property value, which may be approximately 8% based on past trends (ex. \$739)

# VATRE Timeline

6/6 – Final Draft of Budget and Proposed Tax Rate Presented to Board  
6/7 – Publish Public Notice of 6/20 Meeting  
6/20 – Public Meeting to Discuss Budget & Proposed Tax Rate; Board Approval of Budget & Compensation Plan

8/1 – Deadline for tax assessor to determine property values & submit appraisal roll to board  
8/5 – TEA issues preliminary maximum compressed tax rate (MCR) & Determine if second public meeting notice/additional meeting is required

Post VATRE facts on web site  
Informational Meetings

June

August

September - October

2022

2022

2022

2022

2022

2022

July

August (continued)

November

7/25 – Deadline for chief appraiser to provide certified roll (or certified estimate) to tax assessor

8/8 – Adopt Tax Rate (Deadline 8/12) & Order Election for November uniform election date (Deadline 8/22)

11/8 – Uniform election date for VATRE

# Posting Requirements

- Publish Public Notice of 6/20 Public Hearing on Budget & Proposed Tax Rate
- Second Public Notice if the MCR given to the District by TEA on 8/5 is higher than estimated in 6/20 hearing or additional pennies are added before 8/8 budget adoption
- Districts with FY end on 6/30 typically propose the current year MCR with any enrichment pennies desired in order to propose the maximum possible rate and adjust it down when the new MCR is received by the District for August budget adoption

# Posting Requirements

- Tax Code § 26.05(b) requires posting on web site: “(Insert name of district) ADOPTED A TAX RATE THAT WILL RAISE MORE TAXES FOR MAINTENANCE AND OPERATIONS THAN LAST YEAR’S TAX RATE” and “THE TAX RATE WILL EFFECTIVELY BE RAISED BY (INSERT PERCENTAGE BY WHICH THE TAX RATE EXCEEDS THE NO-NEW-REVENUE MAINTENANCE AND OPERATIONS RATE) PERCENT AND WILL RAISE TAXES FOR MAINTENANCE AND OPERATIONS ON A \$100,000 HOME BY APPROXIMATELY \$(Insert amount).”
- Required even though the rate may be the same/compressed rate of prior year, but appraised values increase collections. Tier 1 collection increases are netted by a reduction in state aid to reach the same basic allotment for all Texas students. Districts are required to first reduce Tier 2 funding, starting with copper pennies, then golden, which would be a reduction in total revenue and not result in an increase in state revenue for Lovejoy ISD.

# Future Budget Considerations

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## Implementation Strategies:

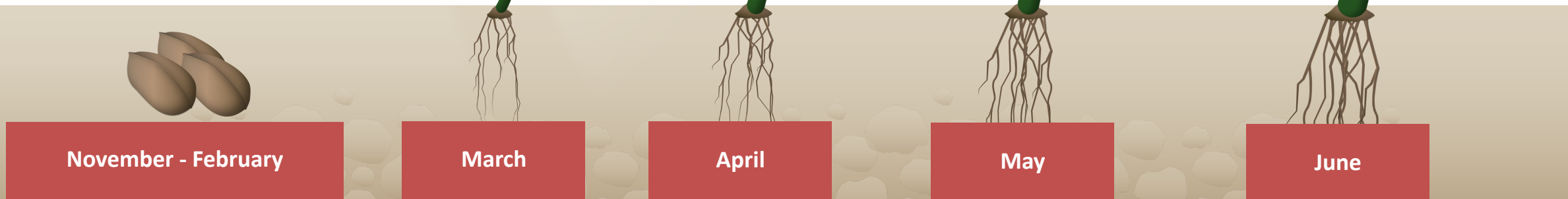
- ✓ Pared Down/Rebuilt in Last Year
- ✓ Organizational Changes/Efficiencies
- Consider Revenue Options

## Impact of Inflation

## Attendance

- Ongoing Program Model/Staffing Review
- Compensation/Contract Days/Additional Stipend Reviews
- Scheduling Models
- Transportation Fee – Reviewing
- Lovejoy Child Development Center Model – Reviewing
- VATRE
- Athletic/Fine Arts Extra-Curricular Fees + \$668k
- Special Revenue – Grant Funding for Child Care, Dyslexia, ESSER Supplemental, etc.

# Building the 2022-2023 Budget

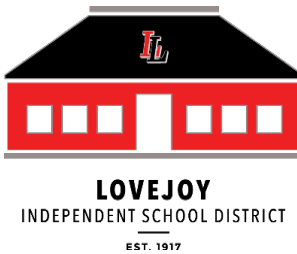




THANK YOU

17. **Set June 20, 2022 as Date for Public Hearing on  
the 2022-2023 Budget**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Set Date for Public Hearing on 2022-2023 Budget & Proposed Tax Rate
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input checked="" type="checkbox"/> None <input type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

The first step in adopting the budget and proposing a property tax rate for Lovejoy ISD for next fiscal year is to set the date for a public hearing. We publish this notice, along with calculations and other disclosures required by the Truth-In-Taxation regulations. We typically adopt the budget on the date of the hearing in accordance with timelines set out by the state.

With changes made in House Bill 3 legislation, the Texas Education Agency assigns us a new maximum compressed tax rate each August, therefore we cannot adopt the actual, final tax rate until August.

So that we may proceed with this prescribed process and meet the calendar requirements, it is the recommendation of the administration that the Board set the date of June 20, 2022 for the public hearing. This is the same date as our regular June meeting.

### Fiscal Implications

Ongoing development of 2022-2023 budget.

### Administrator Recommendation

It is the recommendation of the Administration that the Board approve and publish the date of June 20, 2022 for the public hearing to discuss the 2022-2023 budget and proposed tax rate.

### **Board Priority**

#### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

#### **Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

#### **Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.

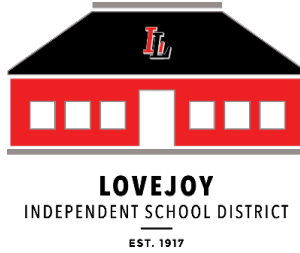
#### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders. Through a shared commitment to our mission and core values, we will build upon Lovejoy ISD's tradition of excellence. We will maintain high expectations and leverage the collective impact of the Lovejoy ISD community to ensure achievement of outcomes on behalf of students. Lovejoy ISD traditions will enable us to honor the past, celebrate the present, and provide a continuing legacy for the future.

**Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.

18. Consider and Act on Board of Trustees 2022-2023  
Meeting Calendar



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Board Meeting Calendar for 2022-2023
<b>Presented For</b>	X Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None   X Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Katie Kordel, Superintendent of Schools

### Executive Summary

A draft calendar of 2022-2023 Board of Trustees Regular and Workshop Meetings is attached for consideration.

### Fiscal Implications

There are no fiscal implications as a result of this action.

### Administrator Recommendation

The district recommends the Board consider and take action on the Board meeting Calendar for the 2022-2023 school year.

### Board Priority

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2022-2023

# Lovejoy Independent District Board Meeting Calendar

Draft 05/04/22

JULY 2022						
S	M	T	W	T	F	S
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	27	28	29	30
31						

AUGUST 2022						
S	M	T	W	T	F	S
	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			

SEPTEMBER 2022						
S	M	T	W	T	F	S
				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	

OCTOBER 2022						
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						1
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

NOVEMBER 2022						
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		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			

DECEMBER 2022						
S	M	T	W	T	F	S
				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

JANUARY 2023						
S	M	T	W	T	F	S
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				

FEBRUARY 2023						
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			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				

MARCH 2023						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
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19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL 2023						
S	M	T	W	T	F	S
						1
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23	24	25	26	27	28	29
30						

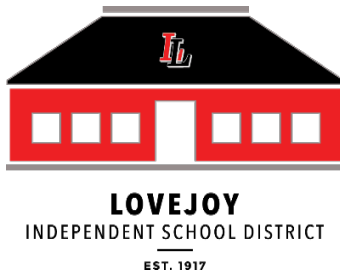
MAY 2023						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

JUNE 2023						
S	M	T	W	T	F	S
				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	

Important Dates		Regular Board Meetings		Calendar Key	
AUG 15	First Day of School	July 2022-June 2023	Monday at 6:00 p.m.	Regular Board Meeting	
SEPT 5-6	Labor Day/Holiday	Board Workshops		Board Workshop	
OCT 7-10	Fall Break	Aug, Sept, Jan	Monday at 5:30 p.m.	Bad Weather Day	
NOV 7-8	Holiday/Election Day	Oct	Tuesday at 5:30 p.m.	Holiday	
NOV 21-25	Thanksgiving Break	Feb, Apr, May, June	Tuesday at 8:30 a.m.	Early Release All Students	
DEC 16-JAN 3	Christmas Break	Early Release Hours		End of Nine Weeks	
JAN 17	MLK Day	Elementary Schools	7:55 AM-12:00 PM	Student Holiday LHS Only	
FEB 17-20	Winter Break	Intermediate School	7:40 AM-11:45 AM	Early Release Day/LHS Only	
MAR 6-10	Spring Break	Middle School	8:45 AM-12:45 PM		
APR 7-10	Easter Break	High School	8:45 AM- 1:00 PM		
MAY 26	Last Day of School				
MAY 27	Graduation				
Lovejoy ISD • 469.742.8000		Draft May 17, 2022			

19. **2021 Evaluation of Accelerated Instruction  
Program for State of Texas Assessments of  
Academic Readiness (STAAR) End-of-Coarse (EOC)  
Presentation**

**Presenter:** Dr. Laurie  
Tinsley, Assistant  
Superintendent of  
Curriculum and  
Instruction



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	2021 Evaluation of Accelerated Instruction Program for STAAR End-Of-Course Presentation
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Dr. Laurie Tinsley – Assistant Superintendent for Curriculum & Instruction
<b>Executive Summary</b>	
<p>The Texas Education Code 29.081 requires each district’s Board of Trustees to hold a public hearing for public discussion to evaluate the effectiveness of the accelerated instruction program for STAAR End-Of-Course assessments.</p> <p>An overview will be presented of the highlights for the 2021 remediation programming and resulting STAAR EOC performance of retesting students. The presentation will support the requirement for a public hearing. According to the guidelines, the posting requirements for this public hearing have been met.</p>	
<b>Fiscal Implications</b>	
None	
<b>Administrator Recommendation</b>	
N/A	
<b>Board Priority</b>	

**Priority 1**

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# 2021 Evaluation of Accelerated Instruction for STAAR End-Of- Course

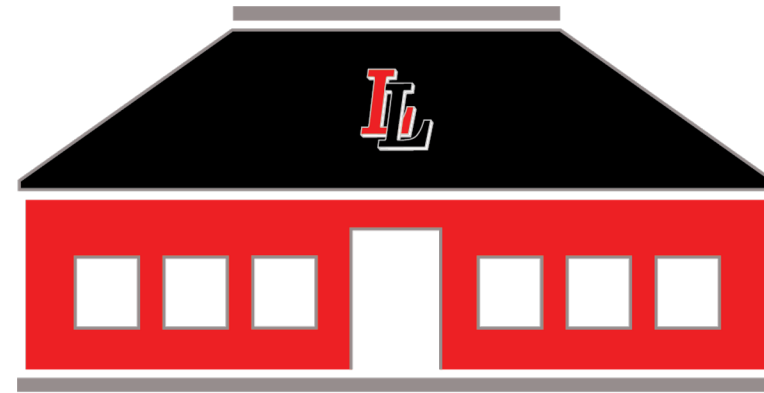
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**LAURIE TINSLEY**

Assistant Superintendent of Curriculum and  
Instruction

**MAY 23, 2022**

Board Meeting



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**STAAR EOC ASSESSMENT  
AND ACCELERATED  
INSTRUCTION**

# Assessment and Accelerated Instruction

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TYPICAL HIGH SCHOOL GRADE LEVEL	END-OF-COURSE ASSESSMENTS
Grade 9	English I, Algebra I, and Biology
Grade 10	English II
Grade 11	U.S. History

# Assessment Opportunities

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- STAAR End-Of-Course (EOC) assessments are administered three times per year, giving multiple retest opportunities to students who have not yet met passing standard.
- In a traditional four-year period, a graduating class will have had the following opportunities to retake STAAR EOCs, if necessary:
  - 10 opportunities for English I, Algebra I, and Biology
  - 7 opportunities for English II
  - 4 opportunities for U.S. History

# Purpose

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- Texas Education Code 29.081 specifies that accelerated instruction will be provided to students who have taken and not passed a STAAR End-Of-Course (EOC) assessment.
- Texas Education Code also requires districts to evaluate the effectiveness of accelerated instruction programs and annually hold a public hearing to discuss results.
- The public hearing shall focus on 2021 EOC Remediation and results from the Spring, Summer, and Fall 2021 administrations of STAAR EOC exams.

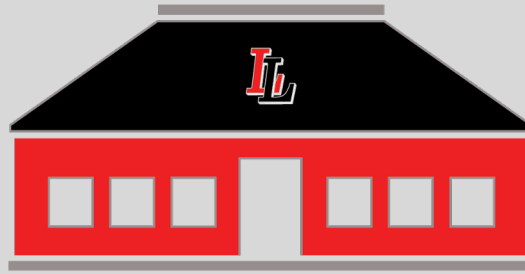
# Program Evaluation Areas of Focus

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Programming Structures and Learning Design

Student Participation

Student Performance



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# Findings Spring 2021 EOC Accelerated Instruction

# 2021 STAAR EOC Spring Performance in Review

	Primary Administration				
EOC Assessment	Texas Passing Rate (All Testers)	LISD # of Students Testing (All Testers)	LISD Passing Rate (All Testers)	LISD # of Students Testing (Retesters Only)	LISD Passing Rate (Retesters Only)
Algebra I	72%	369	97.83%	0	
Biology	81%	377	98.14%	*	100%
English I	66%	365	93.42%	*	33%
English II	70%	385	96.1%	0	
U.S. History	88%	378	98.41%	0	

\* 10 or less

# 2021 Spring Programming Structure

In the Spring of 2021, EOC Remediation was offered to students through:

	Algebra 1	Biology	English I	English II	U.S. History
During/After School Tutorial	X	X	X	X	X
Center for Academic Training	X	X	X	X	X
Digital Learning Platform					



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# Findings Summer 2021 EOC Accelerated Instruction

# 2021 STAAR EOC Summer Retest Performance in Review

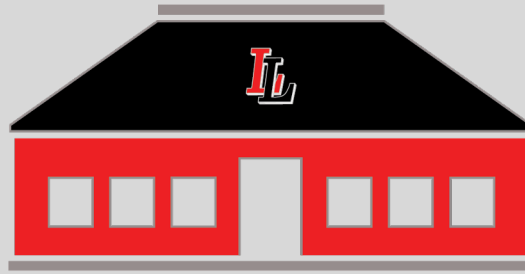
<b>SUMMER RETEST ADMINISTRATION</b>			
<b>EOC Assessment</b>	<b># of Tests Administered</b>	<b># Passed</b>	<b>% Passed</b>
<b>Algebra I</b>	*	*	75%
<b>Biology</b>	*	*	100%
<b>English I</b>	13	*	53.84%
<b>English II</b>	11	*	36.36%
<b>U.S. History</b>	*	*	66.67%

\* 10 or less

# 2021 Summer Programming Structure

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- Summer EOC Remediation occurred for 11-14 days during June.
- Sessions three hours in length were offered morning and afternoon.
- Students may attend remediation in up to two subject areas.
- EOC Remediation is offered without a cost to the student.



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# Findings Fall 2021 EOC Accelerated Instruction

# 2021 STAAR EOC Fall Retest Performance in Review

FALL RETEST ADMINISTRATION			
EOC Assessment	# of Tests Administered	# Passed	% Passed
Algebra I	*	*	50%
Biology	*	*	33%
English I	15	*	46.67%
English II	14	*	42.86%
U.S. History	*	0	0%

\* 10 or less

# 2021 Fall Programming Structure

In the Fall of 2021, EOC Remediation was offered to students through:

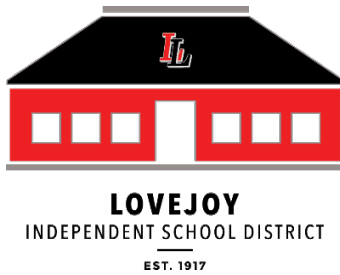
	Algebra 1	Biology	English I	English II	U.S. History
During/After School Tutorial	X	X	X	X	X
Center for Academic Training	X	X	X	X	X
Digital Learning Platform					



THANK YOU

20. **Open a Public Hearing for 2021 Evaluation of Accelerated Instruction Program for State of Texas Assessments of Academic Readiness (STAAR) End-of-Coarse (EOC)**

**Presenter:** Barrett Owens, President



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Public Hearing: 2021 Evaluation of Accelerated Instruction Program for STAAR End-Of-Course
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Dr. Laurie Tinsley – Assistant Superintendent for Curriculum & Instruction
<b>Executive Summary</b>	
<p>The Texas Education Code 29.081 requires each district’s Board of Trustees to hold a public hearing for public discussion to evaluate the effectiveness of the accelerated instruction program for STAAR End-Of-Course assessments.</p> <p>An overview will be presented of the highlights for the 2021 remediation programming and resulting STAAR EOC performance of retesting students. The presentation supports this public hearing requirement. According to the guidelines, the posting requirements for this public hearing have been met.</p>	
<b>Fiscal Implications</b>	
None	
<b>Administrator Recommendation</b>	
Administration recommends the Board of Trustees hold a public hearing on the 2021 Evaluation of Accelerated Instruction Program for STAAR End-Of-Course.	
<b>Board Priority</b>	

**Priority 1**

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21. **Close a Public Hearing for 2021 Evaluation of Accelerated Instruction Program for State of Texas Assessments of Academic Readiness (STAAR) End-of-Coarse (EOC)**

**Presenter:** Barrett Owens, President

22. **Instructional Materials Selection Process and Curriculum Development Update**

**Presenter:** Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction



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## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Instructional Materials Selection Process and Curriculum Development Update
<b>Presented For</b>	<input type="checkbox"/> Board Action   X Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None   X Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Dr. Laurie Tinsley – Assistant Superintendent for Curriculum & Instruction
<b>Executive Summary</b>	
Dr. Tinsley, Assistant Superintendent of Curriculum and Instruction will present the instructional materials selection process and curriculum development update, including information on the State level adoption of new Health and PE Texas Essential Knowledge and Skills (TEKS).	
<b>Fiscal Implications</b>	
N/A	
<b>Administrator Recommendation</b>	
No recommendation is being made at this time. This is a presentation for informational purposes.	
<b>Board Priority</b>	
<p><b>Priority 1</b> Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the</p>	

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# Instructional Materials Selection Process and Curriculum Development Update

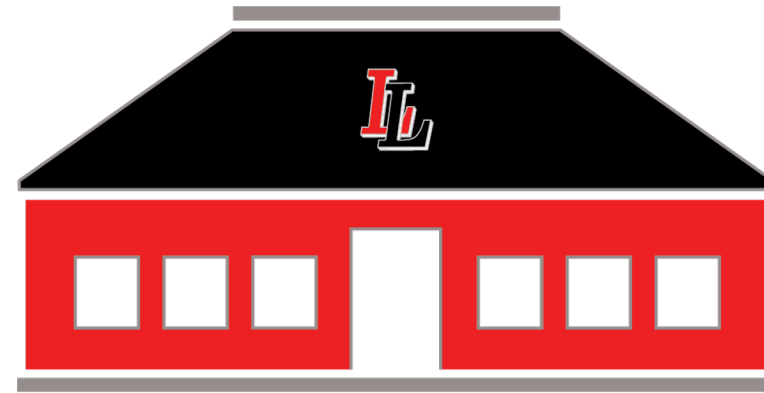
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**LAURIE TINSLEY**

Assistant Superintendent of Curriculum and  
Instruction

**MAY 23, 2022**

Board Meeting



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT

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# **Texas Education Agency Review and Adoption Process**

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The review and adoption process determines the instructional materials eligible for adoption by the State Board of Education (SBOE). The process starts when the SBOE revises or adopts new Texas Essential Knowledge and Skills (TEKS) and is complete with the selection and implementation of new materials by school districts.

# Texas Education Agency Review and Adoption Process

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The SBOE creates an adoption cycle for subjects in the foundation curriculum (English and Spanish language arts and reading, math, science, social studies) to ensure materials in those subjects are reviewed once every eight years.

A review of materials for the enrichment curriculum may occur less often. Enrichment subjects are languages other than English, health, physical education, fine arts, career and technology education, technology applications, religious literature, and personal financial literacy

# State Review Panels

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- Publishers provide sample copies of their instructional materials to the Texas Education Agency (TEA)
- State review panel members review instructional materials
- Commissioner of education reports the percentage of TEKS covered in each product
- Instructional materials must meet at least 50% of the TEKS and 100% of the required ELPS

# Board Policies EF(LOCAL) and EHAA(LEGAL)

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- Outlines process for local district's adoption of Instructional Resources
- Primary objectives of instructional resources are to implement, enrich, and support the District's educational program
- Instructional Materials and Selection Committee (IMSC)
- Resources and instructional materials are selected in an open meeting



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# INSTRUCTIONAL RESOURCES ELIGIBLE FOR ADOPTION 2022

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- **Health and Physical Education**
  - New TEKS Implementation 22-23
- **Advanced Qualitative Reasoning**
  - New High School Math Course 22-23

# Why Adopt New Health and Physical Education Instructional Resources?

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The new health education and physical education TEKS were adopted November 2020, to be effective and implemented beginning with the 2022-2023 school year with an effective date of August 1, 2022.

At that time, the new TEKS will replace the current TEKS in Texas Administrative Code, Chapter 115 and Chapter 116.

# K-3 HEALTH

## Texas Essential Knowledge and Skills

- (3) In Kindergarten-Grade 3, students gain an understanding of health information and skills through five strands: physical health and hygiene; mental health and wellness; healthy eating and physical activity; injury and violence prevention and safety; and alcohol, tobacco, and other drugs.
- (A) Physical health and hygiene education helps to prepare students for improved lifelong health outcomes. Learning about body systems lays the foundation for personal health and hygiene. Health literacy and preventative behaviors empower students to make informed choices to support self, family, and community.
- (B) The mental health and wellness strand recognizes that the knowledge and skills necessary to manage emotions, reactions, and relationships are essential to reaching one's full potential. Students gain knowledge about social and emotional health, including developing a healthy self-concept, understanding risk and protective factors, and identifying and managing mental health and wellness concerns. In the early grades, students develop fluency around emotions and self-regulation and understand the relationship between feelings, thoughts, and behavior. In subsequent grades, students learn and practice appropriate ways to solve interpersonal conflicts, work to develop a positive self-image, and develop healthy self-management skills.

# Grades 4-12 HEALTH

## Texas Essential Knowledge and Skills

(1) In Grade 4 and higher, students gain an understanding of health information and skills through six strands: physical health and hygiene; mental health and wellness; healthy eating and physical activity; injury and violence prevention and safety; alcohol, tobacco, and other drugs; and reproductive and sexual health.

(A) Physical health and hygiene education helps to prepare students for improved lifelong health outcomes. Learning about body systems will lay the foundation for personal health and hygiene. Health literacy and preventative behaviors empower students to make informed choices to support self, family, and community

(B) The mental health and wellness strand recognizes that the knowledge and skills necessary to manage emotions, reactions, and relationships are essential to reaching one's full potential. Students gain knowledge about social and emotional health, developing a healthy self-concept, understanding risk and protective factors, and identifying and managing mental health and wellness concerns. In the early grades, students develop fluency around emotions and self-regulation and understand the relationship between feelings, thoughts, and behavior. In subsequent grades, students learn and practice appropriate ways to solve interpersonal conflicts, work to develop a positive self-image, and develop healthy self-management skills.

(C) The healthy eating and physical activity strand addresses the importance of nutrition and physical activity to support a healthy lifestyle. Students apply critical-thinking and decision-making skills to make positive health choices. Students learn about essential nutrients, food groups, portion control, government nutritional recommendations, and the health benefits of being physically active. Students evaluate the connection between physical activity and nutrition and the prevention of chronic diseases.

(A) By focusing on injury and violence prevention and safety, the standards promote student well-being and awareness of dangerous situations. Supporting student well-being and providing instruction in digital citizenship, bullying [prevention](#), first aid, and the identification of safe and unsafe situations creates empowered and educated students able to make decisions that keep themselves and others safe. Beginning in Kindergarten and continuing through high school, students gain knowledge and skills to support safety and wellness at school, at home, online, and in the community.

(B) The standards under the alcohol, tobacco, and other drugs strand focus on a number of protective factors that develop empowered students who are able to make better-informed decisions, including understanding the impact of substance use on physical, mental, and social health. Through this strand, students learn key concepts about alcohol, tobacco, and other drugs, including the use, misuse, and physiological effects; short- and long- term impacts on health; treatment; risk and protective factors; and prevention. These concepts introduce healthy alternatives and ways for students to ask for and seek out help from parents and [other](#) trusted adults.

(C) Beginning in Grade 4, students learn about changes associated with adolescent development in the reproductive and sexual health strand. In subsequent grade levels, students identify the purpose of these changes and their role in fertilization and reproduction. Students learn the characteristics of healthy and unhealthy relationships and how to use communication and refusal skills to set personal boundaries in dating/romantic relationships. Students also identify how to respond to sexual harassment and abuse.

# 4th Grade Health Human Sexuality TEKS

(20) Reproductive and sexual health--anatomy, puberty, ~~and~~ reproduction [~~and pregnancy~~] . The student identifies [analyzes] adolescent development [~~the process of fertilization, and healthy fetal development~~] . The student is expected to:

(A) explain changes that occur in males and females during puberty and adolescent development; and

(B) define the menstrual cycle.

# 7th Grade Health Human Sexuality TEKS

(20) Reproductive and sexual health--healthy relationships. The student understands the characteristics of healthy romantic relationships. The student is expected to:

(A) ~~compare and contrast the difference between friendship, infatuation, dating/romantic relationships, and marriage;~~

~~[(A) describe types of relationships such as platonic, romantic, and casual;]~~

(B) explain how friendships provide a foundation for healthy dating/romantic relationships;

(C) describe healthy ways to express friendship, affection, and love;

(D) describe appropriate and effective methods of communicating emotions in healthy dating/romantic relationships and marriage;

(E) evaluate the importance of mutual respect, trust, support, honesty, commitment, and reliability in healthy dating/romantic relationships and marriage;

(F) describe behaviors in dating/romantic [romantic] relationships that enhance dignity and [] respect [, and responsibility] ; and

(G) describe the benefits of healthy marriages, including companionship and social, emotional, financial, and health benefits.

# High School Health Human Sexuality TEKS

- (19) Reproductive and sexual health--personal safety, limits, and boundaries. The student understands how to set and respect personal boundaries to reduce the risk of sexual harassment, sexual abuse, and sexual assault. The student is expected to:
- (A) describe the characteristics of sex trafficking such as grooming, controlling behavior, exploitation, force, fraud, coercion, and violence;
  - (B) analyze the characteristics of harmful relationships that can lead to dating violence;
  - (C) analyze [identify] healthy strategies for preventing physical, sexual, and emotional abuse;
  - (D) analyze how a healthy sense of self and making and respecting decisions about safe boundaries and limits promote healthy dating/romantic relationships; [and]
  - (E) explain and demonstrate how refusal strategies can be used to say "no" assertively to unhealthy behaviors in dating/romantic relationships ; [ ]
  - (F) examine factors, including alcohol and other substances, that increase sexual risk and that affect setting, perceiving, respecting, and making decisions about boundaries;
  - (G) examine and discuss influences and pressures to become sexually active and why it is wrong to violate another person's boundaries and manipulate or threaten someone into sexual activity; and
  - (H) explain the importance of reporting to a parent or another trusted adult sexual harassment, sexual abuse, sexual assault, and dating violence involving self or others.

# High School Health Human Sexuality TEKS

- (20) Reproductive and sexual health--personal safety, limits, and boundaries. The student understands how to set and respect personal boundaries to reduce the risk of sexual harassment, sexual abuse, and sexual assault. The student is expected to:
- (A) identify community resources to support individuals who have experienced sexual harassment, sexual abuse, sexual assault, dating violence, and sex trafficking;
  - (B) evaluate [explain] the importance of reporting to a parent or another trusted adult sexual harassment, sexual abuse, sexual assault, and dating violence involving self or others;
  - (C) discuss how refusal skills can be used to set limits and boundaries to avoid behaviors that increase sexual risk;
  - (D) analyze factors, including alcohol and other substances, that increase sexual risk and that affect setting, perceiving, respecting, and making decisions about boundaries; and
  - (E) evaluate [examine and discuss] influences and pressures to become sexually active and why it is wrong to violate another person's boundaries and manipulate or threaten someone into sexual activity.

# When and How Health TEKS Taught?

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- **Guidance Lessons** - School Counselors
- **Physical Education Health Lessons** - Teachers/Coaches
- **Health Lessons** - School Nurses

# Process for Adoption of Human Sexuality Instruction

Lovejoy ISD  
043919

BASIC INSTRUCTIONAL PROGRAM  
REQUIRED INSTRUCTION (ALL LEVELS)

EHAA  
(LOCAL)

## Human Sexuality Instruction

The following process shall apply regarding the adoption of curriculum materials for the district's human sexuality instruction:

1. The Board shall adopt a resolution convening the District's school health advisory council (SHAC) to recommend curriculum materials for the instruction.
2. The SHAC shall hold at least two public meetings on the curriculum materials before adopting recommendations to present to the Board.
3. The SHAC recommendations must comply with the instructional content requirements in law, be suitable for the subject and grade level for which the materials are intended, and be reviewed by academic experts in the subject and grade level for which the materials are intended.
4. The SHAC shall present its recommendations to the Board at a public meeting.
5. After the Board ensures the recommendations from the SHAC meet the standards in law, the Board shall take action on the recommendations by a record vote at a public meeting.

# SB9 and HB1525

87th Legislative Session

Board Policy EHAA (LOCAL) determines the process that shall be applied regarding the adoption of curriculum materials for the district's human sexuality instruction.

## Pursuant to Texas Education Code Section 28.004 and Board Policy EHAA(Local):

- Board to adopt a resolution convening the School Health Advisory Council (SHAC) for the purpose for making recommendations regarding the curriculum materials
- SHAC holds at least two public meetings on the human sexuality curriculum materials before adopting recommendations
- SHAC provides the recommendations to the board at a public meeting of the board
- Board takes action on the adoption of the recommendations by a record vote at a public meeting

# Human Sexuality Curriculum

## **DISTRICTS ARE REQUIRED:**

- Inform parents of the human sexuality instruction requirements under state law
- Provide written notification to parents of the intent to provide prevention education for school safety and human sexuality instruction
- Obtain parental consent for instruction in each the following prevention topics:
  - Anti-Victimization Education; Child Abuse Prevention; Sex Trafficking Prevention
  - Violence Prevention; Family Violence Prevention; Dating Violence Prevention
  - Human Sexuality Instruction Based on the Texas Essential Knowledge and Skills
- Curriculum materials for the district's human sexuality instruction must be posted on the district's website
- Information for parental involvement in the development of the curriculum to be used in human sexuality, including information regarding the SHAC

# Tentative Timeline

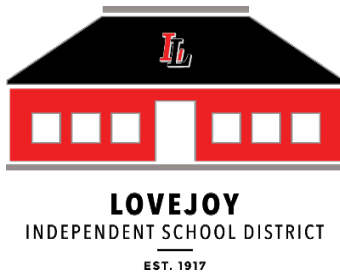
May 23, 2022	Recommend to the Board of Trustees adoption of the Advanced Qualitative Reasoning Instructional Resource
May 23, 2022	Board Presentation: Board Policy EHAA(LOCAL) and Responsibilities of School Health Advisory Committee (SHAC)
June 20, 2022	Recommend the Board of Trustees adopt a resolution authorizing the School Health Advisory Council (SHAC) make recommendations to the board regarding appropriate grade level and methods of instruction for human sexuality and recommend approval of 2022-2023 School Health Advisory Council (SHAC) members
August 29, 2022	SHAC brings forth recommendations to the Board of Trustees regarding appropriate grade level and methods of instruction for human sexuality
September 26, 2022	Recommend to the Board of Trustees adoption of Health and Physical Education Instructional Resource



THANK YOU

23. **Consider and Act on the Adoption of Advanced  
Quantitative Reasoning Instructional Resource**

**Presenter:** Dr. Laurie  
Tinsley, Assistant  
Superintendent of  
Curriculum and  
Instruction



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Approval of Instructional Materials for Advanced Quantitative Reasoning
<b>Presented For</b>	X Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Dr. Laurie Tinsley – Assistant Superintendent for Curriculum & Instruction

### Executive Summary

The District Shall provide a wide range of instructional resources for students and faculty that present varying levels of difficulty, diversity of appeal, and a variety of points of view. Although professional staff members may select instructional resources for their use in accordance with District policy and administrative regulations, the ultimate authority for determining and approving the curriculum and instructional program of the District lies with the school board. EF(LOCAL)

After deliberate review, the Instructional Materials Selection Committee for Mathematics selected the Advanced Quantitative Reasoning textbook published by AQR Press for the advanced mathematics course, Advanced Quantitative Reasoning. Supporting documents are attached.

### Fiscal Implications

Instructional Materials and Technology Allotment (IMTA) funds provided each biennium will be used. Estimated costs for 2022-2023 - \$2,680.00

### Administrator Recommendation

Administration recommends approval of the Committee's selection of Advanced Quantitative Reasoning-Mathematics for The World Around Us published by AQR Press.

## **Board Priority**

### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### **Priority 2**

Lovejoy ISD will continue to strive to be recognized as the employer of choice for educators who believe districts should be defined by a culture of superior work ethic, mission-driven behavior, continuous improvement, growth mindset, and positive relationships with students, parents, and colleagues. Lovejoy ISD team members will exemplify our Educator Profile and align their actions with our Core Values.

### **Priority 3**

Lovejoy ISD will evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students. In support of organizational health and effectiveness, Lovejoy ISD will establish a plan for short and long-term financial sustainability. We will strategically balance financial decision-making with Lovejoy ISD's mission and commitment to the Lovejoy experience. A financial assessment, identification of priorities, and intentional decision-making will support strategic financial planning. Zero-based budgeting will be utilized and transparency will be prioritized.



## **Advanced Mathematics - Advanced Quantitative Reasoning Instructional Materials Recommendation For Approval**

**Publisher Selected** - AQR Press

**Book Selected** - Advanced Quantitative Reasoning-Mathematics For The World Around Us

### **Committee members**

#### **Teachers**

Kellie English - LHS Math Department Head

Kelley Bernhard - WSMS GT Math Teacher/Collin County Adjunct Professor

#### **Administrators**

Tyler Wicke- Assistant Principal LHS

#### **Curriculum Coordinators**

Kelly Cowan

Each member of the Instructional Material Selection Committee for Mathematics was required to complete a rubric to evaluate the resource. The results of the evaluation are linked below.

### **[Rubric](#)**

#### **Features teachers indicated as a need on the teacher textbook survey which Advanced Quantitative Reasoning fulfills-**

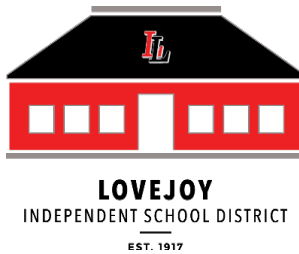
- extension activities for students who master standards early in the learning cycle
- specific scaffolding for learners who are below grade level
- differentiated instructional strategies and materials for every lesson
- inquiry-based mathematical processes that combine with problem-solving

#### **Additional Features**

- Creates a learning environment in which language, thinking, and learning support one another.
- Concludes each of the 3 parts with a project and ultimately has each student conduct a capstone research project that draws on the ideas throughout the course.

24. **Consider and Act on Gym Floor Maintenance and Replacement**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Consider and Act on Gym Floor Maintenance and Replacement
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

Each summer, we review the routine maintenance needs for gym flooring throughout the District to ensure they are maintained properly for safety and longevity.

At this time, we are sharing the recommendations to screen and recoat gym floors at the middle school and high school in order to maintain them properly and add the necessary coating for the longevity of the floors, as well as replacement of the practice gym floor at Sloan Creek Intermediate school due to water and termite damage. In future, the mats in use on this floor will be removed daily by coaching staff to ensure damage does not occur or is mitigated early. Water and ice chests will also not be permitted on the gym floor once replaced.

These services would be procured through district-approved vendors or vendors available through existing purchasing partnerships or cooperatives, Ponder and Z Floors, as presented. This project will be funded by bond funds, primarily through remaining balances in the 2017 series and the 2018 series, which included authorization for projects at these facilities.

### Fiscal Implications

Total maximum cost of this project is \$155,598 and will be funded by bond funds. Future consideration of new rollable mats will be proposed by Student Services.

### **Administrator Recommendation**

It is the recommendation of the administration that the Board of Trustees approve the recommended scope for this work and award the best value bids received and funded as presented.

### **Board Priority**

#### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

#### **Priority 3**

Lovejoy ISD will use established measures to evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students.

#### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.

#### **Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.



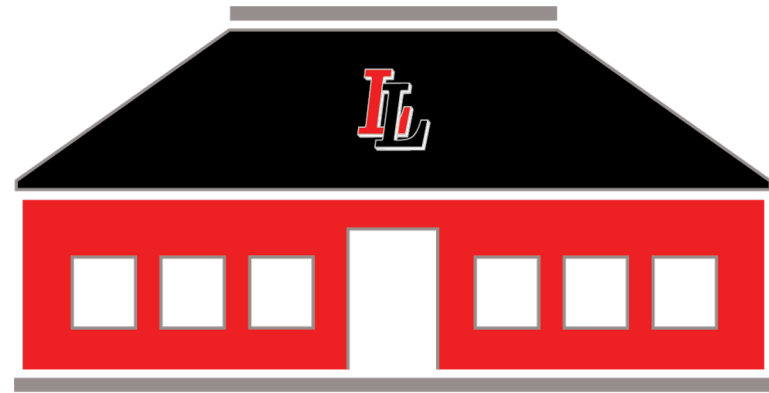
# Gym Floor Maintenance and Replacement

**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT

EST. 1917

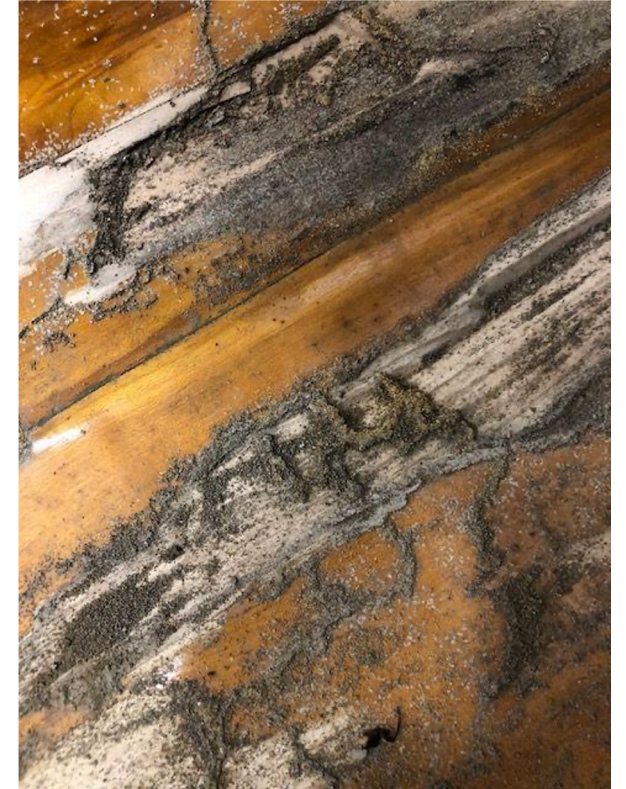
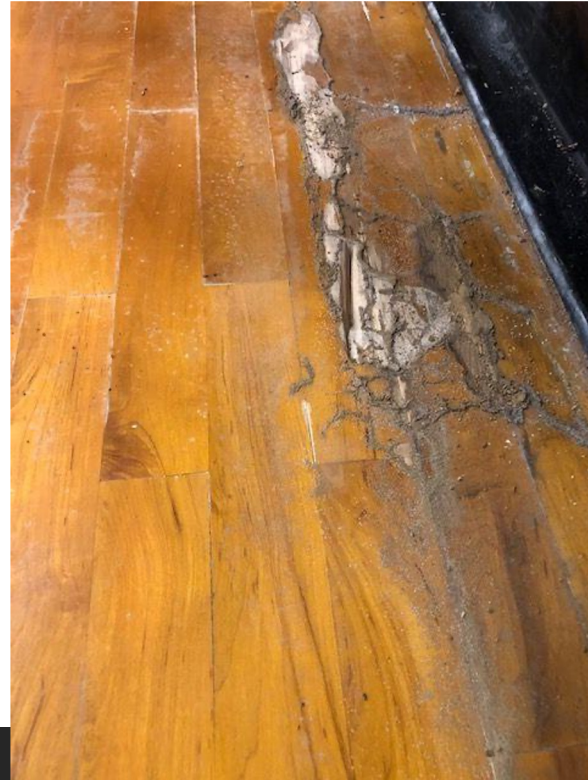
# Gym Floor Maintenance

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- Screen/Recoat – 1-3 years, depending on use and # of coats of finish
  - Can do in-house when fully staffed with skilled employees or contract out
- Refinish – 10 years
- Replacement – when damaged
- No Water/Ice Chests, Daily Cover Removal, Covering Used for Chairs

# SCIS Gym Floor Damage

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# Recommended Scope

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- SCIS Practice Gym Floor Replacement (Repair Not Bid by Some Vendors)
- WSMS Screen/Recoat – Competition & Practice Gym
- LHS Screen/Recoat – Competition & Practice Gym

# Bid Received

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<b>Gym Floor</b>			
	<b>Ponder</b>	<b>Z Floor</b>	<b>Dollamur</b>
<b>SCIS Practice Gym Replacement</b>	\$ 127,416	\$ 134,149	
<b>SCIS Practice Gym Repair</b>	no bid	\$ 40,376	
<b>WSMS Screen/Recoat - Competition &amp; Practice Gym</b>	\$ 10,435	\$ 7,200	
<b>LHS Screen/Recoat - Competition &amp; Practice Gym</b>	\$ 10,411	\$ 7,200	
<b>New Rollable Mats for SCIS Practice Gym - <i>seeking multiple bids from approved vendors for future approval</i></b>			\$ 51,875
<b>Contingency</b>	\$ 12,742	\$ 1,440	
<b>Total</b>			<b>\$ 155,998</b>

Funding Source Recommendation: Bond Funds, Primarily 2017 and 2018 Series

# Next Steps

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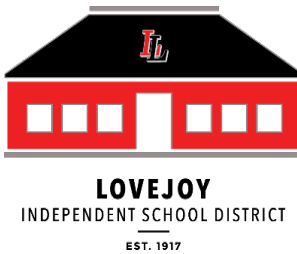
- 5/23: Consider Approval of Gym Floor Maintenance and Replacement Project as Presented
- Consider Future Request for New, Rollable Mats
- Summer Scheduling of Work



THANK YOU

**25. Consider and Act on Power Factor Correction  
Project**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Approval of Power Factor Correction Project
<b>Presented For</b>	<input checked="" type="checkbox"/> Board Action <input type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

On May 9<sup>th</sup> at the Board Workshop, the board reviewed information presented on the assessment of power factor correction as an energy conservation measure in compliance with Board Policy CL LEGAL. Education Code 44.902 and Board Policy CL LEGAL require school districts to evaluate any energy conservation measures with a payback of seven years or less.

The assessment included a final proposal from Ally Energy Solutions that would result in annual savings of \$11,873 and total up-front cost of \$49,500. The payback term of 4 years is matched by a warranty on the equipment through the completion of the payback term.

These services would be procured through the NCPA cooperative contract. It is proposed that this project be funded by bond funds, primarily through remaining balances in the 2014 and 2015 series.

### Fiscal Implications

This project will save \$11,873 annually from the general operating M&O budget and cost \$49,500 in up-front project costs, to be funded by bond proceeds from prior bond sales.

**Administrator Recommendation**

It is the recommendation of the Administration that the Board of Trustees approve the power factor correction project as presented.

**Board Priority**

**Priority 3**

Lovejoy ISD will use established measures to evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students.

**Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.

# Power Factor Correction Assessment

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**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT

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EST. 1917

# Background

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- Board Policy CL
- Long-Range Energy Plan Required
- Adopted 4/25/22
- Strategy #1: Track Utility Cost and Usage
- Strategy #6: Explore Opportunities for Efficiency Savings

**Reduction of Energy Consumption**

The board shall establish a long-range energy plan to reduce the district's annual electric consumption by five percent beginning with the 2008 state fiscal year and consume electricity in subsequent fiscal years in accordance with the district's energy plan. The plan must include:

1. Strategies for achieving energy efficiency that:
  - a. Result in net savings for the district; or
  - b. Can be achieved without financial cost to the district; and
2. For each strategy identified above, the initial, short-term capital costs and lifetime costs and savings that may result from implementation of the strategy.

A strategy for achieving energy efficiency includes facility design and construction.

In determining whether a strategy may result in financial cost to the district, the board shall consider the total net costs and savings that may occur over the seven-year period following implementation of the strategy.

The board may submit the plan to the State Energy Conservation Office for the purposes of determining whether funds available through loan programs administered by the office or tax incentives administered by the state or federal government are available to the district. The board may not disallow any proper allocation of incentives.

# Power Factor

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- Measurement of electrical efficiency
- Ratio of real power to total power
- Expressed as a percentage
  - 0% no power providing useful work
  - 100% all power providing useful work
- Building performing below 95% may be penalized, dependent on tariff, in order to discourage inefficient power distribution/use
- School Buildings can typically range from 80-98%
- Penalty typically adds 10%-20% to TDSP charge on electricity bill

# Example Power Factors

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Incandescent bulb: 100%

Computers: 70% - 95%

Fluorescent ballasts

- Normal power factor: <80%
- Power factor corrected: 80% - 89%
- High power factor: 90% - 98%

Motors

- Loaded: 80% - 85%
- Lightly loaded: Low as 20%

# Power Factor in Tariff

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## 5.5.5 POWER FACTOR

If the Power Factor of Retail Customer's load is found to be less than 95% lagging as measured at the Meter, Company may require Retail Customer to arrange for the installation of appropriate equipment on Retail Customer's side of the Meter necessary to correct Retail Customer's Power Factor between unity and 95% lagging as measured at Meter, or, if Retail Customer fails to correct its Power Factor consistent with this standard, the demand associated with Retail Customer's use of Delivery Service, as determined in the appropriate Rate Schedules in Section 6.1 RATE SCHEDULES, may be increased according to the following formulas:

- (1) Calculation of Power Factor Adjusted NCP kW.  
The NCP kW applicable under the Monthly Rate section shall be modified by the following formula:

Power Factor Adjusted Monthly NCP kW = (Actual Monthly NCP kW x 0.95) / Current Month Power Factor

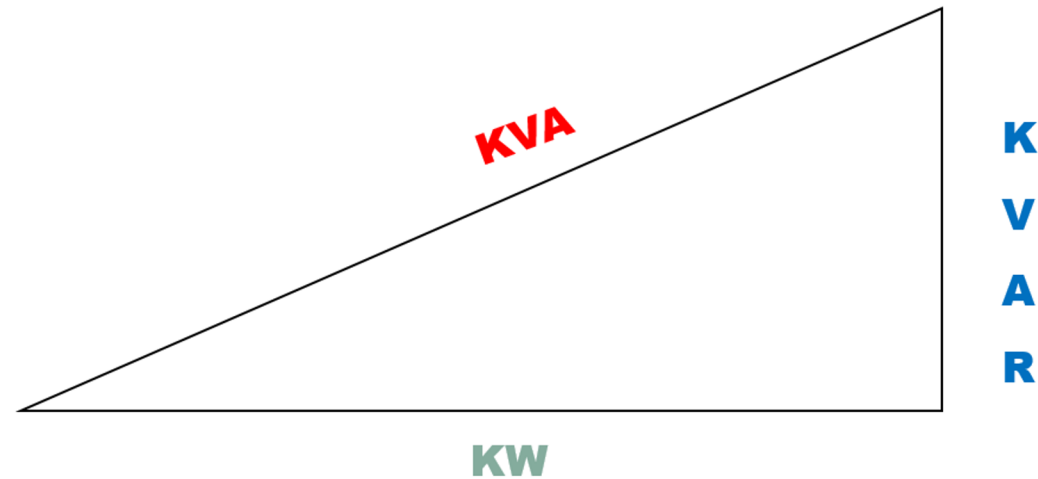
- (2) Calculation of Power Factor Adjusted 4-CP kW.  
Each of the Retail Customer's monthly coincident peak kW Demands used to calculate the Retail Customer's average 4 CP kW Demand applicable under the Monthly Rate section shall be calculated using the following formula:

Power Factor Adjusted Monthly CP kW = (Actual Monthly CP kW Demand at the time of the ERCOT peak x 0.95) / Monthly Power Factor

Power Factor Adjusted 4-CP kW = average of the Retail Customer's Monthly CP kW as adjusted for Power Factor if applicable.

# Power Factor

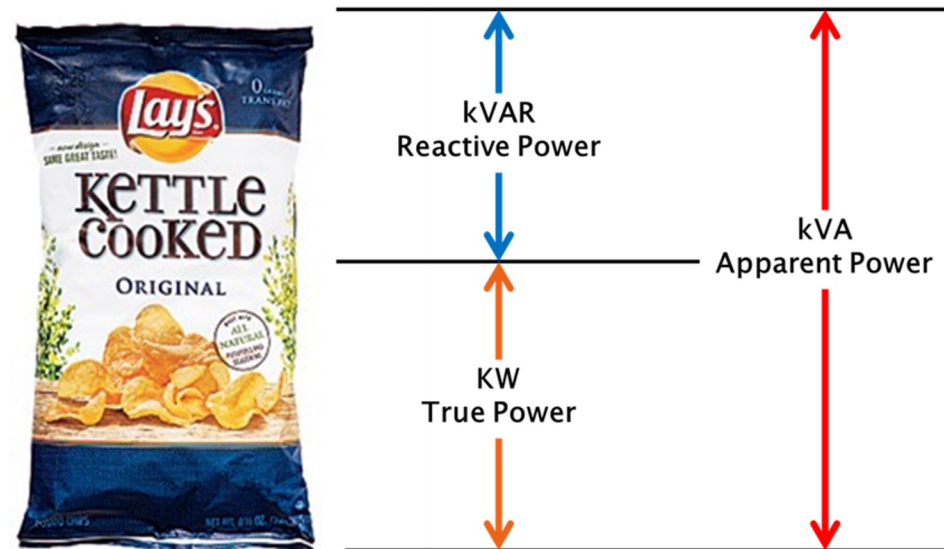
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**POWER FACTOR (PF) = kW / kVA**

# Power Factor: Simplified

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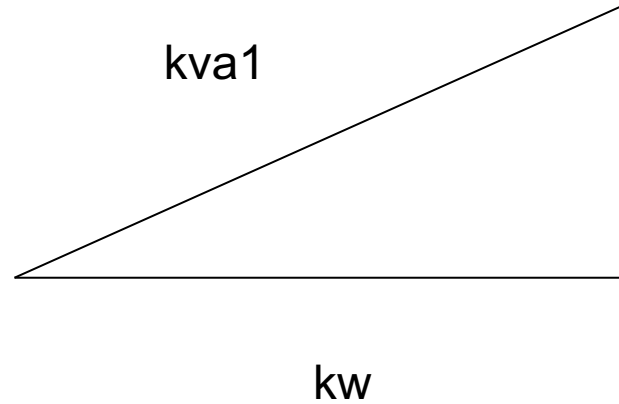


The Air in the Bag is the kVAR....and also the PENALTY!

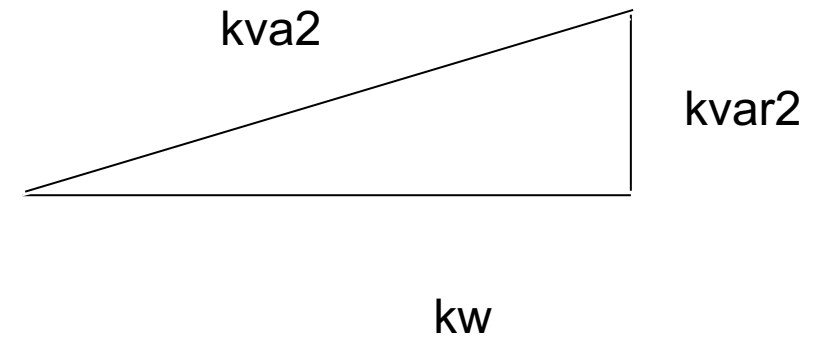
# Power Factor Correction

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Installation of capacitor banks can correct PF to 95%.



Before capacitors



After capacitors

# Power Factor Proposal Highlights

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- Savings: \$11,873
- Cost: \$49,500
- Payback: 4 Years
- Warranty: 4 Years



**NCPA Contract #: 02-120**



# Next Steps

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- Board Consideration of Power Factor Correction Proposal on 5/23
- Consider Funding Source Recommendation: Bond Funds



THANK YOU

# Power Factor Correction Proposal

Lovejoy ISD

4/21/2022

**Ally Energy Solutions**  
Mike Bowman  
work: (469) 363-2445  
mbowman@ally-energy.com

# Our Clients

Ally's Team of Experts Help Businesses Identify and Implement Power Factor Correction Savings Opportunities



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## Introduction

Ally Energy Solutions is pleased to provide the following proposal for a Power Factor Correction System. This system will correct the power factor at or above 95% allowing Lovejoy ISD to avoid approximately \$11,872.86 in annual energy costs.

Ally Energy Solutions is dedicated to providing energy management solutions that work for our clients. We guarantee your satisfaction with the project and performance promised.

Your business is important to us. Please let me know of any questions or concerns. Thank you again for the opportunity to provide a proposal for this project.

## Proposed System and Methodology

Ally Energy Solutions proposes to correct the power factor at Lovejoy ISD by installing power factor correction capacitors on the 480V distribution system of the facility. The project after installation will correct the power factor based on the peak levels over the last 12 months to 95% or higher as measured at the meter.

Ally Energy Solutions determines specifications based on the Historical Load Analysis and Site Review. The Historical Load Analysis determines the proper kVAR necessary to raise the power factor percentage to 95%. The Site Review provides Ally Energy Solutions with physical limitations unique to your business and allows Ally Energy Solutions to determine the ideal location for the capacitor unit(s).

## Installation Work Schedule

The systems will require approximately 8-10 weeks for delivery.

The units will be installed as soon as possible following receipt.

Preparations can be made while the system is energized. However, final terminations may require a shutdown of approximately four (4) hours per system. Shutdown can likely be minimized to location of breaker to which capacitors are connected.

Once installations are complete, Ally Energy Solutions will oversee the commissioning process and system startup.

Commissioning will be provided as soon as possible after final installation connections.

**Proposed System and Installation Description**

The costs proposed are turnkey and completely inclusive of equipment, delivery, connection hardware, labor to install and commissioning upon completion of installation.

**Lovejoy High School**  
**ESI # 10443720009764823**

<b>Item</b>	<b>Measurement</b>
<b>Historic Load Peak</b>	1028 kW
<b>Measured Power Factor</b>	0.79
<b>Estimated Penalty Cost</b>	\$8,074.62 annually
<b>System Cost</b>	\$35,000.00
<b>Return on Investment</b>	4.33 Years

**Puster Elementary School**  
**ESI #10443720008677783**

<b>Item</b>	<b>Measurement</b>
<b>Historic Load Peak</b>	400 kW
<b>Measured Power Factor</b>	0.80
<b>Estimated Penalty Cost</b>	\$3,798.24 annually
<b>System Cost</b>	\$14,500.00
<b>Return on Investment</b>	3.82 Years

**Project Summary**

<b>Total Project Penalty</b>	\$11,872.86 annually
<b>Total Project Cost</b>	\$49,500.00
<b>Total Return on Investment</b>	4.16 Years

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## **Terms and Conditions**

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### **Quote Validity**

This quote is valid for 30 days from date of issuance.

### **Payment Terms**

A 50% deposit is due with order. The remaining balance is due upon completion of installation and commissioning.

### **Ally Energy Solutions Performance Guarantee**

Upon completion of installation, Ally Energy Solutions guarantees that the power factor will be at or above 95%. This will be verified either by taking measurements on the electrical system or by the customer's utility bill power factor reading for the first full month following installation.

If the demand level is at or below the peak load as specified on page three of this proposal, but the power factor is less than 95%, then Ally Energy Solutions will provide additional capacitance, at Ally Energy Solutions's expense, until the power factor level reaches 95% or higher.

Any adjustments to installed capacitor levels will be completed after final project payment is received and cleared by Ally Energy Solutions.

### **Equipment Warranty**

Ally Energy Solutions warrants that Equipment shall be delivered free of defects in material and workmanship and that Services shall be free of defects in workmanship.

The Warranty Remedy Period for Equipment shall end twelve (12) months after installation or eighteen (18) months after date of shipment, whichever first occurs.

### **Free Extended Equipment Warranty (TEMA MEMBER SCHOOL DISTRICTS)**

The Warranty Remedy Period for Equipment shall end forty-eight (48) months after installation or fifty-six (54) months after date of shipment, whichever first occurs.



## NCPA Contract #: 02-120



10443720009764823

Usage Month	Metered kW	Current Power Factor	Additional Distribution kW	Metered 4CP kW	4CP Power Factor	Additional 4CP kW	Distribution Charge	Distribution Recovery Factor	Transmission Cost Recovery Factor	Nuclear Decomm Cost	Power Factor Penalty
Mar-2021	534	0.91	140	274	0.91	13	\$630.00	\$68.71	\$73.29	\$7.42	\$779.42
Apr-2021	744	0.82	119	274	0.91	13	\$535.52	\$58.41	\$73.29	\$6.31	\$615.12
May-2021	791	0.81	134	274	0.91	13	\$604.94	\$65.98	\$73.29	\$7.12	\$685.35
Jun-2021	485	0.82	140	274	0.91	13	\$630.00	\$68.71	\$73.29	\$7.42	\$779.42
Jul-2021	894	0.79	176	274	0.91	13	\$790.41	\$86.21	\$73.29	\$9.31	\$873.01
Aug-2021	978	0.88	81	274	0.91	13	\$366.33	\$39.95	\$73.29	\$4.31	\$443.93
Sep-2021	879	0.89	62	274	0.91	13	\$280.94	\$30.64	\$73.29	\$3.31	\$357.54
Oct-2021	677	0.89	140	274	0.91	13	\$630.00	\$68.71	\$73.29	\$7.42	\$779.42
Nov-2021	669	0.90	140	274	0.91	13	\$630.00	\$68.71	\$73.29	\$7.42	\$779.42
Dec-2021	560	0.95	140	274	0.91	13	\$630.00	\$68.71	\$73.29	\$7.42	\$779.42
Jan-2022	1028	0.88	84	291	0.92	10	\$379.35	\$41.37	\$56.31	\$4.47	\$440.13
Feb-2022	660	0.95	140	291	0.92	10	\$630.00	\$68.71	\$56.31	\$7.42	\$762.44
							<b>\$6,737.49</b>	<b>\$734.82</b>	<b>\$845.52</b>	<b>\$79.35</b>	<b>\$8,074.62</b>



# NCPA Contract #: 02-120



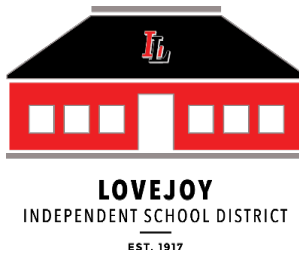
10443720008677783

Usage Month	Metered kW	Current Power Factor	Additional Distribution kW	Metered 4CP kW	4CP Power Factor	Additional 4CP kW	Distribution Charge	Distribution Recovery Factor	Transmission Cost Recovery Factor	Nuclear Decomm Cost	Power Factor Penalty
Mar-2021	180	0.85	38	180	0.00	22	\$171.00	\$18.65	\$99.00	\$2.01	\$290.66
Apr-2021	212	0.85	38	212	0.00	26	\$171.00	\$18.65	\$114.09	\$2.01	\$305.75
May-2021	296	0.82	47	296	0.00	47	\$209.29	\$22.83	\$208.08	\$2.46	\$442.66
Jun-2021	136	0.80	38	136	0.00	26	\$171.00	\$18.65	\$114.99	\$2.01	\$306.65
Jul-2021	384	0.84	48	384	0.00	48	\$217.02	\$23.67	\$215.77	\$2.56	\$459.02
Aug-2021	400	0.85	47	400	0.00	47	\$209.40	\$22.84	\$208.19	\$2.47	\$442.90
Sep-2021	376	0.86	40	376	0.00	40	\$181.43	\$19.79	\$180.38	\$2.14	\$383.74
Oct-2021	260	0.85	38	260	0.00	30	\$171.00	\$18.65	\$135.32	\$2.01	\$326.98
Nov-2021	208	0.89	38	208	0.00	14	\$171.00	\$18.65	\$63.85	\$2.01	\$255.51
Dec-2021	132	0.95	38	132	0.00	0	\$171.00	\$18.65	\$0.00	\$2.01	\$191.66
Jan-2022	168	0.95	38	168	0.00	0	\$171.00	\$18.65	\$0.00	\$2.01	\$191.66
Feb-2022	164	0.94	38	164	0.00	2	\$171.00	\$18.65	\$9.39	\$2.01	\$201.05
							<b>\$2,185.14</b>	<b>\$238.33</b>	<b>\$1,349.06</b>	<b>\$25.71</b>	<b>\$3,798.24</b>

**Annual Total Power Factor Estimate: \$11,872.86**

26. **Puster Play Ground Presentation**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Puster Playground Presentation
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

With the changes that resulted from moving students from Lovejoy Elementary School to Hart and Puster, we have been reviewing district facility needs at all campuses to serve all of our students. We are experiencing overcrowding in the upper elementary playground area at Puster and have requested and received quotes for an additional unit and set of swings for the back of the campus.

We are sharing preliminary information at this time for future board consideration of a project at a June meeting. We have also reviewed the playground at Hart and given the amount of play structures they have for upper elementary, they are not experiencing the same overcrowding at this time.

These services would be procured through district-approved vendors or vendors available through purchasing cooperatives. It would likely be proposed that this project be funded by bond funds, primarily through remaining balances in the 2017 and 2019 series, which included authorization for projects at Puster Elementary.

### Fiscal Implications

Estimated cost of this project at this time is \$150,000 or less. Quotes will be requested and a presentation made on the best value proposal at a future board meeting. The intention would be for this potential project to be funded with bond proceeds from prior bond sales.

### **Administrator Recommendation**

Information only. No recommendation at this time.

### **Board Priority**

#### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

#### **Priority 3**

Lovejoy ISD will use established measures to evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students.

#### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.

#### **Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.



# Puster Playground

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**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



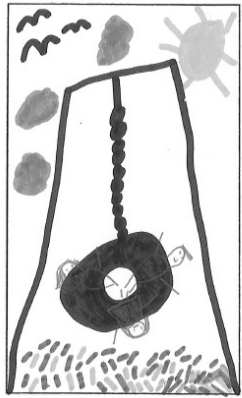
**LOVEJOY**  
INDEPENDENT SCHOOL DISTRICT

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# Wesley & Brandon



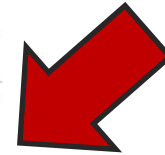
Dear Dr. Kordel  
I want Paster  
elemetary to have  
two tire swings.  
And because, as kids  
have to wait forever.  
And it wastes our  
reeses. And when We don't have  
Reses We Get Fisteey!  
And we'll get so tired we'll fall asleep.  
Would you want every kid to be  
tired? That's why we need  
two tire swings. its also  
crowded love wesley



Brandon



Dear Mrs. H  
Haynes please  
let us have  
more tire Swings  
Because we haft  
to stand in line  
for a long time  
and THAT'S going to take  
away our play time. And can  
we have a trapiln Because  
it would be so fun to jump  
around. from Brandon.



**Trampoline jumping poses a high risk of injury for children.** The activity can result in sprains and fractures in the arms or legs — as well as head and neck injuries. The risk of injury is so high that the [American Academy of Pediatrics](#) strongly discourages the use of trampolines at home.

<https://www.mayoclinic.org/faq-20058001>

[Trampoline jumping: Safe for kids? - Mayo Clinic](#)

# Kathryn



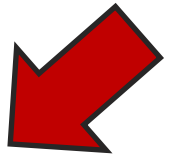
Dear Mrs. Hanse,  
I want to talk  
to you and the  
board members  
about the play  
ground. I would  
like a net

because I want to climb  
on some thing other than  
the jungle jim and I  
don't like people crowding  
around me on a jungle jim  
trust me it gets crowded.

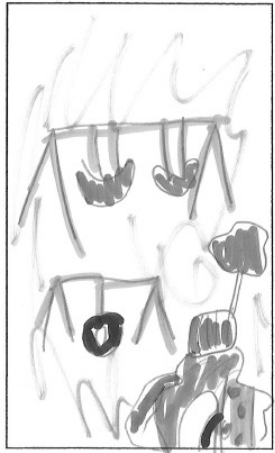


It will be nice  
to have a net to  
climb on and  
no people will  
wait or crowd  
around people.  
I don't like

seeing people waste time at  
recess. I can't wait to  
see everyone playing  
and no one missing out.  
C from Kathryn



# Grace



Dear Lovejoy  
Board members  
It is always  
crowded at the  
playground can you  
please expand it.  
Can you add more

swings and tire swing? Kids always  
get there first. And I have seen so  
many kids fight over the tire swing.  
They always say we got here  
first. No you didn't! And they say  
get off! It is my turn on



a football. And can we have a  
baseball field for the boys that  
play baseball. I feel bad that they  
can not play with their friends.  
And can we have a monkey  
bars for the kids who like to

The tire swing!  
No! I just got on.  
Can you add a  
place for kids to  
play football please?  
I always get hit  
in the head by



Climb on stuff,  
can we have a  
place where the  
girls can do  
gymnastics not  
in the Gaga pit.  
And we get so  
hot can we have a new tent  
and misters please!!  
Please get us new equipment,  
from,  
Grace Knickerbocker.

# Current Puster Playground/Enrollment



HES - 102	
	CY
4th Grade	154
3rd Grade	153
2nd Grade	102
1st Grade	107
Kinder	83
Pre-K	0
EE	3
<b>Total Enrollment</b>	<b>602</b>
PES - 104	
	CY
4th Grade	154
3rd Grade	154
2nd Grade	126
1st Grade	105
Kinder	129
Pre-K	0
EE	3
<b>Total Enrollment</b>	<b>671</b>

# Next Steps

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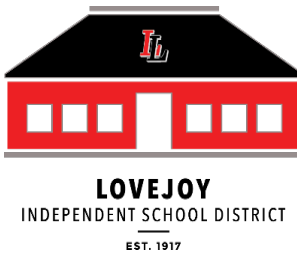
- Receive Quotes from Vendors Available on Bid (Internal Estimate: \$150k or less)
- Board Consideration of Playground Project on 6/6
- Consider Funding Source Recommendation: Bond Funds



THANK YOU

27. **Transportation Area Concrete Presentation**

**Presenter:** Dr.  
Jennifer DuPlessis,  
Assistant  
Superintendent of  
Finance and  
Operations



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Transportation Concrete Presentation
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance and Operations

### Executive Summary

Over time, several areas of concrete have eroded in the Transportation drive area where the buses frequently are pulling in and out of that facility. There is a need to repair areas of concrete in the drive to ensure safety and longevity.

We are sharing preliminary information about this need at this time for future board consideration of a project at a June meeting.

These services would be procured through district-approved vendors or vendors available through existing purchasing partnerships or cooperatives. It would likely be proposed that this project be funded by bond funds, primarily through remaining balances in the 2017 series, which included authorization for projects at the Transportation/Maintenance facility.

### Fiscal Implications

Estimated cost of this project at this time is \$35,000. Quotes have been requested and a presentation made on the best value proposal at a following board meeting to be funded by bond proceeds from prior bond sales.

## Administrator Recommendation

Information only. No recommendation at this time.

## Board Priority

### Priority 1

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

### Priority 3

Lovejoy ISD will use established measures to evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students.

### Priority 4

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.

### Priority 5

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.

# Transportation Drive Concrete

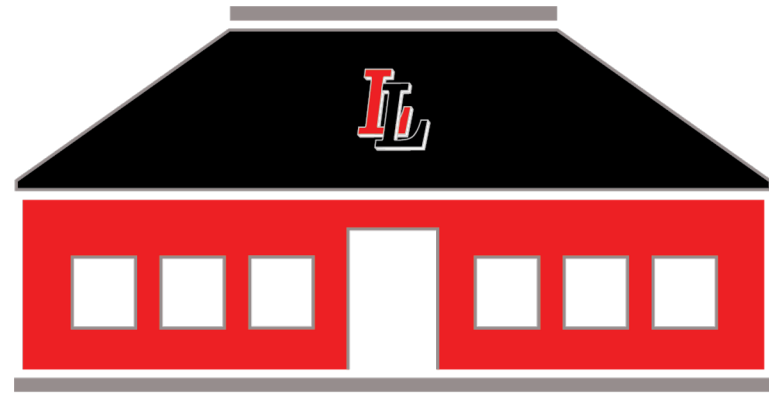
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**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



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# Need



# Next Steps

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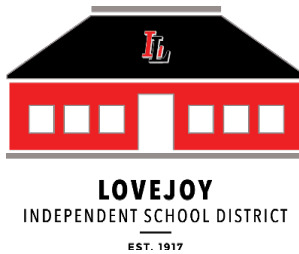
- Receive Quotes from Vendors Available on Bid (Internal Estimate: \$35k)
- Board Consideration of Transportation Drive Repair Proposal on 6/6
- Consider Funding Source Recommendation: Bond Funds



THANK YOU

28. **Lovejoy Child Development Center (LCDC)**  
**Facility Update Presentation**

**Presenter:** Dr. Laurie  
Tinsley, Assistant  
Superintendent of  
Curriculum and  
Instruction



## Lovejoy Independent School District Board of Trustees

<b>Date of Meeting</b>	May 23, 2022
<b>Document Title</b>	Lovejoy Child Development Center/Annex Presentation
<b>Presented For</b>	<input type="checkbox"/> Board Action <input checked="" type="checkbox"/> Report/Review Only
<b>Supporting Documents</b>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
<b>Administrator Responsible</b>	Laurie Tinsley, Ed.D. Assistant Superintendent of Curriculum & Instruction Jennifer DuPlessis, Ph.D. Assistant Superintendent of Finance & Operations

### Executive Summary

With the creation of the Lovejoy Child Development Center, we have been reviewing facility needs in all areas for student and district purposes. We would like to consider options to provide a designated entry for the Lovejoy Child Development Center and improvements to the library and annex areas to optimize the use of space for professional development and collaborative meetings. These improvements would improve our security posture.

We are sharing preliminary information at this time for future board consideration of a project at a June meeting. These most significant portions of the project would be procured through district-approved job-order contractors or job-order contractors available through purchasing cooperatives. It would likely be proposed that this project be funded by bond funds, primarily through remaining balances in the 2015, 2017, 2019, and 2021 series, which included authorization for projects at this facility.

### Fiscal Implications

Quotes from appropriate contractors have been requested and a presentation will be made on the best value proposal for the main work at a following board meeting to be funded by bond proceeds from prior bond sales.

### **Administrator Recommendation**

Information only. No recommendation at this time.

### **Board Priority**

#### **Priority 1**

Lovejoy ISD will continue to demonstrate growth in student academic achievement as evidenced by a broad range of academic measures appropriate for the elementary, intermediate, middle, and high school levels. The Lovejoy ISD Graduate Profile (Intellectually Equipped, Open to the Challenges of Learning, Well-Rounded, Engaged in a Healthy Lifestyle, Fair and Respectful of Others, Works for Justice in the Community) will become a prevalent part of all students' pursuits. Students will personify the Graduate Profile by experiencing challenging and engaging learning. Research-based instructional strategies will be strategically partnered with innovation. Profound learning will develop key skills essential to thriving now and in the future. Technology will be leveraged to enhance individualization, deepen learning, and prepare students for an increasingly technology-driven workforce.

#### **Priority 3**

Lovejoy ISD will use established measures to evaluate all areas which impact the student experience. A sustained focus on continual improvement in all aspects of district services remains a constant with the continued goal of providing the highest quality of learning experiences for our students.

#### **Priority 4**

Lovejoy ISD will develop stronger community connections and confidence through effective communication with both internal and external stakeholders.

#### **Priority 5**

Lovejoy ISD will continuously examine and analyze the best practices of implementation for safety and security; enhancing safety and protecting the positive learning environment and by ensuring the personal/social needs of Lovejoy students are addressed.



# Lovejoy Child Development Center/ Annex Updates

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**LAURIE TINSLEY, ED.D.**

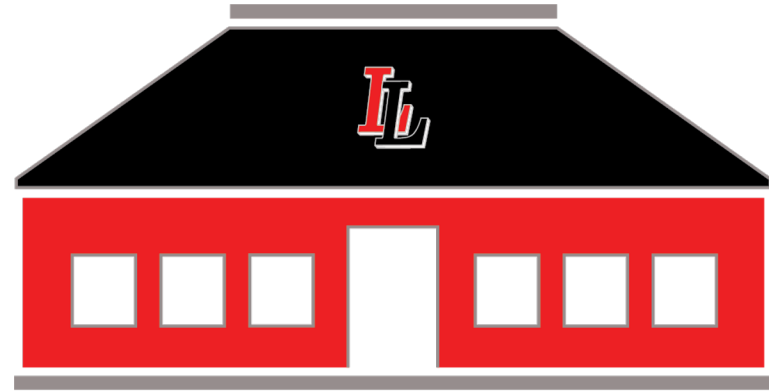
Assistant Superintendent of Curriculum and  
Instruction

**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



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# Goals

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- Provide defined entry and security for LCDC with adjacency
- Ensure Student Safety
- Maximize use of remaining annex space for professional development, meeting rooms, collaborative workspace

# Next Steps

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- Receive Quotes from JOC Contractors Available on Bid for Room/Entry/Access Modifications for LCDC Entry/Library
- Consider Additional Use Options
- Board Consideration of LCDC/Annex Project on 6/6 or 6/20
- Consider Funding Source Recommendation: Bond Funds



THANK YOU

29. **Cabinet Reports**

**Presenter:** Executive  
Cabinet Members

# Finance & Operations Cabinet Report

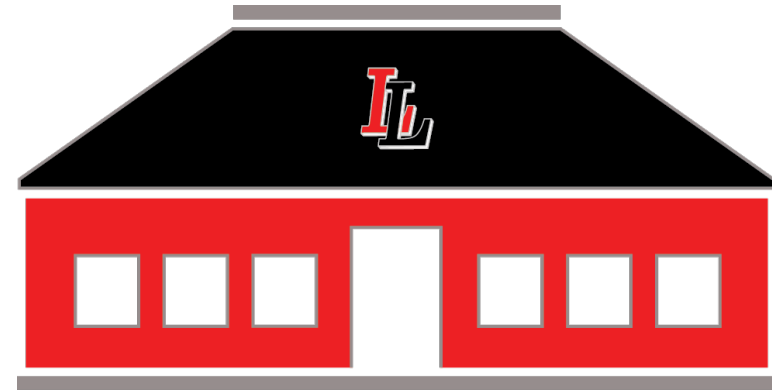
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**JENNIFER DUPLESSIS, PH.D.**

Assistant Superintendent of Finance and  
Operations

**MAY 23, 2022**

Board Meeting



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# Project Updates

- ❑ Winter Storm Repairs
- ❑ Concession Heaters – waiting for final units
- ❑ LCDC Playground – Canopy after Memorial Day, then Fencing, etc.
- ❑ Salvage Item Auction Upcoming – All Portables Sold



THANK YOU

# Curriculum and Instruction Update

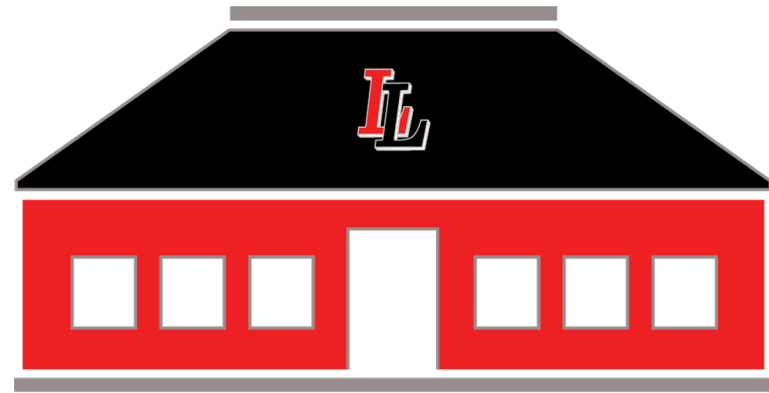
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**LAURIE TINSLEY**

Assistant Superintendent of Curriculum and Instruction

**MAY 23, 2022**

Board Meeting



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INDEPENDENT SCHOOL DISTRICT

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# LEARNING IN LOVEJOY

## 2022



# What is the purpose of professional development?

- Build capacity
- Align practices and philosophy
- Stay relevant
- Growth
- Increase competency
- Lifelong learners
- Calibration

Create an opportunity for Lovejoy staff to come **together** and **engage** in **learning** that focuses on the skills needed to improve their effectiveness in meeting learning and achievement for students.

Provide an opportunity for ALL staff to learn together and establish a common understanding of what is needed that results in our actions and decisions aligning to **LEARNING, COLLABORATION, RESULTS, RELATIONSHIPS** and **FUN**

# Learning in Lovejoy

## OBJECTIVES

Establish pathways of continuous improvement for ALL staff that are aligned to the **mission, vision** and **goals** of the district and campuses.

Create professional development choice for adult learners that allows them to focus on skills they believe is needed to best serve students.

# August 2 and 3

8:00 - 9:30	Keynote (Dr. Peter Noonan)
9:30 - 9:45	Break
9:45 - 10:45	<b>Breakout Session #1</b>
10:45 - 11:00	Break
11:00 - 12:00	<b>Breakout Session #2</b>
12:00 - 1:15	Lunch on your own
1:15 - 2:15	<b>Breakout Session #3</b>
2:15 - 2:30	Break
2:30 - 3:30	General Session (Aug 2 - Student Panel; Aug 3 - Bus/Prof Panel)

# August 4

8:00 - 9:30	Keynote (Dr. Peter Noonan)
9:30 - 9:45	Break
9:45 - 11:30	<b>Campus Breakouts</b> (Facilitated by Principals)
11:30 - 12:45	Lunch on your own
12:45 - 2:30	<b>Campus Breakouts</b> (Facilitated by Principals)
2:30 - 3:30	Closing General Session



THANK YOU

# Human Resources and Communications Update

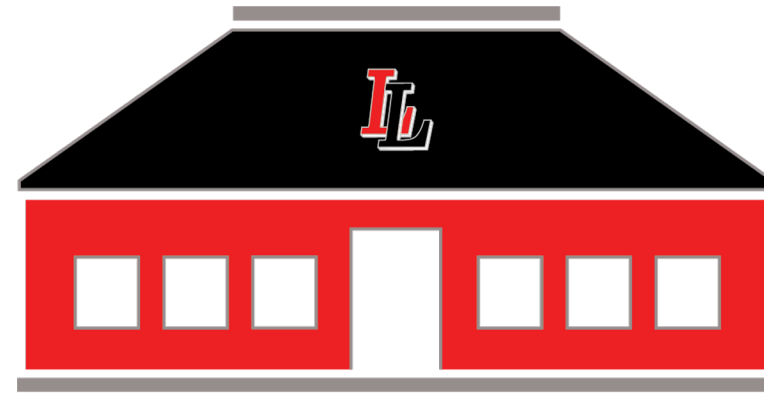
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**ANNA KOENIG**

Executive Director of Human Resources and  
Communications

**MAY 23, 2022**

Board Meeting



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# EMPLOYEE HEALTHCARE PREMIUMS



**LOVEJOY**  
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		TRS ActiveCare Plan PLAN NAME Primary (BlueCross)						
		Blue Cross Statewide Texas Only						
Staff 100	Employee Monthly Premium	On Plan Now	2021 Rate	2022 Rate	\$225 Employer Contribution applied		Rate Comparison	Rate Comparison
					2021	2022	Price decrease	Percentage decrease
	EE Only	73	\$ 417.00	\$ 410.00	\$ 192.00	\$ 185.00	\$ 7.00	-1.68%
	EE+Sp	1	\$ 1,176.00	\$ 1,157.00	\$ 951.00	\$ 932.00	\$ 19.00	-1.62%
	EE+Ch	22	\$ 751.00	\$ 738.00	\$ 526.00	\$ 513.00	\$ 13.00	-1.73%
	EE+Fm	4	\$ 1,405.00	\$ 1,384.00	\$ 1,180.00	\$ 1,159.00	\$ 21.00	-1.49%

# EMPLOYEE HEALTHCARE PREMIUMS

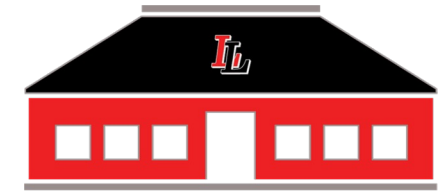


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ActiveCare Plan								
Primary +								
(BlueCross)								
Blue Cross Statewide Texas Only								
Staff 32		On Plan Now	2021/22 Rate	2022 /23 Rate	\$225 Employer Contribution applied		Rate Comparison	Rate Comparison
					2021/22	2022/23	price decrease	Percentage decrease
Employee Monthly Premium	EE Only	14	\$ 542.00	\$ 515.00	\$ 317.00	\$ 290.00	\$ 27.00	-4.98%
	EE+Sp	2	\$ 1,334.00	\$ 1,259.00	\$ 1,109.00	\$ 1,034.00	\$ 75.00	-5.62%
	EE+Ch	12	\$ 879.00	\$ 829.00	\$ 654.00	\$ 604.00	\$ 50.00	-5.69%
	EE+Fm	4	\$ 1,675.00	\$ 1,584.00	\$ 1,450.00	\$ 1,359.00	\$ 91.00	-5.43%



# EMPLOYEE HEALTHCARE PREMIUMS



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		TRS							
		ActiveCare Plan							
		ActiveCare 2							
		(BlueCross) (grandfathered)							
		Blue Cross Nationwide PPO							
Staff 8	On Plan Now	2021/22 Rate	2022/23 Rate	\$225 Employer Contribution applied		Rate Comparison	Rate Comparison		
				2021/22	2022/23			no price change	Percentage
Employee Monthly Premium	EE Only	3	\$ 1,013.00	\$ 1,013.00	\$ 788.00	\$ 788.00	\$ -	0.00%	
	EE+Sp	0	\$ 2,402.00	\$ 2,402.00	\$ 2,177.00	\$ 2,177.00	\$ -	0.00%	
	EE+Ch	4	\$ 1,507.00	\$ 1,507.00	\$ 1,282.00	\$ 1,282.00	\$ -	0.00%	
	EE+Fm	1	\$ 2,841.00	\$ 2,841.00	\$ 2,616.00	\$ 2,616.00	\$ -	0.00%	

# EMPLOYEE HEALTHCARE PREMIUMS



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		Baylor Scott & White HMO						
		Baylor Scott & White HMO						
		Scot & White HMO (North Central)						
Staff 9	Employee Monthly Premium	On Plan Now	2021/22 Rate	2022/23 Rate	\$225 Employer Contribution applied		Rate Comparison	Rate Comparison
					2021/22	2022/23	PRICE INCREASE	Percentage increase
	EE Only	4	\$ 542.48	\$ 543.35	\$ 317.48	\$ 318.35	\$ 0.87	0.16%
	EE+Sp	1	\$ 1,362.70	\$ 1,364.92	\$ 1,137.70	\$ 1,139.92	\$ 2.22	0.16%
	EE+Ch	4	\$ 872.16	\$ 873.57	\$ 647.16	\$ 648.57	\$ 1.41	0.16%
	EE+Fm	0	\$ 1,568.42	\$ 1,570.98	\$ 1,343.42	\$ 1,345.98	\$ 2.56	0.16%

Thank You

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# Student Services

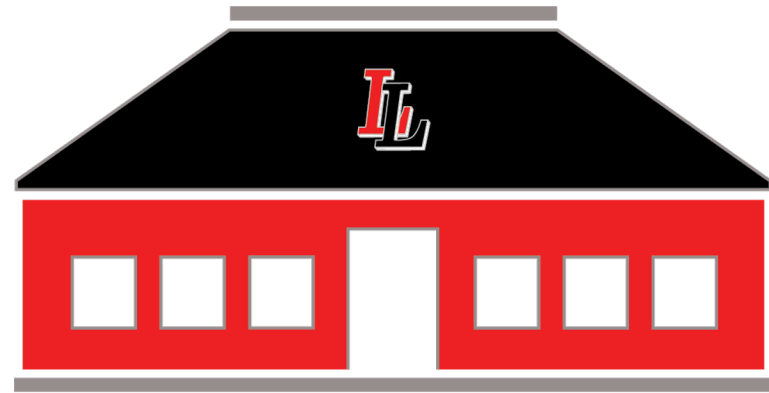
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**KEVIN PARKER**

Executive Director of Student Services

**May 23, 2022**

Regular Board Meeting



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# Student Services

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# Breakfast with Fairview Police Department

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- Sloan Creek hosted the Fairview Police Department for a breakfast on Wednesday, May 18



# Safety and Security Update

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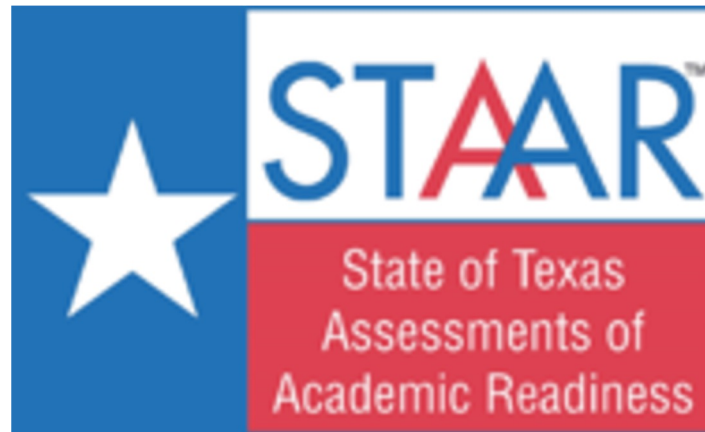
- Casey Littlefield-Head of Safety and Security



# State Testing

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- Testing has completed for the 2021-2022 school year
- Families will have access to scores on June 24 through the Texas Assessment family portal
- Communication will be coming from the district



# Fine Arts Signing Day

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- LHS Fine Arts Signing Day was held on Wednesday, May 18 in the LHS Auditorium



# LHS Senior Signing Day

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- Senior Signing Day was held on Friday, May 20 in the LHS Auditorium

# Update on Wrestling Program

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- Wrestling will remain in the Sloan Creek auxiliary gym.
- Initially, an exclusive space with mats on the gym floor full-time were parameters desired by our wrestling program.
- Administration recommends purchasing wrestling mats that are more light weight and easier to roll up.
- This solution avoids mats on a wood gym floor 24 hours a day as well as supports the safety and instructional needs of gym space for SCIS PE classes.



THANK YOU

# Special Education Update

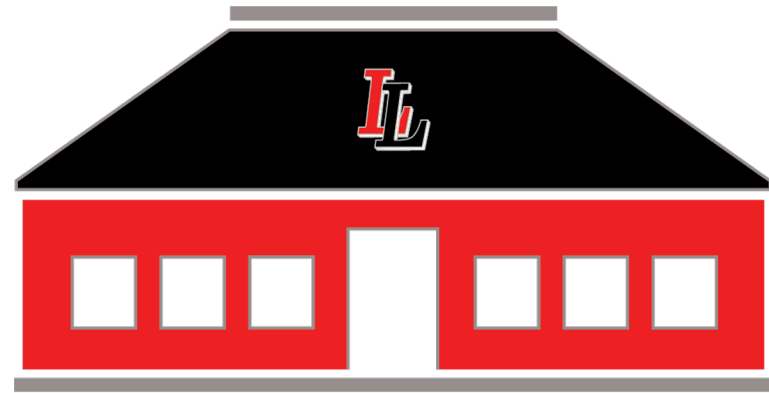
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**SANCY FULLER**

Executive Director of Special Education and  
Academic Support

**MAY 23, 2022**

Board Meeting



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# Special Olympics

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Track & Field Competitions (McKinney, Anna & Prosper)

Special Olympics Banquet – May 17<sup>th</sup>

# Special Olympics Banquet



# Parent & School Partnership



# Showcasing Skills



# Partnership with PALS





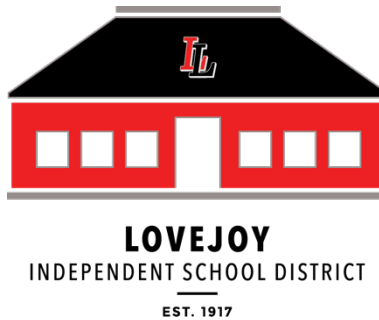
THANK YOU

30. **Superintendent's Report**

**Presenter:** Katie  
Kordel,  
Superintendent of  
Schools

31. **Public Comments Related to Non-Agenda Items**

**Presenter:** Kim  
Steiner, Coordinator  
of Community  
Engagement and  
Organizational  
Development /  
Executive Assistant  
to the Superintendent



# Public Comment Procedures

## Regular Meetings

### Submitting for Public Comment

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice.

Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting.

The Board will provide speakers that submit a public comment card on an agenda item the opportunity to speak prior to the Board's consideration of the item in the order in which they were received.

Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual gets one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items.

If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting.

The comments made by speakers at public comment reflect the opinions solely of the speaker and not the Board of Trustees as a governing body or the District.

### Order of Agenda and Limitations

The Board reserves the right to change the order of the agenda items on the notice of meeting and / or defer agenda items until a later date.

Each speaker will be provided up to three minutes to address the Board of Trustees unless more than 10 speakers sign up to speak, in which case, the presiding officer reserves the right to reduce the time allotted to each speaker to no less than one minute per speaker. (Board Policy BED (LOCAL)).

If at any time, in the opinion of the presiding officer, the individual speaker is attempting to address a non-agenda item in the agenda item public comment period, the presiding officer or designee may stop the speaker and defer the speaker's comments to the appropriate portion of the meeting.

Public comments relating to non-agenda items will be deferred until the end of the meeting if time permits, unless otherwise noted by the Board of Trustees.

### **Disruptive Behavior**

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement.

It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

Conduct defined by Texas Penal Code §42.01 and Board Policies BED (LEGAL) and BED (LOCAL).

Failure to yield the podium at the conclusion of the time allotted to a speaker at public comment constitutes a disruption and will be addressed accordingly.

Comments made to the Board of Trustees by meeting attendees and/or speakers outside of the designated public comment periods during a meeting constitute a disruption.

### **Board's Response to Public Comment**

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board shall not deliberate or decide regarding any subject that is not included on the agenda posted with notice of the meeting. The Board may also refer a speaker to a staff member in authority over the issue.

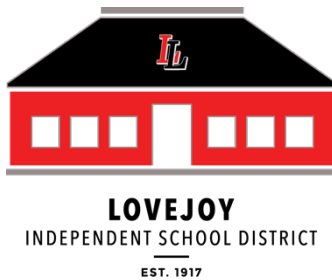
For specific complaints or concerns, speakers are encouraged to utilize the District's appropriate grievance procedures and policies set forth in Board Policies FNG (LOCAL), DGBA (LOCAL), and GF (LOCAL).

### **Special Meetings**

The procedures outlined herein apply to special called Board meetings. However, comments at special called Board meetings are limited to agenda items only.

### **Statement of Non-Discrimination**

The Board does not discriminate against speech on the basis of viewpoint.



## **School Board Public Comments Sign In May 23, 2022**

The Board of Trustees encourages public comment. All public comment at a meeting other than a regularly scheduled meeting should be limited to agenda items posted for the meeting. By signing up to provide public comment at a Board meeting, you are acknowledging and accepting the procedures for public comment available online at [lovejoyisd.net](http://lovejoyisd.net).

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice. Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting. Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual will have one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items. If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting. All speakers will be limited to no more than three minutes. The presiding officer reserves the right to reduce the number of minutes per speaker to no less than one minute per speaker in order to maintain effective meeting management. The speakers will be recognized in the order in which each person signs up. If there are more speakers than time allotted for public comment, the amount of time per speaker may be reduced, as determined appropriate by the Board of Trustees. If time does not allow for you to speak at public comment, the Board of Trustees may allot additional time for public comment or defer specific agenda items for review at a subsequent meeting in an effort to allow more public comment, as determined necessary by the Board. This public comment card will not be maintained from one meeting to the next and is only applicable to the meeting on the date in which it was submitted.

If you have a specific concern related to an employee of the District or a specific student issue, you are encouraged to utilize the District's grievance procedures provided in Board Policies DGBA (LOCAL), FNG (LOCAL), and GF (LOCAL) or applicable grievance process. Each grievance procedure allows for an individual to redress grievances with the Board of Trustees. All relevant policies are available online at [lovejoyisd.net](http://lovejoyisd.net).

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement. It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

The Board of Trustees appreciates your active participation in the school district.

**\*I wish to address the Board about an item appearing on the May 23, 2022 agenda.**

**I wish to speak about agenda item #\_\_\_\_\_ which is titled:**

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**\*I wish to participate in the open forum by speaking about the following topic:**

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**First and Last Name:**

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**Address:**

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**Phone:**

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**Organization (if applicable):**

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32. **Announcements**

**Presenter:** Barrett  
Owens, President

33. **Adjournment**

**Presenter:** Barrett  
Owens, President