



2022-2023

BUDGET

Union Public Schools Independent School District #9 Tulsa, OK 74133 www.unionps.org





Union Public Schools Independent School District #9 Tulsa, Oklahoma

Annual Budget

For the Fiscal Year Ending June 30, 2023

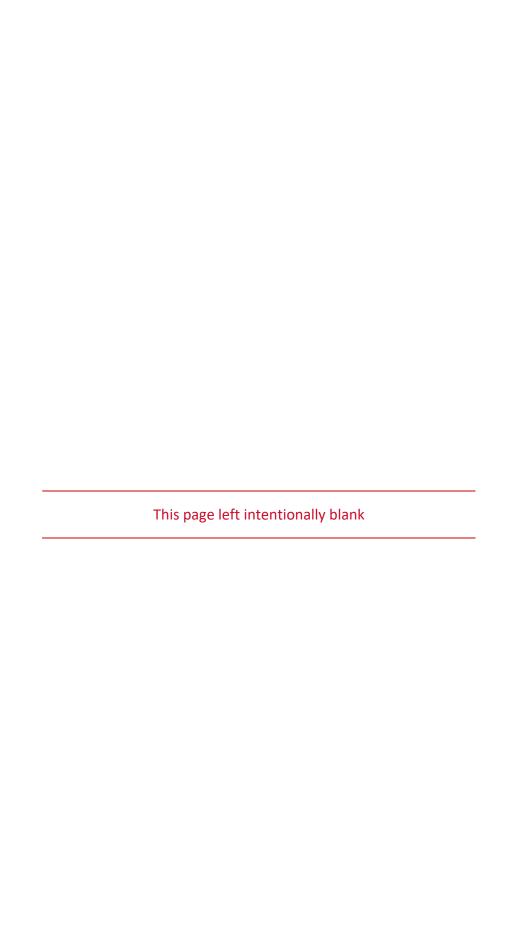
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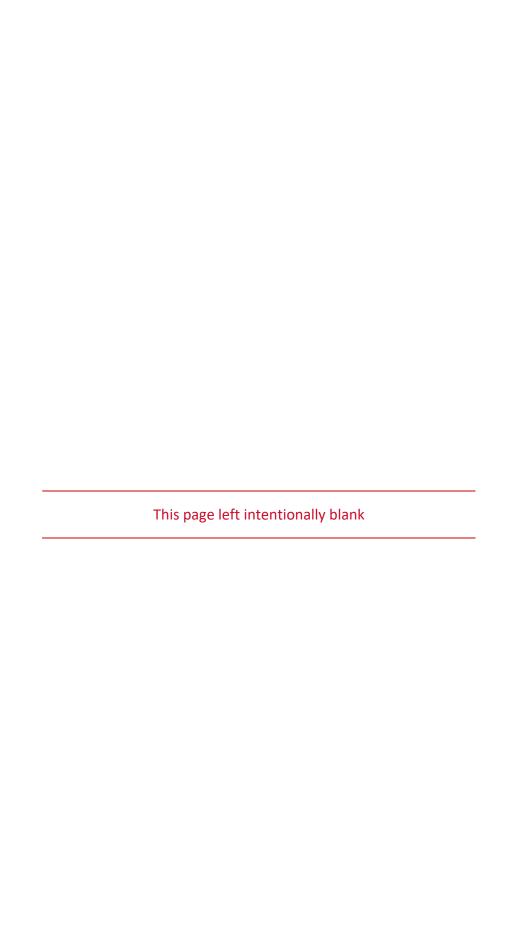
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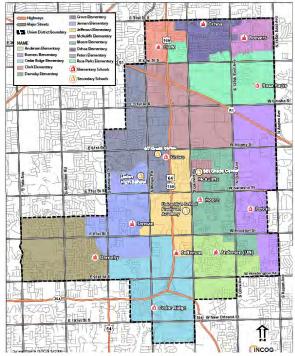


EXECUTIVE SUMMARY



Introduction

Union Public Schools, Independent District #9, Tulsa County, is a premier Oklahoma school district nationally recognized in each of its four strategic areas of emphasis: Early Childhood Education, Community Schools, STEM (Science, Technology, Engineering, & Math), and College/Career Readiness. Success in these areas is helping Union achieve its mission: To graduate 100% of our students, college and career ready.



Union's approximately 15,000 students, Pre-K through 12th grade, reside within a 28-square-mile boundary encompassing both southeast Tulsa and a portion of Broken Arrow. The school system is the heart of the community and serves as a unifying force. Its 19 schools include Rosa Parks Early Childhood Education Center (2008), 13 elementary schools: Andersen (1984), Boevers (1975), Cedar Ridge (1994), Clark (1977), Darnaby (1979), Grove (1974), Jarman (1991), Jefferson (2008), McAuliffe (1987), Moore (2000), Ochoa (2017), Peters (1978), and Rosa Parks (2006), and 5 secondary schools: 6/7th Grade Center (1993), 8th Grade Center (1982), Union High School Freshman Academy (1987), Union High School (1972), and Union Alternative Center (1979).

Parents choose Union for its all-around excellence—dynamic academic programs; award-winning athletics and fine arts; highly respected leaders; remarkable facilities; and organizational effectiveness.

Our Community Schools serve as a model to other districts nationwide. Businesses, community agencies, higher education, and faith-based partners provide extra support such as early childhood care, health and social services, out-of-school activities, family/community engagement, neighborhood development, and lifelong learning. The relationships Union has with its parents and community partners underscore the district motto: Together We Make A Difference!

Using what is considered the gold standard for STEM curriculum, Project Lead The Way (PLTW), Union was the first in the state, and among only a handful of districts nationwide, to offer STEM to students Pre-K through 12th grade.

arnaby Elementary has been designated a PLTW National Showcase School, often hosting educators from other districts eager to see the STEM philosophy in action. In addition to challenging advanced classes, Union offers a variety of Advanced Placement (AP) classes which allow students to earn college credit. In partnership with Tulsa Community College, Union is one of the first to pilot a unique concurrent enrollment program at the Union Collegiate Academy (UCA) on its High School campus, enabling qualifying students to earn both high school and college credits at the same time. In Fall 2017, Union Public Schools, with partner Tulsa Community College (TCC), launched an Early College High School pilot program. The first two cohorts of students – many of whom will be first-generation college students – have the opportunity to earn a high school diploma and an associate degree at the same time. This new program, now called EDGE (Earn a Degree Graduate Early), makes college more accessible and affordable for many. TCC faculty teach courses on-site at Union Collegiate Academy.

Students participating in Union Career Connect (UCC) gain valuable work experience during high school internships in areas such as Automotive Technology, Child Development, Manufacturing, Construction, Culinary Arts, Sports and Community Medicine, and Teaching. Many earn important certifications and, when they graduate, they are often hired by their mentoring companies.

Unlike many schools around the country, art, music, and physical education enrich the traditional curriculum at Union. Professionals in remedial reading, speech therapy, and special education are assigned to the schools, along with library media specialists, nurses, and counselors. Courses for gifted students are offered at all levels, as are programs for English Learners. Union is a strong and supportive community, consistently passing multi-year series bond issues that fund state-of-the-art buildings and equipment for its students.

When Union was founded in 1919, it combined several rural communities and had only four students in its graduating class. Today, it is the eighth-largest district in Oklahoma with a 2021-2022 enrollment of 15,011 PK-12 students. Even so, Union Public Schools continues the spirit, pride, and excellence early families and community leaders established more than a century ago. Those high expectations and impressive results have come to be known simply as "The Union Way." Union Public Schools is an independent school district within the state of Oklahoma. There is no relationship between the state, county, or city governments other than revenue sources. Therefore, the district has not identified any component units that should be included in the district's reporting entity. Charter schools are primary or secondary schools that receive public money but are not subject to the regulations that apply to other public schools. Under Oklahoma law, charter schools operate as a local education agency. Charter schools are funded through the state aid formula, just like public schools. This reduces the overall funding available to traditional public school districts in the state aid formula. There are 30 charter schools in the state of Oklahoma. None of them reside within the Union Public Schools boundaries.

Student Statistics

- In 2021-2022, Union's enrollment gained 52 students. With a 0.3% percent increase over the previous year, Union served 15,011 students 6,927 at the elementary level and 8,084 in grades 6-12.
- Districtwide, 7.386 students (49.2%) were female and 7.625 (50.8%) male.
- In terms of racial origin, 4.1% were American Indian/Alaska Native, 15.0% African American, 9.7% multi-racial, 0.2% Pacific Islander/ Hawaiian, 7.2% Asian, 24.8% Caucasian, and 39.0% of Hispanic ethnicity.
- There were 2,758 identified gifted students in grades 1-12, served by a variety of courses and programs.
- Of the graduating seniors in 2022 . . .
 - -338 took the ACT, with an average composite score of 20.43.
 - -944 took the SAT, with an average total score of 940.53
- 2,042 students (13.6%) were enrolled in special education.
- English Learner (EL) services were provided to 2,510 elementary and 1,730 secondary students; of these students, 197 became English-proficient and exited the program. Our diverse population spoke more than 60 different languages. An estimated 27% of Union students were classified as English Learners.
- Our Extended Day Program (EDP) served 689 students at 15 sites through December 2021. Second semester saw an average of 830 students due to a shortage of qualified applicants to serve the program. Hiring bonuses were implemented to help recruit new staff.
- The EDP Resource Room continued to supply sites with cooking activities, STEM projects, art activities and much more to enhance our curriculum.
- All EDP sites applied and received multiple grants through the Oklahoma Department of Human Services that were offered this past school year.
- Students receiving tribal assistance continued to grow this school year. We added five sites receiving Cherokee Nation Assistance,
 for a total of 12 sites. Five sites continued to receive Muscogee (Creek) assistance. The tribes require that a parent request childcare
 assistance through them before they will extend an agreement. As those requests come in, we immediately submit the paperwork for
 approval for any additional sites. We also accept DHS childcare assistance at all sites for those families that qualify.
- Fall and Spring Break camps were a success this year. We brought activities to the site including a pumpkin patch, a balloon animal artist, and a petting zoo. Summer Camp was our first time offering site field trips since COVID-19. Union's camp was full all summer long.

Student Diversity

Pacific Islander/ Hawaiin 0.2%

> American Indian/ Alaska Native 4.1%

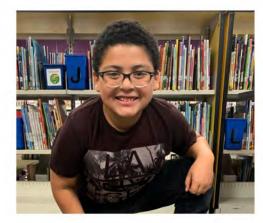
> > **Asian 7.2%**

Multi-racial 9.7%

African American 15.0%

Caucasian 24.8%

Hispanic 39.0%





Student Statistics

- Staff development opportunities for EDP staff were limited to online training events offered by DHS and the University of Oklahoma Center for Early Childhood Professional Development and the Tulsa Child Care Resource Center. Topics included Cherokee Cultural Training sponsored by Cherokee Nation; Resilient Caregivers: 'Bouncing Back' From Stress; Building and Maintaining Relationships in Out of-School Time Classrooms; Math & Science: Learning Through Discovery & Exploration and Enhancing Nature Play: Indoors & Out.
- CPR/First Aid training was offered in small groups in person. All training was approved
 for formal training credit through the University of Oklahoma Center for Early Childhood
 Development. Each staff member is required to be a member of the CECPD registry and
 take 20-30 hours of training annually.
- For more than 25 years, Union Public Schools has served the community with an adult basic education program to assist adults through GED/HiSET Preparation classes and/or English language learning for non-native English speakers. During the 2021-2022 school year, Union's Adult Basic Education (ABE) program enrolled approximately 1,200 students in these classes.



- Through partnerships with local Workforce Development offices and other community agencies, the Union Adult Learning Center (UALC) embraces the opportunity to serve students not only in Tulsa, but also in the neighboring communities of Claremore, Muskogee, Owasso, and Pryor. These partners include, but are not limited to, Community Action Project of Tulsa (CAP), Workforce Tulsa, Tulsa Technology Center, Tulsa Community College, Goodwill Industries, Salvation Army, Women in Recovery, Family and Children's Services, Rogers State University, Workforce Pryor, Workforce Muskogee, Muskogee Public Schools, Owasso Public Schools, Whirlpool Inc., and TRiO.
- The Pearson Vue Testing Center at UALC offers various certification testing for individuals including Teacher Certification testing and high school equivalency (HSE) testing. During the 2021-2022 school year, nearly 2,200 HiSet, GED and/or Pearson tests were given, with approximately 200 individuals earning their High School Equivalency diplomas.

Employee Statistics & Achievements

- Union employed 1,013 teachers, 893 support personnel, and 78 administrators. Of the district's 78 administrators, 91% had a master's
 degree or higher. Of the teaching and administrative staff, 41.4% held graduate-level degrees 433 with master's degrees and 19 with
 doctorates.
- Fifteen teachers held National Board Certification.
- The district welcomed 124 new teachers for the 2021-2022 school year.
- The ethnic diversity among the staff was 7% African American, 6% American Indian, 14% Hispanic, 3% Asian, and 70% Caucasian/other. our hundred and twenty-three were male and 1,545 females.
- Rebecka Peterson, a math teacher at Union High School, was named the 2021-2022 State Teacher of the Year. Tulsa County Commissioners also recognized her with a proclamation in her honor.
- Kelsey McAfee, 8th grade English teacher, was named District Teacher of the Year.
- Candyse Walker, child nutrition chef for Union Schools, was named Support Employee of the Year.
- Michael Lewis, 7th grade science teacher, received a \$10,000 grant from Fund for Teachers
 (FFT). With the grant he will research how the Hawaiian Islands' geological, geographical,
 and atmospheric conditions affect its supply of renewable and non-renewable resources.
 He will use this data to create inquiry learning that leads to students' understanding and
 application of modern scientific and engineering advances that simultaneously reduce
 carbon footprints and enhance local and global economies.
- Amanda Peregrina, district bilingual liaison for Union Public Schools, was appointed to the Tulsa City Human Rights Commission. She will advise the City of Tulsa on issues related to Spanish-speaking families and their needs.
- Jessica Hogaboom, lead counselor at Union, was the Spotlight Counselor of the Month through the Oklahoma State Department of Education in October.
- John Federline was named an assistant superintendent.
- Erika McGhee was named Union High School Theater Director.



Coach of the Year Honors

- Associate Athletic Director Steve Dunlap was inducted into the Oklahoma Coaches Association's 2022 Hall of Fame.
- Tyler Ashley Tennis Oklahoma Coaches Association Region 7 Coach of the Year
- Tim Dial Track Oklahoma Coaches Association Region 7 Coach of the Year
- Lynne Gorman Swim Oklahoma Coaches Association Region 7 Coach of the Year
- Joe Redmond Basketball Oklahoma Coaches Association Region 7 Coach of the Year
- Jonathon Sutmiller Junior High Oklahoma Coaches Association Region 7 Coach of the Vor
- Tamarah Danzy Cheer Oklahoma Coaches Association Region 7 Coach of the Year
- Tanner Bushyhead Golf Oklahoma Coaches Association Region 7 Coach of the Year
- Emily Barkley Athletic Director Oklahoma Coaches Association Region 7 Coach of the Year
- Emily Barkley Athletic Director Oklahoma Coaches Association Athletic Director of the Year
- Darin McAfee OWCA/NWCA Girls Coach of the Year
- High School Principal John Chargois was recognized with a Tomás Rivera Latinx Excellence in Education Hero Award, presented by The Greater Tulsa Area Hispanic/Latinx Affairs Commission.
- Superintendent Dr. Kirt Hartzler was appointed by State Superintendent of Education
 Joy Hofmeister to the State Concurrent Enrollment Task Force. The task force has been
 directed to study and make recommendations regarding current and future concurrent
 enrollment needs of the state and pathways for awarding degrees and certificates through
 concurrent enrollment.
- Superintendent Dr. Kirt Hartzler was a featured presenter at a national symposium April 23, in San Diego on the topic of how to close the graduation gap through "A Culture of Us." The talk was part of the national American Education Research Association education conference. The symposium focused on three public school districts that have equalized educational opportunities for all students.
- Superintendent Dr. Kirt Hartzler and Brittany Hamilton, Union's 2019-2020 Union Public Schools District Teacher of the Year, were honored by Oral Roberts University. They were recognized during a hooding ceremony at the Global Learning Center. Dr. Hartzler received the Dedication to Education Award from the ORU College of Education and Ms. Hamilton, a teacher at Andersen, was recognized as an ORU Outstanding College of Education Alumni after winning the Union District Teacher of Year in only her third year of teaching.
- The Association of School Business Officials International (ASBO) recognized Union Public Schools Independent District I-009 for excellence in budget presentation with the Meritorious Budget Award (MBA) for the 2021–2022 budget year. This is the second year in a row Union has won this honor.

Teaching & Learning

Early Childhood Education

- One hundred and ninety children participated in programs at the Rosa Parks Early Childhood Education Center. Districtwide, 693 four-year-olds enrolled in Pre-K classes.
- Oklahoma moved up three places to rank second in the country for Pre-K access for 4-year-olds, according to a report by the National Institute for Early Education Research (NIEER). While overall enrollment was down due to the pandemic, Oklahoma served 74% of eligible 4-year-old children and 16% of eligible 3-year-old children through public Pre-K and Head Start programs. In addition, Oklahoma was named a leader in policies to support standards for high-quality Pre-K education. Only 11 states met at least nine of the 10 benchmark categories, which include academic standards and staff professional development.
- "Oklahoma's Pre-K program has a history of excellence because our educators know academic success begins with a strong start in reading and math" said State Superintendent of Public Instruction Joy Hofmeister. "Oklahoma's preschool program has weathered the pandemic far better than many other states, and I'm proud of our educators who have stayed focused on our youngest students."
- Oklahoma is one of the few states requiring Pre-K teachers to hold a bachelor's degree with teaching certification, and it ensures them
 equal pay with other grade-level teachers. Pre-K teachers in Oklahoma also have the same professional development opportunities as
 other teachers at the state level. Oklahoma launched its Early Childhood Four-Year-Old Program in 1980 years ahead of the rest of the
 country. In 1998, Oklahoma became only the second state to offer Pre-K for all 4-year-olds, with 100% of school districts participating.

Schools

- All Union Elementary Schools were recognized as "Project Lead The Way" Distinguished Schools. PLTW recognizes Union Public schools for empowering their students to unlock their potential by developing the in-demand, real-world knowledge and skills necessary to thrive in life beyond the classroom.
- About 50 high school seniors from Union and surrounding districts participated in a mini summit hosted at Union High School by Black
 Men in White Coats to encourage more minority students to consider careers in medicine. The event included hands-on activities to
 reinforce skills used by health care professionals. Along with practicing CPR on dummies, putting personal protective equipment on as fast
 as possible and channeling MacGyver to make casts out of cardboard boxes and bubble wrap, one station used Styrofoam cups, orange
 juice, oranges and Ziploc bags to teach students how to safely break a pregnant woman's amniotic sac without injuring the fetus.



Teaching & Learning

- Oklahoma State Sens. David Rader (R-39) and John Haste (R-36) toured the Union High School Freshman Academy to learn about some of the school offerings. During the tour, the senators visited several classrooms and learned about Union's programs in building construction, early college high school, Newcomers, Modern Classrooms and finished with a question-and-answer session.
- Representatives with the Modern Classroom Project (MCP) toured three sites UFA, 6/7th Grade Center, and Union High School to see how some teachers are using its strategies to teach students. In the MCP model, educators implement more self-paced, mastery-based instructional models through technology to reach students, recognizing that students learn at different rates. Under this strategy, teacher can spend more time helping individual students while allowing other students to continue on to the next assignment.
- Ellen Ochoa Elementary was awarded a five-year 21st Century Community Learning Center Grant in the amount of \$1.38 million, as one of 20 new recipients in Oklahoma. The recipients join 36 returning grantees for a total federally-funded allocation of \$13.5 million this year, according to the Oklahoma State Department of Education
- Two hundred-fifty Special Needs students participated in the "Choose to Include" event at the UMAC. The event featured a number of games around the UMAC, with families having lunch afterwards.
- In its first year partnering with Union Public Schools, Reading Partners Tulsa was able to start four new reading centers at Roy Clark, Grove, McAuliffe, and Peters Elementaries. Throughout the year, they worked collaboratively with teachers and reading specialists to make sure students were referred, while promoting volunteer opportunities with their own partners to ensure students get the support they need. Each of these four reading centers has enrolled more than 30 students, and at the midyear point more than 70 percent of Union students enrolled in Reading Partners had met their midyear Primary Literacy Growth Goals and mastered the foundational skills of reading. Union also received a partnership award from Reading Partners "Valued Volunteer for Data Drives Decisions."

Community Schools

Union uses the Community Schools model to equalize the playing field for students and families by removing barriers to learning and by providing access to basic needs and layered supports.

During the 2021-2022 school year, Union's eight full-service community schools partnered with over 100 community organizations to support students, families, and teachers. A community school coordinator at each school oversees delivery of services and coordinates partnerships with local agencies to provide comprehensive academic, social, and health supports for students and families. Schools serve as hubs for programming and connect students and families to resources they need. Offering these opportunities at the school creates an environment where students and families feel safe, supported, and engaged.

Out-of-School-Time Program

Union collaborates with providers and teachers to offer a diverse portfolio of academic and enrichment programs for students in kindergarten through fifth grade. Programs are offered throughout the school year and summer. Students receive a healthy snack, opportunity to complete homework, access to enrichment programs, and transportation home. Union's afterschool programs support the development of social and emotional competencies and 21st century skills, both of which help students navigate personal and professional environments. Afterschool programs increase student access to experts in various professional fields and help build competencies that prepare students to be successful in their education and future careers. This goal is closely aligned with the district's mission of "100% graduation, college and career-ready."

During the 2020-2021 school year:

- 2,133 students participated in afterschool programs at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks elementary schools
- 228 students participated in summer enrichment camps such as Sports Camp, Camp T-Square, Ahha Creative Camp, Camp Loughridge, and YMCA
- 60 STEM programs
- 85 academic and tutoring programs
- 52 health and wellness programs
- 42 youth development/leadership programs
- 24 fine arts programs

Impact of afterschool programs:

Afterschool programs were successful in supporting and building 21st Century Skills for students who participated. Students responded favorably to the statement: "After-school programs helped me ..."

- Become a better leader 71%
- Get better at doing my best 78%
- Work better with others 77%
- Think more about others before I act or speak 63%
- Become a better problem-solver 68%

As a result of participating in afterschool programs, students also reported favorably to:

- Being more excited about coming to school- 76%
- Getting to try new things 88%
- Doing things they did not think they could do before- 74%
- Starting to think about what they want to do when they grow up- 64%
- Learning about STEM- 67%
- Being more interested in taking STEM classes when they are older- 63%
- $\bullet~$ Being able to see themselves in a job within the STEM field– 62%
- Understanding how STEM can help their communities 62%



Teaching & Learning

Early Childhood Programs

Tulsa City-County Library's Youth Services Department distributed 3,792 books to 474 pre-kindergarten students in 22 classrooms at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks elementary schools. This project is funded by the Krueger Charitable Foundation through the Tulsa Library Trust.

- One hundred twenty-seven students received books written in Spanish and 347 students received books written in English.
- Twenty-two classroom teachers and eight school libraries also received monthly copies of books distributed to the children.
- Twenty-one families participated in Baby Book Club.
- Two hundred-thirty students attended Pre-K Camp, which helps incoming students get ready and excited for Pre-K. This program is supported by Union Schools Education oundation.

Parent and Family Engagement

- There were nearly 140 combined opportunities for parent and family engagement at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks.
- The combined Parent-Teacher Conference participation rate was 91.6%.

Basic Needs

Union is committed to ensuring equity for all students. External factors such as food insecurity and access to healthcare can impact a child's ability to learn. Community schools at Union connect students and families to resources.

- Assistance League of Tulsa's signature program, Operation School Bell, provided 450 students with new clothing, shoes, and hygiene kits
- The Food for Kids Backpack Program provided 384 food-insecure students with food every weekend
- Union partnered with James Mission and other faith-based partners to distribute holiday presents to 700 students
- One hundred fifty-eight families received meal assistance during the holidays
- Students and families have access to two school-based health clinics (one at Rosa Parks and another at Ochoa Elementary)
- Over 3,800 students received free vision screenings through Vizavance
- Over 2,000 students received free hearing screenings through the University of Tulsa
- In partnership with Harrel Eye Care, the district provided 14 vouchers for free eye exams and glasses to students without them

Community Partner Appreciation Breakfast

 200 guests attended Union's annual Community Partner Appreciation Breakfast. The featured guest speaker was Oklahoma State Teacher of the Year, Rebecka Peterson. Union's Child Nutrition Department catered the breakfast. Union orchestra and theater students provided entertainment.

STEM (Science, Technology, Engineering, Math) Curriculum

- All 13 of Union's elementary schools were recognized at Project Lead the Way's Distinguished School Launch Program for 2021-2022
- Robotics continues to grow at Union, beginning with several FIRST Lego League groups at the elementary level. The Bazinga Project and Project Agnizab for grades 8-12 are aimed primarily at middle school students, creating our FIRST Tech Challenge robotics team. Both compete to solve real-world problems using STEM and problem-solving skills, learning to work together as a team. UBotics, Union's High School Robotics Team for grades 9-12, comes together to design, program, and build a robot that meets specific criteria to accomplish tasks in FIRST Robotics Competitions.
- STEM course offerings were expanded for the 2022-2023 school year. In the 6th and 7th grade, components were added to all three STEM pathways: engineering, computer science, and biomedical. Also, Flight & Space has been added as a new engineering course for the 7th grade.

College/Career Readiness

- One thousand forty-four students graduated in the Class of 2022.
- Seniors of The Year were: Rigoberto Gonzalez, Jr., and Destiny Reyes.
- Senior Meghana Venkatesha was named an Academic All-State Student by the Oklahoma Foundation for Excellence.
- For ten consecutive years, Union Public Schools has been recognized by the Oklahoma State Regents for Higher Education as the Oklahoma's Promise 2021 State 6A Champion for having 191 seniors from the class of 2021 qualify for the Oklahoma's Promise Scholarship.
- Eleven seniors were named National Merit Semifinalists (2021-2022) and all went on to become National Merit Finalists: Ashwin Chandrasekar, Tammy Dao, Annelise Huynh, Fraz Javed, Ariana Kim, Duy Nguyen, Julie Phung, Honor Plumlee, Reeya Ramasamy, Meghana Venkatesha, and Jacob Wise.
- Seniors Eduardo Barreda and Jacob Griffiths were recognized as Commended Students as part of the 2022 National Merit Scholarship Program.



Teaching & Learning

- Twenty-six students completed more than 200 hours of community service during their four years of high school, earning the distinction of a Community Service Graduate: Ashwin Chandrasekar, Teresa Dan, Tammy Dao, Rigoberto Gonzalez Jr., Bryson Head, Jason Hicks, Annelise Huynh, Shaariq Iqbal, Ankit Jallipalli, Fraz Javed, Chandini Kanderi, Sungwon Lee, Afton Locker, Duy Nguyen Hoang, Rohit Nikam, Lilu Padilla Milanez, Khushi Parekh, Julie Phung, Honor Plumlee, Reeya Ramasamy, Viviana Rodriguez, Alexander Rossow, Mahnoor Saeed, Chaudhry Sher, Meghana Venkatesha, and Olamide Yinusa.
- The 2021 Distinguished Graduates for outstanding academic achievement and service to school and community are: SK Ahmed, Ashwin Chandrasekar, Aaralyn Christie, Teresa Dan, Tammy Dao, Hou Haokip, Annelise Huynh, Shaariq Iqbal, Laybah Iqbal, Chandini Kanderi, Ariana Kim, Jennifer Le, Sungwon Lee, Nikhil Mathew, Duy Nguyen Hoang, Rohit Nikam, Jett Ors, Jacob Osifeso, Khushi Parekh, Alexander Passoni Torres, Julie Phung, Honor Plumlee, Reeya Ramasamy, Destiny Reyes, Chaudhry Sher, Jaila Smith, Emma Thomas, Vincent Tran, Hannah Varickappallil, Meghana Venkatesha, Kelly Vu, and Olamide Yinusa.
- Ten High School students were named National Hispanic Recognition Program Scholars: Daniel Flores, Destiny Reyes, Eduardo Barreda, Eduardo Perez, Fernando Gaona, Gonzalo Barreda, Isabelle Trevino, Shane Houtmann-Harper, Sianna Dunn, and Ximena Maya Trevizo.
- Three High School students were named National African American Recognition Program Scholars: Destiny Reyes, Olamide Yinusa and Raelenn Muldrow.
- Claire Bagett of Union High School was named a National Indigenous Recognition Program Scholar.
- Twenty-seven seniors earned Valedictorian status by ranking in the top 1% of their class as determined by their weighted grade point average, and eighteen were named Salutatorians, the top 2%.
- Sixty-five students were named Academic Scholars in 2021-2022.
- Since its inception in 2014, Union Career Connect has garnered more than 1,450 nationally recognized certifications for 435 students in fields which include, but are not limited to: Manufacturing, Automotive, Informational Technology, Culinary, Early Childhood Education, Law Enforcement, and Construction.



- In 2021-2022, twenty-three Advanced Placement (AP) courses were provided, and 307 students took a total of 566 exams. Two hundred thirty-five students (76%) earned a score of "3" or higher. Ninety-three students received AP Scholar recognition with an average score of 3.69. Of the 93 AP Scholars, 23 students earned National AP Scholar with Distinction recognition with an average test score of 4.17 on five or more exams.
- Students attending college classes offered at the Union Collegiate Academy (UCA) through a dual-credit partnership with Tulsa Community College have earned 21,231 credits since the program began in 2010.
- The EDGE (Earn a Degree, Graduate Early) program, one of the first in the state of Oklahoma in partnership with Tulsa Community College has 188 students enrolled. There are currently 35 seniors who have earned 30-38 hours of college credit, 45 juniors who have earned up to 9 hours of college credit, 46 sophomores who are working on their first 6 hours of college credit, and 62 freshmen who are learning what it takes to be a college student in high school. Each student enrolled in EDGE has the opportunity to earn an associate degree by the time he/she graduates from high school. Forty-seven students have earned an associate degree in the first two graduating cohorts.
- Thirty-one Union seniors in the second cohort of the EDGE program graduated with both an associate degree and their high school diploma: Naomi Adeolu, Senitha Adikaram, Sk Irfan Uddin Ahmed, Anayiah Carr, Omar Carreno, Cassie Cussen, Nychelle Grayson, Hou (Sam) Haokip, Erin Hillhouse, Kaiden Ivey, Ghazal Khan, Josue King, Madison LaPointe, Alexis LeClair, Adrian Marquez Trevizo, Keirsten Metcalf, Lauren Meyer, Rohit Nikam, Eduardo Perez, Diana Pineda, Audrey Roemerman, Kathleen Salas Roldan, Joseph Terrell, Michael Thompson, Vivian Torres, Isabelle Trevino, Angie Vasquez, Ricardo Velez, Raiya Washington, Derek Yang, and Mistura Yinusa.
- Beyond U Senior Conference was held in September at Oklahoma State University-Tulsa. The one-day event provides seniors the opportunity to attend breakout sessions of their choosing on a variety of topics related to college, careers, and successful "adulting."
- Union High School students Ana Medina, Lilu Padilla, Michelle Escobedo, and Rigoberto Gonzalez were honored as scholars at the Tomás Rivera Latinx Excellence in Education Awards. This year's theme was "Education Empowers You" and focused on the importance of education as a pillar to success and personal growth. The scholar category is described as Latinx students in their junior or senior year of high school with a grade-point average of 3.0 or higher, with 90-percent attendance in the first semester of their senior year and who have demonstrated exceptional leadership in extracurricular activities both in school and in the community.
- Union Virtual saw a significant drop in students choosing virtual school during the 2021-2022 School Year, one year after the height of the pandemic. Participation dropped to about 450 students from a high of almost 3,500 students in 2020-2021. All secondary students were moved to the Canvas platform instead of Edgenuity, using the content we purchased from Flexpoint (formerly Florida Virtual). The district utilized our own teachers who taught both in person and virtual classes. In elementary, federal ESSER funds were used to purchase instructional services from Edgenuity. For this program, Edgenuity provided the teaching staff while Blake Martin, our elementary virtual coordinator, facilitated parent communication and monitored student progress within the program.



- Union hosted an informal "topping out" ceremony to celebrate placing the highest beam, signed by UHS band students, in the Fine Arts/band building that will cap the north end of Union's new football stadium.
- Overwhelmingly, students voted in favor of Redhawks as the choice for the district's new
 mascot, with 80.7 percent of students in grades 6-12 voting decisively for the red-winged
 predator versus 19.3 percent for the bison mascot. When fourth and fifth grade student votes
 were included, the Redhawks received 72.5 percent of the vote, and the bison 27.5 percent. On
 Nov. 8, 2021, Union's Board of Education voted unanimously to approve the new Redhawks
 mascot.
- Union students voted decisively in favor of the proposed Redhawks logo designed by student Caiden Morales, a junior at Union High School and Union "lifer" who has been at the district since Pre-K at Peters Elementary. The Board of Education followed suit, unanimously approving the design. "I am really proud of the work that has been done to take us in this new direction as the Union Redhawks," said Superintendent Dr. Kirt Hartzler. "This stellar design by one of our own students will enable us to soar into the future with a mascot of which we can all be proud. I think it does a great job of capturing Union's spirit of fierceness, while aspiring to excellence in all that we do. GO REDHAWKS!"
- Union Public Schools' Bikes for Kids program provided a hands-on chance for some of its students to use their classroom lessons while helping their community. After taking 2020 off due to COVID-19, Union Public Schools' automotive and manufacturing students once again fixed up gently used donated bicycles that will go to elementary students in need.
- Seniors Duy Nguyen Hoang and Reeya Ramasamy were named Mr. and Miss Union for Union High School. Being named Mr. and Miss Union is considered the highest honor a student can receive at Union High School.
- As part of the annual Senior Walk, nearly 600 seniors boarded buses and returned to a previous school they had attended. There, they reunite with past teachers and encourage younger students to continue learning so they, too, can graduate one day.
- High School students participated in the "Breaking Down Walls" program at the UMAC. The program seeks to bring students closer together as part of the High School's effort to foster an atmosphere of understanding and acceptance. Breaking Down the Walls is a powerful, interactive program that creates a unique environment of self-reflection and community building. By working with a cross-section of their peers, students learn they are part of a community that needs each other to be fully successful. The Breaking Down Walls program is a unique opportunity for students and staff to connect, share stories, and realize "it's hard to hate someone whose story you know."

Fine Arts Achievements

- Union High School students Caleb Barrows and Destiny Reyes each received a 2022 State Superintendent's Award for Arts Excellence in instrumental music.
- UHS Senior Honor Plumlee placed 1st in photography and 2nd place in sculpture in the Broken Arrow Rose Art Festival
- Karen Sullivan, elementary music teacher, was named Darnaby Teacher of the Year
- 10 students named as OkMEA all-state musicians (band, orchestra, and choir)
- Cast of the All-School Musical "Freaky Friday" persevered through a one week delay due to a February snowstorm to present three spirited shows for receptive and celebratory audiences
- Middle School Musical "Frozen" performed two shows to sold-out audiences.
- Many students qualified to participate in the OSSAA State Solo & Ensemble Festival held at Oklahoma State University, with band and orchestra earning a total of 45 superior ratings
- Spring contest trips resumed after several years off with middle and high school ensembles visiting Colorado Springs, Colo.; Branson and St. Louis, Mo.; Dallas, Texas; and numerous locations within Oklahoma
- Union Winter Guard won several WGPO shows during their competitive season as well as participating at WGI Nationals in Dayton, Ohio, earning a position in the Semi-Finals competition
- High School Theater hosted and won many individual and group awards at their One-Act Play Competition in October
- Construction continued on the new band building with expected completion over the summer.
- Union continued its partnership with Tulsa Symphony Orchestra, providing musical interaction for students at Rosa Parks Early Childhood Center
- The Carnegie Hall Link-Up Program served 4th grade students throughout the district.
 In May, the Tulsa Symphony Orchestra performed in-person at the Tulsa Performing Arts Center as part of this initiative.



- Forty-two Union High School band students made the All-Region Honor Band
- Speech and debate students qualified to compete in the National Tournament hosted in June in Louisville, Ky.
- The YouthArts Visual Art Show resumed after a two-year hiatus with record crowds and an increase in the number of student artists being featured
- The Renegade Regiment, Union's marching band, returned to competition at the Bands of America St. Louis Super Regional earning a spot in the finals competition
- The Renegade Regiment made its second appearance in the Macy's Thanksgiving Day Parade. The students performed before an estimated 3 million spectators in NYC as well as over 50 million on television. The group also hosted a special concert in Central Park.

Student Engagement

Approximate number of students participating in fine arts (2020-2021)

- Every K-5 student participated in Music & Art: 6,298
- Visual Art (Grades 6-12): 1,763
- Band (Grades 6-12): 890
- Drama (Grades 6-12): 569
- Orchestra (Grades 6-12): 479
- Speech/Debate (Grades 7-12): 91
- Vocal Music (Grades 6-12): 452
- Total: Approximately 10,542 students



Athletic Achievement

- Union Public Schools' Athletic Department was the recipient of the National Athletic Trainers' Association (NATA) Safe Sports School Award. The award champions safety and recognizes secondary schools that have met the recommended standards to improve safety in sports. The award reinforces the importance of providing the best level of care, injury prevention, and treatment.
- Stephanie Pereff made Union history as the first female to kick and score for Union Football.

OCA All-State Athletes

- Hudson Birch, baseball
- Jadyn McNealy, baseball
- T.K. Pitts, girls basketball
- · Keirsten Metcalf, cheer
- Tywana Lark, dance
- Antonio Smith, football
- Gabe Ford, football
- Jaycee Foor, slow-pitch softball
- Makenzie Malham, girls soccer
- Alleysia Jiles, girls soccer
- Abigail McMahon, swimming
- Trenton vonHartitzsch, swimming
- Savanna Rogers, girls tennis
- Ashley Pacilio, girls tennis
- Ashwin Chandrasekar, boys tennis
- Nolan Hance, boys tennis
- Tierney Jackson, volleyball
- · Noah Smith, boys wrestling

Oklahoma Baseball Coaches Association All-State

- Hudson Birch
- Jadyn McNealy

Oklahoma Girls Basketball Coaches Association Large East All-State

- TK Pitts
- Sydni Smith

Oklahoma Football Coaches Association All-Star By Class

- Jackson Jennings
- Gabe Ford

Individual Awards

- Makenzie Malham, Oklahoma NIAAA Scholarship/Essay Award Winner
- Jayden Rowe, 2021-2022 Gatorade Oklahoma Track & Field Athlete of the Year
- TK Pitts, FVC Player of the Year and Defensive Player of the Year
- All-World Girls Basketball Player of the Year TK Pitts
- All-World Boys Swimmer of the Year Trenton vonHartitzsch
- All-World Girls Wrestler of the Year Kali Hayden
- All-World Girls Scholar Athlete of the Year Makenzie Malham
- All-World Swimmer of the Year- Honorable Mention Bryce LaFollette
- All-World Second Team Member Abigail McMahon
- National Merit Finalist Honor Plumlee
- National Merit Finalist Reeya Ramasamy
- National Merit Finalist Ashwin Chandrasekar

OSSAA Academic Awards

- Soccer (girls), Academic Achievement Award, cumulative GPA of 3.25 or above
- Swimming (girls), Academic Achievement Award, cumulative GPA of 3.25 or above
- Swimming (boys), Academic Achievement Award, cumulative GPA of 3.25 or above
- Tennis (boys), Academic Achievement Award, cumulative GPA of 3.25 or above
- Tennis (girls), Academic Achievement Award, cumulative GPA of 3.25 or above

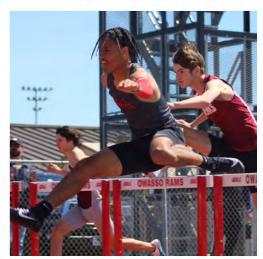


OSSAA State Team Finishes

- Girls Wrestling State Champs
- Girls Basketball State Runner-Up
- Boys Track State Runner-Up
- Girls Track 4th place
- Boys Tennis 3rd place
- Girls Tennis 6th place
- Girls Soccer State Semi-Finalist
- Boys Soccer State Quarterfinalist
- Baseball Regional Runner-Up
- Football State Runner-Up
- Highsteppers Contest of Champions Nationals Runner-Up National Champions Kick
- Pom 4th place at Nationals
- Cheer 4th place at Nationals

Individual State Runner-Ups or Champions

- 4x100 Relay Brannon, Rowe, Banks, Thompson State Runner-Up
- 4x200 Relay Brannon, Thompson, Brown, Banks State Runner-Up
- 4x400 Relay Gothard, Rowe, Brown, Martin State Runner-Up
- 100m Dash Jayden Rowe State Champ
- 200m Dash Jayden Rowe State Champ
- 200m Dash Sidney Smith State Runner-Up
- 100m Hurdles Kendall Hicks State Runner-Up
- 330m Hurdles Kendall Hicks State Runner-Up
- Shot Put Amiyah Norwood State Champ
- Shot Put Gabe Ford State Champ
- Discus Gabe Ford State Runner-Up
- High Jump Tierney Jackson State Runner-Up
- 100m Dash Set a school record KayVeonna Jackson
- Girls Wrestling Azreal Smith State Runner-Up
- Girls Wrestling Chanelle Alburg State Runner-Up
- Girls Wrestling Kali Hayden State Champ
- 100-yard Breaststroke Trenton vonHartitzsch State Champ
- 100-yard Freestyle Trenton vonHartitzsch State Champ



Collegiate Signings

Baseball

- Hudson Birch, Carl Albert State College, Poteau, Okla.
- Canyon Keller, Northeastern State University, Tahlequah, Okla.
- Jadyn McNealy, Cowley College, Arkansas City, Kan.
- Preston Petty, Northeastern State University, Tahlequah, Okla.

Basketball- Girls

- Desiree Marshall-Penny, Ottawa University, Ottawa, Kan.
- Takayla "TK" Pitts, Southern Methodist University, Dallas, Texas

Esports

 Brandon Reed, Rogers State College, Claremore, Okla.

- Royaughn Banks, Abilene Christian University, Abilene, Texas
- Makhai Belt, University of Central Oklahoma Edmond, Okla.
- Tyler Cowan, University of Central Oklahoma Edmond, Okla.
- · Jackson Jennings, Ouachita Baptist University Arkadelphia, Ark.
- · Jayden Rowe, University of Oklahoma Norman, Okla.
- · Da'Monn Sanders, Northeastern State University Tahlequah, Okla.
- Junior Smith, University of Central Oklahoma Edmond, Okla.
- Will Thomas, New Mexico State University Las Cruces, N.M.

Collegiate Signings

Golf

 Cierra Tunley, Sterling College Sterling, Kan.

Soccei

- Raquel Fanelli, Oklahoma Christian University Edmond, Okla.
- Allieysia Jiles, University of the Ozarks Clarksville, Ark.
- Makenzie Malham, University of Arkansas Fayetteville, Ark.
- Stephenie Pereff, University of Texas at El Paso El Paso, Texas
- Hailey Stage, Northern Oklahoma College Tonkawa, Okla.

Softbal

- Jaycee Foor, Northern Oklahoma College Enid, Okla.
- Sydney Owens, Carl Albert State College Poteau, Okla.

Swim

- Abigail McMahon, Ouachita Baptist University Arkadelphia, Ark.
- Trenton VonHartitzsch, New York University New York City, N.Y.

Track

- R.J. Brown, Pittsburg State University Pittsburg, Kan
- Kyndall Hicks, Oklahoma Baptist University Shawnee, Okla.

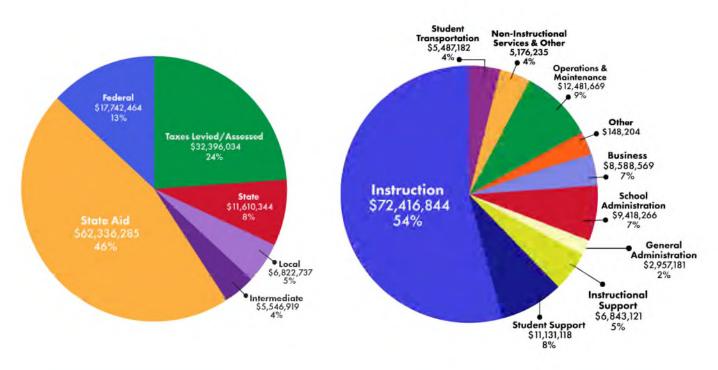
Volleybal

- Tierney Jackson, West Virginia University Morgantown, W.Va.
- Maddi LaPointe, Pittsburg State University Pittsburg, Kan.

Financial Highlights

FY 2021-22 Revenues and Expenditures for the General Fund:

- For FY 2021-22, the General Fund (the District's main operating fund), reported revenues of \$136,454,784 and expenditures of \$134.648,388.
- Foundation (Formula) State Aid, the district's single largest source of operating revenue, was \$49,265,144.
- Ad Valorem revenues of \$32,396,034 were received in the General Fund based on the district's NAV (Net Assessed Valuation) of \$911.194.842.
- Total bonded indebtedness as of June 30, 2022, was \$96,009,625 (principal and interest). Union maintains an excellent bond rating of AA+ from Standard & Poors.



Financial Highlights

Finance Division Highlights:

 Ms. Becky Byers, CPA, Ms. Jessica Wright, CPA, and Mr. Kurt Frentzel have each received the School Finance and Operations (SFO) certification from the Association of School Business Officials International. Only four individuals in the state of Oklahoma have earned this honor.

The Treasury, Budget, and Financial Reporting Department:

- The Certificate of Achievement for Excellence in Financial Reporting, the top recognition in governmental accounting and financial reporting, was awarded to the Finance Division by the Government Finance Officers Association (GFOA) of the United States and Canada. The district has received the award every year since 1992.
- Union also earned the Certificate of Excellence in Financial Reporting from the Association of School Business Officials International (ASBO), the highest recognition for a school district offered by ASBO. They have received the award every year since 1991.
- The Association of School Business Officials International (ASBO) recognized Union Public Schools for excellence in budget presentation with the Meritorious Budget Award (MBA) for excellence in budget presentation.

The Accounting Department:

- 6,245 purchase orders totaling \$74,435,940 were processed in 2021-2022. 6,900 payments (paper checks and electronic payments) were processed totaling \$51,723,338.
- The District expanded the use of electronic payments for goods and services this last fiscal year, increasing total electronic payments from 26% at the beginning of the year to 43% at year-end.
- In late 2021, the District began implementing a purchase card (P-Card) program. As the number of suppliers and service providers who will accept a District purchase order declines, the P-Card allows the District to maintain diversity of supply chain vendors while expediting the purchasing process. Use of the P-Card for certain travel expenses reduces the out-of-pocket expenses incurred by staff members when on business travel. P-Cards allow more controls and limitations of use than a typical credit card, have no monthly fees, and offer rebates on usage, making P-cards a valuable tool for effectively managing District expenses.

The Purchasing & Supply Management Department:

- Purchased and launched a web-hosted eProcurement sourcing and contract management solution (electronic bidding and contracting)
- Contracts, MOUs & Participating Addenda reviewed and processed: 430
- Solicitations (RFQs, RFPs, IFBs) issued: 103
- District wide quotes: 650
- School & department items distributed: 33,140
- Total deliveries: 3,235
- Surplus items picked up: 4,549
- Inter-school mail deliveries: 5,324
- Teacher and event materials moved: 4,639
- Total items distributed, picked up and moved: 154,189
- Food & supplies items distributed: 111,861
- Food & supply deliveries: 1,398
- Surplus auctions: 242
- Surplus auction revenue: \$43,214

The Federal Programs Department reported the following for FY 2021-22:

Total Federal spent in FY21:
 Total Federal spent in FY22:
 ESSER spending outside of IDEA spent in FY22:
 ESSER spending of IDEA spent in FY22:
 Total ESSER of all grants spent in FY22:
 Mini grant expenditures FY22:
 \$ 18,872,197.22
 \$ 17,972,243.67
 \$ 8,811,705.86
 \$ 148,587.44
 \$ 8,960,293.30
 \$ 2,420,475.76

The Human Resources Department:

- Participated in 21 job fairs and recruited teachers and staff through 54 colleges and universities in Oklahoma and surrounding states.
- Provided 86 sign-on bonuses to new hires through various grants.
- Provided tuition assistance to over 100 staff members working on undergraduate or graduate degrees.
- Hosted 81 student teachers across the district, helping them develop their skills and complete their college requirements.
- Granted stipends to 92 teachers who achieved their ESL (English as a second language) certification.

Operations

Department Statistics

- Transportation More than 7,600 students rode the bus on a regular basis during the 2021-22 school year. Our route buses completed 346 routes per day, transporting students to and from school. The district maintained a fleet of 118 school buses and 94 support vehicles. The district ran 1,571 trips, 12 Tulsa Tech daily shuttles and two vehicles dedicated to the McKinney-Vento/Foster Care programs.
- The district purchased 165,464 gallons of diesel fuel and 44,845 gallons of unleaded fuel for a combined cost of \$631,518.49.
- The **Child Nutrition Department** served 1,598,706 lunches, 381,645 supper meals, 1,032,371 breakfasts, and over 6,000 fresh fruit and vegetable snacks per day during the 2021-22 school year.
- The Child Nutrition department has four chefs, four dieticians and trained about 170 employees in culinary arts and safe food handling. Over half the employees have received Talents to Strength training to determine employees' strengths and passions in the work arena. The number of students qualifying for free/reduced lunch has steadily increased over recent years and is currently at 68%.
- The district purchased fresh vegetables and fruits and local grass-fed beef from six local farms. These local products have been served on the menus every day in August and September, and we will continue to offer local products each month. Child Nutrition purchases have enabled farmers to increase their revenue, continue farming, and hire additional farm help.
- Thirteen elementary schools participated in the Fresh Fruit and Vegetable Grant, which provided \$537,000 to purchase fresh produce for snacks every day in the classroom.
- The district's two nutrition educators developed seven nutrition videos called "Food for U" that are used in classrooms and in the homes of virtual learners. These videos are very interactive, and provide interesting history, science, math, geography, and cooking connections with foods. Union High School and elementary students participated in these videos. Union Dietitians also developed video lessons on a new field called nutritional psychiatry, which will be utilized by teachers to help students understand the importance of nutrition on emotions and feelings and will bolster Union's efforts in the areas of Hope and social/emotional learning. The new program is called Food Mood Connection, which started at the 6th and 7th grades, will be introduced at the 8th Grade, and eventually will be offered in all schools.
- Seventeen Union schools participated in the afterschool supper meal program. The program reduces hunger among students who otherwise might not get a good, healthy afternoon meal and encourages participation in afterschool programs that tend to drive class attendance and performance.
- Union was recognized by the United Fresh Produce Association as the "Produce Excellence in Foodservice for Schools" national award-winner for our use of fresh produce, nutrition education, and for promoting the consumption of more produce by children. Union was also awarded a USDA Farm to School Grant of \$100,000 to provide a district gardener, a farmer consultant, and a hoop house to grow vegetables and herbs; the grant also provides STEM learning experiences and Career Connect agricultural experiences for students, involves more farmers in the Farm to School Program to increase the usage of more local products, and to provide mentoring from the consultant farmer to improve farming practices.
- Plans are being made to renovate and expand the 8th Grade cafeteria kitchen and serving area, replace two schools' walk-in refrigerators and freezers, replace the dish machine at the High School, and to purchase two new trucks for food distribution from the warehouse. The High School equipment has been almost totally replaced with new equipment due to the ice storm and freezing temperatures in the winter that destroyed water-based equipment.
- Director of Child Nutrition Lisa Griffin was featured in Today's Dietitian magazine as one of 10 recognized in their Annual Showcase of registered dieticians making a difference.



The **Custodial Department** employs 109 full-time custodians, a district custodial coordinator, and a district building engineer. Over 3.5 million square feet of floor space is cleaned nightly. On average, each full-time custodian cleans more than 35,000 square feet on a nightly basis. This includes over 1,000 individual classrooms.

- Custodians staff nearly 1,500 district and community events across the district.
- Larger custodial projects include the stripping and refinishing of tile surfaces across the district and the refinishing of wood floor gymnasiums.
- Districtwide custodial equipment inventory continues. This enables us to accurately identify future needs.
- Daily custodial checklists have been updated and implemented to place a higher emphasis on surface disinfection.
- Every custodian has been provided an electrostatic ionizing backpack sprayer to be able to deep clean and disinfect large areas in a short period of time. This is especially important in the event of widespread illnesses at schools and for COVID transmission prevention.
- Every elementary school has been provided with new vacuum equipment, replacing aging and obsolete machines.
- Every site district wide has transitioned to the Buckeye "E" chemical mixing and dispenser system. This allows custodians to mix and dispense their various cleaning products accurately and efficiently.

- The Buckeye Honors program has been initiated. This provides online and hands-on training for equipment and flooring maintenance.
- Custodial staff worked diligently to stock and prepare the new band building for its inaugural school year.
- The Union High School campus has seen the deployment of the district's first robotic floor cleaning machine.
- Monthly lead custodian training and monthly crew meetings have been implemented to ensure all staff are trained and adhering to district cleaning and safety expectations.
- All of this has been accomplished while navigating a severe staff shortage.
 The custodial staff has gone above and beyond to maintain deanliness of the district the Union Way.

The **Grounds Division** employs 12 full-time grounds men, one small-engine mechanic, and one district grounds coordinator. The Grounds Division maintains over 450 acres of land. During peak mowing season, each grounds man is responsible for maintaining over 40 acres of land. The grounds division is responsible for mowing, edging, blowing, fertilizing, and treating all district grass and naturally surfaced athletic fields. All landscaping design and maintenance is handled in-house. This includes all district flowerbeds and trees. Grounds is also responsible for:

- The laydown and removal of large event set-ups across the district, including the portable basketball floor at the UMAC.
- Inspecting and maintaining all playground equipment across the district.
- Plowing, clearing, and sanding the entire district during severe winter weather events.
- Resealing and repairing smaller sections of asphalt parking lots in-house. This increases the longevity of the lot and reduces the cost of resurfacing.
- Providing signage and painting for all district parking lots and bus loops across the district.
- Assisting with painting, plumbing, and power-washing projects across the district.
- Major projects included pouring large sections of concrete at Jarman Elementary, resealing large areas of the Freshman Academy and the drive to the baseball and softball facilities, and other improvements across the district.

The Maintenance Division employs 12 skilled tradesmen, 24 building engineers, and one District Maintenance Coordinator. Our tradesmen include five HVAC technicians, two electricians, one plumber, one kitchen technician, two carpenters, and one locksmith. Our 24 building engineers are responsible for maintaining the mechanical systems of their respective sites. They also are responsible for minor repairs. In addition:

- Our maintenance staff closes nearly 10,000 repair and preventative maintenance work orders every year.
- Larger projects include UMAC/High School campus electrical upgrades, HVAC unit replacements, major water leak repairs, shelving fabrication, small roof replacements, and other large repairs.
- Cooling tower water meters were installed at Union High School, the Eighth Grade Center, and Union Freshman Academy campuses to help monitor and reduce our district water and sewer costs.
- Our HVAC technicians and electricians worked diligently to reduce energy consumption during PSO peak events, resulting in tens of thousands of dollars returned to the district in the way of rebates.
- Implementing a building engineer training and license test preparation program has been a goal for the division. The goal of the program is to prepare future building engineer candidates from the ranks of our custodial and grounds staff, as well as to ensure all building engineers obtain a minimum 3rd class stationary engineers license.



Safety and Security

- The district employed a director of security and a security coordinator, as well as 13 fulltime security officers for all school sites and 20 part-time officers for athletic and special events. One Broken Arrow School Resource Officer was on call daily, in addition to 10 off-duty Tulsa Police Department officers on a rotating schedule, allowing one to patrol the district each day.
- District employees completed more than 18,877 assigned training courses and more than 1,700 unassigned safety courses on their own, for a training completion rate of 76 percent. The security coordinator met with students at elementary sites weekly and performed routine safety walks at all sites, with follow-ups including the site administrator.



Operations

Union Multipurpose Activity Center (UMAC)

• Facility scheduling not only encompasses the actual event, but all communications, operations, and maintenance required to prepare, set up, run, and clean up every event. Two employees coordinated 43,569 internal events and 2,720 external rentals involving scheduling, contracts, conflict resolution, staffing, and set-up and tear-down. The Facilities Department also schedules, stocks, and operates UMAC Concessions, serving 35 UMAC events last year.



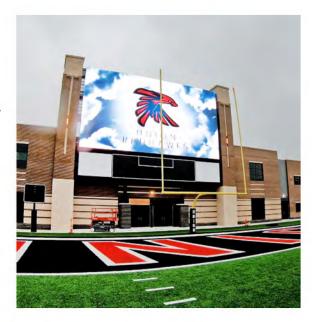
Construction/Facilities

2021-2022 Projects (Completed):

- Freshman Academy boiler and valve replacement
- Innovation Lab Phase I, marquee sign installation
- Glass partition wall at Union Collegiate Academy
- Districtwide access controls
- Moore Elementary cafeteria repairs project
- Stormwater lift station replacement at Union High School
- Boiler and holding tank replacement at 6th/7th Grade Center
- Installation of hoop house at Ochoa Elementary
- Accent painting project at UMAC
- Enrollment Center water damage repairs
- Jarman Elementary HVAC and lighting upgrades
- Golf facility and practice area
- Big chill water damage insurance project
- Pavement improvements at UMAC
- Video board and scoreboard at Union High School
- High school electrical upgrades
- Bus exhaust system upgrades

Ongoing and Planned Projects

- Band building, volleyball renovations at Union High School
- Roofing improvements/replacements at Union High School, Andersen, Grove, and ESC
- Innovation Lab Phase II
- Districtwide building automation system upgrades
- Playground improvements at Peters, Rosa Parks, and Grove Elementary
- HVAC replacements at Peters and Grove
- Outdoor canopy at Community Health Connection Clinic (on Ochoa Elementary campus)
- Operations loading dock improvements
- Freezer/cooler replacement at Andersen and Cedar Ridge
- Flooring improvements at Jarman, Peters, Rosa Parks and ESC
- 6th/7th Grade Center Improvements



Community Support

- Dr. Chris McNeil was elected to a five-year term representing Zone 2 on the Board of Education.
- Board president Stacey Roemerman conducted a presentation at the National School Board Association Conference in San Diego, Calif. She shared Union's work in regard to our mission to "graduate 100 percent of our students college and career-ready."
- Union hosted an appreciation breakfast at the UMAC for more than 140 people representing the district's community partners.
 District Community Schools Coordinator Kulsum Siddiqui, who organized the breakfast, was lauded by Dr. Hartzler for coordinating Union's community schools initiative. The district's Community Schools coordinators were also recognized, as was Teresa Kiger, executive director of Elementary Education. Hartzler said Union's path toward building community schools started with an idea by Kiger some 20 years ago and fostered by previous Superintendent Dr. Cathy Burden.
- Union Public Schools received donations of \$8,500 in August and \$7,500 in October from TTCU Federal Credit Union as part of their TTCU School Pride program.
- McAuliffe Elementary School received about \$10,000 in donations of coats, headphones and school supplies from Avantive Solutions.
- The Union Schools Education Foundation awarded 108 educational grants in fall 2021 valued at \$101,654.54. The projects to be funded ranged in value from \$95 to a districtwide grant continuing the support of math manipulatives for all first grade classes for \$11,008.
- In addition to funding educational grants, the Foundation also pledged support for several districtwide programs throughout the 2021-2022 school year. USEF continued support for Union High School's College & Career Center, Union Pre-K Camp, Union High School Leadership, New Teacher Induction, BizTown, Union's Special Olympics Team, Teacher and Support Person of the Year, and Graduation Celebration. Total support pledged to the district in 2021-2022 was over \$145,000.
- The teachers, administrators and staff of Union Public Schools pledged an incredibly generous \$76,655.80 to USEF during the 2021 Month of Giving. These funds directly support USEF educational grants.
- The Foundation welcomed a record 610 guests at its annual dinner and auction on May 14, 2022, at River Spirit Resort. Oklahoma Teacher of the Year, Union's own Rebecka Peterson, gave a wonderful presentation and Union patrons raised a record \$300,000 in support of Union Schools Education Foundation. The accompanying online auction raised an additional \$15,050. These funds will directly benefit educational programs throughout the district.



Business/Technology Highlights

- Purchased 5,100 new student laptops
- Purchased 1,200 home routers for student internet service at home
- Installed over 120 new interactive flat panels in classrooms throughout the district
- Continued to enhance physical security measures throughout the district
- Enabled dual authentication for all user accounts
- Enabled dual authentication for all servers and VPN access
- Numerous firewall and cybersecurity updates
- Upgraded the virtual server farm
- Purchased headphones for all students
- Piloted wireless casting from mobile devices to the TV in the classroom
- Piloted classroom management software
- Created an entirely separate network for Operations to manage some of their back-end devices

- Deployed a "car rider" system at the elementary schools to help with student dismissal
- Migrated all users to M365 cloud-based office applications
- Migrated all personal data shares from on-premises servers to a cloud provider
- Deployed a new Help Desk ticketing system
- Successfully provided devices for all ELL/state testing
- Replaced old iPads from the classroom with new models
- Launched the new Esports Arena at the Freshman Academy
- Replaced phones at Ochoa Elementary
- Finished last phase of the teacher laptop upgrade cycle
- Deployed 120 pod printers
- Installed new security cameras at the Education Service Center



This Meritorious Budget Award is presented to

UNION PUBLIC SCHOOLS INDEPENDENT DISTRICT I-009

for excellence in the preparation and issuance of its budget for the Fiscal Year 2020–2021.

The budget adheres to the principles and standards of ASBO International's Meritorious Budget Award criteria.



W. Edward Chabal

W. Edward Chabal President David J. Lewis Executive Director

BOARD OF EDUCATION

2022-2023 Board of Education

Joey Reyes – Zone 1

Dr. Chris McNeil – Zone 2

Heather McAdams – Zone 3

Stacey Roemerman – Zone 4

Ken Kinnear – Zone 5



Board members are elected by registered voters of their respective districts for five-year terms and receive no pay for performing their duties.

School Board general elections are conducted on the first Tuesday in April, with one Board position open for election each year. If more than two candidates run during the December filing period for an open seat or an unexpired term, a primary election will be conducted on the second Tuesday in February. If no candidates receives more than 50 percent of the vote, the top two candidates will proceed to the school board election on the first Tuesday in April. Only those registered voters living within the geographical boundaries of the Board district in which a term is expiring or in which a vacancy exists are eligible to vote for that Board position.

2022-2023 CABINET MEMBERS



Kirt Hartzler Superintendent



Charlie Bushyhead
Associate Superintendent



Sandi Calvin Assistant Superintendent



John Federline Assistant Superintendent



Trish Williams
Chief Financial Officer



Chris Payne
Chief Communications
Officer



Gart Morris
Executive Director of
Instructional Technology



Theresa Kiger Executive Director of Elementary Education



Kenneth Moore Executive Director of Secondary Education



Todd Nelson
Senior Executive Director
of Research-DesignAssessment



Todd Borland
Executive Director of
Information Technology



Jay Loegering
Executive Director of
Human Resources

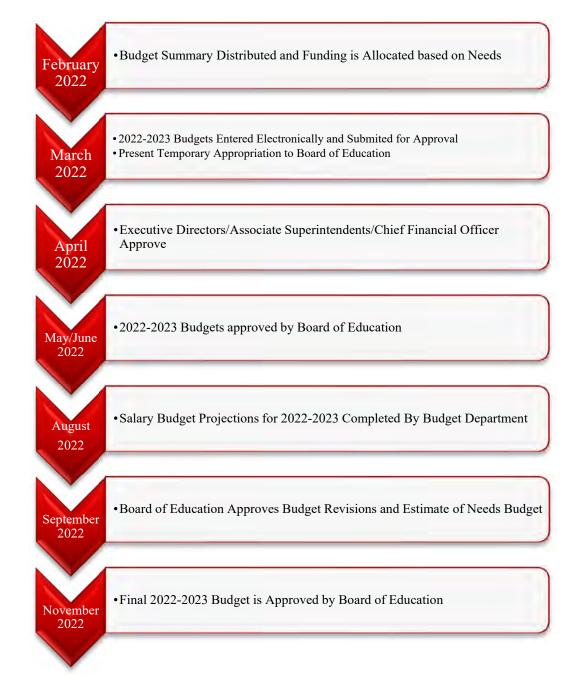
2022-2023 ADMINISTRATORS

Emily Barkley	Director of Athletics
Meghan Bender	Director of Student Life
Melissa Brock	Director of Human Resources
Becky Byers	Director of Financial Reporting/Treasury
Christine Andrews	Director of Payroll
Joshua Robinson	Director of Operations
Marla Robinson	Director of College and Career Center
Amy Smith	Director of English Learners Program
Lindsay Smith	Director of Special Services
Ty Wardlow	Director of Safety and Security
David Young	Director of Purchasing & Supply Management
Fred Isaacs	Director of Construction Services
Amy McCready	Director of Adult Learning Center
Matthew McCready	Director of Fine Arts
Scott Pennington	Director of Hope-Guidance-Social and Emotional Learning
Susan Pettit	Director of Transportation
Charles Pisarra	Director of Union Bands
Lisa Griffin	Director of Child Nutrition
Chasity Gray	Director of Professional Learning
Julie Harkrider	Director of Accounting
Sherri Fair	Director of Federal Programs
Cathy Damen	Associate Director of Special Services
Steven Dunlap	Associate Athletic Director
Kirk Fridrich	Associate Athletic Director & Head Football Coach
Robert Harris	Associate Director of Transportation
Bradyn Powell	Associate Director of Child Nutrition

2022-2023 PRINCIPALS

John Chargois	High School
Briane Grass	High School
Tony Tempest	High School
Beau Brannon	Union High School Freshman Academy
Chris Ducker	Alternative School
Michelle Cundy	Eighth Grade Center
Clayton Hucke	Sixth/Seventh Grade Center
Tammy Ward	Sixth/Seventh Grade Center
Bethany Harper	Andersen Elementary
Leedy Smith	Boevers Elementary
Michele Spencer	Cedar Ridge Elementary
	Darnaby Elementary
	Grove Elementary
Shawna Thompson	Jarman Elementary
Shana Harris	Jefferson Elementary
Jennifer McKnight	McAuliffe Elementary
Becky King	Moore Elementary
Rita Long	Ellen Ochoa Elementary
Tracy Weese	Peters Elementary
Heather Federline	Rosa Parks Elementary
Alycia Pennington	Rosa Parks Early Childhood Education Center

BUDGET PROCESS



The district strives to pour every resource into our students and their successes. Advancements in software have allowed the district to move to an eco-friendly electronic version of budget development.

THE UNION WAY

LEARNING The Union Way

Literacy is reading, writing, speaking, listening, and thinking in such a way that pertinent content and ideas are processed and communicated effectively (Mark Forget).



Cognitive

Cognitive Capacity refers to the ability of the brain to exercise thinking processes that facilitate learning. These processes include problem solving, critical thinking, processing speed, attention, self-control, working memory, and fluid intelligence (transfer skills) (Eric Jensen).



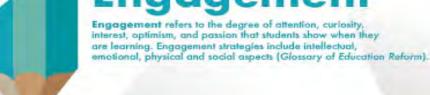
Social/

Social-emotional Learning is the process through which students acquire and effectively apply the knowledge, attitudes, and skills necessary to understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions (CASEL). Traits include social intelligence, positive character development, academic mindsets, and teamwork.



aaa

interest, optimism, and passion that students show when they are learning. Engagement strategies include intellectual,



STRATEGIC GOALS

Teaching/Learning

- Ensure that all students through Union's Learning Model – have access to a high-quality instructional and supportive learning environment.
- Close achievement gaps for all learners.
- Ensure curriculum, instruction, technology, and assessment are designed and delivered with a focus on content rigor, student engagement, and continuous academic improvement.

Partnerships

 Promote greater awareness, partnerships, and engagement among school stakeholders to enhance support of our mission and increase human and organizational capital.

Human Capital

 Enhance student and organizational performance by attracting, supporting, and developing a world-class workforce.

Business/Operations

 Provide quality technology and business services to optimize operations, communications, and academic results.

- Ensure the operating and capital budgets reflect our priorities as well as areas of focus to improve student achievement and fiscal responsibility.
- Promote operational/organizational safety and highquality infrastructure to ensure effective and efficient learning and working environments.

Culture

 Provide a physically and emotionally safe learning and work environment in support of continuous student improvement.

- Maintain a caring, professional, and ethical organization.
- Foster an atmosphere of respect and effective communication.

Measuring Our Progress

School Health Indicators

- Student health core
- Organizational capacity
- Instructional capacity
- Learning capacity
- Home and community capacity

Organizational Health Indicators

- Office and department performance measures
- Employee engagement survey



Student Outcomes Elementary

- · Kindergarten readiness
- Attendance
- · Reading on grade level
- · Proficiency on state assessments
- Social-emotional development
- Family engagement

Secondary

- · Proficiency on state assessments
- PSAT 9th and 10th grades
- SAT 11th grade
- Attendance
- Percentage on track for graduation
- · College readiness course completion
- Graduation rate
- Student engagement

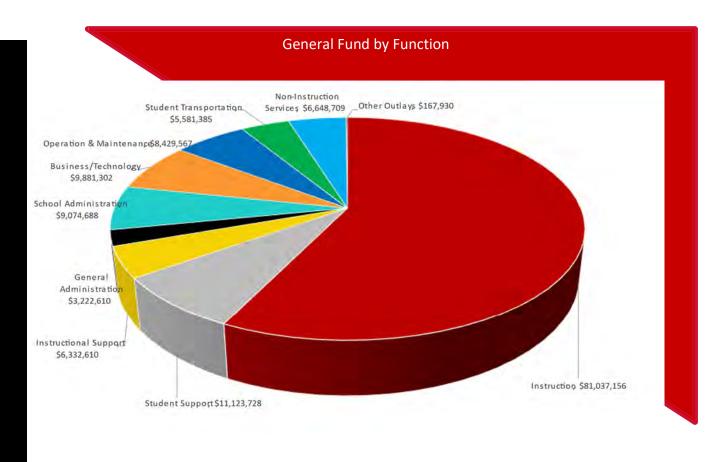
REVENUE AND EXPENDITURES SUMMARY

The Districts classification of revenues can be found in the Organizational Section.

	General Fund Budget 2022-2023	Building Fund Budget 2022-2023	Child Nutrition Fund Budget 2022-2023	Sinking Fund Budget 2022-2023	Bond Funds Budget 2022-2023	Total All Funds Budget 2022-2023
Revenues						11
Local Sources	\$ 40,697,809	\$5,097,119	\$ 2,567,733	\$26,650,000	\$26,168,192	\$101,180,853
Intermediate Sources	5,634,478	0	0	0	0	5,634,478
State Sources	71,195,736	0	89,479	0	0	71,285,215
Federal Sources	23,573,661	0	7,549,648	0	0	31,123,309
Total Revenues	141,101,684	5,097,119	10,206,860	26,650,000	26,168,192	209,223,855
Expenditures	14.01					
Instruction	81,037,156	0	0		36,233,132	117,270,288
Student Support	11,123,728	0	0			11,123,728
Instructional Support	6,332,610	0	0			6,332,610
General Administration	3,222,610	0	0			3,222,610
School Administration	9,074,688	0	0			9,074,688
Business/Technology	9,881,302	0	0			9,881,302
Operation & Maintenance	8,429,567	5,100,236	0			13,529,803
Student Transportation	5,581,385	0	0			5,581,385
Non-Instruction Services	6,648,709	0	16,276,454			22,925,163
Other Outlays	167,930	0	0	27,327,875		27,495,805
Facilities Acquisitions and Construction	0	0	0			0
Total Expenditures	\$141,499,685	\$5,100,236	\$ 16,276,454	\$27,327,875	\$36,233,132	\$226,437,382

Source: District Records

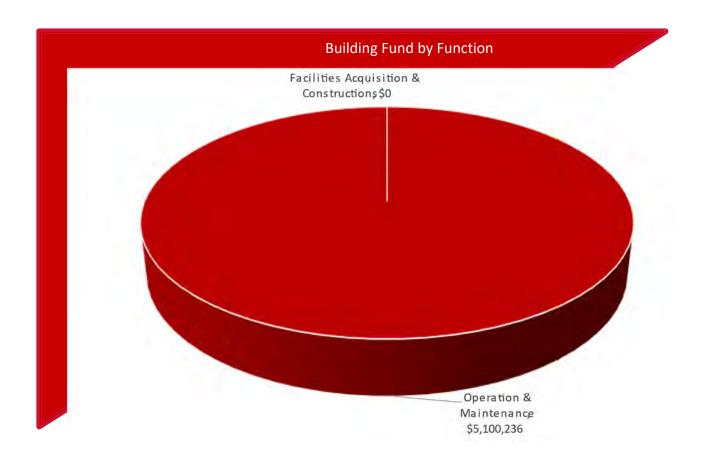




Source: District Records

	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025	2025-2026
Local Sources	\$ 38,085,440	\$ 38,125,225	\$ 37,520,455	\$ 39,173,977	\$ 40,697,809	\$ 40,697,809	\$ 41,104,787	\$ 41,515,835	\$ 41,930,993
Intermediate Sources	4,248,303	4,543,236	4,966,445	5,546,919	5,634,478	5,634,478	5,690,823	5,747,731	5,805,208
State Sources	69,286,870	71,378,323	69,052,048	73,946,629	71,195,736	71,195,736	69,771,821	70,469,539	71,878,930
Federal Sources	9,348,645	9,492,779	17,878,666	17,787,259	23,573,661	23,573,661	20,509,085	21,534,539	21,319,194
Total Revenues	\$ 120,969,259 \$ 123,539,5		\$ 129,417,614	\$ 136,454,784	\$ 141,101,684	\$ 141,101,684	\$ 137,076,516	\$ 139,267,645	\$ 140,934,327
Expenditures	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	11/14/2022 Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Instruction	\$ 67,633,827	\$ 70,255,223	\$ 74,044,051	\$ 72,416,844	\$ 81,037,156	\$ 81,037,156	\$ 78,606,041	\$ 79,392,102	\$ 80,186,023
Student Support	9,317,736	9,749,731	10,733,346	11,131,118	11,123,728	11,123,728	10,790,016	10,897,916	11,006,895
Instructional Support	5,232,565	5,112,927	6,181,922	6,843,121	6,332,610	6,332,610	6,142,632	6,204,058	6,266,099
General Administration	2,442,970	2,568,552	2,682,929	2,957,181	3,222,610	3,222,610	3,125,932	3,157,191	3,188,763
School Administration	9,120,025	9,302,859	9,962,296	9,418,266	9,074,688	9,074,688	8,802,447	8,890,472	8,979,377
Business/Technology	7,883,100	8,158,132	8,538,965	8,588,569	9,881,302	9,881,302	9,584,863	9,680,712	9,777,519
Operation & Maintenance	9,216,510	8,693,970	9,604,834	12,481,669	8,429,567	8,429,567	8,176,680	8,258,447	8,341,031
Student Transportation	4,607,423	4,757,427	5,029,463	5,487,182	5,581,385	5,581,385	5,413,943	5,468,083	5,522,764
Non-Instruction Services	4,320,290	4,870,920	5,039,585	5,176,235	6,648,709	6,648,709	6,449,248	6,513,740	6,578,878
Other Outlays	104,635	234,380	54,427	148,204	167,930	167,930	162,892	164,521	166,166
Total Expenditures	\$ 119,879,080	\$ 123,704,121	\$ 131,871,818	\$ 134,648,388	\$ 141,499,685	\$ 141,499,685	\$ 137,254,694	\$ 138,627,241	\$ 140,013,514

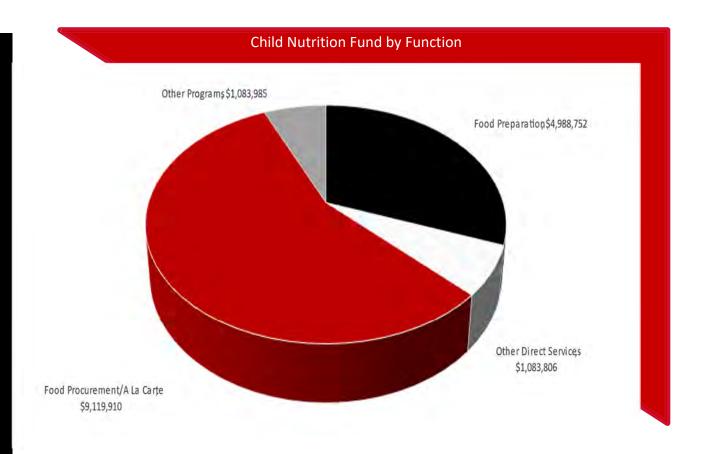




REVENUES	2	Actual 2018-2019		Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023		1/14/2022 Approved 2022-2023		Forecast 2023-2024		Forecast 2024-2025	Forecast 2025-2026
Local Sources	\$	13,174,034	\$	5,272,220	\$ 5,124,618	\$ 4,865,540	\$ 5,097,119	\$	5,097,119	\$	5,148,090	\$	5,199,571	\$ 5,251,567
Federal Sources		0		0	0	0	0		0		0		0	0
Total Revenues	\$	13,174,034	\$	5,272,219	\$ 5,124,618	\$ 4,865,540	\$ 5,097,119	\$	5,097,119	\$	5,148,090	\$	5,199,571	\$ 5,251,567
								1	1/14/2022					
Expenditures	2	Actual 2018-2019		Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023		Approved 2022-2023	3	Forecast 2023-2024		Forecast 2024-2025	Forecast 2025-2026
Operation & Maintenance	\$	6,295,070	5	8,185,511	\$ 7,650,960	\$ 4,986,336	\$ 5,100,236	\$	5,100,236	5	5,151,238	5	5,202,751	\$ 5,254,778
Facilities Acquisition & Constructions		2,516,774		5,113,937	626,235	14,748	0	-	0		0		0	0
Total Expenditures	\$	8,811,844	\$	13,299,448	\$ 8,277,194	\$ 5,001,084	\$ 5,100,236	\$	5,100,236	\$	5,151,238	\$	5,202,751	\$ 5,254,778

Source: District Records



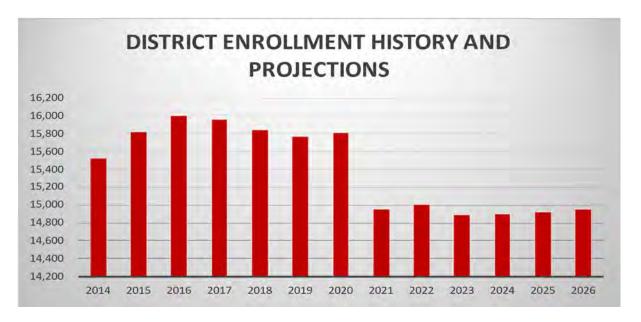


REVENUES	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	11/14/2022 Approved 2022-2023	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Sources	\$ 2,279,451	\$ 2,495,723	\$ 1,866,418	\$ 568,518	\$ 890,962	\$ 2,567,733	\$ 2,567,733	\$ 2,593,410	\$ 2,619,344	\$ 2,645,538
State Sources	73,393	68,357	80,358	79,825	89,479	89,479	89,479	90,374	91,278	92,190
Federal Sources	6,838,170	7,252,920	7,526,297	11,140,772	12,656,897	7,549,648	7,549,648	7,625,144	7,701,396	7,778,410
Total Revenues	\$ 9,191,015	\$ 9,816,999	\$ 9,473,073	\$11,789,115	\$13,637,338	\$10,206,860	\$10,206,860	\$10,308,929	\$10,412,018	\$10,516,138
Expenditures	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	11/14/2022 Approved 2022-2023	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Food Preparation	\$ 3,592,407	\$ 3,917,720	\$ 4,327,688	\$ 4,348,466	\$ 4,671,789	\$ 4,988,752	\$ 4,988,752	\$ 4,993,741	\$ 4,998,734	\$ 5,003,733
Other Direct Services	1,027,217	964,897	1,014,951	940,246	1,274,004	1,083,806	1,083,806	1,084,890	1,085,975	1,087,061
Food Procurement/A La Carte	3,388,160	3,832,105	3,464,372	3,483,942	4,500,104	9,119,910	9,119,910	9,129,030	9,138,159	9,147,297
Other Programs	936,101	928,868	1,264,529	622,974	579,233	1,083,985	1,083,985	1,085,069	1,086,154	1,087,240
Total Expenditures	\$ 8,943,885	\$ 9,643,590	\$10,071,540	\$ 9,395,628	\$11,025,130	\$16,276,454	\$16,276,454	\$16,292,730	\$16,309,022	\$16,325,331

Source: District Records

STUDENT ENROLLMENT TRENDS AND FORECAST

- Student Enrollment: State enrollment has increased 4,500 students from 2020-2021 but is still down from 2019-2020 total enrollment.
- Oklahoma's public school enrollment has brought back about half of students lost due to pandemic.
- According to the annual Oct. 1 student count, overall enrollment increased from last year by 2,562, or 0.99%, to 701,258 students' total.
- According to data from the National Center for Education Statistics, Oklahoma public school enrollment had been on the rise every year since 2002.



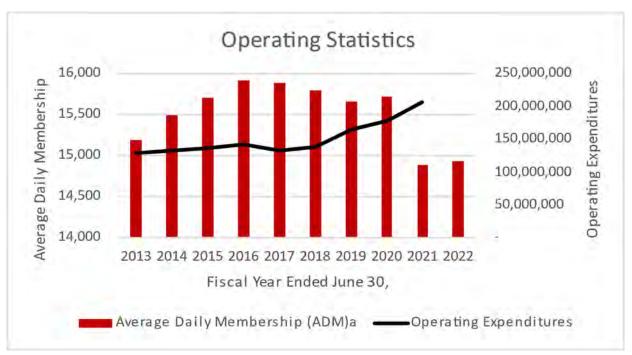
SCHOOL YEAR	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
ENROLLMENT	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959	15,011	14,890	14,905	14,920	14,950
STUDENT INCREASE	227	297	183	-46	-113	-74	43	-857	52	(121)	15	15	45
PERCENT CHANGE	1.48%	1.91%	1.16%	-0.29%	-0.71%	-0.47%	0.27%	-5.42%	0.35%	-0.81%	0.10%	0.10%	0.30%

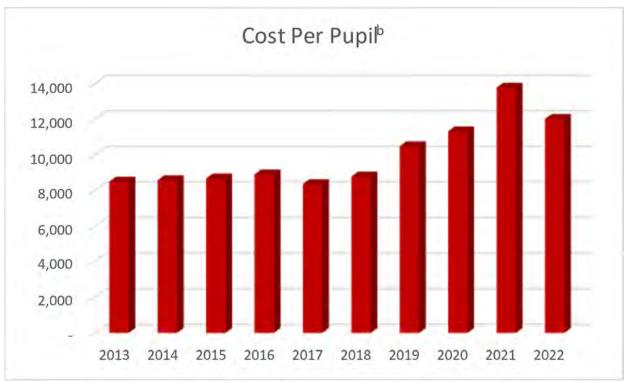
Source: District Records

The district projects enrollment trends by several factors:

- Examination of population patterns in the 2010 Census and changes since 2000
- Exploration of birth data Kindergarten enrollment trends
- Evaluation of third-party population estimates and projections
- Extrapolation of statistical trends in historical K-12 enrollments into the next decade

OPERATING STATISTICS





Source: District Records

 $[^]a$ Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education.

^bCost per pupil is calculated by dividing operating expenditures by the final audited average daily membership (ADM) certified

OPERATING STATISTICS

Operating Statistics Last Ten Fiscal Years

Fiscal Year Ended June 30,	Average Daily Membership (ADM) ^a	Operating Expenditures	Cost Per Pupil ^b	Percentage Change ^c	Teaching Staff ^d	Pupil/ Teacher Ratio	Number of Graduates
2013	15 100	120 141 650	0.502	0.72%	949	16:1	967
area.	15,190	129,141,650	8,502	12.0		777	1 2 3 1
2014	15,486	132,928,940	8,584	0.97%	937	16:1	932
2015	15,700	136,330,809	8,683	1.16%	1,004	16:1	1,075
2016	15,919	141,848,815	8,911	2.62%	991	16:1	1,063
2017	15,887	132,885,970	8,364	-6.13%	978	16:1	1,059
2018	15,797	138,784,093	8,785	5.03%	968	16:1	1,065
2019	15,655	164,242,916	10,491	19.42%	996	16:1	1,128
2020	15,726	178,187,950	11,331	8.00%	1,017	15:1	1,055
2021	14,889	205,491,187	13,781	21.62%	1,008	15:1	907
2022	14,926	179,445,081	12,022	-12.76%	998	15:1	1,044

Source: District Records

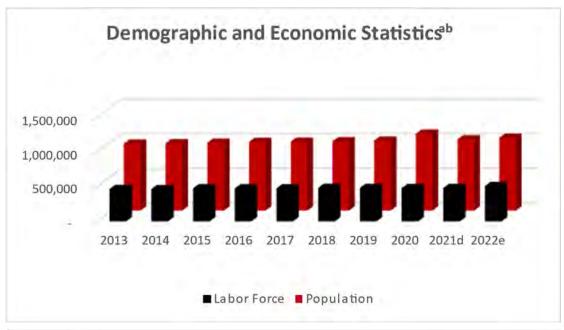
^a Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education.

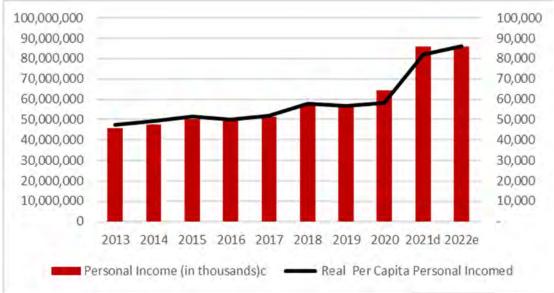
^b Cost per pupil is calculated by dividing operating expenditures by the final audited average daily membership (ADM) certified

^c Teaching staff includes all certified personnel whose pay is based on the Union Classroom Teacher's Association (UCTA)

^d Number of graduates obtained from District records maintained by the Union High School Registrar.

DEMOGRAPHIC AND ECONOMIC STATISTICS





^a Tulsa MSA specific demographic data

Note: Tulsa MSA comprises seven counties: Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa and Wagoner

^b Data obtained from the Tulsa Metro Chamber 2019 Economic Profile

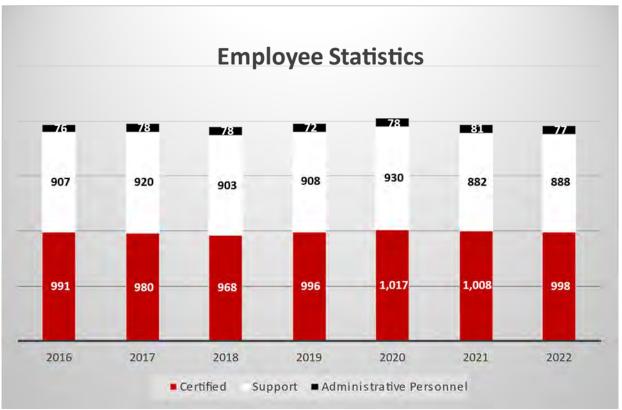
^c Calculation based on the 2019 Tulsa Chamber of Commerce Economic Profile MSA population projection multiplied by 2019 projected per capita income

^d Estimate based on data obtained from the Tulsa Metro Chamber

^eProjection based on data obtained from the Tulsa Metro Chamber

PERSONNEL RESOURCES

In FY 22, certified personnel decreased by 10 positions, support personnel increased by 6 positions and administrative personnel decreased by 4 positions.



Source: District Records

Title 70, Chapter 1, Section 18-124 of Oklahoma State Statutes restricts any district with greater than 1,500 students to spend no more than 5% of total expenditures on costs that are considered "administrative." If this limitation is exceed, State Aid will be reduced for the following year by the amount of the overage.

Administrative costs are costs associated with the Board of Education, Staff relations, Superintendent, or any employee who is a director, coordinator, supervisor. The Oklahoma Cost Accounting System (OCAS) has assigned specific coding to be reported to the state to track this spending. Union Public Schools continually watches expenditures and coding to make sure we are within compliance. Positions are assigned and tracked by Position Control Number. The Chief Financial Officer approves the addition of all new full-time positions and reports increases and decreases to the Board of Education yearly.

TEACHER PAY SCALE

Employee Information Last Ten Fiscal Years

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Certified Personnel		12.31						200	777	9.0
Bachelor's										
Minimum Salary	31,600	31,600	32,050	32,150	32,350	32,697	39,000	40,220	40,220	40,220
Maximum Salary	50,576	51,461	52,461	53,248	53,780	54,856	62,150	64,370	64,370	64,670
Average Salary	35,812	35,754	36,152	36,495	36,478	36,822	43,868	45,132	45,248	45,266
Number of Teachers	617	642	674	653	646	632	638	648	633	623
Master's										
Minimum Salary	32,800	32,800	33,250	33,400	33,600	33,972	41,000	42,220	42,220	42,220
Maximum Salary	55,427	56,397	57,397	58,258	58,841	60,018	66,550	68,770	68,770	69,070
Average Salary	40,961	40,946	41,103	41,017	40,856	41,244	48,987	50,184	49,856	49,936
Number of Teachers	322	318	315	326	321	325	344	356	366	365
Doctor's										
Minimum Salary	34,000	34,000	34,450	34,600	34,800	35,196	46,500	47,720	47,720	47,720
Maximum Salary	57,905	58,918	59,918	60,817	61,425	62,654	70,350	72,570	72,570	72,870
Average Salary	45,857	44,678	47,407	47,259	48,809	51,525	59,385	61,758	59,909	59,909
Number of Teachers	10	15	15	12	11	11	14	13	9	10
Total Certified Personnel	949	975	1,004	991	980	968	996	1,017	1,008	998
Support Personnel										
Number of Support	866	855	887	907	920	903	908	930	882	888
Administrative Personnel										
Number of Administrators	72	81	80	76	78	78	72	78	81	77

On April 2, 2018 teachers across the state of Oklahoma walked out to protest low pay, overcrowded classrooms, and tax cuts that resulted in lower state-wide education spending. It was the first such action in Oklahoma since 1990. The Oklahoma Education Association declared an end to the walkout on April 12 after an agreement to increase salaries and state funding for education. The walkout resulted in a \$6,000 raise for teachers and a \$1,250 raise for support staff, along with increased funding for public education.

Source: District Records

TAX BASE AND RATE TRENDS

Property Tax Levies and Collections Last Ten Fiscal Years

		Collected of Fiscal Year of			ted in ent Years ^b			
Fiscal Year Ended June 30,	Total Tax Levied for Fiscal Year	Current Tax Collections	Percent of Current Tax Collected	Delinquent Tax Collections	Total Tax Collection	Ratio of Total Tax Collection to Levy ^c	Outstanding Delinquent Taxes	Ratio of Delinquent Taxes to Total Levy ^c
2013	51,098,476.00	50,136,476.00	98.12%	985,461.00	51,121,937.00	100.05%	1,903,829	3.73%
2014	51,257,300.00	50,231,293.00	98.00%	910,509.00	51,141,802.00	99.77%	1,889,675	3.69%
2015	52,292,932.00	51,034,795.00	97.59%	906,394.00	51,941,189.00	99.33%	1,785,109	3.41%
2016	54,307,855.00	53,392,086.00	98.31%	907,623.00	54,299,709.00	99.99%	1,805,492	3.32%
2017	56,651,801.00	55,237,805.00	97.50%	819,589.00	56,057,394.00	98.95%	1,981,909	3.50%
2018	59,711,382.00	58,210,863.00	97.49%	1,398,460.00	59,609,323.00	99.83%	2,225,068	3.73%
2019	61,054,057.00	59,170,949.00	96.92%	1,056,051.00	60,227,000.00	98.65%	2,516,937	4.12%
2020	62,495,382.00	61,977,275.00	99.17%	1,006,640.00	62,983,915.00	100.78%	2,764,349	4.42%
2021	63,859,558.00	62,851,899.00	98.42%	1,394,179.00	64,246,078.00	100.61%	2,382,610	3.73%
2022	66,792,094.00	62,574,865.00	93.69%	972,563.00	63,547,428.00	95.14%	2,334,546	3.50%

a The Tulsa County Assessor is required to file a tax roll report on or before October 1 of each year with the Tulsa County Treasurer who must begin collecting taxes by November. The first half of taxes is due and payable on or before December 31. The second half becomes due and payable on or before March 31. If the first half is not paid by December 31, the total tax becomes due and payable on January 1.

b Ad valorem taxes not paid on or before April 1 are considered delinquent. Interest accrues on delinquent taxes at the rate of one and one-half percent monthly (18 percent annually) to a maximum of 100 percent of the taxes due until such time as the delinquent taxes are paid. If not paid by the following October 1, the property is offered for sale for the amount of taxes due.

c In accordance with Oklahoma State Law 68 O.S. 2001 Section 3009 and Sections 26 and 28 of Article 10 of the Oklahoma Constitution, the County Excise Board assumes a delinquency rate of

10% when the Board approves the total tax levy. However, the District has a history of only 2% - 4% delinquency rate. Therefore, the "Ratio of Delinquent Taxes to Total Levy" may exceed 100%.

Source: Tulsa County Treasurer

TAX BASE AND RATE TRENDS

Assessed and Estimated Actual Value of Taxable Property Last Ten Fiscal Years

Fiscal Year Ended June 30,	Real Property Assessed Value ^a	Personal Property Net Assessed Value ^a	Public Service Property Property Assessed Value ^b	Total Net Assessed Value	Total Estimated Actual Value ^c	Ratio of Gross Assessed Value to Total Estimated Actual Value	Total Direct Tax Rate ^d	
2013	601,412,818	88,022,848	21,252,456	710,688,122	6,562,775,286	10.83%	71.90	
2014	610,351,602	91,811,689	19,160,939	721,324,230	6,671,918,494	10.81%	71.06	
2015	628,740,000	99,732,783	16,546,904	745,019,687	6,905,133,965	10.79%	70.19	
2016	647,399,204	101,040,598	16,351,844	764,791,646	7,085,583,042	10.79%	71,01	
2017	673,539,097	104,988,429	18,150,870	796,678,396	7,368,526,233	10.81%	71.11	
2018	692,847,775	106,814,765	19,086,696	818,749,236	7,564,864,003	10.82%	72,93	
2019	718,866,548	110,992,122	19,057,585	848,916,255	7,841,339,927	10.83%	71.92	
2020	742,216,596	111,856,098	20,845,162	874,917,856	8,068,048,672	10.84%	72.34	
2021	760,697,383	110,747,589	22,570,959	894,015,931	8,231,037,095	10.86%	71.43	
2022	775,116,488	111,964,105	24,114,249	911,194,842	8,378,679,168	10.88%	69.82	

- a. Assessed value is defined as the taxable value of real or personal property and is subject to an assessment rate set by the County Assessor to calculate the amount of tax liability. The current assessment rate is 11% for real property and 10% for personal property.
- b. Public service property is centrally assessed by the Oklahoma State Board of Equalization. The assessment rates on public service property, and on airlines and railroads included in the public service category, are set at 22.85% and 11.84% respectively.
- c. Estimated actual value is used in computing the gross assessed value for tax purposes. The Oklahoma Constitution provides that this value will not exceed a 5% increase over the previous year unless improvements were made to the property or if title to the property is transferred, changed, or conveyed to another person.
- d. Components of total direct tax rate are found on the Direct and Overlapping Property Tax Rate table.

Source: Tulsa County Assessor

PROPERTY TAX RATE IMPACT ON TAXPAYER

Rates for Taxpayers in the City of Tulsa Market

		Value	Assessment A	Assessed	Millage	Property	
Fiscal	Mills	of	Rate	Value	Rate	Tax	Change
Year		Property				Due	
2012	134.44	250,000	11%	27,500	0.13444	3,697	
2013	134.84	250,000	11%	27,500	0.13484	3,708	11
2014	134.08	250,000	11%	27,500	0.13408	3,687	-21
2015	134.42	250,000	11%	27,500	0.13442	3,697	9
2016	136.56	250,000	11%	27,500	0.13656	3,755	59
2017	135.09	250,000	11%	27,500	0.13509	3,715	-40
2018	138.15	250,000	11%	27,500	0.13815	3,799	84
2019	137.34	250,000	11%	27,500	0.13734	3,777	-22
2020	137.66	250,000	11%	27,500	0.13766	3,786	9
2021	133.00	250,000	11%	27,500	0.13300	3,658	-128
2022	134.94	250,000	11%	27,500	0.13494	3,711	53

Approximately 86% of the District lies within the City of Tulsa. The ten-year tax levy average for property owners in the City of Tulsa is 135.61 mills.

Rates for Taxpayers in the City of Broken Arrow

	Market					
	Value	Assessment	Assessed	Millage	Property	
Mills	of	Rate	Value	Rate	Tax	Change
	Property	,			Due	
131.56	250,000	11%	27,500	0.13156	3,618	
131.18	250,000	11%	27,500	0.13118	3,607	-10
131.16	250,000	11%	27,500	0.13116	3,607	-1
130.10	250,000	11%	27,500	0.13010	3,578	-29
130.87	250,000	11%	27,500	0.13087	3,599	21
130.81	250,000	11%	27,500	0.13081	3,597	-2
132.55	250,000	11%	27,500	0.13255	3,645	48
130.81	250,000	11%	27,500	0.13081	3,597	-48
131.20	250,000	11%	27,500	0.13120	3,608	11
131.41	250,000	11%	27,500	0.13141	3,614	6
130.55	250,000	11%	27,500	0.13055	3,590	-24
	131.56 131.18 131.16 130.10 130.87 130.81 132.55 130.81 131.20 131.41	Mills of Property 131.56 250,000 131.18 250,000 131.16 250,000 130.10 250,000 130.87 250,000 130.81 250,000 130.81 250,000 131.20 250,000 131.41 250,000	Mills Value of Rate Property 131.56 250,000 11% 131.18 250,000 11% 131.16 250,000 11% 130.10 250,000 11% 130.87 250,000 11% 130.81 250,000 11% 130.81 250,000 11% 130.81 250,000 11% 131.20 250,000 11% 131.41 250,000 11%	Mills Value of property Assessment Assessed Nature 131.56 250,000 11% 27,500 131.18 250,000 11% 27,500 131.16 250,000 11% 27,500 130.10 250,000 11% 27,500 130.87 250,000 11% 27,500 130.81 250,000 11% 27,500 130.81 250,000 11% 27,500 131.20 250,000 11% 27,500 131.41 250,000 11% 27,500 131.41 250,000 11% 27,500	Mills Value of of Rate Property Rate Property Value Value Rate Rate 131.56 250,000 11% 27,500 0.13156 131.18 250,000 11% 27,500 0.13118 131.16 250,000 11% 27,500 0.13116 130.10 250,000 11% 27,500 0.13010 130.87 250,000 11% 27,500 0.13087 130.81 250,000 11% 27,500 0.13081 130.81 250,000 11% 27,500 0.13081 131.20 250,000 11% 27,500 0.13120 131.41 250,000 11% 27,500 0.13120	Mills Value of of Property Rate Value Value Rate Property Value Due Rate Property Due 131.56 250,000 11% 27,500 0.13156 3,618 131.18 250,000 11% 27,500 0.13118 3,607 131.16 250,000 11% 27,500 0.13116 3,607 130.10 250,000 11% 27,500 0.13010 3,578 130.87 250,000 11% 27,500 0.13087 3,599 130.81 250,000 11% 27,500 0.13081 3,597 130.81 250,000 11% 27,500 0.13081 3,597 131.20 250,000 11% 27,500 0.13081 3,597 131.20 250,000 11% 27,500 0.13120 3,608 131.41 250,000 11% 27,500 0.13141 3,614

Approximately 14% of the District lies within the City of Broken Arrow. The ten-year tax levy average for property owners in the City of Broken Arrow is 131.06 mills.

Note: A mill is the equivalent of \$1 per \$1,000 of net assessed value. The District's millage rate levy is pursuant to provisions of the Constitution of the. State of Oklahoma contained in Article X. The County Excise Board certifies the Estimate of Needs submitted by the District annually and computes the rate of mill levy necessary for General Fund, Building Fund and Sinking Fund purposes. Once the levy is certified by the Excise Board, the county assessor extends said levies upon the tax rolls. Pursuant to an amendment to the Oklahoma Constitution enabling local school districts to seek permanent voter approval of a 5-mill emergency levy, a 5.15-mill building levy, and a 10-mill local support levy, the District submitted such permanent levies to the voters at an election held on February 13, 2001. The permanent levies were approved, and the District no longer has to submit approval of these funding sources to voters on an annual basis.

Source: Tulsa County Clerk

DISTRICT STAFFING AND RESOURCE ALLOCATION



The District receives revenue from many different sources, with the largest single revenue source originating from state aid. In addition to state aid, other state revenue sources include; motor vehicle tax, state land earnings, state flexible benefits allowance, alternative education, state grants and fees. Other funding includes Ad Valorem Tax, local revenue, federal revenue, and county revenue. The District staffs school sites with a full complement of personnel, including teachers, counselors, nurses, media specialists, administrators, teacher aides, computer technicians, food service staff, secretarial staff, and custodial staff. Moreover, school staffing includes those who support our programs for student involvement, including tutors for academic programs, as well as athletic and spirit coaches, and those who support our fine arts programs. Additionally, bus drivers serve each of our school sites, supported by those who maintain our buses and coordinate routing. The District also staffs the Education Service Center with personnel who perform district-wide functions, including the management of curriculum and training programs, the management of information technology resources, as well as those who manage the child nutrition, transportation, maintenance and custodial services, and those who manage and support financial aspects of the district, such as payroll, human resources, receipt and management of funding, payment of invoices, and other critical business functions.



RATIOS OF NET GENERAL BONDED DEBT OUTSTANDING

Ratios of Net General Bonded Debt Outstanding Last Ten Fiscal Years

Fiscal Year Ended June 30,	Total General Obligation Bonds ^a	Total Estimated Actual Value ^b	Ratio of Total Debt to Estimated Actual Valuation ^b	Average Daily Membership (ADM) ^c	Ratio of Total Debt Per Student ^c
2012	72,325,000	6,525,004,824	1.11%	14,836	4,875
2013	72,678,038	6,562,775,286	1.11%	15,190	4,785
2014	72,803,641	6,671,918,494	1.09%	15,486	4,701
2015	79,142,155	6,905,133,965	1.15%	15,700	5,041
2016	85,897,257	7,085,583,042	1,21%	15,919	5,396
2017	89,967,590	7,368,526,233	1.22%	15,887	5,663
2018	89,200,374	7,564,864,003	1.18%	15,797	5,647
2019	88,458,169	7,841,339,927	1.13%	15,655	5,650
2020	91,877,570	8,068,048,672	1.14%	15,726	5,842
2021	92,827,426	8,231,037,095	1.13%	14,889	6,235
2022	93,274,864	8,378,679,168	1,11%	14,926	6,249

^aPremiums received on issuance of debt are transferred to sinking fund, therefore, the net bonded debt outstanding is net of premiums and related discounts

Per GASB Q&A 9.24.6; the amounts reflect bonded debt, net of related premiums, discounts, and adjustments. The debt and premiums can be found on Note E- Long-Term Debt of the Notes to the Financial Statements

^bEstimated actual valuation is taken from the table, Assessed and Estimated Actual Value of Taxable Property, which the District considers a more appropriate economic base than personal income on which to calculate the debt ratio.

^cSince the District lies within the boundaries of two Oklahoma cities, per capita calculations are based on the final audited average daily membership (ADM) certified by the Oklahoma State Department of Education as a more relevant indicator of the debt ratio. See Demographic and Economic Statistics.

Note: The District issues only general obligation bonds

Sources: District records, Tulsa County Assessor, Oklahoma State Department of Education

As of 6/30/2022, the sinking (debt service) fund had a total fund balance of \$14,901,811, all of which was restricted for the payment of debt service. The net decrease in fund balance during the current year in the debt service fund was \$192,693. Millage rates for sinking fund levies are not controlled by the district but are set annually by the Tulsa County Excise Board after a thorough review of property valuations and the district's debt service needs.

The bond fund had a total fund balance of \$35,801,705, all of which was restricted for capital projects. The decrease in fund balance during the current reported year in the bond fund was \$851,364. This decrease in fund balance is primarily do to reduced capital outlay expenditures

CHANGES IN LONG TERM DEBT

Ratios of Outstanding Debt by Type Last Ten Fiscal Years

Fiscal Year Ended June 30,	Total Governmental Activities General Obligation Bonds ^a	Total Estimated Actual Value ^b	Ratio of Total General Debt to Estimated Actual Valuation ^b	Total Personal Income (in thousands) ^c	Ratio of Total General Debt Per Personal Income	Average Daily Membership (ADM) ^d	Total General Debt Per Student ^d	Tulsa MSA Population (in thousands)	Total Debt per Capita
2013	72,678,038	6,562,775,286	1.11%	45,544,362	0.16%	15,190	4,785	963	755
2014	72,803,641	6,671,918,494	1.09%	47,726,528	0.16%	15,486	4,701	969	751
2015	79,142,155	6,905,133,965	1.15%	50,060,454	0.16%	15,700	5,041	975	812
2016	85,897,257	7,085,583,042	1.21%	49,475,553	0.17%	15,919	5,396	987	870
2017	89,967,590	7,368,526,233	1.22%	50,667,475	0.18%	15,887	5,663	991	908
2018	89,200,374	7,564,864,003	1.18%	54,941,840	0.16%	15,797	5,647	996	896
2019	88,458,169	7,841,339,927	1.13%	59,497,322	0.15%	15,655	5,650	1,006	879
2020	91,877,570	8,068,048,672	1.14%	68,588,892	0.13%	15,726	5,842	1,107	830
2021	92,827,426	8,231,037,095	1.13%	85,993,501	0.11%	14,889	6,235	1,107	887
2022	93,274,864	8,378,679,168	1.11%	89,969,935	0.10%	14,926	6,249	1,047	891

- a. Premiums received on issuance of debt are transferred to sinking fund, therefore, the net bonded debt outstanding is net of premiums and related discounts per GASB Q&A 9.24.6; the amounts reflect bonded debt, net of related premiums, discounts, and adjustments. The debt and premiums can be found on Note E-Long-Term Debt of the Notes to the Financial Statements
- b. Estimated actual valuation is taken from the table, Assessed and Estimated Actual Value of Taxable
 Property, which the District considers a more appropriate economic base than personal income on which
 to calculate the debt ratio however, personal income ratios are included.
- c. Calculation based on the 2020 Tulsa Chamber of Commerce Economic Profile MSA population projection multiplied by 2020 projected per capita income.
- d. Since the District lies within the boundaries of two Oklahoma cities, per capita calculations are based on the final audited average daily membership (ADM) certified by the Oklahoma State Department of Education as a more relevant indicator of the debt ratio.

See Demographic and Economic Statistics.

Note: The District issues only general obligation bonds.

Sources: District Records

Tulsa County Assessor

Oklahoma State Department of Education

CHANGES IN LONG TERM DEBT

State statutes prohibit the District from becoming indebted in an amount exceeding the revenue to be received for any fiscal year without approval by the District's voters. Bond issues have been approved by the voters and issued by the District for various capital improvements. State law requires these bonds be fully paid serially within 25 years from the date of issue.

Long-term liabilities of the District consist of bonds payable, obligations for compensated absences, a liability for the early retirement incentive plan, a liability for other post-employment benefits "OPEB", and a pension liability. Debt service requirements for bonds are payable solely from the fund balance and future revenues of the sinking fund. The General Fund is the fund that is typically used to liquidate compensated absences, early retirement incentive, and the OPEB obligation.

Maturities of long-term debt are as follows

Year ending June 30,	Principal	Interest	Total
2023	25,625,000	1,702,875	27,327,875
2024	26,400,000	1,244,125	27,644,125
2025	20,275,000	748,000	21,023,000
2026	13,025,000	334,125	13,359,125
2027	6,525,000	130,500	6,655,500
	\$ 91,850,000	\$ 4,159,625	\$ 96,009,625

Source: District Records

In 2018, Union asked for and the voters approved a \$128.6-million, five-year series bond that did not raise taxes above traditional levels. Multi-year bonds have become a standard in Oklahoma, as they provide for greater efficiency in planning larger capital projects. A single campaign spanning five years helps the district save money by not having an election every year. While this is a change from the familiarity of an annual bond election, this five-year general obligation bond will allow Union to be more efficient in the planning, sequencing, and building of these projects.

CHANGES IN LONG TERM DEBT

Other key projects in the proposal include a significant expansion and renovation of the district's fine arts, athletics, classroom, and stadium facilities, located on the High School campus. Student participation in Union's extra-curricular activities has grown to 90 percent, which has stressed our building capacity at the High School to meet the demand. Aging facilities like Union's Tuttle Stadium have presented us with a unique opportunity to add a Fine Arts wing to better serve band students – more than 1,100 members strong – while modernizing restrooms and concession areas, and improving accessibility to meet federal ADA requirements. Plans call for an expansion of the weight room and locker facilities for athletics, as well as new space for wrestling, volleyball, spirit, and golf. Artificial turf and other upgrades are planned for baseball and softball, as well as a renovation of the district's Performing Arts Center.

The Union School Board and administration take their role as good financial stewards very seriously. We are designating funds to replace roofing and HVAC systems at schools throughout the district (see the "2018 – 2022 Bond Project Timeline" for details), as well as exterior and interior renovations, flooring, playground upgrades, and the installation of new digital marquees at 10 elementary schools. Funds have also been allocated to Transportation and the replacement of aging school buses and fleet vehicles, as well as the implementation of RFID and GPS technology that will improve the safety of students on our buses.

Union Public Schools was recently recognized by The New York Times for its exceptional programs: "Union shows what can be achieved when a public school system takes the time to invest in a culture of high expectations, recruit top-flight professionals and develop ties between schools and the community.

5-YEAR TOTAL	\$128,600,000
Fees, Professional Services, and Contingency	\$ 7,200,000
Transportation – Buses	\$ 4,600,000
Early Childhood Education Center Purchase Payments	\$ 2,500,000
Site and Department Allocations	\$ 6,850,000
Technology Hardware, Software, and Subscriptions	\$20,600,000
District Maintenance and Operations Equipment and Other Capital Improvements	\$ 8,400,000
District HVAC System Replacements	
District Roof Replacements	
District Exterior and Interior Renovations (includes playgrounds, marquees, and flooring)	
Teaching and Learning Instructional Resources (not including technology for classrooms)	\$ 4,750,000
District Fine Arts, Athletics, Classroom, and Stadium Renovation and Construction including FF&E	\$42,475,000
Performing Arts Center – Restroom Renovation; Lighting, Sound, and Acoustical Improvements	
Design Lab at Metro Building Renovation and FF&E	
Ellen Ochoa Elementary Construction Phase III and Furniture, Fixtures, and Equipment (FF&E)	\$ 6,600,000

Source: District Records

CHANGES IN GENERAL FUND REVENUE

State aid revenue is the District's largest single revenue source representing \$48 million in Fiscal Year 2022-2023. The state aid allocation will be recalculated in January 2023 and will be adjusted to reflect the actual number of students served as of October 2022 as well as any changes in 2022-2023 property valuations. The state aid and state flexible benefit allowances have historically been the District's most stable sources of revenue, except for the years of 2001-2002 and 2002-2003, which resulted in a \$3.4 million loss. State aid revenue increased in 2020-2020 by approximately \$214,07515 compared to 2019-2020 collections.

In 2009-2010, the State began to reduce state aid, but the decrease was supplemented with federal ARRA stabilization funds. The federal government provided this funding under the belief that states would utilize these funds to offset the reduction in state aid for two years (2009-2010 and 2010-2011), with state aid funding levels, beginning in 2011-2012, returning to 2008-2009 funding levels. However, the state of Oklahoma did not increase state aid back to the prefederal ARRA stabilization funding levels of 2008-2009. The federal ARRA stabilization funds were not provided and the State did not increase funding to aid in recovering the loss. The 2011-2012 state aid payment amount of \$37,521,745 was \$900,835 less than the 2010-2011 combined state aid and federal ARRA stabilization payment of \$38,422,580. From 2012-2015, the State had slowly increased the allocation paid to the District. In 2013-2014, the District received an allocation greater than the allocation received in 2008-2009 for the first time, but the District received fewer dollars per student compared with 2008-2009. In 2017-2018, the District received \$38.43 million in state aid, and an additional payment one-time payment of \$159,585 for FY17 returned Aid. The District's FY18 state aid total was \$1.4 million less than what was allocated and collected in 2008-2009. In 2018-2019 the district received \$47,297,237, and the WADM was \$3,435.76 compared to the previous high in 2008-2009 of \$3,275.60. The increase in funding was due to several legislative revenue changes that went into effect during the 2018-2019 school year. 2019-2020 hit record highs for State Aid and WADM, and closed out the year at \$50.17 million in State Aid and \$3,581.44 in WADM. As of September 2022, the State Aid allocation is \$48,040,959.

Ad Valorem is the second largest major source of revenue in the General Fund, and the second most volatile. Union Public Schools collected ad valorem tax receipts of \$31,906,986 in 2021-2022. For 2022-2023 the district's total NAV has increased by almost \$1 million bringing our new NAV to \$32,844,389. This is an increase of 1.02% from last year. The state aid allocation law, effective with the 1997-1998 fiscal year, requires that if local ad valorem tax revenues increase due to property valuation increases, the adjusted additional revenue must be subtracted from the January 2022 mid-term revision to the state aid allocation. While the District will retain any annual increase in ad valorem revenue, the state aid allocation will be recalculated in January and will be reduced by the amount to be gained in ad valorem revenue. However, the District will also be given credit in January 2022 for any net new children who enrolled during the first quarter of the school year which will help offset the change.

SIGNIFICANT EXPENSE CHANGES

The general fund is the chief operating fund of the district. At the end of June 30, 2022, unassigned fund balance of the general fund was \$16,134,557. As a measure of the general fund's liquidity, it may be useful to compare both unassigned fund balance and total fund balance to total fund expenditures. Unassigned fund balance represents 11.82 percent of total general fund expenditures.

Controlling fiscal year-end expenditures to maintain a continuing level of fund balance is also a contributing factor to the district's financial stability. The district relies on the ending fund balance to meet cash flow needs during the first six months of the following fiscal year. While a small portion of the revenue is collected during the first six months of the fiscal year, the significant revenue collections occur in late spring. This annual cash flow trend requires the district to increase the ending fund balance each year as the expenditure budget grows in order to meet cash flow requirements of the first six months prior to tax revenues being collected.

The approved final expenditure budget was intentionally larger than anticipated actual expenditures to provide the flexibility necessary to manage any unanticipated revenue receipts and expenditures incurred in the final days of the fiscal year.

The building fund had a total fund balance of \$4,214,351. The net decrease in fund balance is due to the expenditure funds received from the City of Tulsa for a community health center on Ochoa Elementary grounds. The variance in the final budget versus the actual revenues and expenditures revealed a variance in revenues of \$259,078 and a variance in expenditures of \$3,276,109. The large variance in expenditures is due to the allowance in the budget for final clinic expenditures. The Oklahoma Constitution allows the building fund to be used for erecting, remodeling, repairing, or maintaining school buildings; purchasing furniture, equipment, or computer software; paying energy and utility costs purchasing telecommunications services; paying fire and casualty insurance premiums; purchasing security systems; and paying salaries of security personnel. The ending fund balance will be used for those purposes. The building fund revenue and expenditure budgets are revised during the fiscal year based on the actual revenue receipts and other unanticipated increases or decreases in revenue or expenditures. The revenue and expenditure budget were increased due to the anticipation of one-time funds from the City of Tulsa for a community health center.

The child nutrition fund is included as a Non-Major Governmental fund. This program had operating revenues of \$13,637,337, and expenses of \$11,025,130 for the fiscal year 2022. Child nutrition expenditures remained stable as the district has made a concerted effort to provide more healthy food options for students. The Child Nutrition fund ended the year in a positive financial condition. Management has reviewed this program and, barring any unforeseen circumstances, the Child Nutrition program should remain stable and require no support from tax revenue



Union Public Schools Www.unionps.org

About the District

The eighth largest public school district in Oklahoma, Union has approximately 14,959 students, prekindergarten through 12th grade, residing within a 28-square-mile boundary encompassing both southeast Tulsa and a portion of Broken Arrow. The school system is the heart of the community and serves as a unifying force. It includes an early childhood center for three-year-olds; 13 elementary schools prekindergarten through fifth grade including the brand new Ellen Ochoa Elementary School; and five secondary schools—a 6th/7th Grade Center, 8th Grade Center, 9th Grade Center, High School (Grades 10-12,) and an Alternative School for grades 9-12.

In addition, Union's Adult Education Learning Center serves northeastern Oklahoma, offering GED classes, English as a Second Language and more.

Parents choose the Union district for its all-around excellence. They take great pride in its wide-ranging, dynamic academic programs; award-winning activities; caring, talented teachers; highly respected elected and administrative leaders; and remarkable facilities. Union is one of the leading districts in Oklahoma in the number of teachers earning National Board Certification and in number of Presidential Math and Science Award recipients.

Union's Community Schools—
elementary schools complete with
health clinics and services from
community agencies—serve as a
model to other districts nationwide.
They increase academic success by
forming community partnerships to
provide extra supports such as
early care, health and social
services, out-of-school activities,
family/community engagement,
neighborhood
development and lifelong learning.



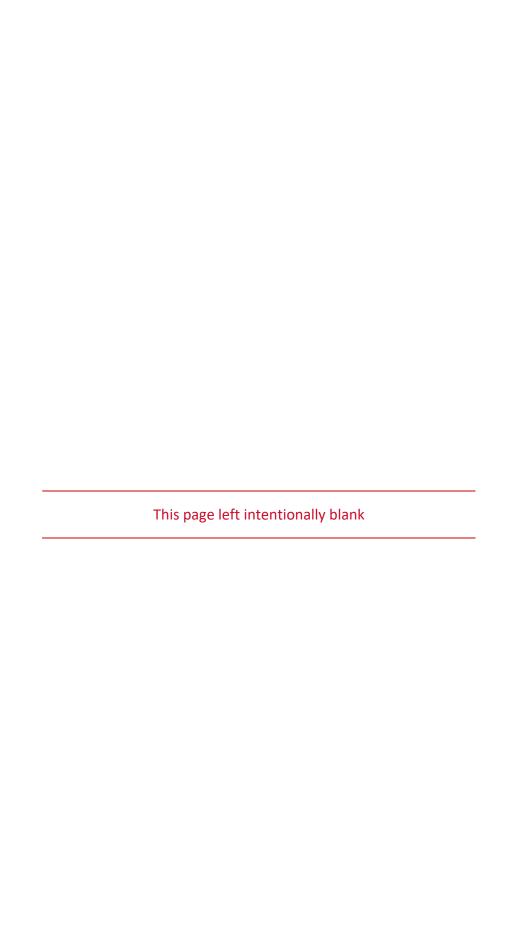
In addition to challenging Pre-Advanced Placement (AP) classes, Union offers a variety of Advanced Placement classes which allow students to earn college credit while learning about a subject in depth. In partnership with Tulsa Community College (TCC), Union was the first to pilot a unique concurrent enrollment program - EDGE - Earn a Degree, Graduate Early - on its High School campus, enabling qualifying students to earn both high school and college credits at the same time virtually tuition free!

Union's Collegiate Academy at the High School provides students a challenging college-like experience with TCC instructors, tiered lecture halls, advanced science labs, student launges, and specialty food shops, along with a safety net of high school staff members there to ensure their success. Counselors in the College and Career Center help students and their parents complete college entrance, financial aid, and scholarship applications or bank college credit through Tulsa Technology Center.

The Union community provides whatever it takes to ensure all students graduate college/career ready. Successful bond issues have funded state-of-the-art tools to enhance reading, language, math, science, and writing skills at every grade level. Art, music, and physical education enrich the traditional curriculum. Professionals in remedial reading, speech therapy, and special education are assigned to the schools along with library media specialists, nurses, and counselors. Courses for gifted students are offered at all levels, as are programs for English Language Learners.



ORGANIZATIONAL SECTION



LAWS AND REGULATIONS

Statutory provisions allowing the State Board of Education to administer the laws pertaining to Oklahoma school finance are found primarily within Title 70 of the Oklahoma Statutes, Articles 5 and 18. Related provisions are found in Titles 61, 62, 68 and 74 of the Oklahoma Statutes. School districts shall report financial transactions for all funds, (except for the school activity fund), using the Oklahoma Cost Accounting System (OCAS) as adopted by the State Board of Education pursuant to 70 O.S. §§ 5–135 and 5–135.2. Costs shall be reported by curricular subject area where applicable. For the 1992–93 school year and in each subsequent school year, school districts shall report financial transactions for all funds using the Oklahoma Cost Accounting System. A permanent rule was accepted on December 31, 1991, under Oklahoma Administrative Code (OAC) Subchapter 1, 3, 5, and 7, Chapter 25: Finance, Title 210, State Department of Education.

CALCULATION FOR PRIOR YEAR'S GENERAL FUND BALANCE

Any penalty assessed for excessive general fund carryover will be determined by using data extracted from a school district's Web-based data collection filed with the State Department of Education (Financial Accounting/Oklahoma Cost Accounting System [OCAS]) and crosschecked with the Estimate of Needs filed with the State Board of Equalization and the Financial Accounting/OCAS Section of the State Department of Education.

The General Fund Balance Allowable percentage is 14 percent (14%) of revenue, based on enrollment. If the actual amount of the school district's general fund carryover exceeds the



allowable amount, deduct Federal Revenue and Gifts, Donations, and Endowments received during the previous school year (Sources of Revenue: 4000 Series, 1610, and 1640). Next, deduct any exclusions that are applicable to your school district, if a balance remains, a State Aid penalty would result.

LAWS AND REGULATIONS

GENERAL FUND CARRYOVER PENALTY

Title 70, Chapter 1, Section 18-200.1.G.

1. Notwithstanding the provisions of Section 18-112.2 of this title, a school district shall have its State Aid reduced by an amount equal to the amount of carryover in the general fund of the district as of June 30 of the preceding year, that is in excess of the following standards for two (2) consecutive years. Total Amount of General Fund Collections, Amount of General Fund Excluding Previous Year Cash Surplus as Balance Allowable of June 30:

Less than \$1,000,000 40% \$1,000,000 - \$2,999,999 35% \$3,000,000 - \$3,999,999 30% \$4,000,000 - \$4,999,999 25% \$5,000,000 - \$5,999,999 20% \$6,000,000 - \$7,999,999 18% \$8,000,000 - \$9,999,999 16% \$10,000,000 or more 14%

- 2. By February 1 the State Department of Education shall send by certified mail, with return receipt requested, to each School District Superintendent, Auditor and Regional Accreditation Officer a notice of and calculation sheet reflecting the general fund balance penalty to be assessed against that school district. Calculation of the general fund balance penalty shall not include federal revenue. Within thirty (30) days of receipt of this written notice the school district shall submit to the Department a written reply either accepting or protesting the penalty to be assessed against the district. If protesting, the school district shall submit with its reply the reasons for rejecting the calculations and documentation supporting those reasons. The Department shall review all school district penalty protest documentation and notify each district by March 15 of its finding and the final penalty to be assessed to each district. General fund balance penalties shall be assessed to all school districts by April 1.
- 3. Any school district which receives proceeds from a tax settlement or a Federal Emergency Management Agency settlement during the last two (2) months of the preceding fiscal year shall be exempt from the penalties assessed in this subsection, if the penalty would occur solely as a result of receiving funds from the tax settlement.

LAWS AND REGULATIONS

- 4. Any school district which receives an increase in State Aid because of a change in Foundation and/or Salary Incentive Aid factors during the last two (2) months of the preceding fiscal year shall be exempt from the penalties assessed in this subsection, if the penalty would occur solely as a result of receiving funds from the increase in State Aid.
- 5. If a school district does not receive Foundation and/or Salary Incentive Aid during the preceding fiscal year, the State Board of Education may waive the penalty assessed in this subsection if the penalty would result in a Policies & Procedures 44 loss of more than forty percent (40%) of the remaining State Aid to be allocated to the school district between April 1 and the remainder of the school year and if the Board determines the penalty will cause the school district not to meet remaining financial obligations.
- 6. Any school district which receives gross production revenue apportionment during the 2002-2003 school year or in any subsequent school year that is greater than the gross production revenue apportionment of the preceding school year shall be exempt from the penalty assessed in this subsection, if the penalty would occur solely as a result of the gross production revenue apportionment, as determined by the State Board of Education.



- 7. Beginning July 1, 2003, school districts that participate in consolidation or annexation pursuant to the provisions of the Oklahoma School Voluntary Consolidation and Annexation Act shall be exempt from the penalty assessed in this subsection for the school year in which the consolidation or annexation occurs and for the next three (3) fiscal years.
- 8. Any school district which receives proceeds from a sales tax levied by a municipality pursuant to Section 22- 159 of Title 11 of the Oklahoma Statutes or proceeds from a sales tax levied by a county pursuant to Section 1370 of Title 68 of the Oklahoma Statutes during the 2003-2004 school year or the 2004-2005 school year shall be exempt from the penalties assessed in this subsection, if the penalty would occur solely as a result of receiving funds from the sales tax levy.
- 9. For purposes of calculating the general fund balance penalty, the terms "carryover" and "general fund balance" shall not include federal revenue.

Basis of Presentation: The financial statements of the Union Public Schools Independent District No. 9 (the "District") have been prepared in conformity with accounting principles generally accepted in the United States of America "GAAP" as applied to government units as promulgated by the Governmental Accounting Standards Board "GASB", the accepted standard-setting body for governmental accounting and financial reporting principles. The more significant of the District's accounting policies are described below.

Reporting Entity: The District is a corporate body for public purposes created under Title 70 of the Oklahoma statutes and, accordingly, is a separate entity for operating and financial reporting purposes. The District is part of the public school system of Oklahoma under the general direction and control of the Board of Education and is financially dependent on the state of Oklahoma for support. The general operating authority for the public school system is the Oklahoma School Code contained in Title 70, Oklahoma statutes. As required by GAAP, the basic financial statements present the reporting entity, which consists of the primary government, organizations for which the primary government is financially accountable, and other organizations for which the nature and significance of their relationship with the primary government are such that exclusion could cause the District's basic financial statements to be misleading.



The District has presented the entities that comprise the reporting entity in the basic financial statements for 2017. The District has not identified any component units that should be included in the District's reporting entity.

The governing body of the District is its Board of Education composed of five elected members. The appointed superintendent is the executive officer of the District.

Basic Financial Statements: The government-wide financial statements (i.e. the statement of net position and the statement of activities) report information on all of the non-fiduciary activities of the District. For the most part, the effect of interfund activity has been removed from these statements. Interfund services provided and used are not eliminated. Governmental activities are normally supported by taxes and intergovernmental revenues. The statement of activities demonstrates the degree to which the direct expenses of a given function or segment is offset by program revenues.

District expenses are those that are clearly identifiable with a specific function or segment. Indirect expenses of other functions are not allocated to those functions but are reported separately in the statement of activities. Depreciation expense is specifically identified by function and is included in the direct expenses to each function. Program revenues include 1) charges to customers or applicants who purchase, use or directly benefit from goods, services, or privileges provided by a given function or segment, and 2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Taxes and other items not properly included among program revenues are reported as general revenues. Separate financial statements are provided for governmental funds, proprietary funds, and fiduciary funds, even though the latter are excluded from the government-wide financial statements. Major individual governmental funds are reported as separate columns in the fund financial statements.



Basis of Accounting and Measurement Focus: The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting, as are the proprietary fund and fiduciary fund financial statements. The economic resources measurement focus is not applicable to the agency funds and therefore have no measurement focus. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Property taxes are recognized as revenues in the year for which they are levied. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met. Agency funds are reported in fiduciary fund financial statements and apply the accrual basis of accounting but do not have a measurement focus.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. Specifically, property taxes are considered available if they are collected within 60 days of the end of the current fiscal period, and all other revenues are considered to be available if they are collected within 90 days of the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under modified accrual accounting. However, debt service expenditures, as well as expenditures related to compensated absences, the early retirement incentive plan, pensions, and the other post retirement plan are recorded only when the payment is due.

Property taxes, interest and amounts due from other governments associated with the
current fiscal period are all considered to be susceptible to accrual and so have been
recognized as revenues of the current fiscal period. All other revenue items are
considered to be measurable and available only when cash is received by the
government.

Budgets and Budgetary Accounting: The District is required by state law to prepare an annual budget. A temporary appropriation budget is approved by Board of Education in March for the fiscal year beginning July 1, allowing the District to legally expend funds. If the preliminary budget requires an additional levy, the District must hold an election on the second Tuesday in February to approve the levy. If the preliminary budget does not require an additional levy, it becomes the legal budget. If an election is held and the taxes are approved, then the preliminary budget becomes the legal budget. If an election rejects the additional taxes, the District must adopt a budget within the approved tax rate.

A budget is legally adopted by the Board of Education for the General Fund, Building Fund, and Child Nutrition Fund that includes revenues and expenditures. These budgets are prepared on a cash basis for revenues and principally on the modified cash basis for expenditures. Budgetary control is maintained by fund, function, and activity and budgeted expenditures may not exceed appropriation at the fund level. Amendments may be made to the budget without approval by the governing body at the function and activity levels. Fund level budgetary amendments require approval of the governing body

In addition, encumbrance accounting is employed. Under this system, purchase orders, contracts, and other commitments for the expenditure of resources are recorded to reserve a portion of the applicable appropriation. At the end of the year, encumbered appropriations for which goods and/or services have not been received lapse. At the beginning of the next year, prior year encumbrances are reviewed, and some are reestablished. There were no material encumbrances which lapsed at June 30, 2021, and were reinstated during fiscal year 2022, for the general fund, building fund, or child nutrition fund.











GEOGRAPHICAL AREA SERVED



Union Public Schools, whose 19 sites are located in portions of South East Tulsa and North West Broken Arrow has an enrollment of about 15,000 students.

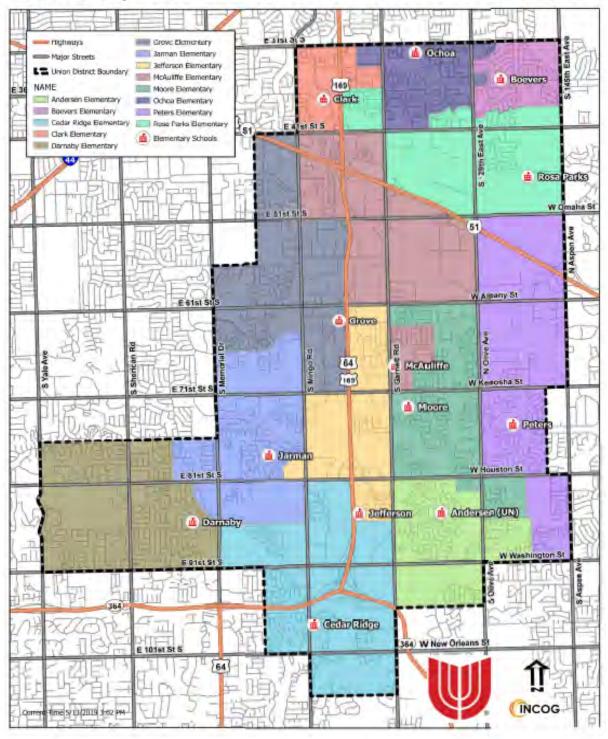






GEOGRAPHICAL AREA SERVED

Elementary School Boundaries - Union Public School District



SCHOOLS AND CAMPUS INFORMATION

UNION PUBLIC SCHOOLS District Addresses & Phone Numbers

Education Service Center Dr. Kirt Hartzler, Superintendent 8506 East 61st Street Tulsa OK 74133 918-357-4321

Enrollment Center 6011 S. 89 E. Ave. Tulsa OK 74145

918-357-6150

Union Multipurpose Activity Center (UMAC)

6836 S. Mingo Tulsa OK 74133 918-357-7481

Union High School

John Chargols, 12th Grade Principal Maria Robinson, 11th Grade Principal Tony Tempest, 10th Grade Principal 6636 S. Mingo Tulsa OK 74133

Tulsa OK 7413 918-357-4323

Union High School Freshman Academy

Kenny Moore, Principal 7616 S. Garnett Broken Arrow OK 74012 918-357-4324

Union Alternative School

Chris Ducker, Principal 5656 S. 129th E. Ave. Tulsa OK 74134 918-357-4327

Union Eighth Grade Center

Michelle Cundy, Principal 6501 S. Garnett Broken Arrow OK 74012 918-357-4325

Union Sixth/Seventh Grade Center

Scott Pennington, 7th Grade Principal Tammy Ward, 6th Grade Principal 10100 E. 61st St. Tulsa OK 74133 918-357-4326

Andersen Elementary Bethany Harper, Principal 1200 S. Willow Ave. Broken Arrow OK 74012 918-357-4328

Boevers Elementary Amy Smith, Principal 3433 S. 133rd E. Ave. Tulsa OK 74134

918-357-4329

Cedar Ridge Elementary Michelle Spencer, Principal 9817 S. Mingo Tulsa OK 74133 918-357-4331



Clark Elementary

Alicia Ewing, Principal 3656 S. 103rd E. Ave. Tulsa OK 74146 918-357-4332



Darnaby Elementary

Chris Reynolds, Principal 7625 E. 87th St. Tulsa OK 74133 918-357-4333



Grove Elementary

Kim Berns, Principal 10202 E. 62nd St. Tulsa OK 74133 918-357-4334



Jarman Elementary

Shawna Thompson, Principal 9015 E. 79th St. Tulsa OK 74133 918-357-4335



Jefferson Elementary

Shana Harris, Principal 8418 S. 107 E. Ave. Tulsa OK 74133 918-357-4339



McAuliffe Elementary

Jennifer McKnight, Principal 6515 S. Garnett Broken Arrow OK 74012 918-357-4336



Moore Elementary

Lindsay Smith, Principal 800 N. Butternut Pl. Broken Arrow OK 74012 918-357-4337



Ochoa Elementary

Rita Long, Principal 12000 E. 31st St. Tulsa OK 74146 918-357-4330



Peters Elementary

Tracy Weese, Principal 2900 W. College Broken Arrow OK 74012 918-357-4338



Rosa Parks Elementary

Jackie DuPont, Principal 13702 E. 46 Pl. Tulsa OK 74134 918-357-2757

Rosa Parks Early Childhood Education Ctr.

Alycia Pennington, Principal 13804 E. 46 Pl. Tulsa OK 74134 918-357-7380

SCHOOL BUILDING INFORMATION

Year Ended June 30, 2023

School Building Information

District Building	2019	2020	2021	2022	2023
Elementary:					
Andersen Elementary (1984)					
Square Feet	67,709	67,709	67,709	67,709	67.709
Capacity (students)	600	600	600	600	600
Enrollment	459	489	410	400	388
Percentage of Capacity Used	76.50%	81.50%	68.33%	66.67%	64.67%
Boevers Elementary (1975)	1075		123.72.1	3444014	47.46
Square Feet	59,773	59,773	59,773	59,773	59,773
Capacity (students)	600	600	600	600	600
Enrollment	609	468	418	420	434
Percentage of Capacity Used	101.50%	78.00%	69.67%	70.00%	72.33%
Briarglen Elementary (1971) ^h	101.5070	10.0070	05.0770	10.0070	12.007
Square Feet	61,349	61,349	61,349	61,349	61,349
Capacity (students)	01,343	01,545	01,343	01,045	01,545
Enrollment					
Percentage of Capacity Used	0.00%	0.00%	0.00%	0.00%	0.00%
Cedar Ridge Elementary (1994)	0.0076	0.0076	0.0076	0.0078	0.007
Square Feet	82,000	82,000	82.000	82,000	82,000
	600	600	600	600	600
Capacity (students)				417	
Enrollment	506 84.33%	470	447	4.25	431
Percentage of Capacity Used	04.33%	78.33%	74.50%	69.50%	71.83%
Clark Elementary (1977)	74 400	74 400	74 400	74 400	74 400
Square Feet	71,480	71,480	71,480	71,480	71,480
Capacity (students)	600	600	600	600	600
Enrollment	674	449	448	455	403
Percentage of Capacity Used	112.33%	74.83%	74.67%	75.83%	67.17%
Darnaby Elementary (1979)	70.450	70.150	70.450	70.150	70 150
Square Feet	73,458	73,458	73,458	73,458	73,458
Capacity (students)	600	600	600	600	600
Enrollment	643	595	531	566	568
Percentage of Capacity Used	107.17%	99.17%	88.50%	94.33%	94.67%
Grove Elementary (1974) ^a					
Square Feet	77,028	77,028	77,028	77,028	77,028
Capacity (students)	600	600	600	600	600
Enrollment	552	567	540	549	548
Percentage of Capacity Used	92.00%	94.50%	90.00%	91.50%	91.33%
Jarman Elementary (1991)					
Square Feet	68,592	68,592	68,592	68,592	68,592
Capacity (students)	600	600	600	600	600
Enrollment	551	621	621	607	614
Percentage of Capacity Used	91.83%	103.50%	103.50%	101.17%	102.33%
McAuliffe Elementary (1987)					
Square Feet	70,316	70,316	70,316	70,316	70,316
Capacity (students)	600	600	600	600	600
Enrollment	607	570	566	499	497
Percentage of Capacity Used	101.17%	95.00%	94.33%	83.17%	82.83%

SCHOOL BUILDING INFORMATION

Year Ended June 30, 2023

School Building Information

District Building	2019	2020	2021	2022	2023
Elementary:					
Moore Elementary (2000)					
Square Feet	74,632	74,632	74,632	74,632	74,632
Capacity (students)	600	600	600	600	600
Enrollment	511	512	482	511	520
Percentage of Capacity Used	85.17%	85.33%	80.33%	85.17%	86.67%
Ochoa Elementary 2017					
Square Feet	70,705	70,705	70,705	70,705	70,705
Capacity (students)	1,092	1,092	1,092	1,092	1,092
Enrollment	560	1,014	962	957	907
Percentage of Capacity Used	51.28%	92.86%	88.10%	87.64%	83.06%
Peters Elementary (1978)					
Square Feet	70,893	70,893	70,893	70,893	70,893
Capacity (students)	600	600	600	600	600
Enrollment	441	420	348	401	434
Percentage of Capacity Used Rosa Parks (2006) ^f	73.50%	70.00%	58.00%	66.83%	72.33%
Square Feet	87,550	87,550	87,550	87,550	87,550
Capacity (students)	900	900	900	900	900
Enrollment	844	730	660	602	622
Percentage of Capacity Used Thomas Jefferson (2008)	93.78%	81.11%	73.33%	66.89%	69.11%
Square Feet	69,356	69,356	69,356	69,356	69,356
Capacity (students)	600	600	600	600	600
Enrollment	579	583	526	543	578
Percentage of Capacity Used	96.50%	97.17%	87.67%	90.50%	96.33%
Secondary:					
6th/7th Grade Center (1993) ^a					
Square Feet	292,416	292,416	292,416	292,416	292,416
Capacity (students)	2,440	2,440	2,440	2,440	2,440
Enrollment	2,369	2,449	2,332	2,241	2,182
Percentage of Capacity Used 8th Grade Center (1982) ^b	97.09%	100.37%	95.57%	91.84%	89.43%
Square Feet	263,309	263,309	263,309	263,309	263,309
Capacity (students)	1,300	1,300	1,300	1,300	1,300
Enrollment	1,140	1,218	1,168	1,223	1,122
Percentage of Capacity Used 9th Grade Center (1987) ^c	87.69%	93.69%	89.85%	94.08%	86.31%
Square Feet	463,450	463,450	463,450	463,450	463,450
Capacity (students)	2,200	2,200	2,200	2,200	2,200
Enrollment	1,264	1,217	1,196	1,280	1,287
Percentage of Capacity Used Senior High School (1972)°	57.45%	55.32%	54.36%	58.18%	58.50%
Square Feet	745,220	745,220	745,220	745,220	745,220
Capacity (students)	3,490	3,490	3,490	3,490	3,490
Enrollment	3,464	3,444	3,304	3,340	3,355
Percentage of Capacity Used	99.26%	98.68%	94.67%	95.70%	96.13%
	Source: District	t Records			

DISTRICT CABINET MEMBERS AND ADMINISTRATORS

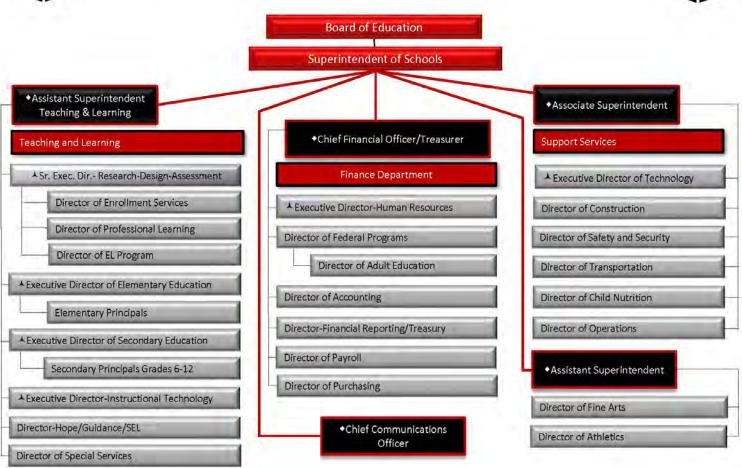
Dr. Kirt Hartzler	Superintendent
Dr. Trish Williams	Chief Financial Officer
Charlie Bushyhead	Associate Superintendent
Sandi Calvin	Assistant Superintendent
John Federline	Assistant Superintendent
Chris Payne	Chief Communications Officer
Gart Morris	Executive Director of Instructional Technology
Theresa Kiger	Executive Director of Elementary Education
Kenneth Moore	Executive Director of Secondary Education
Dr. Todd Nelson	Senior Executive Director of Research-Assessment-Design
Todd Borland	Executive Director of Technology
Jay Loegering	Executive Director of Human Resources
Emily Barkley	Director of Athletics
Meghan Bender	Director of Student Life
Melissa Brock	Director of Human Resources
Becky Byers	Director of Financial Reporting/Treasury
Christine Andrews	Director of Payroll
Dr. Joshua Robinson	Director of Operations
Dr. Marla Robinson	Director of College and Career Center
Amy Smith	Director of English Learners Program
Lindsay Smith	Director of Special Services
Ty Wardlow	Director of Safety and Security
David Young	Director of Purchasing & Supply Management
Fred Isaacs	Director of Construction Services
Dr. Amy McCready	Director of Adult Learning Center
Dr. Matthew McCready	Director of Fine Arts
Scott Pennington	Director of Hope-Guidance-Social and Emotional Learning
Susan Pettit	Director of Transportation
Charles Pisarra	Director of Union Bands
Lisa Griffin	Director of Child Nutrition
Chasity Gray	Director of Professional Learning
Julie Harkrider	Director of Accounting
Sherri Fair	Director of Federal Programs

ADMINISTRATIVE ORGANIZATIONAL CHART



Union Public Schools | 2022-2023 Administrative Organizational Chart





• Executive Cabinet Position

▲ Cabinet Position

BOARD OF EDUCATION

Board of Education Elected Position

Ken Kinnear President

Heather McAdams Vice President

Stacey Roemerman Board Clerk

Joey Reyes Deputy Board Clerk

Appointed Positions:

Dr. Kirt Hartzler Superintendent

Dr. Trish Williams Chief Financial Officer

Board Terms

School Board general elections are conducted on the first Tuesday in April, with one Board position open for election each year. If more than two candidates fle during the December filing period for an open seat or an unexpired term, a primary election will be conducted on the second Tuesday in February. If no candidates receives more than 50 percent of the vote, the top two candidates will proceed to the school board election on the first Tuesday in April. Only those registered voters living within the geographical boundaries of the Board district in which a term is expiring or in which a vacancy exists are eligible to vote for that Board position.

To seek election to a Board saat, candidates must have resided and been a registered voter for at least six months preceding the first day of the filing period in the Board district open for election, and all candidates must hold a high school diploma or a certificate of high school equivalency. The filing period for Board seats is the first Monday through Wednesday in December.

School districts with Average Daily Attendance (ADA) of 10,000 students or more are required to elect members by Board district rather than at-large. Union's Board districts were reapportioned in 1991 and again in 2001, as required by law, to be as equal in population as practical with not more than a 10 percent variance between the most populous and least populous.

The Union Public Schools Board of Education is responsible for establishing the policies under which the District operates. The five-member Board must act within the framework of state and federal laws and still be responsible to the unique needs of the Union community.

The Superintendent of Schools is the Chief Executive Officer for the Board and is responsible for administering Board policies and District regulations.

The Board strives to foster an atmosphere of communication and understanding among students, parents, teachers, and administrators.

Regular meetings are conducted the second Monday of every month at 7 p.m. in the Board Room of the Union Education Service Center, 8506 East 61st Street, Tulsa, OK (www.unionps.org). Agendas for each meeting are posted on our web site, at the Education Service Center and in schools throughout the district at least 24 hours in advance of each meeting, excluding weekends and holidays.

Patrons may address the Board during regular meetings under two specific areas of the agenda, one addressing items posted on the agenda and the other about any item concerning the district. Speakers must sign in within the 15-minute period before the Board meeting to be heard. The president may establish the order for speakers. During this time, each speaker is given a maximum of three minutes. Members of the Board are not allowed to respond to comments from the floor, and no vote or action may be taken on issues raised.

BOARD OF EDUCATION



Pictured are members of the Union Public Schools Board of Education, from left to right, Vice President Heather McAdams, Superintendent Dr. Hartzler, Board Clerk Stacey Roemerman, Board Member Chris McNeil, Deputy Clerk Joey Reyes, and President Ken Kinnear

BUDGETARY GOALS

The Board of Education of Union Public Schools, in conjunction with the Superintendent and Chief Financial Officer, establishes a system of sound financial planning and management to assure that the district's objectives are addressed and that funds are expended in accordance with plans expressed through the Board budget. The financial management system components include: 1) a planning process that consists of a review of state statutes, Board policies, concepts, ideas, problems, constraints, approaches, and systems before dollar amounts are established in the budget; and 2) a budget that is the expression of the plans of the Board through three main budgets – the General Fund, a Special Revenue Fund, and the Child Nutrition Fund.

The district utilizes budgetary controls to ensure compliance with legal appropriation limitations and to provide an operating plan for the district's resources. The annual appropriated budget includes activity of the General, Special Revenue Funds, and Child Nutrition Funds. Capital projects activity is controlled with approval of project-length financial plans. Initial budgets are adopted at the beginning of the fiscal year with periodic amendments approved by the Board as necessary.

The level of budgetary control is maintained by fund, project, and function of the OCAS (Oklahoma Cost Accounting System.) Individual line items may be adjusted without Board



action, but total budgeted expenditures may not exceed appropriations at the major fund level without Board approval. The district utilizes an encumbrance system as a technique of budgetary control with encumbered appropriations lapsing at year end. The District stives to maintain a fund balance allowable percent of 14 percent (14%) of revenue, as stated within the laws and regulations for th District.



REASONS WHY FAMILIES CHOOSE UNION PUBLIC SCHOOLS

1. 100% GRADUATION; 100% COLLEGE/CAREER READY

With the motto, "Together We Make a Difference," the Union community and its many public and private partners are committed to academic excellence. Ensuring all students graduate from high school, prepared for college or career training, guides our practice Pre-K through 12th grade.

2. ROSA PARKS EARLY CHILDHOOD EDUCATION CENTER

Partnering with the Community Action Project, Union provides a full-day, year-round program for income-eligible 3-year-olds. The site embraces the world-renowned Reggio Emilia philosophy of rich language development, fine arts exploration, and problem solving in a beautiful, family-friendly facility.

3. FULL-DAY PRE-KINDERGARTEN AND KINDERGARTEN

All 13 Union elementary schools offer innovative, developmentally appropriate programming that builds academic and social skills from the very beginning.

4. INDIVIDUALIZED TEACHING AND LEARNING

At both the elementary level (Pre-K through 5th grade) and at our secondary schools (6th grade through 12th), caring, dedicated teachers and administrators get to know each student and gear instruction to that individual's needs—whether for advanced challenges or extra assistance

5. STUDENT INVOLVEMENT

Union believes an engaged student is a successful student. The district offers 167 non-competitive intramural teams, 23 competitive sports, a rich array of clubs (from environmental to robotics and everything in between), and award-winning music and theater programs at every level.



6. NATIONALLY RECOGNIZED COMMUNITY SCHOOLS

The 6/7th Grade Center and eight Union elementaries are structured as full-service community schools. They are recognized for their work for neighborhood development, parent involvement, academic enrichment, physical and mental health, and family activities to create student achievement. Data point to increased attendance, reduced mobility, and improved academic success as a result of partnerships with community agencies, businesses, faithbased organizations, and foundations.

7. UNION COLLEGIATE ACADEMY

This wing of Union High School incorporates science labs, tiered lecture halls, Wi-Fi enabled student lounges, cafés, and a roof-top "green" classroom to create a collegiate (or college-like) setting. Here, students can meet high school graduation requirements while earning college credits – virtually free of charge – from Tulsa Community College. Advanced Placement courses, the Union Virtual Learning Academy, Tulsa Technology Center, and Union Career Connect internships provide an array of options to prepare students for college or the workforce.

8. STEM EMPHASIS

From science labs at every elementary, to our advanced science and math courses at the High School, Union offers a wide range of Science, Technology, Engineering, and Mathematics opportunities. Union is the first district in the state to utilize the award-winning Project Lead the Way curricula to offer biomedical, engineering, and computer science coursework in grades K-12.

9. OUTSTANDING TEACHERS

Union teachers are among the best. Several are recipients of prestigious national honors such as the Presidential Award for Excellence in Mathematics and Science and the Milken Foundation Award of Excellence. A high percentage of them have master's degrees or higher, and more than 80 are Nationally Board Certified.

10. ENGAGED AND SUPPORTIVE FAMILIES

Parents are not only involved in their student's academic and school-related activities, they consistently pass annual bond proposals by impressive percentages to provide and maintain some of the best-equipped and most up-to-date school facilities in the state.

Revised 2/25/15

"Together We Make a Difference"

COST OF SIGNIFICANT GOALS – CAP TULSA



"TO THIS DAY I BELIEVE WE ARE HERE ON THE PLANET EARTH TO LIVE, GROW UP AND DO WHAT WE CAN TO MAKE THIS WORLD A BETTER PLACE FOR ALL PEOPLE TO ENJOY FREEDOM." -- ROSA PARKS

School Mission

Our mission is simple: To enhance the development of very young children and promote healthy family functioning.

Accreditation

National Association for the Education of Young Children Accreditation (NAEYC) of programs for young children represents the mark of quality in early childhood education. NAEYC Accreditation began in 1985 with the goal of providing an accrediting system that would raise the level of early childhood programs. Today, more than 7,000 programs are NAEYC Accredited supporting greater readiness for and success in school. This rigorous process started two years ago with an enrollment request followed by an 18-page application form initiating a yearlong self-assessment process. Multiple staff and family surveys guided our progress as well as ongoing professional development opportunities supporting the development and continuum of NAEYC's 10 assessed standards including Relationships, Curriculum, Teaching, Assessment, Health, Teachers, Families, Community Relationships, Physical Environments, and Leadership and Management. Program commendations were given to the Rosa Parks Early Childhood Center in the areas of Relationships, Teaching, Assessment, Health, Families, Community Relationships and Leadership and Management.

Home Base Visitation Services (Early Head Start)

Early Head Start (EHS) offers free weekly 90-minute home visits by a certified teacher for children between the ages of birth to three, bimonthly parent and child group meetings, resources and referrals to community resources, developmental screenings, and an early partnership between home and school.

Full Day Educational Services (Head Start and State Pilot Project)

Head Start and the State Pilot Project offers a free year-round, full-day developmentally appropriate educational program for children who turn three by September 1, certified teachers in every classroom, referrals to community resources, developmental screenings, and free breakfast, lunch and snack.

Class environment

The Rosa Parks Early Childhood Education Center utilizes a unique environment, apart from the rest of Union's school sites, to help the classrooms resemble children's homelife.

This effect is accomplished through low-level lighting and thoughtful presentation and placement of open-ended authentic materials supporting both academics and social emotional competency.

COST OF SIGNIFICANT GOALS – CAP TULSA CONTINUED

And, of course, lots and lots of hugs and personal attention! The idea is designed to ease children's transition to a school environment and make the center more welcoming. Below are sample classroom environments:

Identity, Community and Long-Term Investigations

Students engage in a variety of activities supporting community and identity, often following a long term investigation though the school year as they build upon lessons they have previously explored. Students work both in small groups and independently while certified teachers offer explorations encouraging creativity, critical thinking skills and socialization. Parents are integral throughout this process and participate in activities that encourage and support children.

Principal



Alycia Pennington received her Bachelor of Science in Elementary Education from Northeastern State University. She completed her Master of School Administration degree, also from NSU in 2008. She was named principal of the Rosa Parks Early Childhood Education Center in spring 2016. Pennington has served as the principal at Boevers Elementary for five years as well as an assistant principal for Rosa Parks and McAuliffe in previous years. She also has served as a teacher at Andersen Elementary.

CAP Tulsa	- p
Schedule of Expenditu	res
	Actual
	2021-2022
Salaries	\$1,093,820
Benefits	284,910
Contracted Services	242,039
Purchased Property Services	2,110
Other Purchased Services	861
Supplies and Materials	44,102
Other objects	1,170
Other Uses of Funds	68,332
	\$1,737,344

COST OF SIGNIFICANT GOALS - REACH

The Reach Program is an evidence-informed approach to serving and supporting students that provides sexual health education, mental health support, and college and career counseling to complement the strong academic and activities programs for which Union is known. Interventions that address the core competencies of social-emotional learning (self-awareness, self-management, social awareness, relationship skills, and responsible decision-making) are related to increases in academic achievement (CASEL). The Reach Program is designed to provide SEL support to students that present SEL needs in a timely, personalized, and effective way. The program provides all 7th and 9th grade Union students with evidence-based sexuality education curricula that is age and stage appropriate. Full-time mental health specialists serve Reach students in 7th and 9th-12th grades, including those at the Alternative Education Center. A Reach college and career specialist serves students in 9th-12th grades.

Goals

The goal of the Reach Program at Union Public Schools is to increase student success by:

- building cognitive and social-emotional learning capacity.
- providing graduation and postsecondary planning support.
- developing medically accurate and age-appropriate sexual and reproductive health literacy.

Funding

- George Kaiser Family Foundation (GKFF) is the primary Reach partner.
- Other partners include the QuikTrip Corporation.

REACH Schedule of Expenditures Actual 2021-2022 Social Work Services \$ 170,547 Guidance Services \$ 145,548 \$ 316,095

COST OF SIGNIFICANT GOALS - EDGE



While Union has offered concurrent classes of eligible students to several years, EDGE presents a new cohort of students each year with a unique early college high school experience. TCC instructors teach rigorous college-level courses on-site at Union High School.

The courses offered at Union and at TCC include the general education requirements many local universities require in the initial two years of post-secondary education. Students qualifying for the program have the opportunity to earn 60 hours of college credit and an associate degree in a Liberal Arts field.

Expectations are HIGH... for students and the pilot program. Through the cooperative and shared use of resources, personnel, and facilities, TCC and Union Public Schools will provide access to higher education while reducing the barriers to college completion.

This program is setting the stage for how Early College High School is implemented in Oklahoma. The State Regents for Higher Education is committed to helping **improve college graduation rates** in Oklahoma, as well as helping to **create more first-generation college students.**

The program is also a direct response to Oklahoma's workforce needs, as employers struggle to find enough qualified employees to fill positions in high-growth industries.

Breaking Down the Barriers to College

EDGE at Union Public Schools will target first-generation college students, those who come from families who have had no experience with college or expectation that their children will attend a university.

By putting students on-track for college before they leave high school, we plan to change the life trajectory for many young people. Ultimately, we hope to improve college graduation rates in Oklahoma, while better preparing students for a successful career in high-demand fields with potentially higher salaries.

EDGE - Earn a Degree, Graduate E	arly	
Schedule of Expenditures		
		Actual
	20	21-2022
Salaries	\$	21,807
Benefits		5,358
Contracted Services		41,800
Supplies and Materials		977
	\$	69,942

COST OF SIGNIFICANT GOALS – PROJECT LEAD THE WAY



Union Public Schools implements STEM through the support of Project Lead The Way (PLTW). PLTW is the nation's leading provider of STEM education curricular programs for elementary, middle and high school students.

PLTW's elementary program is designed for students in kindergarten through fifth grades and will align with Oklahoma state standards and Next Generation Science Standards. Through a series of topic-based modules, students will engage in design problems that encourage collaboration, analysis, problem solving, and computational thinking.

We are very fortunate to be a PLTW school within the Union School District. Students have the unique opportunities to learn like engineers. The process is key. Students learn to question, plan, try things out, evaluate, and communicate about what worked and what didn't. Students learn to become real world problem solvers. Studies show that students decide as early as second and third grade whether they like, and think they are good at, math and science.

Students learn science through hands-on exploration and scientific investigation with our curriculums Discovery and Project Lead the Way. We focus largely on incorporating STEM, or Science, Technology, Engineering, and Mathematics. Students enhance their technology skills as they access Project Lead the Way resources through iPads.

STEM at Union Public Schools is a transdisciplinary approach to learning that encourages students to inquire, explore and problem solve.

Union's vision of STEM is driven by four unique design principles, each with its own design features. This framework provides direction for implementation, aids in curriculum and professional development, and drives our district goal of 100 percent college and career ready.

Project Lead the Way		
Schedule of Expenditures		
		Actual
	20	21-2022
Salaries	\$	10,228
Benefits		2,708
Contracted Services		17,296
	\$	30,232

EDUCATIONAL PROGRAMS

College and Career Readiness



Oklahoma to use the awardwinning Project Lead The Way program to offer biomedical, engineering, and computer science coursework in grades



- Union has earned the Class 6A Championship for graduating the most Oklahoma's Promise participants for four consecutive years.
- Through Union Career Connect, High School students are taking classes, completing industry-based internships, and earning national certifications in culinary arts, manufacturing, automotive technology, K-12 education, early childhood education, and construction.

 Union Collegiate Academy students have earned 10,779 college credit hours through AP exams and courses offered by Tulsa Community College, saving families millions of dollars.



- Union's nationally recognized Rosa Parks Early Childhood **Education Center showed** a 22-percent enrollment increase over 2014-2015.
- Home-based visitation services are provided for families with infants and toddlers through the age of
 - · All of Union's elementary schools offer full-day PreK and Kindergarten.







- 'Together We Make a Difference" for children, families, and neighborhoods through Union's full-service community schools.
- The data indicate increased attendance, reduced mobility, and improved academic success as a result of partnerships with community agencies, businesses, faith-based organizations, and foundations.







EDUCATIONAL PROGRAMS

Community Schools



Union Public Schools utilizes Community Schools as a core equity strategy that provides layered supports and removes barriers to basic needs to promote student achievement and create strong ties between families, schools, and communities.

Starting in 2004, Union Public Schools began to experience a demographic shift that resulted in an increase of students who needed more support than a traditional school district could provide.

71%

This is a 370% increase in low-income students,

2000 2020

15%

Current graduation rate is one of the highest in the area.

This is because Union responded to the changing needs of the students by addressing:

- Social-Emotional Issues
- Food Insecurity
- Access to Health Care
- Basic Needs
- Other Systemic Barriers

Union offers a range of comprehensive supports for students from infancy through adulthood:



Expanded Learning Opportunities

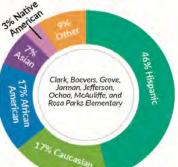
> Social & Mental Health Services



College & Career Preparation

Offering such provisions at school, along with caring adults, creates an environment where students feel safe, supported, and engaged. With these measures in place, Union remains committed to our mission: 100% graduation college and/or career ready.







- An average of 87% of students at the eight schools qualify for the free and reduced lunch program
- 45% speak English as a second language

Community School Coordinators

Boevers Mindi Bisdee 918-357-8301

Grove Shiloh Wolff 918-357-4334 Ellen Ochoa Andrea Zambrano & Derek Frey 918-357-4330

> McAuliffe Daisy Pokhrel-Duran 918-357-6561

Jarman Scott McCrary 918-357-4335

Jefferson Scott McCrary 918-357-4339 Roy Clark Linda Stevenson 918-357-8550

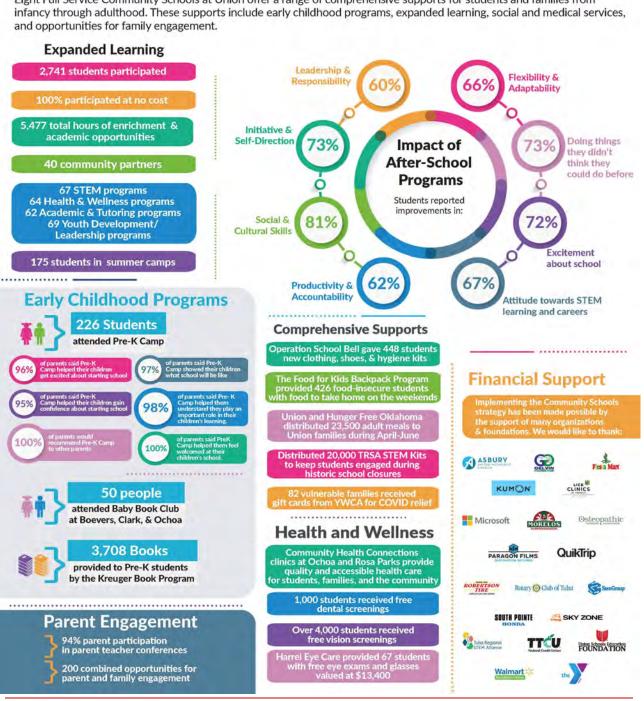
Rosa Parks Danielle Brinlee

To learn more about the Community Schools program at Union Public Schools, please contact Kulsum Siddiqui at siddiqui.kulsum@unionps.org or 918.357.6240.

EDUCATIONAL PROGRAMS



Eight Full Service Community Schools at Union offer a range of comprehensive supports for students and families from



MISSION STATEMENT AND CORE VALUES



Our mission is to graduate 100% of our students, college and/or career ready.

The following core values serve to guide our strategic focus and actions in accomplishing our mission:

- > Commitment to Excellence —Pursue the highest measure of quality in all that we do.
- > Collegiality Demonstrate respect and an ability to work as team members.
- ➤ Honesty, Integrity, Transparency Do what's right and above board.
- > Innovation Embrace new, effective thinking and programs.
- ➤ Inclusiveness Cultivate an organizational culture of accepting children, families, and employees for who they are rather than categorizing them by income, ethnicity, or ability.
- > **Empowerment** Help people reach their full potential.
- > Accountability Accept responsibility for achieving results.
- > Thoughtful Planning Use data and district values in planning and decision maki



CORE VALUES

These core values serve to guide our strategic focus and actions in accomplishing our mission



STRATEGIC GOALS

Message from Superintendent Dr. Kirt Hartzler & the Board of Education

Dear Union Patrons,

As we celebrate Union's first 100 years, I am thankful for not only the "Uncommon Vision" of our district's founders, but also the clarity and consistency of our community's shared vision. In 1919, when they first joined together the four rural districts that would become Union Public Schools, our founders had big hopes and dreams. The future of their children was riding on the success of the union they had created, just as it does for our own children today.

Every day, I am proud of the district we inherited, and the one we continue to re-imagine and reinvent on an almost daily basis. Thankfully, we have bold leadership at the Board level and a supportive community that is deeply invested in the work that we do. Your approval in February 2018 of a \$128.6 million multi-year bond has put us on track to effect improvements that will carry us through 2022.

So many exciting things are underway at Union Public Schools. In the fall, we launched Union Virtual, the district's first 100% online education offering for grades 6-12. We recently completed the implementation of "1-to-1," with a portable laptop device for every student in grades 9-12, enabling high school students to have computer access 24/7. Our Innovation Lab, located down the street from the High School, opened to new students last August. We continue to blaze new trails in expanding student access to college and career opportunities.

Three cohorts of students so far have been selected for our Early College High School program, with participants receiving both a high school diploma and an associate degree from Tulsa Community College. We are relentless in our pursuit of academic excellence and our district's mission of "100% Graduation, College and Career-Ready."

Preparations for a new stadium and Fine Arts addition are already well underway. In the coming months, demolition of the west (home) side of the stadium will begin. Given the 43-year history of Union Tuttle Stadium and our many athletic victories, it will be a bittersweet moment, indeed, when the walls come tumbling down.

This is an EXCITING time for students and teachers at Union Public Schools. I hope you enjoy this progress report covering Year 2 of our five-year bond. We also wanted to provide you with a road map for the year ahead, as there are many positive changes coming just around the corner.

I often wonder if our forebearers would recognize the Union Public Schools of today. Even if they did not recognize us at first glance, I believe they would be proud of what we have grown into, considering the humble seeds from which we had been planted.

Sincerely, Kirt Hartzler, Ed.D., Superintendent

STRATEGIC GOALS

These strategic goals in the following focus areas provide guidance for leadership, policy decisions, and development of initiatives, programs, and strategies to achieve our mission.

Learning

- -Ensure that all students through greater personalization -- have access to a high-quality instructional and educational environment that prepares them for college or a career.
- Enhance the communication, advocacy, and engagement with our students and families.
- Close achievement gaps for all learners.

Teaching

- Differentiate instruction to meet the needs of all students.
- Promote ongoing professional learning for teachers and leaders.
- Successfully implement the TLE Evaluation System and Oklahoma Academic Standards.
- Use multiple measures for student success.

Partnerships

- Expand partnerships to enhance learning opportunities for student success and for greater human and organizational capital.
- Promote greater awareness and engagement among school stakeholders
- Establish business and alumni partnerships in order to garner and sustain continued support for Union Public Schools.

> Human Capital

- Recruit, develop, retain, and support caring, motivated, innovative professional faculty and staff.

Business/Operations

- Ensure the operating and capital budgets reflect our priorities as well as areas of focus and need.
- Promote operational safety and high-quality infrastructure to ensure effective and efficient learning and working environments.
- Maintain a technology system that promotes teaching/learning and efficiency within the operational functions of the organization.

> Culture

- Foster an atmosphere of respect and effective communication.
- Promote a commitment to equity and excellence.

SIGNIFICANT GOALS AND OBJECTIVE

Kindergarten Readiness

- Early childhood emphasis
- Pre-K emphasis

Grade 3

- Provide positive learning environment
- Reading at the proficient and advanced levels

Grade 5

- Enhance Character/Civic Responsibility
- Reading and mathematics at the proficient and advanced levels in Grade 5
- Engage parents in student support

Grade 6 & 7

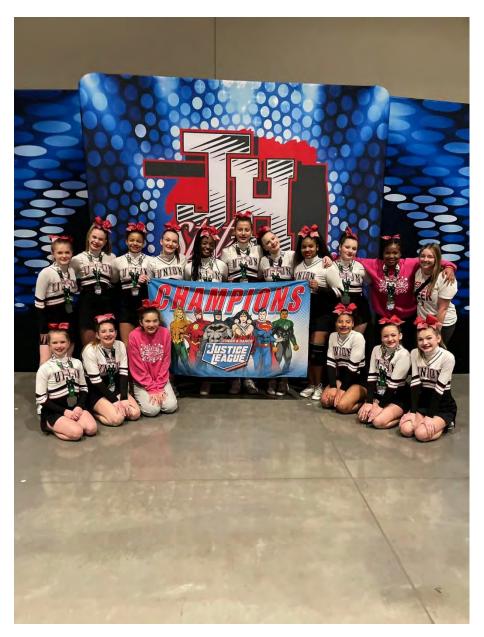
- Inform parents of college requirements
- Explore talents and interests
- Expand social skills
- •Reading and mathematics at the proficient and advanced levels
- •Build leadership skills

Grades 8 & 9

- •Formulate 4-year graduation plan
- Assess interests and skills/EXPLORE Test
- •Expand career awareness
- •Register in OKCIS to begin college planning
- •EOI Biology and Algebra I at the proficient and advanced levels
- •Involve parents in HS/Career Planning

Grades 10 thru 12

- Maximize dual credit opportunities
- Earn graduation credits and pass EOIs
- Advanced Placement 3 or higher
- National Merit Scholars
- ACT 24 or higher
- On-time graduation







SCHOOL SITE BUDGET ALLOCATIONS

Site budgets are determined by student count. All elementary schools receive \$31 per student, 6th-9th grade receive \$33 per student, and the High School receives \$38 per student. The student count at October 1st is reported to the state and used for our analysis. The site is given the higher student count of the current year or previous year. This measure extends toward district goals and objectives, as well as seeking out the highest qualified staff, which share our "uncommon vision" in reaching the districts strategic goals for our students.

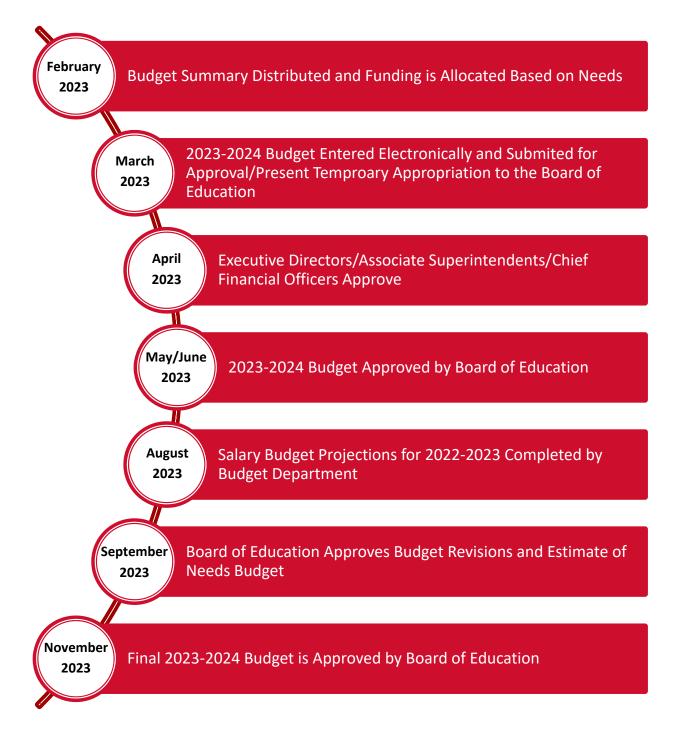
Our reoccurring bond approvals also offer tremendous strides in providing improvements in our district and help us to provide a commitment of excellence and reach Union Public Schools mission to "graduate 100% of our students, college and/or career ready".

UNION PUBLIC SCHOOLS SCHOOL SITE BUDGET ALLOCATIONS FY 2022-2023

Site Name	Site	Current \$ Per Student	October 2020 Count	Calculated Base 2021-22	Final Base 2021-22	October 2021 Count	Calculated Base 2022-2023	Proposed Base 2022-2023
Grove Elementary	105	31.00	540	16,740	17,577	549	17,019	17,019
Boevers Elementary	115	31.00	418	12,958	14,508	420	13,020	13,020
Clark Elementary	120	31.00	448	13,888	13,919	455	14,105	14,105
Darnaby Elementary	122	31.00	531	16,461	18,445	566	17,546	17,546
Peters Elementary	125	31.00	348	10,788	13,020	401	12,431	12,431
Andersen Elementary	130	31.00	410	12,710	15,159	400		12,710
McAuliffe Elementary	135	31.00	566	17,546	17,670	499		17,546
Jarman Elementary	140	31.00	621	19,251	19,251	607	18,817	19,251
Cedar Ridge Elementary	145	31.00	447	13,857	14,570	417	12,927	13,857
Moore Elementary	150	31.00	482	14,942	15,872	511	15,841	15,841
Rosa Parks Elementary	155	31.00	660	20,460	22,630	602	18,662	20,460
Thomas Jefferson Elementary	160	31.00	526	16,306	18,073	543	16,833	16,833
Ochoa	180	31.00	962	29,822	31,434	957	29,667	29,822
6th / 7th Grade Center	510	33.00	2,332	76,956	80,817	2,241	73,953	76,956
8th Grade Center	620	33.00	1,168	38,544	40,194	1,223	40,359	40,359
9th Grade Center	720	38.00	1,186	45,068	46,056	1,265	48,070	48,070
High School (10-12)*	705	38.00	3,163	120,194	130,172	3,153	119,814	125,194
Alternative High School	725	38.00	151	5,738	5,890		7,676	7,676
			14,959	\$ 502,229	\$ 535,257	15,011	\$ 504,609	\$ 518,696

^{*}Includes an additional \$5,000 for UView Budget

BUDGET PLANNING PROCESS



BUDGET PLANNING PROCESS

The following budget development calendar denotes the budget planning process for the 2022-2023 budget:

February 2022 (prior to fiscal year)

Budget totals are set by the budget department and summaries are distributed to the district employees to allocate appropriate funding needs.

March 2022 (prior to fiscal year)

Projected budgets are entered into the MUNIS system by the responsible district employees and the budgets are submit to direct supervisors for first level approval. Temporary Appropriations are reviewed by Board of Education.

April 2022 (prior to fiscal year)

Executive Directors, the Associate Superintendent, and the Chief Financial Officer review final budget changes and submit the approved budgets to the Budget Department for final review.

May/June 2022 (prior to fiscal year)

2022-2023 budget are reviewed with the Board of Education.

August 2022

Budget projections are completed by the Budget Department to set the new preliminary budget for the 2022-2023 fiscal year.

November 2022

Final 2022-2023 budgets are approved by the Board of Education and budget amendments are made by the Budget Department to finalize the budget process.

All district administrators submit budget requests to their Associate or Assistant Superintendent who reviews the requests prior to submitting them to the Chief Financial Officer. The submitted budget requests are reviewed, modified for accuracy and consistency, and then further submitted to the Cabinet who serve as the District's budget committee. The district has until September 30th of the current fiscal year to approve the budget and submit it to the County Excise Board. The public hearing on the budget is required within 45 days after the Board of Education approves the budget after the County Excise Board approves the Board of Education accepted Estimate of Needs.

BUDGET PLANNING PROCESS

Budgetary Controls The district utilizes budgetary controls to ensure compliance with legal appropriation limitation and to provide an operating plan for the district's resources. The annual appropriated budget includes activity of the General Fund, Building Fund, and Child Nutrition Fund. The Activity Fund budgets are submitted and approved by the Board annually and updated as needed. Capital projects are controlled with approval of five year bond issues and financial plans. Initial budgets are adopted at the beginning of the fiscal year with periodic amendments approved by the Board of Education as necessary.

THE 2022-2023 BUDGET IS BEING ADOPTED **ACCORDING TO THE** PROVISIONS OF BOARD POLICY 3050. IN SUCH TERMS, "IT IS THE POLICY OF THE BOARD OF **EDUCATION OF UNION PUBLIC SCHOOLS** INDEPENDENT DISTRICT NO. 9 TO ADOPT **OPERATING BUDGETS** FOR THE GENERAL FUND, **BUILDING FUND, AND** CHILD NUTRITION FUND PRIOR TO OCTOBER 1 OF THE FISCAL YEAR."

The level of budgetary controls is maintained by fund and project. Individual line items may be adjusted without Board action, but total budgeted expenditures may not exceed appropriations at the major fund level without the Board approving a revision to the budget. The district utilizes an encumbrance system as a technique of budgetary control with encumbered appropriations lapsing at year-end into accounts payable if goods and services have been received.

Independent Audit Oklahoma state statues require an annual audit by independent certified public accountants. The accounting firm of RSM US LLP, was selected by the Board of Education to conduct the audit. In addition to meeting the requirements set forth in state statues, the audit was also designed to meet the requirements of the Federal Single Audit Act of 1984 and related OMB Uniform Grant Guidance.

Internal Control Management of the district is responsible for establishing and maintaining an internal control structure designed to ensure that the assets of the district are protected from loss, theft or misuse and to ensure that adequate accounting data is compiled to allow for the preparation of

financial statements in conformity with generally accepted accounting principles (GAAP). The internal control structure is designed to provide reasonable, but not absolute, assurance that these objectives are met. The concept of reasonable assurance recognizes that 1) the cost of control should not exceed the benefits likely to be derived; and 2) the valuation of costs and benefits requires estimates and judgments by management.

DISTRICT FUNDS

<u>Governmental Funds:</u> Governmental funds are used to account for all or most of a government's general activities, including the collection and disbursement of earmarked monies (special revenue funds), the acquisition or construction of general capital assets (capital projects funds), and the servicing of general long-term debt (debt service funds). The District reports the following major governmental funds:

General Fund The general fund is used to account for all transactions except those required to be accounted for in another fund. Major revenue sources include local property taxes, state funding, and federal grants.

Bond Fund The District's bond fund is a capital project fund and is used to account for the proceeds of bond sales to be used exclusively for acquiring school sites, constructing and equipping new school facilities, renovating existing facilities, and acquiring transportation equipment. This fund is also utilized to acquire books and other non-capitalizable items.

Sinking Fund The District's sinking fund is a debt service fund and is used to account for the accumulation of financial resources for the payment of general long-term debt principal, interest and related costs. The primary revenue sources are local property taxes levied specifically for debt service and interest earnings from temporary investments.

The District reports the following non-major governmental funds:

Building Fund The District's Building Fund is a special revenue fund and consists of monies derived from property taxes levied for the purpose of erecting, remodeling, or repairing buildings and for purchasing furniture and equipment.

Child Nutrition Fund The District's Child Nutrition Fund is a special revenue fund and is used to account for the operations of the child nutrition programs. In addition to meal ticket sales, revenue sources include federal and state grants for free and reduced meals.

Gift Fund The District's Gift Fund is a special revenue fund and is used to account for donations received for the benefit of specified individuals associated with the District.

Arbitrage Fund The District's arbitrage fund is special revenue fund and is used to account for any liability penalties from the Internal Revenue Service on any outstanding bond fund proceeds according to arbitrage calculations performed by an outside consultant.

DISTRICT FUNDS

Governmental Funds Continued:

Agency Fund (Student Activity) The Agency Fund consists of the School Activities fund. The School Activities fund is used to account for monies collected principally through fundraising efforts of the students and District sponsored groups. The administration is responsible, under the authority of the Board, for collecting, disbursing, and accounting for these activity funds.

Proprietary Funds (Employee Insurance): Proprietary funds are used to account for activities similar to those found in the private sector, where the determination of net income is necessary or useful to sound financial administration. Goods or services from such activities can be provided either to outside parties or to other departments or agencies primarily within the District (internal service funds). Proprietary funds distinguish operating revenues and expenses from non-operating items. Operating revenues and expenses generally result from providing services in connection with a proprietary fund's principal ongoing operations. Operating expenses for the internal service funds include the cost of services and administrative expenses. All revenues and expenses not meeting this definition are reported as non-operating revenues and expenses. The District reports the following proprietary funds:

Internal Service Fund: Employee Insurance Fund The Employee Insurance Fund is an internal service fund used to account for the accumulation, recording and disbursing of District and participant contributions to the District's self-insured medical, dental, and short-term disability programs.

CLASSIFICATION OF REVENUE

Sources of General Fund Revenue

Union Public Schools receives revenue to support its General Fund from the following major revenue functions. The function dimension within the Chart of Accounts describes the revenue received such as Ad Valorem tax.

State Revenues: Revenues from state sources for current operations are primarily governed by the state aid formula under the provisions of Article XVIII, Title 70, Oklahoma statutes. The State Board of Education administers the allocation of state aid funds to school districts based on information accumulated from the districts. After review and verification of reports and supporting documentation, the State Department of Education (the "Department") may adjust allocations of money for errors disclosed by review. Normally, such adjustments are treated as reductions or additions of revenue in the year the adjustment was made.

The District receives revenue from the state to administer certain categorical educational programs. Board of Education rules require that revenue earmarked for these programs be expended only for the program for which the money is provided and require that the money not expended as of the close of the fiscal year be carried forward into the following year to be expended for the same categorical programs. The Department requires that categorical educational program revenues be accounted for in the general fund.

Local Sources of Revenue - 41000

Local sources of revenue from local sources is the money generated from within the boundaries of the district and available to the district for its use.

Ad Valorem Tax - 41110

The second largest major source of revenue in the General Fund, and the second most volatile, is the current ad valorem tax. Unfortunately, the state aid allocation law, effective with the 1997-1998 fiscal year, requires that if local ad valorem tax revenues increase due to property valuation increases, the adjusted additional revenue must be subtracted from the mid-term revision to the state aid allocation. While the District will retain any annual increase in ad valorem revenue, the state aid allocation will be re-calculated in January and will be reduced by the amount to be gained in ad valorem revenue. However, the District will also be given credit in January for any net new children who enrolled during the first quarter of the school year, which will help offset he change.

Local Revenue - Other - Varies

Local revenue consists of all revenues, other than current ad valorem taxes, which are generated within the boundaries of the Union District and are available to the District for its use. The major sources are interest earnings, extended day fees, building rental fees, tuition, local grants, and athletic admissions.

CLASSIFICATION OF REVENUE

Local Revenue Continued:

Extended Day Tuition:

Union has a tuition based Extended Day Program where we offer after school supervision for Union Elementary Students. For the Fiscal year 2022-2023 the budget is \$1,740,000. Actuals for 2021 were \$1,733,217, for 2020 were \$954,927.

Facility Rentals:

The District make its facilities available to various community and civic organizations for a fee. In fiscal year 2022 total revenue was \$215,534, in 2021 it was \$229,247. The budget for the current year is \$230,000 but due to the pandemic revenue will probably fall short of that number.

Interest Earnings:

The district invests excess funds in short-term investments to provide a return until the funds are needed. Interest rates have had significant fluctuations over the past several years. Revenue for 2022 was \$73,040, 2021 was \$35,269, resulting in a \$37,771 increase. Interest in the current year is expected to increase to \$150,000.

Local Grants:

The district receives several different local grants that support Union students in school and after school. Without our partners we wouldn't be able to provide many programs. For the year ended 2021 the district received \$2,238,720 in local grants, 2022 was \$3,343,321. The budget for 2023 is \$4,622,470.

Intermediate Sources of Revenue - 42000

Revenue from intermediate sources is the amount of money from funds collected by an intermediate administrative unit or a political subdivision between the district and the state, and distributed to districts in amounts that differ in proportion to those which were collected within such systems.

State Sources of Revenue – 43000

Revenue from state sources provided to LEAs in the form of grants or other types of allocations.

State Aid Revenue - 43200

State aid is the District's largest single revenue source. The state aid allocation will be recalculated in January and will be adjusted to reflect the actual number of students served as of October, the previous year, as well as, any changes in prior fiscal year property valuations.

CLASSIFICATION OF REVENUE

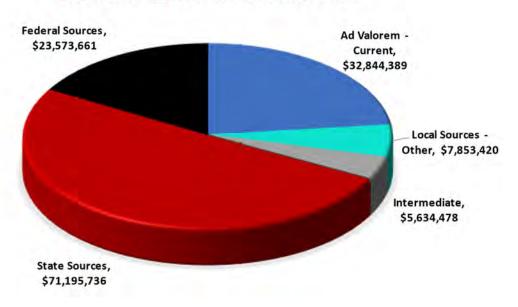
State Revenue - Other Sources - 43100

The third major source of revenue for the General Fund is state revenue - other sources. These include motor vehicle tax, state land earnings, state flexible benefit allowance, alternative education, state grants, and fees. Some of the sources of revenue, which are generated at the state level, are distributed to districts on an average-daily-membership (ADM) basis, through state line-item grants, or funding for specific programs.

Federal Sources of Revenue - 44000

Consists of several grant and project categories received from Federal sources. The function dimension within the Chart of Accounts describes the activity being performed for which a service or material object, such as the Instruction Function, is acquired. The following are the major function categories required to be used under the Oklahoma Cost Accounting System (OCAS).

2022-2023 GENERAL FUND REVENUE



CLASSIFICATION OF EXPENDITURES BY OBJECT

The following are the major object categories required to be used under the Oklahoma Cost Accounting System (OCAS).

Salaries - Object 100

Amounts paid to regular, part-time, temporary, or casual district employees.

Benefits - Object 200

Amounts paid by the district on behalf of the employees as a fringe benefit such as social security matching, group health, dental, vision, life and workers' compensation insurance, teachers' retirement, etc.

Purchased Professional and Technical Services - Object 300

Amounts paid for professional and technical services to personnel who are not on the district payroll.

Purchased Property Services - Object 400

Services purchased from non-district personnel to operate, repair, rent, or maintain district property.

Other Purchased Services - Object 500

Amounts paid to non-employees of the district for services such as telephone, postage, and tuition, as well as, all travel related expenses.

Supplies and Materials - Object 600

Amounts paid for material items of an expendable nature including supplies, electricity, natural and diesel gas, books, and software that are consumed, worn out, or deteriorated by use.

Property Expenses - Object 700

Amounts paid for the acquisition of fixed assets or the addition to fixed assets such as furniture, equipment, vehicles, and machinery.

Other Objects - Object 800

Amounts paid for goods and services not otherwise classified.

Others Uses of Funds – Object 900

Amounts used to classify transactions which are not properly recorded as expenditures to the LEA, but require budgetary or accounting control. These include redemption of principal and interest on long-term debt, housing authority obligations, and fund transfers.

CLASSIFICATION OF EXPENDITURES BY FUNCTION

Instruction - Function 51000

Includes the activities dealing directly with the interaction between teachers and students.

Student Support - Function 52100 Activities designed to assess and improve the well-being of students, supplement the teaching process, and attempt to prevent or solve problems involving the home, school, and community; examples include counselors, nurses, psychologists, speech pathologists, audiologists, Parents as Teachers, and enrollment center.

Instructional Staff Support Services - Function 52200 Activities associated with assisting the instructional staff with the content and process of providing learning experiences for students; examples include instruction and curriculum development, staff training, and media specialists.

General Administration - Function 52300

Activities associated with superintendent's office, board of education, and overall grant administration in connection with operating the entire school district.

School Administration - Function 52400

Activities concerned with overall administrative responsibility for a single school or a group of schools; principals are included here, as well as athletics, fine arts, and special education directors.

Business Support - Function 52500

Activities concerned with fiscal services including accounting, fixed assets, treasury, payroll, purchasing, budgeting, printing, warehousing, information services, human resources, planning and administrative technology.

Operation & Maintenance - Function 52600

Activities concerned with keeping the grounds, buildings, and equipment in an effective and safe working condition, and security.

Student Transportation Services - Function 52700

Activities concerned with the supervision, monitoring, vehicle operations, servicing, and maintenance of student transportation.

Community Services Operations - Function 53300

Activities, such as programs of civic activities and community welfare activities. i.e. Extended Day program, CAP three year old program.

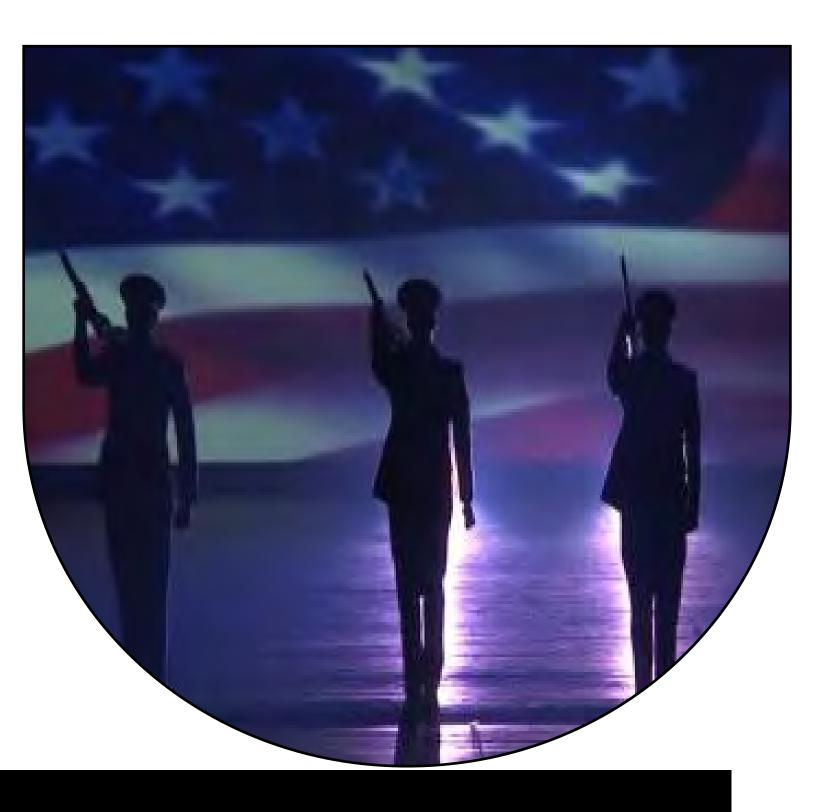
Debt Service - Function 55100

Servicing of the debt of the district including payment of principal and interest.

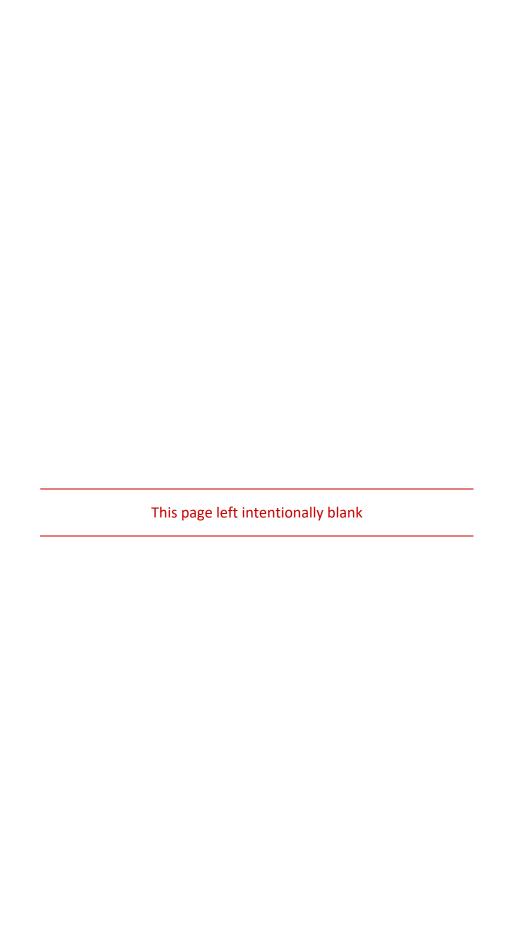






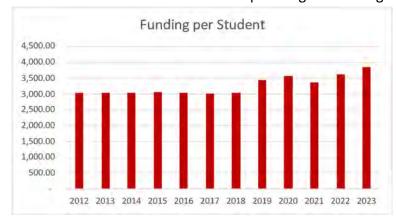


FINANCIAL SECTION



MAJOR REVENUE SOURCES

State aid is the District's largest single revenue source. The state aid allocation is recalculated in January 2022 and will be adjusted to reflect the actual number of students served as of October, the previous year, as well as, any changes in prior fiscal year property valuations. The state aid and state flexible benefit allowances have historically been the District's most stable sources of revenue, except for the years of 2001-2002 and 2002-2003, which resulted in a \$3.4 million loss. State aid decreased in 2016-2017 from 2015-2016 by approximately \$1.54 million, due to several State revenue failures. For 2016-2017, the flexible benefits allocation of \$10,951,679.16 was fully funded by June of 2017. In 2009-2010, the State began to reduce state aid, but the decrease was supplemented with federal ARRA stabilization funds. The federal government provided this funding under the belief that states would utilize these funds to offset the reduction in state aid for two years (2009-2010 and 2010-2011), with state aid funding levels, beginning in 2011-2012, returning to 2008-2009 funding levels. However, the state of Oklahoma did not increase state aid back to the pre-federal ARRA stabilization funding levels of 2008-2009. The federal ARRA stabilization funds were not provided and the State did not increase funding to aid in recovering the loss. The 2011-2012 state aid payment amount of \$37,521,745 was \$900,835 less than the 2010-2011 combined state aid and federal ARRA stabilization payment of \$38,422,580. From 2012-2015, the State had slowly increased the allocation paid to the District. In 2013-2014, the District received an allocation greater than the allocation received in 2008-2009 for the first time, but the District received fewer dollars per student compared with 2008-2009. In 2016-2017, the District received \$38,776,485 in state aid, and an additional payment of \$599,513 as a onetime payment of 2015-2016 returned Aid. The District's 2016-2017 state aid total was still \$616,315 less than what was allocated and collected in 2008-2009. The amount per weighted average daily membership (WADM) was cut

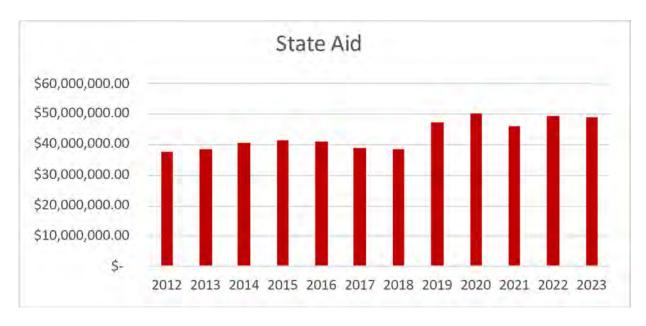


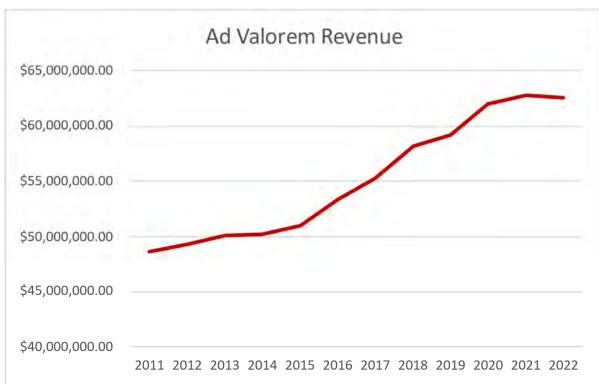
\$40.40 throughout the year due to multiple State cuts.

The second largest major source of revenue in the General Fund, and the second most volatile, is the current ad valorem tax.
Unfortunately, the state aid allocation law, effective with the 1997-1998 fiscal year, requires that if local ad valorem tax revenues increase due to property valuation

increases, the adjusted additional revenue must be subtracted from the mid-term revision to the state aid allocation. While the District will retain any annual increase in ad valorem revenue, the state aid allocation will be re-calculated in January and will be reduced by the amount to be gained in ad valorem revenue. However, the District will also be given credit in January for any net new children who enrolled during the first quarter of the school year, which will help offset he change.

MAJOR REVENUE TRENDS



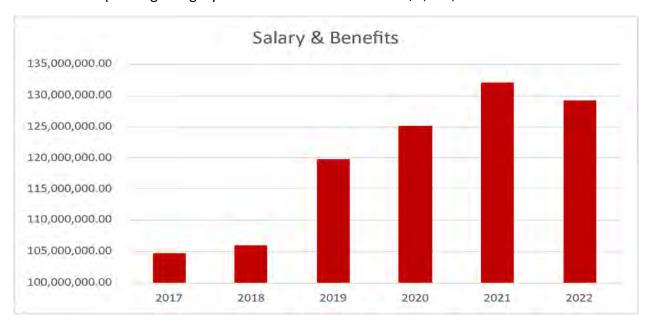


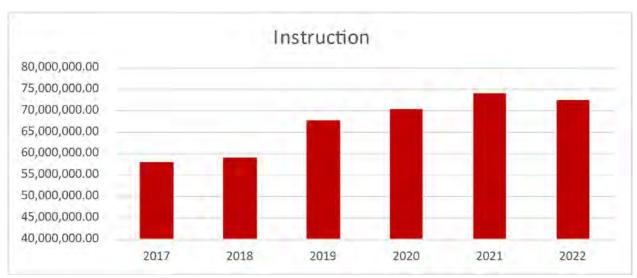
Source: District Records

MAJOR EXPENDITURE CATEGORIES

Salaries and benefits comprise 85%-90% of the General Fund operating budget. Teacher's salaries are established by the State Department of Education based upon years of service and levels of advanced education. Currently the District has one of the richest employee benefits of any local school district in Oklahoma.

Looking at expenditures from the perspective of Function, Instruction comprises over 57% of expenditures, with a budget in the General Fund of \$81,037,156. Student Support comes in second at 8%, or \$11,123,728. Business/Technology is next at 8% with a total of \$10,343,777. The smallest spending category is General Administration at \$3,222,610 or 2%.





Source: District Records

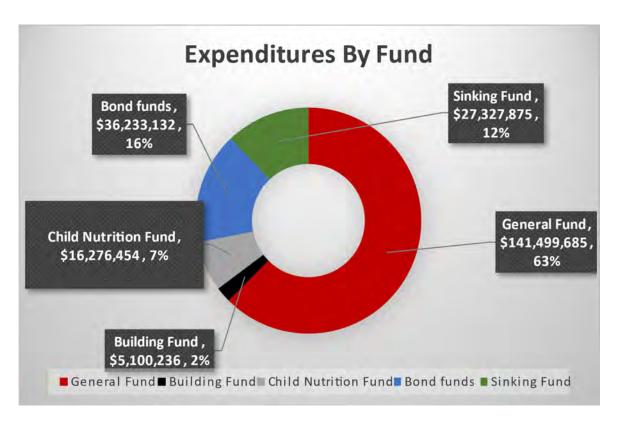
SUMMARY OF REVENUES AND EXPENDITURES – ALL FUND

			Summary of T	otal Budget - All I	unds				
	Actual	Actual	Actual	Actual	Proposed	Approved	Forecast	Forecast	Forecast
Revenue By Source	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025	2025-2026
Local Revenue									
Ad Valorem Tax	\$ 60,226,999	\$ 62,983,915	\$ 64,246,078	\$ 63,674,039	64,745,357	\$ 64,745,357	\$ 60,896,783	\$ 61,758,229	\$ 61,798,374
Tuition and Fees	1,717,207	1,360,135	1,028,015	1,778,196	1,812,000	1,812,000	1,830,120	1,848,421	1,866,905
Investments	1,667,475	1,188,475	616,195	256,413	499,492	499,492	516,211	438,547	522,111
Rental, Disposals, and Commissions	614,495	487,636	356,071	358,424	378,000	378,000	462,782	467,410	472,084
Reimbursements	211,539	204,593	166,016	275,831	353,000	353,000	356,530	360,095	363,696
Donations	12,166,333	4,200,023	2,741,354	3,761,567	4,050,871	4,050,871	3,965,130	4,004,781	4,044,829
Athletic Programs	148,859	167,427	91,875	238,401	240,000	240,000	242,400	244,824	247,272
Other Local sources	1,012,298	704,251	1,281,057	569,817	733,800	733,800	867,388	876,062	884,822
Bond Sale	24,915,438	29,387,606	26,515,125	26,000,000	26,000,000	26,000,000	30,400,000	30,400,000	30,400,000
Meals	2,214,703	1,646,669	391,784	757,182	2,310,000	2,310,000	2,333,100	2,356,431	2,379,995
Intermediate Revenue									
County Four Mill Levy	3,521,781	3,698,889	3,872,896	4,184,004	4,285,758	4,285,758	4,328,616	4,371,902	4,415,621
County Mortgage Tax	606,922	697,475	947,724	1,164,237	1,164,237	1,164,237	1,175,879	1,187,638	1,199,515
Resale of Property	119,601	146,872	145,825	198,677	184,483	184,483	186,328	188,191	190,073
State Revenue									
State Dedicated Revenue	8,294,343	6,619,728	8,413,442	9,358,530	9,358,532	9,358,532	9,171,361	9,263,075	9,448,336
State Aid	59,419,745	63,089,063	59,057,777	62,336,285	59,865,935	59,865,935	58,668,616	59,255,302	60,440,409
Alternative Education	142,164	155,432	141,302	224,472	292,520	292,520	286,670	289,536	295,327
State Categorical	1,256,095	1,357,745	1,288,482	1,799,841	1,459,674	1,459,674	1,430,481	1,444,785	1,473,681
State Matching	68,357	80,358	79,825	89,479	89,479	89,479	90,374	91,278	92,190
Other State Sources of Revenue	81,283	44,054	51,058	113,018	113,018	113,018	110,758	111,865	114,103
State Vocational Programs	93,239	112,300	99,988	114,484	106,057	106,057	103,936	104,975	107,075
Federal Revenue	30,233	222,000	33,300	22.710.7	200,007	200,007	200/000	20 1/2/2	20,,013
Student Meals	6,642,426	6,379,189	16,719,833	20,893,808	19,843,936	19,843,936	19,863,780	20,062,418	20,263,042
Grants in Aid From Federal Gov	337,625	374,827	376,919	389,427	383,676	383,676	333,798	350,488	346,983
Improving Academic Achiev. Of Disad.	4,216,368	4,911,018	4,376,208	4,460,755	4,449,441	4,449,441	3,871,014	4,064,564	4,023,919
Individuals with Disabilities	3,130,595	2,927,062	2,618,931	3,005,755	4,068,603	4,068,603	3,539,685	3,716,669	3,679,502
Every Student Succeeds	144,049	124,466	340,545	225,519	795,333	795,333	691,940	726,537	719,271
Federal Grants Through Other Sources	69,081	82,486	752,079	248,433	291,217	291,217	294,129	297,070	300,041
Other Federal Sources Through State	1,340,524	990,271	986,921	1,092,300	1,213,634	1,213,634	1,055,862	1,108,655	1,097,568
Federal Vocational Education	610,494	1,132,236	2,764,817	83,363	77,469	77,469	67,398	70,768	70,060
Other	213,071	319,424	136,200	123,596	58,333	58,333	0	0	0
Total Revenues	195,203,109	195,573,625	200,604,342	207,775,853	209,223,855	209,223,855	207,141,069	209,460,516	211,256,804
Expenditures By Object									
Salaries	88,107,846	92,014,181	96,414,138	93,487,917	101,937,286	101,937,286	99,222,607	100,161,821	101,110,374
Benefits	31,662,081	33,112,983	35,620,763	35,827,503	34,911,644	34,911,644	33,941,120	34,269,027	34,600,202
Purchased Professional & Technical Service	2,380,124	2,982,009	2,723,745	3,202,824	3,745,927	3,745,927	3,634,015	3,670,220	3,706,786
Purchased Property services	15,563,862	18,472,999	25,303,185	17,850,485	29,570,189	29,570,189	32,589,416	32,607,133	32,625,024
Other Purchased Services	1,999,840	3,558,171	5,975,820	3,454,176	2,639,886	2,639,886	2,563,355	2,588,214	2,613,320
Supplies and Materials	17,681,805	14,236,742	14,351,135	19,799,404	16,022,412	16,022,412	15,654,956	15,738,131	15,822,062
Property Expenses	4,484,258	7,109,181	540,035	1,807,173	404,354	404,354	404,624	405,066	405,509
Control of the Control		28.315.323			37,205,684	7.5 (7.5) (7.5)	29.933.883		
Other	27,614,591	20,313,323	27,465,410	28,492,410	37,203,084	37,205,684	29,933,003	22,997,528	16,872,844
Total Expenditures	189,494,407	199,801,589	208,394,231	203,921,892	226,437,382	226,437,382	217,943,976	212,437,140	207,756,121
Net	5,708,702	(4,227,964)	(7,789,889)	3,853,961	(17,213,527)	(17,213,527)	(10,802,907)	(2,976,624)	3,500,683
Beginning Fund Balance	85,884,188	91,592,890	87,364,926	79,575,037	83,428,998	83,428,998	66,215,471	55,412,564	52,435,940
Fund Balance	\$ 91,592,890	\$ 87,364,926	\$ 79,575,037	\$ 83,428,998	66,215,471	\$ 66,215,471	\$ 55,412,564	\$ 52,435,940	\$ 55,936,623

Source: District Records

2022-2023 SUMMARY – ALL FUNDS

General Fund	\$ 141,101,684	\$ 141,499,685
Building Fund	\$ 5,097,119	\$ 5,100,236
Child Nutrition Fund	\$ 10,206,860	\$ 16,276,454
Bond Funds	\$ 26,168,192	\$ 36,233,132
Sinking Fund	\$ 26,650,000	\$ 27,327,875
Total FY 2022-23 - All Funds	\$ 209,223,855	\$ 226,437,382



Source: District Records

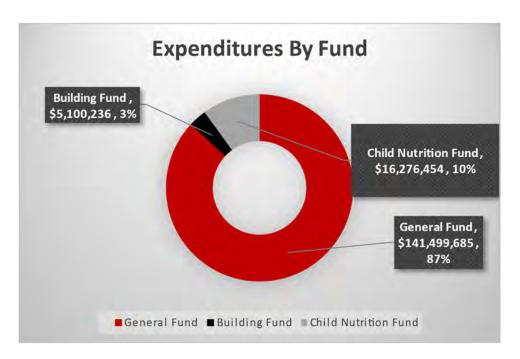
SUMMARY OF OPERATING FUNDS

	Actual	Actual	mmary of Total E	Actual	2000		Approved	Forecast	Forecast	Forecast
Revenue By Source	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023		Approved 2022-2023	2023-2024	2024-2025	2025-2026
Local Revenue	2010-2015	2017-2020	2020-2021	2021-2022	2022-2025		2022-2025	2025-2024	2024-2025	2025-2020
Ad Valorem Tax	\$ 34,497,176	\$ 35,875,844	\$ 37,046,509	\$ 37,024,039	\$ 38,095,357	\$	38,095,357	\$ 38,476,311	\$ 38,861,074	\$ 39,249,684
Tuition and Fees	1,717,207				1,812,000		1,812,000	1,830,120	1,848,421	1,866,905
Investments	1,069,920		100		331,300		331,300	334,613	337,959	
Rental, Disposals, and Commissions	614,495	507.3000			378,000		378,000	381,780	385,598	
Reimbursements	211,539				353,000		353,000	356,530	360,095	
Donations	12,166,333				4,050,871		4,050,871	3,965,130	4,004,781	4,044,829
Athletic Programs	148,859				240,000		240,000	242,400	244,824	247,272
Other Local sources	1,012,298				733,800		733,800	867,388	876,062	
Meals	2,214,703					100	2,310,000	2,333,100	2,356,431	- 47.43.43
Intermediate Revenue	2,22.,7.00	2,010,000	552,7.5.	131/132	2,020,000		2,520,000	2/030/200	2,000,002	2,0.0,000
County Four Mill Levy	3,521,781	3,698,889	3,872,896	4,184,004	4,285,758	\$	4,285,758	4,328,616	4,371,902	4,415,621
County Mortgage Tax	606,922				1,164,237		1,164,237	1,175,879	1,187,638	
Resale of Property	119,601	777.77			3.		184,483	186,328	188,191	1, 1971 1, 1911
State Revenue	115,001	140,072	140,020	130,077	201,103	*	201,105	100,525	100,151	130,073
State Dedicated Revenue	8,294,343	6,619,728	8,413,442	9,358,530	9,358,532	S	9,358,532	9,171,361	9,263,075	9,448,336
State Aid	59,419,745				59,865,935	7.0	59,865,935	58,668,616	59,255,302	
Alternative Education	142,164	1	Contract of the contract of th	0.6975	292,520		292,520	286,670	289,536	The state of the state of
State Categorical	1,256,095				1,459,674		1,459,674	1,430,481	1,444,785	
State Matching	68,357	The second second			89,479		89,479	90,374	91,278	92,190
Other State Sources of Revenue	81,283				113,018		113,018	110,758	111,865	114,103
State Vocational Programs	93,239			E. C.	106,057		106,057	103,936	104,975	
Federal Revenue	33,233	112,500	33,300	114,404	100,037		100,037	103,530	104,575	101,015
Student Meals	6,642,426	6,379,189	16,719,833	18,871,695	19 843 936	4	19,843,936	7,684,061	7,760,901	7,838,512
Grants in Aid From Federal Gov	337,625				383,676		383,676	333,798	350,488	
Improving Academic Achiev. Of Disad.	4,216,368				4,449,441		4,449,441	3,871,014	4,064,564	
Individuals with Disabilities	3,130,595				4,068,603		4,068,603	3,539,685	3,716,669	
Every Student Succeeds	144,049				795,333		795,333	691,940	726,537	
Federal Grants Through Other Sources	69,081		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		291,217	9.70	291,217	10,949,389	11,496,859	11,381,890
Other Federal Sources Through State	1,340,524				1,213,634		1,213,634	1,055,862	1,108,655	
Federal Vocational Education	610,494				77,469		77,469	67,398	70,768	
Other	213,071	319,424					58,333	07,338		
Total Revenues	143,960,293				156,405,663	_	156,405,663	152,533,538	154,879,233	156,702,031
_	245/500/255	130,20 1,033	210,552,511	234,337,002	230,103,003		130,103,003	132,333,330	134,013,233	130,102,032
Expenditures By Object										
Salaries	88,089,846	91,996,181			101,937,286		101,937,286	99,222,606	100,161,821	101,110,374
Benefits	31,680,081	33,130,983	32,975,255	35,827,503	34,911,644		34,911,644	33,941,119	34,269,027	34,600,202
Purchased Professional & Technical Service	1,263,571	1,368,174	2,697,856	2,185,982	3,745,927		3,745,927	3,634,015	3,670,220	3,706,786
Purchased Property services	4,296,238	7,338,563	1,845,857	1,632,799	2,242,314		2,242,314	2,189,415	2,207,133	2,225,024
Other Purchased Services	1,999,840	2,541,573	3,017,938	3,396,133	2,639,886		2,639,886	2,563,355	2,588,214	2,613,321
Supplies and Materials	10,242,351	9,442,792	13,339,329	13,131,971	16,022,412		16,022,412	15,799,970	15,884,594	15,969,990
Property Expenses	246,435	619,957	1,355,955	157,004	404,354		404,354	404,624	405,066	405,510
Other	733,391	853,654	975,220	855,294	972,552		972,552	943,558	952,940	962,416
Total Expenditures	138,551,753	147,291,877	153,076,437	150,674,603	162,876,375		162,876,375	158,698,662	160,139,015	161,593,623
Net	5,408,540	(9,007,022)	(6,745,090)	4,283,058	(6,470,712)		(6,470,712)	(6,165,124)	(5,259,782)	(4,891,592)
Beginning Fund Balance	32,804,583	38,213,123	29,206,101	22,461,011	26,744,069		26,744,069	20,273,357	14,108,233	8,848,451

Source: District Records

2022-2023 SUMMARY – OPERATING FUNDS

Fund	Revenues	E	xpenditures
General Fund	\$ 141,101,684	\$	141,499,685
Building Fund	5,097,119		5,100,236
Child Nutrition Fund	10,206,860	_	16,276,454
Total FY 2022-23	\$ 156,405,663	\$	162,876,375



Source: District Records

REVENUE AND EXPENDITURE SUMMARY – ALL FUNDS

	General Fund Budget 2022-2023	Building Fund Budget 2022-2023	Child Nutrition Fund Budget 2022-2023	Sinking Fund Budget 2022-2023	Bond Funds Budget 2022-2023	Total All Funds Budget 2022-2023
Revenues	2022-2023	2022-2023	2022-2023	2022-2023	2022-2023	2022-2023
Local Sources	\$ 40,697,809	\$5,097,119	\$ 2,567,733	\$26,650,000	\$26,168,192	\$101,180,853
Intermediate Sources	5,634,478	0	0	0	0	5,634,478
State Sources	71,195,736	0	89,479	0	0	71,285,215
Federal Sources	23,573,661	0	7,549,648	0	0	31,123,309
Total Revenues	141,101,684	5,097,119	10,206,860	26,650,000	26,168,192	209,223,855
Expenditures						
Instruction	81,037,156	0	0		36,233,132	117,270,288
Student Support	11,123,728	0	0			11,123,728
Instructional Support	6,332,610	0	0			6,332,610
General Administration	3,222,610	0	0			3,222,610
School Administration	9,074,688	0	0			9,074,688
Business/Technology	9,881,302	0	0			9,881,302
Operation & Maintenance	8,429,567	5,100,236	0			13,529,803
Student Transportation	5,581,385	0	0			5,581,385
Non-Instruction Services	6,648,709	0	16,276,454			22,925,163
Other Outlays	167,930	0	0	27,327,875		27,495,805
Facilities Acquisitions and Construction	0	0	0			(
Total Expenditures	\$141,499,685	\$5,100,236	\$ 16,276,454	\$27,327,875	\$36,233,132	\$226,437,382

Source: District Records

GENERAL FUND REVENUE SCHEDULE

2022-2023 General Fund Revenue

	Actual	Actual	Actual	Actual	Proposed	Approved	Forecast	Forecast	Forecast
Source Sub Source	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025	2025-2026
Local Revenue	4 00.0000	\$ 50.507.0						4 500000	4 2.5
Ad Valorem Tax	\$ 30,185,029	\$ 31,391,363	\$ 32,415,695	\$ 32,396,034	\$ 33,333,438	\$ 33,333,438	\$ 33,666,772	\$ 34,003,440	\$ 34,343,475
Tuition and Fees	1,717,207	1,360,135	1,028,015	1,778,196	1,812,000	1,812,000	1,830,120	1,848,421	1,866,905
Interest	649,929	198,807	39,051	74,124	151,100	151,100	152,611	154,137	155,678
Rental, Disposals, and Comm	614,495	487,636	356,071	358,424	378,000	378,000	381,780	385,598	389,454
Reimbursements	211,539	204,593	166,016	275,831	353,000	353,000	356,530	360,095	363,696
Donations & Misc	3,946,920	3,919,865	2,574,765	3,659,445	3,925,871	3,925,871	3,965,130	4,004,781	4,044,829
Athletic Programs	148,859	167,427	91,875	238,401	240,000	240,000	242,400	244,824	247,272
Other	611,463	395,400	853,082	371,345	504,400	504,400	509,444	514,538	519,684
Total Local Revenue	38,085,441	38,125,226	37,524,570	39,151,800	40,697,809	40,697,809	41,104,787	41,515,835	41,930,993
Intermediate Revenue									
County Four Mill Levy	3,521,781	3,698,889	3,872,896	4,184,004	4,285,758	4,285,758	4,328,616	4,371,902	4,415,621
County Mortgage Tax	606,922	697,475	947,724	1,164,237	1,164,237	1,164,237	1,175,879	1,187,638	1,199,515
Resale of Property Fund	119,601	146,872	145,825	198,677	184,483	184,483	186,328	188,191	190,073
Total Intermediate Revenue	4,248,304	4,543,236	4,966,445	5,546,918	5,634,478	5,634,478	5,690,823	5,747,732	5,805,209
State Revenue									
State Dedicated revenue	8,294,343	6,619,728	8,413,442	9,358,530	9,358,532	9,358,532	9,171,361	9,263,075	9,448,336
State Aid	59,419,745	63,089,063	59,057,777	62,336,285	59,865,935	59,865,935	58,668,616	59,255,302	60,440,409
Alternative Education	142,164	155,432	141,302	224,472	292,520	292,520	286,670	289,536	295,327
State Categorical	1,256,095	1,357,745	1,288,482	1,799,841	1,459,674	1,459,674	1,430,481	1,444,785	1,473,683
Other State Sources Of Revenue	81,283	44,054	51,058	113,018	113,018	113,018	110,758	111,865	114,103
State Vocational Programs	93,239	112,300	99,988	114,484	106,057	106,057	103,936	104,975	107,075
Total State Revenue	69,286,869	71,378,322	69,052,049	73,946,630	71,195,736	71,195,736	69,771,822	70,469,537	71,878,931
Federal Revenue					7-27				
Grants in Aid From Federal Gov	337,625	374,827	376,919	389,427	383,676	383,676	333,798	350,488	346,983
Title I	4,216,368	4,911,018	4,376,208	4,460,754	4,449,441	4,449,441	3,871,014	4,064,564	4,023,919
Individuals with Disabilities	3,130,595	2,927,062	2,618,931	3,005,755	4,068,603	4,068,603	3,539,685	3,716,669	3,679,502
No Child Left Behind	144,049	124,466	340,545	225,519	795,333	795,333	691,940	726,537	719,27
Federal Grants Through Other	69,081	82,486	9,095,956	8,485,345	12,585,505	12,585,505	10.949,389	11,496,859	11,381,890
Other Federal Sources Through Stat		990,271	986,921	1,159,271	1,213,634	1,213,634	1,055,862	1,108,655	1,097,568
Federal Vocational Education	110,403	82,648	79,070	83,363	77,469	77,469	67,398	70,768	70,060
Total Federal Revenue	9,348,645	9,492,778	17,874,550	17,809,434	23,573,661	23,573,661	20,509,085	21,534,539	21,319,194
Total Revenue	\$ 120,969,259	\$ 123,539,562	\$ 129,417,614	\$ 136,454,782	\$ 141,101,684	\$ 141,101,684	\$ 137,076,518	\$ 139,267,643	\$ 140,934,327

Source: District Records

BUILDING FUND REVENUE SCHEDULE

2022-2023 Building Fund Revenue

Source Sub Source	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Local Revenue				10000					
Ad Valorem Tax	\$ 4,312,147	\$ 4,484,480	\$ 4,630,814	\$ 4,628,005	\$ 4,761,919	\$ 4,761,919	\$ 4,809,538	\$ 4,857,634	\$ 4,906,210
Interest	346,746	135,379	10,617	3,925	80,200	80,200	81,002	81,812	82,630
Rentals, Disposals and Commissions	0	0	0	0	0	0	0	0	0
Donations	7,975,000	0	0	0	0	0	0	0	0
Other Local Sources	540,140	652,360	483,187	233,610	255,000	255,000	257,550	260,126	262,727
Total Local Revenue	13,174,033	5,272,219	5,124,618	4,865,540	5,097,119	5,097,119	5,148,090	5,199,572	5,251,567
Total Revenue	\$ 13,174,033	\$ 5,272,219	\$ 5,124,618	\$ 4,865,540	\$ 5,097,119	\$ 5,097,119	\$ 5,148,090	\$ 5,199,572	\$ 5,251,567

Source: District Records



CHILD NUTRITION FUND REVENUE SCHEDULE

2022-2023 Child Nutrition Fund Revenue

Source Sub Source	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Local Revenue									
Interest	\$ 73,245	\$ 61,195	\$ 8,226	\$ 10,172	\$ 100,000	\$ 100,000	\$ 101,000	\$ 102,010	\$ 103,030
Other Local Sources	161,302	128,018	132,733	66,983	99,400	99,400	100,394	101,398	102,412
Meals	2,214,703	1,646,669	391,784	757,182	2,310,000	2,310,000	2,333,100	2,356,431	2,379,995
Total Local Revenue	2,449,250	1,835,882	532,743	834,337	2,509,400	2,509,400	2,534,494	2,559,839	2,585,437
State Revenue									
State Matching	6,576,369	6,115,779	84,501	89,479	89,479	89,479	90,374	91,278	92,190
Total State Revenue	6,576,369	6,115,779	84,501	89,479	89,479	89,479	90,374	91,278	92,190
Federal Revenue		1	1					10.70	
Student Meals	791,381	1,521,412	11,171,871	12,713,522	7,607,981	7,607,981	7,684,061	7,760,901	7,838,510
Total Federal Revenue	791,381	1,521,412	11,171,871	12,713,522	7,607,981	7,607,981	7,684,061	7,760,901	7,838,510
Total Revenue	\$9,816,999	\$9,473,073	\$11,789,115	\$13,637,338	\$10,206,860	\$10,206,860	\$10,308,929	\$10,412,018	\$10,516,137

Source: District Records



GENERAL FUND SUMMARY

REVENUES		Actual 2018-2019		Actual 2019-2020		Actual 2020-2021		Actual 2021-2022		Proposed 2022-2023		Approved 2022-2023		Forecast 2023-2024	Forecast 2024-2025		Forecast 2025-2026
Ad Valorem - Current	s	30,185,029	Ś	31,391,363	Ś	32,415,695	Ś	31,906,986	Ś	32,844,389	Ś	32,844,389	Š	33,172,833	\$ 33,504,561	Ś	33,839,607
Local Sources - Other		7,900,412		6,733,863	•	5,108,875	ň	7,266,991		7,853,420		7,853,420		7,931,954	8,011,274	ř.	8,091,386
Intermediate		4,248,304		4,543,236		4,966,445		5,546,919		5,634,478		5,634,478		5,690,823	5,747,731		5,805,208
State Sources		69,286,869		71,378,322		69,052,049		73,946,629		71,195,736		71,195,736		69,771,821	70,469,539		71,878,930
Federal Sources		9,348,645		9,492,778		17,874,550		17,787,259		23,573,661		23,573,661		18,858,929	19,801,875		19,603,856
TOTAL REVENUES	Ξ	120,969,259		123,539,562		129,417,614		136,454,784		141,101,684		141,101,684		135,426,360	137,534,981		139,218,988
EXPENDITURES																	
Instruction		67,633,827		70,255,223		74,004,051		72,416,844		81,037,156		81,037,156		78,606,041	79,392,102		80,186,023
Student Support		9,317,736		9,749,731		10,733,346		11,131,118		11,123,728		11,123,728		10,790,016	10,897,916		11,006,895
Instructional Support		5,232,565		5,112,927		6,181,922		6,843,121		6,332,610		6,332,610		6,142,632	6,204,058		6,266,099
General Administration		2,442,970		2,568,552		2,682,929		2,957,181		3,222,610		3,222,610		3,125,932	3,157,191		3,188,763
School Administration		9,120,025		9,302,859		9,962,296		9,418,266		9,074,688		9,074,688		8,802,447	8,890,472		8,979,377
Business/Technology		7,883,100		8,158,132		8,538,965		8,588,569		9,881,302		9,881,302		9,584,863	9,680,712		9,777,519
Operations & Maintenance		9,216,510		8,693,970		9,604,834		12,481,669		8,429,567		8,429,567		8,176,680	8,258,447		8,341,031
Student Transportation		4,607,423		4,757,427		5,029,463		5,487,182		5,581,385		5,581,385		5,413,943	5,468,083		5,522,764
Non-Instructional Services		4,320,290		4,870,920		5,039,585		5,176,235		6,648,709		6,648,709		6,449,248	6,513,740		6,578,878
Other Outlays		104,635		234,380		54,427		148,204		167,930		167,930		162,892	164,521		166,166
TOTAL EXPENDITURES		119,879,080		123,704,121		131,831,817		134,648,389		141,499,685	-	141,499,685		137,254,694	138,627,241	_	140,013,514
EXCESS REV (EXP)		1,090,179		(164,559)		(2,414,203)		1,806,395		(398,001)		(398,001)		(1,828,334)	(1,092,261)		(794,525)
FUND BALANCE 07/1		15,820,859		16,911,038		16,746,479		14,332,276		16,138,671		16,138,671		15,740,670	13,912,336		12,820,075
FUND BALANCE 06/30	\$	16,911,038	\$	16,746,479	\$	14,332,276	\$	16,138,671	\$	15,740,670	\$	15,740,670	\$	13,912,336	\$ 12,820,075	\$	12,025,549

Source: District Records



GENERAL FUND BUDGETARY HIGHLIGHTS

General Fund Budgetary Highlights

Union Public School District adopts an annual appropriated budget for its general fund. The district's budget is prepared according to Oklahoma law and is based on accounting for certain transactions on a basis of cash receipts, disbursements, and encumbrances. The most significantly budgeted fund is the general fund.

For the general fund, budget basis revenue was \$136,454,791 with original budget estimates of \$135,209,107 and final budget estimates of \$,138,085,520. The majority of the revenue variance came from higher than anticipated Ad Valorem Tax receipts.

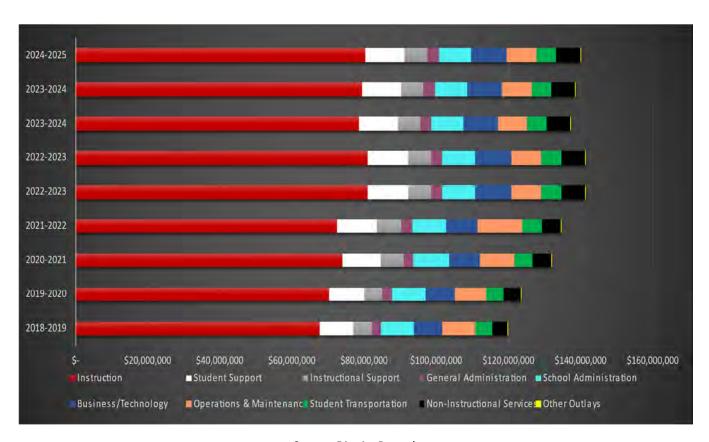
The final expenditure budget was intentionally approved to be larger than needed in order to provide the necessary spending authority to the district by the Board to meet the State of Oklahoma spending requirements. The District must have sufficient budget spending authority to allow for any unanticipated revenues that might be collected during the last thirty calendar days of the fiscal year. During 2021-22, the majority of the additional spending authority was allocated to the instructional, instructional staff, and operations and maintenance function areas. Although the revenue collections were higher than the final revenue budget, spending was curtailed making it unnecessary to revise the budget in order to stay within the carryover limit required by the Board. Union carried forward a budgetary ending fund balance of 12.01 percent.



GENERAL FUND SCHEDULE OF EXPENDITURES BY FUNCTION

General Fund By Function

	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2023-2024	Forecast 2024-2025
Instruction	\$ 67,633,827	\$ 70,255,223	\$ 74,004,051	\$ 72,416,844	\$ 81,037,156	\$ 81,037,156	\$ 78,606,041	\$ 79,392,102	\$ 80,186,023
Student Support	9,317,736	9,749,731	10,733,346	11,131,118	11,123,728	11,123,728	10,790,016	10,897,916	11,006,895
Instructional Support	5,232,565	5,112,927	6,181,922	6,843,121	6,332,610	6,332,610	6,142,632	6,204,058	6,266,099
General Administration	2,442,970	2,568,552	2,682,929	2,957,181	3,222,610	3,222,610	3,125,932	3,157,191	3,188,763
School Administration	9,120,025	9,302,859	9,962,296	9,418,266	9,074,688	9,074,688	8,802,447	8,890,472	8,979,377
Business/Technology	7,883,100	8,158,132	8,538,965	8,588,569	9,881,302	9,881,302	9,584,863	9,680,712	9,777,519
Operations & Maintenance	9,216,510	8,693,970	9,604,834	12,481,669	8,429,567	8,429,567	8,176,680	8,258,447	8,341,031
Student Transportation	4,607,423	4,757,427	5,029,463	5,487,182	5,581,385	5,581,385	5,413,943	5,468,083	5,522,764
Non-Instructional Services	4,320,290	4,870,920	5,039,585	5,176,235	6,648,709	6,648,709	6,449,248	6,513,740	6,578,878
Other Outlays	104,635	234,380	54,427	148,204	167,930	167,930	162,892	164,521	166,166
Total Expenditure by Function	\$119,879,081	\$123,704,121	\$131,831,817	\$134,648,388	\$141,499,685	\$141,499,685	\$ 137,254,694	\$ 138,627,241	\$ 140,013,514

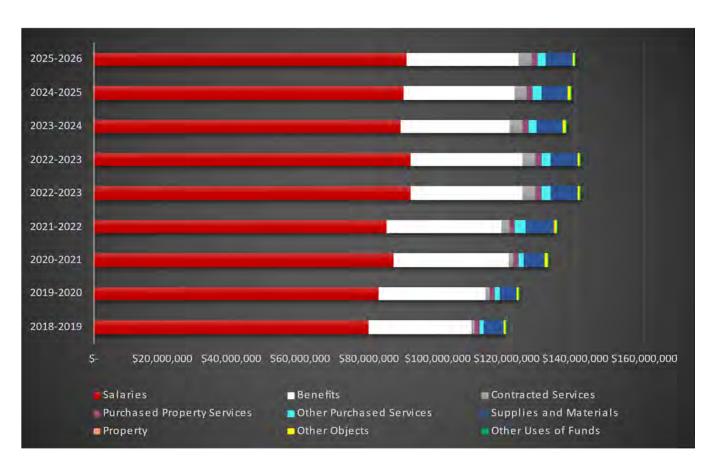


Source: District Records

GENERAL FUND SCHEDULE OF EXPENDITURES BY OBJECT

General Fund By Object

	Actual 2018-2019		Actual 2019-2020	Actual 2020-2021	Actual 2021-2022		Proposed 2022-2023	Approved 2022-2023		Forecast 2023-2024		Forecast 2024-2025	Forecast 2025-2026
Salaries	\$ 79,819,036	\$	82,749,488	\$ 87,134,942	\$ 85,049,497	\$	92,027,329	\$ 92,027,329	\$	89,266,509	\$	90,159,174	\$ 91,060,766
Benefits	29,891,823		31,078,985	33,470,416	33,568,929		32,703,717	32,703,717		31,722,606		32,039,832	32,360,230
Contracted Services	1,036,173		1,263,286	1,488,478	2,176,385		3,730,927	3,730,927		3,619,000		3,655,190	3,691,741
Purchased Property Services	1,378,295		1,321,572	1,327,301	1,463,644		1,778,739	1,778,739		1,725,377		1,742,630	1,760,057
Other Purchased Services	1,106,786		1,517,696	1,605,329	3,333,852		2,553,886	2,553,886		2,477,269		2,502,042	2,527,062
Supplies and Materials	5,926,587		4,944,692	6,108,525	8,183,972		7,734,081	7,734,081		7,502,058		7,577,079	7,652,849
Property	18,265		12.0		24,223		4,354	4,354		4,224		4,266	4,308
Other Objects	621,357		593,219	639,991	724,583		798,722	798,722		774,760		782,508	790,333
Other Uses of Funds	98,758		235,182	56,835	123,304		167,930	167,930		162,892		164,521	166,166
Total Expenditure By Object	\$ 119,897,080	Ś	123,704,121	\$ 131,831,817	\$ 134,648,389	Ś	141,499,685	\$ 141,499,685	Ś	137,254,694	Ś	138,627,241	\$ 140,013,514



Source: District Records

GENERAL FUND BY CATEGORY

General Fund Schedule of Expenditures

			Sched	ule of Expend	itures				
	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Instruction									
Salaries	\$48,145,471	\$50,241,292	\$51,922,879	\$49,220,107	\$ 55,760,328	\$55,760,328	\$54,087,518	\$54,628,393	\$55,174,677
Benefits	17,192,870	18,000,038	18,690,441	18,784,162	18,241,254	18,241,254	17,694,017	17,870,957	18,049,666
Contracted Services	206,420	169,181	483,633	896,389	1,359,180	1,359,180	1,318,404	1,331,588	1,344,904
Purchased Property Service	79,653	67,413	68,411	75,658	67,919	67,919	65,881	66,540	67,205
Other Purchased Services	84,034	416,214	607,477	215,600	257,901	257,901	250,164	252,665	255,192
Supplies and Materials	1,875,465	1,296,709	2,190,754	3,131,297	2,024,920	2,024,920	1,964,173	1,983,814	2,003,652
Property	0	0	0	12,534	0	0	0	0	0
Other objects	49,914	64,377	40,456	81,098	93,453	93,453	90,649	91,556	92,471
Other Uses of Funds	0	0	0	0	0				
	67,633,827	70,255,224	74,004,051	72,416,845	77,804,955	77,804,955	75,470,805	76,225,513	76,987,768
Student Support	1244	32.225.305	200000	2010'00	0.000 000	0.000.000	- Cal. Da.		22222
Salaries	6,850,957	7,210,885	7,825,054	7,880,574	8,182,565	8,182,565	7,937,088		8,096,623
Benefits	2,337,068	2,423,438	2,744,398	2,880,337	2,840,602		2,755,384		2,810,767
Contracted Services	30,428	49,998	83,173	240,883	45,875		44,499		
Purchased Property Service	1 4 7 7 7 7 7 7	2,726	1,852	12,374	400		388		
Other Purchased Services	10,370	12,373	6,650	16,753	17,495		16,970		17,311
Supplies and Materials	67,446	42,755	66,161	91,983	111,913	111,913	108,555		110,737
Property	0	0	0	0	0		0	4	
Other objects	19,556	7,556	6,058	8,213	3,000		2,910		2,968
Other Uses of Funds	9,317,736	9,749,731	10,733,346	11,131,117	11,201,850	11,201,850	10,865,793	10,974,451	11,084,196
Instructional Support	3,317,730	3,143,131	10,733,340	11,131,117	11,201,000	11,201,000	10,803,733	10,574,451	11,004,150
Salaries	3,691,461	3,484,458	4,247,239	4,770,225	4,326,589	4,326,589	4,196,792	4,238,759	4,281,147
Benefits	1,151,852	1,088,228	1,394,843	1,570,738	1,465,354	100000000000000000000000000000000000000	1,421,393		1,449,963
Contracted Services	186,183	338,139	248,301	222,990	100,586		97,568		99,529
Purchased Property Service		11,700		5,047	15,510				15,347
Other Purchased Services		100000	4,121				15,045		
	40,318 108,642	31,289	5,758	29,164	480,701	480,701	466,280		475,652
Supplies and Materials	108,042	95,608	177,252	146,421	119,539	119,539	115,953		118,283
Property					4,354	4,354	4,224		4,308
Other Objects	45,504	63,505	104,407	98,536	69,266	69,266	67,188		68,538
Other Uses of Funds	5,232,565	5,112,927	6,181,921	6,843,121	6,581,899	6,581,899	6,384,442	6,448,286	6,512,769
General Administration			.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				3,22.4		-,,
Salaries	1,471,112	1,480,885	1,593,106	1,728,526	1,674,794	1,674,794	1,624,550	1,640,795	1,657,203
Benefits	444,348	458,540	500,053	524,365	533,510	533,510	517,505	522,680	527,907
Contracted Services	205,939	268,781	178,740	153,932	408,034	408,034	395,793	399,751	403,748
Purchased Property Service	4,035	2,241	1,217	2,122	8,250	8,250	8,003	8,083	8,163
Other Purchased Services	270,463	312,482	346,383	486,180	496,495	496,495	481,600	486,416	491,280
Supplies and Materials	8,953	4,555	17,410	27,472	54,345	54,345	52,715	53,242	53,774
Property	0	0	0	0	0	0	0	0	0
Other objects	38,122	41,068	46,018	34,583	50,500	50,500	48,985	49,475	49,970
Other Uses of Funds	0	0	0	0	0		0		0
Cabaal Administration	2,442,972	2,568,552	2,682,927	2,957,180	3,225,928	3,225,928	3,129,150	3,160,442	3,192,046
School Administration			7040474	c 705 405				C 407 746	6 F 60 700
Salaries	6,562,254	6,764,830	7,212,171	6,796,186	6,632,382		6,433,410		6,562,722
Benefits	2,429,920	2,459,489	2,686,501	2,536,094	2,296,982		2,228,072		
Contracted Services	2,733	720	0	300	5,000		4,850		
Purchased Property Service		13,147	17,702	27,500	8,720		8,458		
Other Purchased Services	24,853	21,229	14,092	22,713	48,214		46,768		
Supplies and Materials	38,918	43,272	30,050	31,884	85,130		82,577		
Property	0	0	0	0	0		0		
Other objects	1,180	173	1,780	3,589	210		204		
Other Uses of Funds	0	0	0	0	0		0		0
	\$ 9,120,024	\$ 9,302,860	\$ 9,962,296	\$ 9,418,266	\$ 9,076,638	\$ 9,076,638	\$ 8,804,339	\$ 8,892,383	\$ 8,981,306

GENERAL FUND BY CATEGORY

General Fund Schedule of Expenditures

			Sched	ule of Expend	litures				
	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Propsed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Business Services	0.91 4.0				- y 'y i y 'i		10000	VI. Took	
Salaries	\$ 4,929,420	\$ 5,263,031	\$ 5,520,036	\$ 5,419,887	\$ 5,228,499	\$ 5,228,499	\$ 5,071,644	\$ 5,122,361	\$ 5,173,584
Benefits	1,749,211	1,866,103	2,057,999	1,977,183	1,782,916	\$ 1,782,916	1,729,428	1,746,723	1,764,190
Contracted Services	255,827	197,307	238,217	353,316	1,290,325	\$ 1,290,325	1,251,615	1,264,131	1,276,773
Purchased Property Service	40,153	26,810	26,019	29,360	56,595	\$ 56,595	54,897	55,446	56,001
Other Purchased Services	266,851	250,710	133,360	209,886	538,157	\$ 538,157	522,012	527,232	532,505
Supplies and Materials	193,632	162,826	148,769	123,303	172,730	\$ 172,730	167,548	169,224	170,916
Property	0	0	0	0	0	\$ -	0	0	0
Other objects	448,005	391,345	414,565	475,634	537,199	\$ 537,199	521,083	526,294	531,557
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	7,883,099	8,158,132	8,538,965	8,588,569	9,606,421	9,606,421	9,318,229	9,411,411	9,505,525
Operations & Maintenance									
Salaries	3,011,776	2,744,251	3,126,372	3,536,925	3,239,365	3,239,365	3,142,184	3,173,606	3,205,342
Benefits	1,840,817	1,816,612	2,160,573	2,048,368	1,990,905	1,990,905	1,931,178	1,950,489	1,969,994
Contracted Services	27,800	28,152	33,503	51,982	155,326	155,326	150,666	152,173	153,695
Purchased Property Service	1,121,802	1,142,318	1,067,222	1,216,781	1,515,395	1,515,395	1,469,933	1,484,633	1,499,479
Other Purchased Services	195,072	249,085	266,362	2,108,927	424,183	424,183	411,458	415,572	419,728
Supplies and Materials	3,003,949	2,702,281	2,939,263	3,502,982	4,022,016	4,022,016	3,901,355	3,940,369	3,979,772
Property	12,500	0	0	11,689	0	0	0	0	0
Other objects	2,794	11,273	11,540	4,015	3,100	3,100	3,007	3,037	3,067
Other Uses of Funds	0	0	0	0	0	0	0	0	0
13.5000000000000000000000000000000000000	9,216,510	8,693,972	9,604,835	12,481,669	11,350,290	11,350,290	11,009,781	11,119,879	11,231,077
Student Transportation									
Salaries	2,707,193	2,834,806	2,912,521	2,958,579	2,847,805	2,847,805	2,762,371	2,789,995	2,817,895
Benefits	1,070,368	1,134,796	1,352,092	1,257,549	1,245,662	1,245,662	1,208,292	1,220,375	1,232,579
Contracted Services	4,191	5,198	3,533	4,053	2,500	2,500	2,425	2,449	2,474
Purchased Property Service	59,728	52,743	124,472	67,369	67,700	67,700	65,669	66,326	66,989
Other Purchased Services	204,206	216,147	223,536	242,440	274,490	274,490	266,255	268,918	271,607
Supplies and Materials	552,255	505,894	406,039	944,766	999,748	999,748	969,756	979,453	989,248
Property	0	0	0	0	0	0	0	0	
Other objects	9,483	7,843	7,269	12,427	12,600	12,600	12,222	12,344	12,468
Other Uses of Funds	0	0	0	0	0	0	0	0	0
a the constant of the	4,607,424	4,757,427	5,029,462	5,487,183	5,450,505	5,450,505	5,286,990	5,339,860	5,393,259
Non-Instructional Services									
Salaries	2,449,392	2,725,051	2,775,563	2,738,490	4,130,261	4,130,261	4,006,353	4,046,417	4,086,881
Benefits	1,657,369	1,831,742	1,883,515	1,990,134	2,311,274	2,311,274	2,241,936	2,264,355	2,286,998
Contracted Services	109,853	205,812	219,377	252,539	364,102	364,102	353,179	356,711	
Purchased Property Service	2,125	2,475	16,287	2,532	38,250	38,250	37,103	37,474	
Other Purchased Services	10,617	8,167	1,710	2,188	16,250	16,250	15,763	15,920	
Supplies and Materials	77,327	90,792	130,996	183,864	143,739	143,739	139,427	140,821	142,229
Property	5,765	0	0	0	0	0	0	0	
Other objects	7,841	6,882	12,137	6,488	29,394	29,394	28,512	28,797	
Other Uses of Funds	0	0	0	0	0	0	0	0	
-	4,320,289	4,870,921	5,039,585	5,176,235	7,033,270	7,033,270	6,822,273	6,890,495	6,959,400
Other Outlays									
Salaries	0	0	0	0	0	0	0	0	0
Benefits	0	0	0	0	0	0	0	0	0
Contracted Services	6,800	0	0	0	0	0	0	0	
Purchased Property Service	117	0	0	24,900	0	0	0	0	0
Other Purchased Services	0	0	0	0	0	0	0	0	
Supplies and Materials	0	0	1,832	0	0	0	0	0	
Property	0	0	0	0	0	0	0	0	
Other objects	0	24,841	0	0	0	0	0	0	
Other Uses of Funds	97,718	209,539	52,595	123,303	167,934	167,934	162,896	164,525	
Carer Oses Of Failos	104,635	234,380	54,427	148,203	167,934	167,934	162,896	164,525	166,170
			- 4		2-1,1-21	,	_,_,_,		
Total General Fund Budget	119,879,081	123,704,126		134,648,388 P. District R		141,499,685	137,254,694	138,627,241	140,013,514

Source: District Records

BUILDING FUND SUMMARY

REVENUES		ACTUAL 2018-2019	ACTUAL 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024		Forecast 2024-2025	Forecast 025-2026
Ad Valorem	\$	4,238,099	\$ 4,412,484	\$ 4,531,531	\$ 4,558,141	\$ 4,692,056	\$ 4,692,056	\$ 4,738,977	\$	4,786,366	\$ 4,834,230
Local Sources - Other		8,153,916	237,833	181,566	69,864	69,863	69,863	70,562		71,267	71,980
Interest - Interfund		782,018	621,903	411,521	237,535	335,200	335,200	338,552		341,938	345,357
TOTAL REVENUES		13,174,033	5,272,220	5,124,618	4,865,540	5,097,119	5,097,119	5,148,090	_	5,199,571	5,251,567
EXPENDITURES											
Operations & Maintenance		6,295,070	8,185,511	7,650,960	4,986,336	5,100,236	5,100,236	5,151,238		5,202,751	5,254,779
Facilities Acq & Construction		2,516,774	5,113,937	626,235	14,748	0	0	0		0	0
TOTAL EXPENDITURES	Ξ	8,811,844	13,299,448	8,277,195	5,001,084	5,100,236	5,100,236	5,151,238		5,202,751	5,254,779
EXCESS REV (EXP)		4,362,189	(8,027,228)	(3,152,577)	(135,544)	(3,117)	(3,117)	(3,148)		(3,180)	(3,212)
FUND BALANCE 07/1		11,167,511	15,529,700	7,502,472	4,349,895	4,214,352	4,214,352	4,211,235		4,208,087	4,204,907
FUND BALANCE 06/30	\$	15,529,700	\$ 7,502,472	\$ 4,349,895	\$ 4,214,352	\$ 4,211,235	\$ 4,211,235	\$ 4,208,087	\$	4,204,907	\$ 4,201,695

Source: District Records



BUILDING FUND BY CATEGORY

2022-2023 Building Fund Expenditure Schedule

			Building	Fund By Obj	ject				
	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Salaries	\$ 4,260,655	\$ 4,962,255	\$ 4,960,590	\$ 3,948,220	\$ 4,025,645	\$ 4,025,645	\$ 4,065,902	\$ 4,106,561	\$4,147,626
Benefits	871,854	1,039,545	1,110,406	988,286	931,014	931,014	940,324	949,727	959,224
Supplies and Materials	3,679,335	6,936,531	2,202,847	64,578	143,577	143,577	145,013	146,463	147,928
Other Objects	0	361,117	3,351	0	0	0	0	0	0
Total Expenditure by Object	\$ 8,811,844	\$ 13,299,448	\$ 8,277,195	\$ 5,001,085	\$ 5,100,236	\$ 5,100,236	\$ 5,151,238	\$ 5,202,751	\$ 5,254,778

				Building	Fund By Fund	tic	on				
	Actual 2018-2019		Actual 2019-2020	Actual 2020-2021	Actual 2021-2022		Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Operations & Maintenance		_		\$ 7,650,960		_		\$ 5,100,236			
Facilities Acq & Construction	0		5,113,937	626,235	14,749		0	0	0	0	0
Total Expenditure by Function	\$17,623,688	\$	13,299,448	\$ 8,277,195	\$ 5,001,085	\$	5,100,236	\$ 5,100,236	\$ 5,151,238	\$ 5,202,751	\$ 5,254,778

Source: District Records

Local Revenue		<u>5,097,11</u>
Interest - Interfund	280,200.00	
Local Sources - Other	14,863.00	
Ad Valorem - Current	4,692,056.00	
cal Revenue		

CHILD NUTRITION SUMMARY

REVENUES		ACTUAL 2018-2019	ACTUAL 2019-2020		ACTUAL 2020-2021	ACTUAL 2021-2022		Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Local Sources	\$	2,495,723	\$ 1,866,418	\$	559,885	\$ 890,962	\$	2,567,733	\$ 2,567,733	\$ 2,593,410	\$ 2,619,344	\$ 2,645,538
State Sources		68,357	80,358		8,633	89,479		89,479	89,479	90,374	91,278	92,190
Federal Sources		7,252,920	7,526,297		11,220,597	12,656,897		7,549,648	7,549,648	7,625,144	7,701,396	7,778,410
TOTAL REVENUES	_	9,817,000	9,473,073	-	11,789,115	13,637,338		10,206,860	10,206,860	10,308,929	10,412,018	10,516,138
EXPENDITURES												
Food Preparation		3,917,720	4,327,688		4,348,466	4,671,789		4,988,752	4,988,752	4,993,741	4,998,734	5,003,733
Other Direct Services		964,897	1,014,951		940,246	1,274,004		1,083,806	1,083,806	1,084,890	1,085,975	1,087,061
Food Procurement/A La Carte		3,832,105	3,464,372		3,483,942	4,500,104		9,119,910	9,119,910	9,129,030	9,138,159	9,147,297
Other CN Programs		928,868	1,264,529		622,974	579,233		1,083,985	1,083,985	1,085,069	1,086,154	1,087,240
TOTAL EXPENDITURES	_	9,643,590	10,071,540		9,395,628	11,025,130	ī	16,276,453	16,276,454	16,292,729	16,309,022	16,325,331
EXCESS REV (EXP)		173,409	(598,467)		2,393,487	2,612,208		(6,069,593)	(6,069,594)	(5,983,801)	(5,897,004)	(5,809,193)
FUND BALANCE 07/1		6,089,670	6,263,079		5,664,612	8,058,099		10,670,307	10,670,307	4,600,713	(1,383,087)	(7,280,092)
FUND BALANCE 06/30	\$	6,263,079	\$ 5,664,612	\$	8,058,099	\$ 10,670,307	\$	4,600,714	\$ 4,600,713	\$ (1,383,087)	\$ (7,280,092)	\$ (13,089,285)

Source: District Records



CHILD NUTRITION FUND BY CATEGORY

ocal Revenue	rition Fund Revenue Summary
	\$ 100,000
Interest	•
Other Local Sources	99,400
Student Meals	2,310,000
Local Revenue	2,509,400
State Revenue	
State Matching	89,479
State Revenue	89,479
ederal Revenue	
Fresh Fruit and Vegetable	7,607,981
Federal Revenue	7,607,98
otal Revenue	\$10,206,860

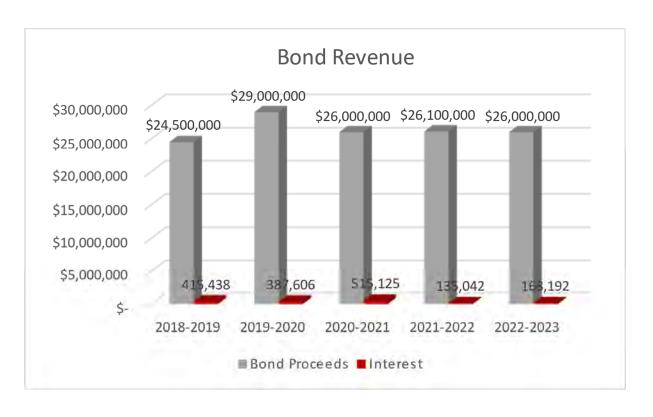
			Child I	Nutrition By	Object				
	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Salaries	\$ 4,028,154	\$ 4,302,438	\$ 4,318,606	\$ 4,490,200	\$ 5,884,312	\$ 5,884,312	\$ 5,890,196	\$ 5,896,086	\$ 5,901,982
Benefits	916,404	994,452	1,039,941	1,270,288	1,276,913	1,276,913	1,278,190	1,279,468	1,280,748
Contracted Services	3,782	41,216	8,273	9,597	15,000	15,000	15,015	15,030	15,045
Purchased Property Services	527,739	951,583	258,342	169,155	463,575	463,575	464,039	464,503	464,967
Other Purchased Services	31,539	33,601	63,185	62,281	86,000	86,000	86,086	86,172	86,258
Supplies and Materials	4,111,765	3,680,924	3,671,389	4,883,421	8,144,754	8,144,754	8,152,899	8,161,052	8,169,213
Property	10,933	52,805	16,490	132,781	400,000	400,000	400,400	400,800	401,201
Other Objects	13,275	14,520	19,401	7,407	5,900	5,900	5,905	5,911	5,917
Total Expenditure by Object	\$ 9,643,590	\$10,071,540	\$ 9,395,628	\$11,025,130	\$16,276,454	\$16,276,454	\$ 16,292,729	\$16,309,022	\$16,325,331

			Child N	utrition By Fo	unction				
	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Approved 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Food Preparations	\$ 3,917,720	\$ 4,327,688	\$ 4,348,466	\$ 4,671,789	\$ 4,988,752	\$ 4,988,752	\$ 4,993,741	\$ 4,998,734	\$ 5,003,733
Other Direct Services	964,897	1,014,951	940,246	1,274,004	1,083,806	1,083,806	1,084,890	1,085,975	1,087,061
Food Procurement/A La Carte	3,832,105	3,464,372	3,483,942	4,500,104	9,119,910	9,119,910	9,129,030	9,138,159	9,147,297
Other CN Programs	928,868	1,264,529	622,974	579,233	1,083,985	1,083,985	1,085,069	1,086,154	1,087,240
Total Expenditure By Function	\$ 9,643,590	\$10,071,540	\$ 9,395,628	\$11,025,130	\$16,276,454	\$16,276,454	\$ 16,292,729	\$16,309,022	\$16,325,331

Source: District Records

BOND FUND SUMMARY

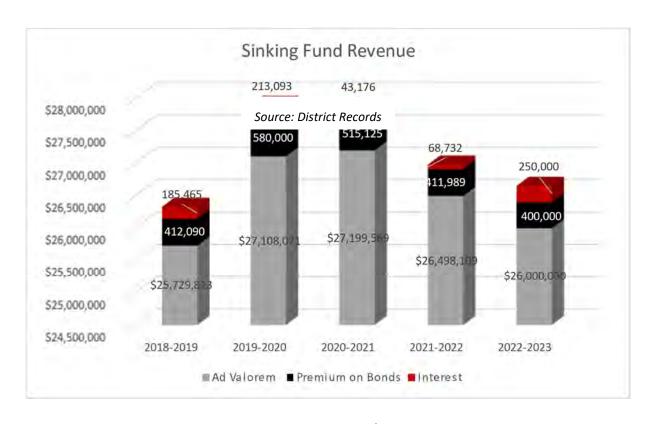
		Bond F	und Revenue	and Expendi	tures			
REVENUES	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023	Forecast 2023-2024	Forecast 2024-2025	Forecast 2025-2026
Bond Proceeds	\$ 24,500,000	\$ 29,000,000	\$ 26,000,000	\$ 26,100,000	\$26,000,000	\$30,400,000	\$30,400,000	\$30,400,000
Interest	415,438	387,606	515,125	135,042	168,192	182,400	182,400	182,400
TOTAL REVENUES	24,915,438	29,387,606	26,515,125	26,235,042	26,168,192	30,582,400	30,582,400	30,582,400
EXPENDITURES								
Instruction	5,047,027	3,951,045	4,995,591	5,312,601	7,386,648	4,711,538	4,711,538	6,197,480
Student Support	145,557	17,371	62,812	179,509	249,589	20,714	20,714	209,408
Instructional Support	788,817	452,725	748,352	369,625	513,927	539,865	539,865	431,190
General Administration	99,258	19,505	2,276	100,175	139,283	23,259	23,259	116,860
School Administration	37,455	73,465	157,748	73,322	101,947	87,605	87,605	85,535
Business/Technology	1,487,820	1,599,406	897,303	1,908,041	2,652,942	1,907,258	1,907,258	2,225,848
Operations & Maintenance	1,586,639	1,227,268	785,582	1,043,513	1,450,902	1,463,491	1,463,491	1,217,323
Student Transportation	2,686,070	67,611	18,259	25,933	36,058	80,625	80,625	30,253
Appliances, Furniture, Fixtures	81,407	16,525	41,804	49,030	68,172	19,706	19,706	57,197
Buildings & Construction	12,101,404	17,623,123	23,129,255	16,309,085	22,676,174	21,015,206	21,015,206	19,025,561
Other	397,280	445,066	127,249	688,643	957,490	530,732	530,732	803,345
TOTAL EXPENDITURES	24,458,734	25,493,109	30,966,231	26,059,477	36,233,132	30,400,000	30,400,000	30,400,000
EXCESS REV (EXP)	456,704	3,894,497	(4,451,106)	175,566	(10,064,940)	182,400	182,400	182,400
FUND BALANCE 07/1	37,527,272	37,983,976	41,878,472	37,427,366	37,602,932	27,537,992	27,720,392	27,902,792
FUND BALANCE 06/30	\$ 37 983 976	\$ 41 878 472	\$ 37 427 366	\$ 37 602 932	\$ 27 537 992	\$ 27 720 392	\$ 27 902 792	\$ 28 085 192



Source: District Records

SINKING FUND SUMMARY

		Sink	ing Fund Rever	nue and Expend	litures					
REVENUES	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Actual 2021-2022	Proposed 2022-2023		Forecast 2023-2024		Forecast 2024-2025	Forecast 2025-2026
Ad Valorem	\$ 25,729,823	\$ 27,108,071	\$ 27,199,569	\$ 26,498,109	\$ 26,000,000	\$	26,000,000	\$	26,000,000	\$ 26,000,000
Premium on Bonds	412,090	580,000	515,125	411,989	400,000		400,000		400,000	400,000
Interest	185,465	213,093	43,176	68,732	250,000		250,000		200,000	200,000
TOTAL REVENUES	26,327,378	27,901,164	27,757,869	26,978,830	26,650,000		26,650,000		26,600,000	26,600,000
EXPENDITURES										
Principal	25,250,000	25,750,000	25,125,000	26,955,313	25,625,000		26,895,313		19,948,125	13,812,500
Interest	1,848,438	1,928,438	1,830,313	1,562,813	1,702,875	1	1,950,000		1,950,000	1,950,000
TOTAL EXPENDITURES	27,098,438	27,678,438	26,955,313	28,518,125	27,327,875		28,845,313	_	21,898,125	15,762,500
EXCESS REV (EXP)	(771,060)	222,727	802,557	(1,539,295)	(677,875)		(2,195,313)		4,701,875	10,837,500
FUND BALANCE 07/1	15,153,249	14,382,189	14,604,916	15,407,473	13,868,178		13,190,303		10,994,990	15,696,865
FUND BALANCE 06/30	\$ 14,382,189	\$ 14,604,916	\$ 15,407,473	\$ 13,868,178	\$ 13,190,303	\$	10,994,990	\$	15,696,865	\$ 26,534,365



Source: District Records

ANALYSIS OF PRIOR YEAR GOVERNMENTAL FUNDS

Union Public School District uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements.

The focus of the district's governmental funds is to provide information on near-term inflows, outflows, and balances of spendable resources. Such information is useful in assessing the district's financing requirements. In particular, fund balances may serve as a useful measure of a government's net resources available for spending at the end of the fiscal year.

At the end of Fiscal year 2022, the district's governmental funds reported combined ending fund balances of \$100,099,875, with \$2,001,344 of this total amount constituting non-spendable fund balance reserved for inventories. In addition, \$66,807,938 is restricted for specific purposes: \$874,084 in general fund, \$4,233,341 in the building fund for uses mandated by the Oklahoma Constitution including building erection and maintenance, security, utilities, and fire/casualty premiums; \$14,953,573 in the sinking fund for debt service, and \$35,801,705 in the bond fund for capital project, \$10,914,476 in the child nutrition fund for school lunches, \$76,522 in the gift fund restricted for purposes designated by the donor, and \$5,999 in other governmental funds for arbitrage. Assigned fund balance totals \$5,695,677 for compensating balances, early retirement incentive, and insurance recovery. Unassigned fund balance totals \$22,946,204 and is available for spending at the District's discretion.

The general fund is the chief operating fund of the district. At the end of the current fiscal year, unassigned fund balance of the general fund was \$22,946,204. As a measure of the general fund's liquidity, it may be useful to compare both unassigned fund balance and total fund balance to total fund expenditures. Unassigned fund balance represents 16.28 percent of total general fund expenditures and total fund balance represents 21.27 percent of total general fund expenditures. The fund balance of the District's general fund decreased by \$1,916,926 from the prior year primarily as a result of a decrease in state and local revenue sources.

Controlling fiscal year-end expenditures to maintain a continuing level of fund balance is also a contributing factor to the district's financial stability. The district relies on the ending fund balance to meet cash flow needs during the first six months of the following fiscal year. While a small portion of the revenue is collected during the first six months of the fiscal year, the significant revenue collections occur in late spring. This annual cash flow trend requires the district to increase the ending fund balance each year as the expenditure budget grows in order to meet cash flow requirements of the first six months prior to tax revenues being collected.

The revenue and expenditure budgets are revised during the fiscal year based on the final federal grant award notifications, state aid allocation revisions, actual revenue receipts, and other unanticipated increases or decreases in revenue or expenditures. Fiscal year 2022 general fund revenue budgets were revised during the year based on adjustments to revenue collections. The fiscal year saw a \$1,653,522 increase in local revenue sources, a \$580,474 increase in state aid and property tax collections, and \$91,407 decrease in federal source collections.

ANALYSIS OF PRIOR YEAR GOVERNMENTAL FUNDS

The building fund is included as a Non-Major Governmental Fund. This program had a total

fund balance of \$4,233,341. The net decrease in fund balance during the current year in the building fund was \$249,624. The decrease in the fund balance is due to expenditure exceeding revenue. The variance in the final budget versus the actual revenues and expenditures revealed a variance in revenues of \$390,926 and a variance in expenditures of \$82,452. The Oklahoma Constitution allows the building fund to be used for erecting, remodeling, repairing, or maintaining school buildings; purchasing furniture, equipment, or computer software; paying energy and utility costs purchasing telecommunications services; paying fire and casualty insurance premiums; purchasing security systems; and paying salaries of security personnel. The ending fund balance will be used for those purposes. The building fund revenue and expenditure budgets are revised during the fiscal year based on the actual revenue receipts and other unanticipated increases or decreases in revenue or expenditures.

Union Public Schools

The child nutrition fund is included as a Non-Major Governmental fund. It had a total fund balance of \$12,442,765. This program had operating revenues of \$14,659,943, and expenses of \$11,733,182 for the fiscal year 2022. Although

expenditures for food, milk, and supplies continue to increase, the child nutrition program has made a concerted effort to provide more healthy food options for students. The Child Nutrition fund ended the year in a positive financial condition. Management has reviewed this program and, barring any unforeseen circumstances, the Child Nutrition program should remain stable and require no support from tax revenues.

BOND PROJECTS

All capital projects for the District are paid for with bond dollars. It is through issuance of bonds that Union is able to pay for capital expenditures such as textbooks, instructional technology, equipment and construction. Without bond propositions, the district would have to tap into its general fund to pay for the facilities and instructional tools our children need, leaving little money to hire teachers or conduct daily operations.

2022 BOND PROJECTS THE YEAR AHEAD

Fine Arts/Band Building: A Race to the Finish



Given the dramatic new profile and transformation of Union Tuttle Stadium, it's hard to believe that the best is yet to come. Already underway is the district's new Fine Arts/Band Building that will cap the stadium's north end and provide the backdrop for a new high-definition video display. Work will be completed by the second week of August, in time for the 2022 football season.

The one-story, 25,000 square foot building will be the new home of Union's Renegade Regiment. Featuring 20-foot ceilings for good acoustics and a large practice room that will hold the entire band, there's also a medium practice room, instrument lockers, uniform storage, a ticket booth, office space and restrooms.

On the stadium-facing side of the building will be a striking 31' x 55' 10mm video display manufactured by Watchfire Signs of Danville, Illinois. The new video scoreboard is 35 percent larger than the previous one and provides greater flexibility in how it displays content. The virtual scoreboard can be programmed to show scores, player photos and statistics, animated graphics to fire up the crowd, and live video.

Advertising zones will allow the school to generate ad revenue. "We were especially interested in purchasing a video board from a company with substantial operations in the United States so parts and support would be readily available," said Lee Snodgrass, recently retired director of special projects.





BELIEVING IN "U" -BOND PROJECTS

Believing in W#



Dear Union Patrons:
REACHING – ENGAGING – INSPIRING.
That is what we aspire to do every day
when teaching and relating to students
in our quest for "100% Graduation,
College and Career Ready." While this
proved to be a good theme for this
year's Teacher Kick-Off, it's equally
descriptive of the physical spaces,
technology and learning environments
that are necessary if we are to effectively
connect with our students.

I think you will agree: Our physical structures are second to none, and for that we make no apology. Our kids are worth it. Look no further than Union Collegiate Academy, the Performing Arts Center, the UMAC and, of course, our gorgeous new Union Tuttle Stadium. All these public investments are more than dollars spent just on bricks and mortar, computers, and technology licenses. In choosing to support Union's bond initiatives, we recognize your vote is an investment in our children's future.

We greatly appreciate our students, staff, and patrons in these challenging times. I appreciate their strength, fortitude, and grace as we've kept our focus on educating students while keeping them and our staff safe. Together, we have much to celebrate this last year:

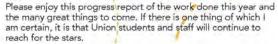


- In March, we honored the first class of Union graduates of the EDGE (Earn a Degree, Graduate Early) pilot program, as they received an associate degree along with their high school diploma.
- The completion of Phase I of our new stadium, nicknamed "The Big House" by Coach Kirk Fridrich.

- Eleven Union High School seniors were named National Merit Semifinalists and 14 were awarded with Academic Honors from the College Board National Recognition Programs.
- The completion of a new esports arena in the former orchestra room at Union High School Freshman Academy to accommodate a team of 150 students.
- The selection of a new mascot for our district, the UNION REDHAWKS, by more than 80% of our students in grades 6-12.
- The Renegade Regiment Marching Band performed in the 95th Annual Macy's Thanksgiving Day Parade in November, after being delayed the previous year due to the pandemic.

I hope you enjoy this progress report covering Year 4 of our five-year bond. We are nearing completion of this \$128.6 million multi-year bond that passed by a wide margin in 2018. Thankfully, we have bold leadership at the board level and a supportive

community that is deeply invested in our work.



5-YEAR TOTAL \$128,600,000

Sincerely,

Kuti el Huffer Kirt Hartzler, Ed.D., Superintendent

5-Year Series Bond (2018 - 2022) \$128.6-Million Proposition at a Glance*

Generously approved by patrons, Union's historic five-year bond proposal has provided \$128.6 million for the following projects through 2022.

"U" ARE WORTHY: NEW 5-YEAR SERIES BOND PROPOSAL



orthy VOTE Tuesday February 14, 2023!



Dear Union Patrons,
"Our Kids Are Worthy." That was the Tulsa World headline in January 2020 when we began the demolition of Tuttle Stadium's west side in preparation for the improvements we now enjoy. Not only is the new stadium more accessible, but we also added a new wrestling and weight room, two concession stands, a press box and improved amenities. At

the high school, we also added space for volleyball. Then we capped off the project with the Band Building at the stadium's north end. When challenged to explain why a school district would go to such lengths, I said, "Because our kids are worthy."

Five years ago, we went out on a limb when we embarked on the district's first five-year general obligation bond. That was daring for Union, as we had previously done only annual bond elections. Our Board of Education, however, saw the wisdom in minimizing risk. What a great decision that turned out to bel No one could have anticipated the magnitude of the disruption due to the pandemic. Although our investment in 1-to-1 ("one computer device for every student") proved almost prophetic.

We come to you again with a host of new projects as we seek approval of a \$152 million, five-year series bond. As before, this bond will not raise taxes above traditional levels. Among the signature projects is a plan that would significantly transform Union's Sixth/Seventh Grade Center. Over the last few years, we have had concerns about elementary students' transition to the secondary environment.

Now is the time, we believe, to alter the 6th grade setting to more closely align with elementary by creating smaller learning communities. We also plan to add more restrooms, cafeteria and gym space as we seek to compress lunchtime and improve traffic flow. Ultimately, we envision a more studentfriendly 6th grade on the east side of the building, with the 7th grade on the west, and a building that is more conducive to a 21st century learning environment, (See the full details inside).

Other key projects include ongoing investments in technology, safety and security, as well as upgrades to athletic and fine arts facilities to include the UMAC, the Performing Arts Center and turf and courts districtwide for soccer, tennis, golf and indoor baseball/softball. There is also a significant need districtwide for roof and HVAC systems, interior and exterior building renovations, as well as textbooks, digital curriculum, instructional resources, and transportation needs.

The list of needs is extensive and greatly exceeds the budget available to do them. But with your commitment, passage of this bond will go a long way toward giving our students and teachers the tools they need to be successful. I think you will agree: Union's physical structures are second to none, and for that we make no apology. All these public investments are more than dollars spent just on bricks and mortar, computers and technology licenses. In choosing to support Union's bond initiatives, you are investing in our children's future. Students, "U Are Worthy."

Please remember to vote on Tuesday, February 14!

Sincerely.

Kutu il Huffen Kırt Hartzler, Ed.D., Superintendent

5-YEAR SERIES BOND (2023 - 2027)

\$152 Million Proposition at a Glance*

6th/7th Grade Center Renovation and Expansion Project and FF&E	\$51,600,000
District Athletics and Fine Arts Facility Upgrades	\$5,775,000
District Exterior and Interior Renovations (includes utility systems and equipment, playgrounds, flooring	
painting, windows, doors, millwork, lighting and FF&E)	\$10,240,000
District Roof Replacements.	
District HVAC Systems Replacements	\$10,000,000
District Equipment and Other Improvements (includes security items, safety upgrades, fencing, paving, roofing, doors, windows, playgrounds, rooftop units, boilers, chillers, hot water tanks, appliances,	
signage, tools and other renovation or replacement projects)	\$15,187,500
Technology.	\$15,712,500
Textbooks, Digital Curriculum, Software, Subscriptions and Instructional Resources	\$15,500,000
Site and Department Allocations	\$5,425,000
Transportation - Buses.	\$3,960,000
Transportation - Buses. Transportation - Vehicles	\$1,500,000
Fees, Professional Services, and Contingency	
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*Note: The numbers presented in the table above are estimates Passage WILL NOT increase taxes above traditional levels!

5-YEAR TOTAL \$152,000,000

#### **DEBT OBLIGATIONS**

State statutes prohibit the District from becoming indebted in an amount exceeding the revenue to be received for any fiscal year without approval by the District's voters. Bond issues have been approved by the voters and issued by the District for various capital improvements. State law requires these bonds be fully paid serially within 25 years from the date of issue.

Long-term liabilities of the District consists of bonds payable, obligations for compensated absences, a liability for the early retirement incentive plan, a liability for other post-employment benefits (OPEB), and a pension liability which is discussed in Note G. Debt service requirements for bonds are payable solely from the fund balance and future revenues of the sinking fund. The general fund is the fund that is typically used to liquidate compensated absences, early retirement incentive, the OPEB liability, and the pension liability.

A brief description of the outstanding general obligation bond issues at June 30, 2022 is set forth below:

	Ju	Balance ine 30, 2021	Additions	Deductions	Ju	Balance ne 30, 2022	ue Within One Year
Governmental Activities							
Bonds Payable	\$	91,375,000	\$ 26,100,000	\$ (25,625,000)	\$	91,850,000	\$ 25,625,000
Premium on debt		1,452,426	411,989	(439,551)		1,424,864	0
Compensated absences		5,720,385	0	(1,060,627)		4,659,758	2,046,655
Early retirement incentive		1,503,933	774,760	(122,059)		1,156,634	710,537
	\$	100,051,744	\$ 27,286,749	\$ (27,247,237)	\$	99,091,256	\$ 28,382,192

	Amounts Outstanding
dependent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2018, ginal issue \$23,000,000 interest rate of 2.0% to 3.0% due in installments of \$5,750,000 annually, final rment of 5,750,000 due April 1, 2023.	
nen 01 3,750,000 dae 11pm 1, 2023.	\$ 5,750,000
dependent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2019, ginal issue \$24,500,000 interest rate of 2.0% to 3.0% due in installments of \$6,125,000 annually, final rement of \$6,125,000 due April 1, 2024.	
	12,250,000
ependent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2020, ginal issue \$29,000,000, interest rate of 1.0% to 2.0% due in installments of \$7,250,000 annually, final ment of \$7,250,000 due April 1, 2025.	
01 47,220,000 000 1.pt. 1, 2023.	21,750,000
dependent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2021, ginal issue \$26,000,000, interest rate of 1.125% due in installments of \$6,500,000 annually, final rment of \$6,500,000 due April 1, 2026.	
nkm of 50,700,000 dat ripin 1, 2020.	26,000,000
dependent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2022, ginal issue \$26,100,000, interest rate of 2.0% to 3.0% due in installments of \$6,525,000 annually, final rment of \$6,525,000 due April 1, 2027.	
ment of 30,725,000 due April 1, 2021.	26,100,000
	\$ 91,850,000

# **DEBT OBLIGATIONS**

Maturities of long-term debt are as follows

Year ending June 30,	Principal	Interest	Total
2023	\$ 25,625,000	\$ 1,702,875	\$ 27,327,875
2024	26,400,000	1,244,125	27,644,125
2025	20,275,000	748,000	21,023,000
2026	13,025,000	334,125	13,359,125
2027	6,525,000	130,500	6,655,500
	\$ 91,850,000	\$ 4,159,625	\$ 96,009,625

Source: District Records



#### EMPLOYEE RETIREMENT SYSTEM OBLIGATIONS

Members who joined prior to November 1, 2011 and whose age and service do not equal the eligible limit may receive reduced benefits as early as age 55, and at age 62 receive unreduced benefits based on their years of service. Members who joined after October 31, 2011 and whose age and service do not equal the eligible limit may receive reduced benefits as early as age 60, and at age 65 receive unreduced benefits based on their years of service. The maximum retirement benefit is equal to 2% of final compensation for each year of credited service. Monthly benefits are at 1/12 of this amount.

Final compensation for members who joined the System prior to July 1, 1992 is defined as the average salary for the three highest years of compensation. Final compensation for members joining the System after June 30, 1992 is defined as the average of the highest five consecutive years of annual compensation in which contributions have been made. The final average compensation is limited for service credit accumulated prior to July 1, 1995 to \$40,000 or \$25,000, depending on the member's election. Service credits accumulated after June 30, 1995 are calculated based on each member's final average compensation.

Upon the death of a member who has not yet retired, the designated beneficiary shall receive the member's total contributions plus 100% of interest earned through the end of the fiscal year, with interest rates varying based on time of service. A surviving spouse of a qualified member may elect to receive, in lieu of the aforementioned benefits, the retirement benefit the member was entitled to at the time of death as provided under the Joint Survivor Benefit Option.

Upon the death of a retired member, the System will pay \$5,000 to the designated beneficiary, in addition to the benefits provided for the retirement option selected by the member.

A member is eligible for disability benefits after ten years of credited Oklahoma service. The disability benefit is equal to 2% of final average compensation for the applicable years of credited service. Upon separation from the System, members' contributions are refundable with interest based on certain restrictions provided in the plan, or by the IRC.

Members may elect to make additional contributions to a tax-sheltered annuity program to the exclusion allowance provided under the IRC under Code Section 403(b).

#### **OPEB OBLIGATIONS**

Contributions: The contribution requirements of OTRS are at an established rate determined by Oklahoma Statute, amended by the Oklahoma Legislature, and are not based on actuarial calculations. The District's contribution rate is 9.50% of the employees' annual pay and an additional 7.90% for any employees' salaries covered by federal funds for the years ended June 30, 2022. The District's contributions to OTRS in 2022 were \$9,189,519, equal to the required contributions.

Employees are required to contribute 7.00% of their annual compensation, which the District pays on behalf of certain employees as allowed by statute. The District made contributions on behalf of certain employees in 2022 totaling approximately \$2,002,000.

The State of Oklahoma makes a contribution on behalf of each teacher meeting minimum salary requirements (known as the OTRS years of service credit). The credit amount is determined based on years of service and ranges from \$60.15 per year for 0 years of service to \$1,410.53 per year for 25 years or more of service. For the fiscal year ended June 30, 2022 the State paid approximately \$633,000 on behalf of teachers employed at the District. In accordance with GAAP, the District recognized the on- behalf-of payments as revenue and expense/expenditure in the government wide and fund financial statements.

	Deferred Outflow of Resources		Deferred Inflows of Resources	
Differences between expected actual experience	\$	5,770,537	\$ (3,254,412)	
Changes of assumptions		13,613,913	(871,547)	
Net difference between projected and actual earnings on pension plan investments  Changes in proportion and differences between District contributions		-	-45454611	
and proportionate share of contributions		11,710,394	(672,328)	
Total deferred amounts to be recognized in pension expense in				
future periods		31,094,844	(50,252,898)	
District contributions subsequent to the measurement date		9,189,519	-	
Total	\$	40,284,363	\$ (50,252,898)	

a San Latina and Aria	Total OPEB Liability	Plan Difuciary Net Position	Net OPEB Liability
Total OPEB Liability - beginning of year	\$6,772,189	\$ -	\$6,772,189
Changes for the year			
Service cost	464,501		464,501
Interest	172,459	1	172,459
Differences between expected and actual experience	1,067,865	4	1,067,865
Changes of assumptions	(102,091)	2	(102,091
Employer Contributions		395,123	(395,123
Benefit payments	(395,123)	(395,123)	-
Net change in total OPEB liability	1,207,611		1,207,611
Total OPEB Liability - end of year	\$7,979,800	\$ -	\$7,979,800

Source: District Records



# INFORMATIONAL SECTION



#### **NET ASSESSED VALUATION**

Since local revenue sources are dependent on the value of property within the District, trends in property valuations are an important economic indicator of a district's revenue base. The assessed valuation of property within the School District is comprised of three components: real, personal, and public service. The county assessor in each county determines the real and personal property values on an annual basis. Public service valuations are set annually by the Oklahoma Tax Commission. Once the valuation is determined, an assessment rate is calculated to provide the assessed valuation on which the appropriate tax levy is applied.

In accordance with the Oklahoma Constitution, the assessment rate for real and personal property set by each county must be within a range established by the State Board of Equalization. As a result of passage of State Question No. 675 on November 5, 1996, the Oklahoma Constitution was amended to provide that the allowable range for real property be placed between 11 percent and 13 ½ percent and the range for personal property be set between 10 percent and 15 percent. Beginning January 1, 1997, the percentage at which real or personal property is assessed within a county shall not be increased except upon approval by a majority of the registered voters of the county, voting at an election called for that purpose by a majority of county commissioners, or upon a petition initiated by not less than ten percent (10%) of the registered voters of the county based on the total number of votes cast at the last general election for the county office receiving the highest number of votes at the election. In no event shall the percentage be increased by more than on percentage point per year or increase in excess of the aforementioned assessment ranges for personal and real property. The percentage at which real or personal property is assessed within a county may be decreased with the limitations (assessment ranges) without approval of the voters of the county.

Also, as provided by State Question No. 675, all other property (primarily public service property) assessed by the State Board of Equalization shall be assessed at the percentage of its fair cash value, estimated at the price it would bring at a fair voluntary sales, at which it was assessed on January 1, 1996. Consequently, the assessment rates on public service property and on airlines and railroads included in the public service category were set at 22.85% and 11.84%, respectively.

The Constitution of the State of Oklahoma provides exemptions to real and personal property owners based on certain qualifications and guidelines. A residential homeowner is allowed a homestead exemption deduction equal to \$1,000 of net assessed valuation. The homeowner must apply annually for the exemption in order to receive the deduction.

An exemption on certain household property taxes was approved by the voters of the state in the form of State Question 648 at an election held November 3, 1992. This exemption applies to "household goods of the heads of families and livestock employed in support of the family." State Question 648 actually authorized each county to hold an election approving the exemption. On September 14m 1993, Tulsa County voters became the first county in Oklahoma to approve the household property exemption. The exemption was effective for tax year 1994. As a result, the School District's personal property valuation declined. In order to ensure a neutral effect on local government ad valorem tax revenues, State Question 648 provided for an adjustment in the mill levies assess by counties and schools, which prevented the School District from experiencing a decline in local revenues. Consequently, at that time the adjusted mill levies for Union's General Fund and Building Fund were set at 36.058 and 5.15 mills, respectively. In addition, the District's adjusted net debt limitation percentage was modified to 10.30% *10% adjustment factor of 1.03) of net assess property located in the District. The adjustment factor for the Union School District was determine by Tulsa County officials.

#### **NET ASSESSED VALUATION CONTINUED**

# Assessed and Estimated Actual Value of Taxable Property Last Ten Fiscal Years

Fiscal Year Ended June 30,	Real Property Assessed Value ^a	Personal Property Net Assessed Value ^a	Public Service Property Property Assessed Value ^b	Total Net Assessed Value	Total Estimated Actual Value ^c	Increase	Ratio of Gross Assessed Value to Total Estimated Actual Value	Total Direct Tax Rate ^d
2012	594,315,814	90,932,503	20,465,196	705,713,513	6,525,004,824	-0.47%	10.82%	71.65
2013	601,412,818	88,022,848	21,252,456	710,688,122	6,562,775,286	0.58%	10.83%	71.90
2014	610,351,602	91,811,689	19,160,939	721,324,230	6,671,918,494	1.66%	10.81%	71.06
2015	628,740,000	99,732,783	16,546,904	745,019,687	6,905,133,965	3.50%	10.79%	70.19
2016	647,399,204	101,040,598	16,351,844	764,791,646	7,085,583,042	2.61%	10.79%	71.01
2017	673,539,097	104,988,429	18,150,870	796,678,396	7,368,526,233	3.99%	10.81%	71.11
2018	692,847,775	106,814,765	19,086,696	818,749,236	7,564,864,003	2.66%	10.82%	72.93
2019	718,866,548	110,992,122	19,057,585	848,916,255	7,841,339,927	3.65%	10.83%	71.92
2020	742,216,596	111,856,098	20,845,162	874,917,856	8,068,048,672	2.89%	10.84%	72.34
2021	760,697,383	110,747,589	22,570,959	894,015,931	8,231,037,095	2.02%	10.86%	71.43
2022	775,116,488	111,964,105	24,114,249	911,194,842	8,378,679,168	1.79%	10.88%	69.82
2023	790,618,818	113,083,746	24,355,391	928,057,955	8,462,465,960	2.81%	10.97%	69.82
2023	806,431,194	114,214,584	24,598,945	945,244,723	8,547,090,619	1.00%	11.06%	69.82
2024 est	814,495,506	115,356,729	24,844,935	954,697,170	8,632,561,525	1.00%	11.06%	69.82
2025 est	822,640,461	116,510,297	25,093,384	964,244,142	8,718,887,141	1.00%	11.06%	69.82
2026 est	830,866,866	117,675,400	25,344,318	973,886,583	8,806,076,012	1.00%	11.06%	69.82

^a Assessed value is defined a the taxable value of real or personal property and is subject to an assessment rate set by the County Assessor to calculate the amount of tax liability. The current assessment rate is 1% for real property and 10% for personal property.

Source: Tulsa County Assessor

^b Public service property is centrally assessed by the Oklahoma State Board of Equalization. The assessment rates on public service property, and on airlines and railroads included in the public service category, are set at 22.85% and 11.84% respectively.

^c Estimated actual value is used in computing the gross assessed value for tax purposes. The Oklahoma Constitution provides that this value will not exceed a 5% increase over the previous year unless improvements were made to the property or if title to the property is transferred, changed, or conveyed to another person.

^d Components of total direct tax rate are found on the Direct and Overlapping Property Tax Rate table.

#### DIRECT AND OVERLAPPING PROPERTY TAX RATES

# Direct and Overlapping Property Tax Rates Last Ten Fiscal Years

Rates for Taxpayers in the City of Tulsa

	_	Direct R	ates			Total				
Fiscal	Uni	ion School District		Total Direct	Tulsa	Tulsa Comm	Tulsa	Tulsa	Total Overlapping	Direct & Overlapping
Year	General	Building	Sinking	Rates	County	College	VoTech	City	Rates	Rates
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	20.16	62.94	134.84
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	20.24	63.02	134.08
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	21.46	64.23	134.42
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	22.79	65.55	136.56
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	21.20	63.98	135.09
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	22.44	65.22	138.15
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	22.14	65.42	137.34
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	22.12	65.32	137.66
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	17.78	61.57	133.00
2022	36.05	5.15	29.50	70.70	23.26	7.21	13.33	20.44	64.24	134.94

Rates for Taxpayers in the City of Broken Arrow^b

		Direct R	ates			Total				
Fiscal	Un	ion School District		Total Direct	Tulsa	Tulsa Comm	Tulsa	Broken Arrow	Total Overlapping	Direct & Overlapping
Year	General	Building	Sinking	Rates	County	College	VoTech	City	Rates	Rates
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	16.50	59.28	131.18
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	17.32	60.10	131.16
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	17.14	59.91	130.10
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	17.10	59.86	130.87
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	16.92	59.70	130.81
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	16.84	59.62	132.55
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	15.61	58.89	130.81
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	15.66	58.86	131.20
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	16.19	59.98	131.41
2022	36.05	5.15	29.50	70.70	23.26	7.21	13.33	16.05	59.85	130.55

Note: A mill is the equivalent of \$1 per \$1,000 of net assessed value. The District's millage rate levy is pursuant to provisions of the Constitution of the State of Oklahoma contained in Article X. The County Excise Board certifies the Estimate of Needs submitted by the District annually and computes the rate of mill levy necessary for general fund, building fund and sinking fund purposes. Once the levy is certified by the Excise Board, the county assessor extends said levies upon the tax rolls. Pursuant to a recent amendment to the Oklahoma Constitution enabling local school districts to seek permanent voter approval of a 5-mill emergency levy, a 5.15-mill building levy, and a 10-mill local support levy, the District submitted such permanent levies to the voters at an election held on February 13, 2001. The permanent levies were approved, and the District no longer has to submit approval of these funding sources to voters on an annual basis.

Source: Tulsa County Clerk

^a Approximately 86% of the District lies within the City of Tulsa. The ten-year tax levy average for property owners in the City of Tulsa is 135.61 mills.

^b Approximately 14% of the District lies within the City of Broken Arrow. The ten-year tax levy average for property owners in the City of Broken Arrow is 131.06 mills.

# PROPERTY TAX RATE IMPACT ON PROPERTY OWNERS

### **Property Tax Rate Impact on Property Owners**

### Rates for Taxpayers in the City of Tulsa

Market

	Property	Millage	Assessed	Assessment A	Value		
Change	Tax	Rate	Value	Rate	of	Mills	Fiscal
1111111	Due			Property		Year	
	3,697	0.13444	27,500	11%	250,000	134.44	2012
11	3,708	0.13484	27,500	11%	250,000	134.84	2013
-21	3,687	0.13408	27,500	11%	250,000	134.08	2014
9	3,697	0.13442	27,500	11%	250,000	134.42	2015
59	3,755	0.13656	27,500	11%	250,000	136.56	2016
-40	3,715	0.13509	27,500	11%	250,000	135.09	2017
84	3,799	0.13815	27,500	11%	250,000	138.15	2018
-22	3,777	0.13734	27,500	11%	250,000	137.34	2019
9	3,786	0.13766	27,500	11%	250,000	137.66	2020
-128	3,658	0.13300	27,500	11%	250,000	133.00	2021
53	3,711	0.13494	27,500	11%	250,000	134.94	2022

#### Rates for Taxpayers in the City of Broken Arrow

Market

		Value	Assessment	Assessed	Millage	Property	
Fiscal	Mills	of	Rate	Value	Rate	Tax	Change
Year		Property				Due	
2012	131.56	250,000	11%	27,500	0.13156	3,618	
2013	131.18	250,000	11%	27,500	0.13118	3,607	-10
2014	131.16	250,000	11%	27,500	0.13116	3,607	-1
2015	130.10	250,000	11%	27,500	0.13010	3,578	-29
2016	130.87	250,000	11%	27,500	0.13087	3,599	21
2017	130.81	250,000	11%	27,500	0.13081	3,597	-2
2018	132.55	250,000	11%	27,500	0.13255	3,645	48
2019	130.81	250,000	11%	27,500	0.13081	3,597	-48
2020	131.20	250,000	11%	27,500	0.13120	3,608	11
2021	131.41	250,000	11%	27,500	0.13141	3,614	6
2022	130.55	250,000	11%	27,500	0.13055	3,590	-24

Source: Tulsa County Clerk

### PROPERTY TAX AND COLLECTIONS

# Property Tax Levies and Collections Last Ten Fiscal Years

	Collected within the Collected in  Fiscal Year of the Levy* Subsequent Years*							
Fiscal Year Ended June 30,	Total Tax Levied for Fiscal Year	Current Tax Collections	Percent of Current Tax Collected	Delinquent Tax Collections	Total Tax Collection	Ratio of Total Tax Collection to Levy	Outstanding Delinquent Taxes	Ratio of Delinquent Taxes to Total Levy
2012	50,564,373.21	49,356,792.50	97.61%	1,128,029.84	50,484,822.34	99.84%	1,825,174	3.61%
2013	51,098,475.97	50,136,475.61	98.12%	985,460.76	51,121,936.37	100.05%	1,903,829	3.73%
2014	51,257,299 78	50,231,292.56	98.00%	910,508.71	51,141,801.27	99.77%	1,889,675	3.69%
2015	52 292 931.83	51 034 794.79	97.59%	906,394.03	51,941,188.82	99.33%	1,785,109	3.41%
2016	54.307.854.78	53 392 085.63	98.31%	907,622.92	54,299,708.55	99.98%	1,805,492	3.32%
2017	56,651,800,74	55,237,805.08	97.50%	819,588.64	56,057,393.72	98.95%	1,981,909	3.50%
2018	59,711,381.78	58,210,862.77	97.49%	1,398,459.65	59,609,322.42	99.83%	2,225,068	3.73%
2019	61,054,057.06	59,170,948.54	95.92%	1,056,050.52	60,226,999.06	98.65%	2,516,937	4.12%
2020	62,495,382.00	61,977,275.00	99.17%	1,006,640.00	62,983,915.00	100.78%	2,764,349	4.42%
2021	63,859,558.00	62,851,899.00	98.42%	1,394,179.00	64,246,078.00	100.61%	2,382,610	3.73%
2022	66,792,094.00	62,574,865.00	93.69%	972,563.00	63,547,428,00	95.14%	2,334,546	3.50%
2023 Est	63 120 335 82	62,489,132.46	99.00%	1,000,000.00	63,489,132,46	100.58%	2,964,349	4.70%
2024 Est	63,751,539.18	62,476,508.39	98.00%	1,000,000,00	63,476,508,39	99.57%	3,164,349	4.96%
2025 Est	64,389,054.57	63,423,218.75	98.50%	1,000,000.00	64,423,218.75	100.05%	3,364,349	5.23%

^aThe Tulsa County Assessor is required to file a tax roll report on or before October 1 of each year with the Tulsa County Treasurer who must begin collecting taxes by November. The first half of taxes is due and payable on or before December 31. The second half becomes due and payable on or before March 31. If the first half is not paid by December 31, the total tax becomes due and payable on January 1.

Source: Tulsa County Treasurer

^bAd valorem taxes not paid on or before April 1 are considered delinquent. Interest accrues on delinquent taxes at the rate of one and one-half percent monthly (18 percent annually) to a maximum of 100 percent of the taxes due until such time as the delinquent taxes are paid. If not paid by the following October 1, the property is offered for sale for the amount of taxes due.

[°]In accordance with Oklahoma State Law 68 O.S. 2001 Section 3009 and Sections 26 and 28 of Article 10 of the Oklahoma Constitution, the County Excise Board assumes a delinquency rate of 10% when the Board approves the total tax lewy. However, the District has a history of only 2% - 4% delinquency rate. Therefore, the "Ratio of Deliquent Taxes to Total Levy" may exceed 100%.

# **CALCULATING A TAX BILL**

		SAMPL	E TAX BILL F	OR CITY OF	TUL	SA - 202	2	
Taxable Value \$ 100,000	Asse	Gross ssed Value 11,000	Exemption 1	Net Assessed		e	Tax Rate M 133.32	
Distribution of you	r Ad Va	lorem Tax						
Health	\$	25.80	Tulsa Technol	ogy Center	\$	133.28	City	\$ 196.97
School 4-Mill	\$	39.99	Tulsa Commun	nity College	\$	72.09	County	\$ 112.58
School District	\$	699.10	Emergency Me	dical Service	\$		Library	\$ 53.19
Tax Amount Due	\$	1,333.00						



# **STATE AID CALCULATION**

## UNION PUBLIC SCHOOLS

# State Aid Calculation Sheet FY23 Mid-Term

#### FOUNDATION AID

Foundation Weighted ADM	24,483.08				
Foundation Aid Factor	1,953.07			\$	47,817,169.06
Less Chargeables:					
Ad Valorem	911,171,589.18	5	14,624,304.01		
Foundation Mils	0.01605				
County 4 Mil Levy (75%)	4,243,715.96	\$	3,182,786.97		
School Land Earnings			2,219,905.77		
Gross Production			10,568.57		
Motor Vehicle			7,091,760.44		
Rea Tax					
TOTAL CHARGEABLES	1 7			\$	(27,129,325.76)
NET FOUNDATION AID (ZERO IF L	ESS THAN ZERO)			S	20,687,843.30

#### TRANSPORTATION AID:

Regular Average Daily Haul	9,011.21	0 -	
Per Capita Amount	\$ 33.00		
Transportation Factor	1.39	\$	413,344.20

#### SALARY INCENTIVE AID:

Incentive Aid Guarantee Factor	92.04			
Weighted ADM	24,483.08	S	2,253,422.68	
Adjusted District Valulation	911,171,589.18	S	911,171.59	
Incentive Mils	20			\$ 26,845,022.00

#### REDUCTIONS:

OCAS Non-Compliance	S	10.1	
Per-Pupil Revenue Exceeds 150%	\$		
Administrative Costs Penalty	\$		
Adjustments due to Additions	\$	4 .	
Adjustments due to Reductions	\$	3.1	
General Fund Balance Penalty	\$	4 1	
TOTAL REDUCTIONS			\$ 

#### **TOTAL NET STATE AID**

\$47,946,209.50

Source: District Records

Calculated Per Student Factor	1 \$	3.793.87

# **INITIAL ALLOCATION - CHARGEABLE CALCULATIONS**

# Union Public Schools Initial Allocation - Chargeable Calculations FY23

		COUNTY 4 MIL	GROSS PRODUCTION	MOTOR VEHICLE	SCHOOL LAND
FY21	July	24,004.33	167.15	598,008.95	369,023.85
FY21	August	23,629.63	116.99	532,843.62	102,615.90
FY21	September	12,849.09	327.49	490,305.39	138,096.22
FY21	October	18,907.34	402.54	497,008.25	182,548.60
FY21	November	7,254.44	345.61	490,327.77	133,939.59
FY21	December	154,626.73	309.83	410,353.15	137,762.53
FY21	January	2,264,399.41	407.34	514,381.85	265,784.09
FY21	February	586,848.13	402.52	497,591.83	166,192.39
FY21	March	110,209.16	340.06	389,758.64	186,346.27
FY21	April	412,419.84	696.50	618,119.06	186,971.66
FY21	May	163,181.54	350.38	599,162.44	115,230.45
FY21	June	94,566.80	596.39	568,361.37	180,759.15
FY22	July	18,485.76	546.68	628,460.94	190,782.75
FY22	August	13,909.29	665.75	656,074.47	99,038.19
FY22	September	10,941.70	985.33	670,961.13	156,562.64
FY22	October	18,378.77	816.68	569,050.76	190,696.84
FY22	November	8,679.81	731.22	569,997.58	144,545.35
FY22	December	142,456.66	854.34	557,886.38	173,065.86
FY22	January	2,648,015.86	1,034.54	574,501.43	315,413.60
FY22	February	595,068.78	880.71	568,445.83	188,751.02
FY22	March	125,324.74	605.93	476,111.99	167,818.88
FY22	April	420,723.09	1,148.33	652,217.93	175,944.28
FY22	May	147,164.70	1,026.19	564,814.33	128,900.16
FY22	June	34,855.31	1,272.87	603,237.67	288,386.20

	\$ 4,243,715.96	\$ 10,568.57	\$ 7,091,760.44	\$ 2,219,905.77
SDE Chargeable Amount	\$ 3,182,786.97	\$ 10,568.57	\$ 7,091,760.44	\$ 2,219,905.77
Difference	75%	\$ -	\$	\$

Source: District Records

### **DEMOGRAPHIC AND ECONOMIC STATISTICS**

# Demographic and Economic Statistics^{ab} Last Ten Fiscal Years

Fiscal Year Ended June 30,	Population	Total Personal Income (in thousands) ^c	Real Per Capita Personal Income ^d	Labor Force	Unemployment Rate
2012	952,836	44,545,083	46,750	466,927	5.4%
2013	962,944	45,544,362	47,297	468,063	5.3%
2014	969,224	47,726,528	49,242	465,969	4.5%
2015	975,096	50,060,454	51,339	476,569	4.4%
2016	987,201	49,475,553	50,117	475,681	5.0%
2017	988,248	50,667,475	51,270	476,252	4.5%
2018	991,009	54,941,840	55,390	484,343	3.7%
2019	1,006,076	59,497,322	59,138	482,158	3.3%
2020	1,006,411	68,588,892	61,977	478,978	3.3%
2021 ^d	1,023,988	85,993,501	82,088	481,572	3.7%
2022 ^e	1,047,063	89,969,935	85,926	509,635	3.5%

^{*}Tulsa MSA specific demographic data

Note: Tulsa MSA comprises seven counties: Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa and Wagoner

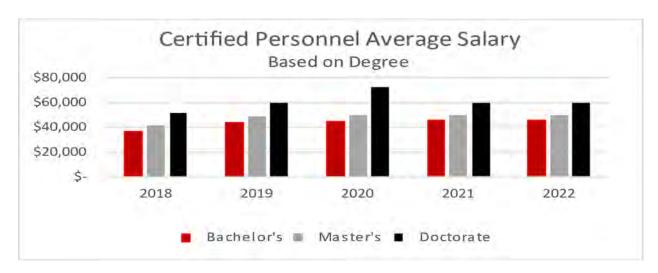
Data obtained from the Tulsa Metro Chamber 2019 Economic Profile

^cCalculation based on the 2019 Tulsa Chamber of Commerce Economic Profile MSA population projection multiplied by 2019 projected per capita income

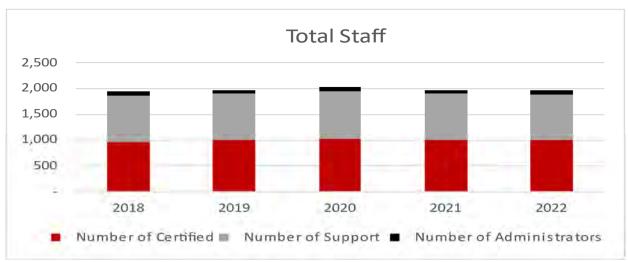
^dEstimate based on data obtained from the Tulsa Metro Chamber

^eProjection based on data obtained from the Tulsa Metro Chamber

### **PERSONNEL RESOURCES**







Source: District Records

### **PERSONNEL RESOURCES**

Average Salary - Certified Staff									
		2018		2019		2020	2021	2022	
Bachelor's	\$	36,822	\$	43,868	\$	45,132	\$ 45,248	\$ 45,248	
Master's	\$	41,244	\$	48,987	\$	50,184	\$ 49,856	\$ 49,856	
Doctorate	\$	51,525	\$	59,385	\$	72,570	\$ 59,909	\$ 59,909	

	Staffing I	y Category		2	
	2018	2019	2020	2021	2022
Number of Certified	968	996	1,017	1,009	1,008
Number of Support	903	908	930	885	882
Number of Administrators	78	72	78	81	81

	Certified Personnel - College Degree									
1 O-6	2018	2019	2020	2021	2022					
Bachelor	632	638	649	645	645					
Master's	325	344	355	355	355					
Doctorate	11	14	13	15	15					







100% GRADUATION, COLLEGE & CAREER READY #UBelong

Source: District Records

# **PERSONNEL RESOURCES - PRIOR YEAR SALARY**

TOTAL SALARY BY FUNCTION	SALARY BY FUNC 2020	2021	2022
51000 - INSTRUCTION	\$ 50,397,804	\$52,009,867	
52112 - ATTENDANCE SERVICES	499,110	524,573	538,990
52113 - SOCIAL WORK SERVICES	354,562	360,732	323,21
52120 - GUIDANCE SERVICES	2,252,107	2,755,358	2,903,193
52132 - MEDICAL SERVICES	905,136	956,872	911,20
52135 - OCCUPATIONAL THERAPY	205,405	219,781	194,87
52140 - PSYCHOLOGICAL SERVICES	937,238	938,847	908,870
52152 - SPEECH PATHOLOGY SERVICES	971,071	954,173	942,075
52170 - PHYSICAL THERAPY	79,431	85,320	73,39
52194 - PARENTAL ADVISORY	473,896	570,004	572,245
52199 - OTH SUPPORT SERVICES STUDENT	589,881	540,437	608,24
52212 - INSTR CURR DEVELOPMENT SVC	1,764,871	1,744,195	1,497,24
52213 - INSTR STAFF TRAINING SVC	830,347	1,458,398	2,248,57
52220 - LIBRARY MEDIA SERVICES	660,757	815,216	766,78
52230 - INSTR RELATED TECHNOLOGY	130,298	138,633	135,56
52240 - ACADEMIC STU ASSESSMENT	125,195	106,824	141,97
52312 - BOARD MINUTES CLERK SERVICES	13,595	13,241	13,218
52313 - BOARD TREASURER SERVICES	126,053	134,084	207,67
52321 - OFFICE OF SUPERINTENDENT	627,281	660,700	812,97
52330 - STATE FED RELATIONS SERVICES	316,060	339,595	283,34
52340 - OTHER GENERAL AND ADMIN SVC	429,068	474,838	441,67
52410 - OFFICE OF PRINCIPAL SERVICES	6,172,470	6,573,264	6,162,48
52490 - OTHR SUP SVC SCHOOL ADM	661,370	686,028	669,33
52511 - BUSINESS OFFICE	320,633	334,760	321,31
52511 - BUDGETING SERVICES	246,262	265,611	185,58
52512 - BODGETING SERVICES	147,184	156,379	151,20
52513 - TREASORT SERVICES	423,153	407,135	401,08
52515 - FINANCIAL ACCOUNTING SERVICES	687,226	679,580	614,56
52517 - PROPERTY ACCOUNTING SERVICES	185,671		
52517 - PROPERTY ACCOUNTING SERVICES 52519 - GRANT SERVICES		211,324	233,93
52520 - PURCH WRHSE DISTRB SERVICES	223,083	234,487	279,69
52530 - PRINTING PUBLSHN DISTRBNG	441,708 57,834	476,102	404,28
52544 - EVALUATION SERVICES		61,918	62,33
	7,816	9,064 339,100	9,20
52560 - INFORMATION SERVICES	305,405		331,44
52571 - RECRUITMENT PLACEMENT	473,917	488,133	461,64
52572 - PERSONNEL SERVICES	484,933	496,411	475,50
52573 - INSERVICE TRAINING NONINSTRT	5,645	14,878	168,38
52575 - OTHER STAFF SERVICES	33,674	36,459	27,00
52580 - ADMIN TECHNOLOGY SERVICES	1,310,094	1,386,858	1,365,86
52582 - SYS APPLICTN DEV 52620 - OPERATION OF BLDG SERVICES	216,387	187,627	186,92
	5,957,768	6,327,527	
52630 - CARE UPKEEP OF GROUNDS SVC	461,645	456,524	439,91
52640 - CARE UPKEEP OF EQUIPMENT SVC	122,812	125,568	130,04
52660 - SECURITY SERVICES	1,225,613	1,228,803	1,299,11
52670 - SAFETY	23,957	10,624	11,30
52720 - VEHICLE OPERATION SVC STUDENT	2,181,145	2,237,036	2,283,28
52730 - MONITORING SERVICES STUDENT	351,927	368,790	373,83
52740 - VEHICLE MAINT SERVICES STUDENT	301,734	306,695	315,14
53120 - FOOD PREP DISPENSING SERVICES	3,553,180	3,547,065	3,679,16
53130 - FOOD SUPPLY DELIVERY SERVICES	181,307	184,837	186,23
53140 - OTHER DIR RLTD CN SERVICES	221,638	219,604	229,76
53150 - FOOD MILK PURCH REIMB STUD	142,151	150,461	152,12
53180 - NUT EDU AND STAFF DEVELOP	161,115	169,942	204,01
53190 - OTH CHILD NUT PROG OPERATIONS	86,582	87,800	87,41
53300 - COMMUNITY SVCS OPERATIONS	2,793,255	2,795,553	2,702,08
57800 - LONG TERM DISABILITY CLAIMS	4,120	3,520	3,97
Grand Total	\$ 92,863,581	\$97,067,156	\$94,208,88

Source: District Records

# **PERSONNEL RESOURCES – CURRENT YEAR SALARY**

### **2023 SALARY BUDGET BY FUNCTION**

51000 - INSTRUCTION	\$ 56,061,594	52515 - FINANCIAL ACCOUNTING SERVICES	598,402
52112 - ATTENDANCE SERVICES	495,151	52517 - PROPERTY ACCOUNTING SERVICES	226,030
52113 - SOCIAL WORK SERVICES	339,333	52519 - GRANT SERVICES	298,400
52120 - GUIDANCE SERVICES	2,728,355	52520 - PURCH WRHSE DISTRB SERVICES	407,455
52132 - MEDICAL SERVICES	967,973	52530 - PRINTING PUBLSHN DISTRBNG	55,103
52135 - OCCUPATIONAL THERAPY	170,818	52544 - EVALUATION SERVICES	9,682
52140 - PSYCHOLOGICAL SERVICES	957,638	52560 - INFORMATION SERVICES	300,667
52152 - SPEECH PATHOLOGY SERVICES	962,339	52571 - RECRUITMENT PLACEMENT	413,261
52170 - PHYSICAL THERAPY	80,942	52572 - PERSONNEL SERVICES	437,823
52194 - PARENTAL ADVISORY	612,024	52575 - OTHER STAFF SERVICES	14,146
52199 - OTH SUPPORT SERVICES STUDENT	885,739	52580 - ADMIN TECHNOLOGY SERVICES	1,429,251
52212 - INSTR CURR DEVELOPMENT SVC	1,546,964	52582 - SYS APPLICTN DEV	181,334
52213 - INSTR STAFF TRAINING SVC	1,673,652	52620 - OPERATION OF BLDG SERVICES	5,628,920
52220 - LIBRARY MEDIA SERVICES	872,595	52630 - CARE UPKEEP OF GROUNDS SVC	439,853
52230 - INSTR RELATED TECHNOLOGY	131,353	52640 - CARE UPKEEP OF EQUIPMENT SVC	133,130
52240 - ACADEMIC STU ASSESSMENT	123,945	52660 - SECURITY SERVICES	1,099,889
52312 - BOARD MINUTES CLERK SERVICES	13,333	52670 - SAFETY	15,254
52313 - BOARD TREASURER SERVICES	111,972	52720 - VEHICLE OPERATION SVC STUDENT	2,250,930
52321 - OFFICE OF SUPERINTENDENT	823,674	52730 - MONITORING SERVICES STUDENT	323,200
52330 - STATE FED RELATIONS SERVICES	279,647	52740 - VEHICLE MAINT SERVICES STUDENT	285,676
52340 - OTHER GENERAL AND ADMIN SVC	476,570	53120 - FOOD PREP DISPENSING SERVICES	5,107,604
52410 - OFFICE OF PRINCIPAL SERVICES	6,049,859	53130 - FOOD SUPPLY DELIVERY SERVICES	158,931
52490 - OTHR SUP SVC SCHOOL ADM	617,480	53140 - OTHER DIR RLTD CN SERVICES	274,044
52511 - BUSINESS OFFICE	275,499	53150 - FOOD MILK PURCH REIMB STUD	99,940
52512 - BUDGETING SERVICES	144,702	53180 - NUT EDU AND STAFF DEVELOP	201,724
52513 - TREASURY SERVICES	243,950	53190 - OTH CHILD NUT PROG OPERATIONS	107,627
52514 - PAYROLL SERVICES	391,165	53300 - COMMUNITY SVCS OPERATIONS	4,054,425

Source: District Records

# **PRESENT ENROLLMENT**

Enrollment as of October 1, SCHOOL	# OF STUDENTS
Andersen Elementary	388
Boevers Elementary	434
Cedar Ridge Elementary	431
Clark Elementary	403
Darnaby Elementary	568
Grove Elementary	548
Jarman Elementary	614
Jefferson Elementary	578
McAuliffe Elementary	497
Moore Elementary	520
Ochoa Elementary	907
Peters Elementary	434
Rosa Parks Elementary	622
6/7th Grade Center	2,182
8th Grade Center	1,122
Union Freshman Academy	1,287
Union High School	3,355
DISTRICT TOTAL NUMBER OF STUDENTS:	14,890



Source: State Department of Education

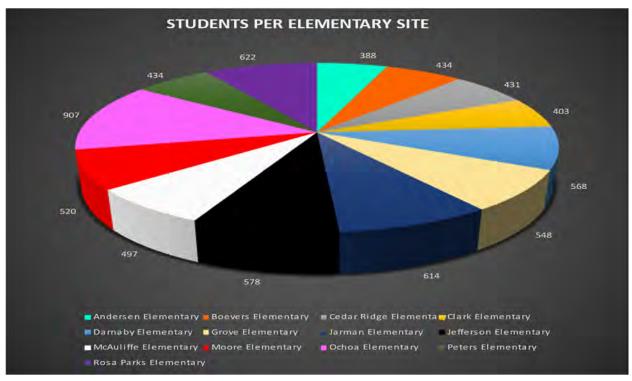
# STUDENT ENROLLMENT HISTORY BY SCHOOL SITE

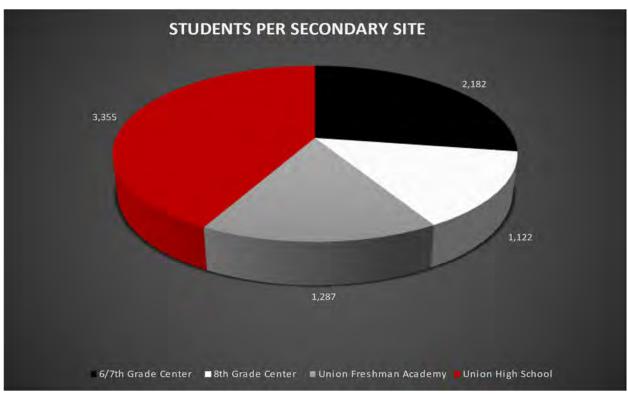
	Stu	ident Enro	Ilment Hi	story By S	chool Site					
SCHOOL SITE	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Andersen Elementary	477	466	463	429	441	459	489	410	400	388
Boevers Elementary	558	592	580	575	612	609	468	418	420	434
Cedar Ridge Elementary	518	504	500	482	479	506	470	447	417	431
Clark Elementary	638	609	659	672	696	674	449	448	455	403
Darnaby Elementary	647	622	610	640	651	643	595	531	566	568
Grove Elementary	611	625	636	581	543	552	567	540	549	548
Jarman Elementary	601	600	591	630	583	551	621	621	607	614
Jefferson Elementary	576	558	554	568	545	579	583	526	543	578
McAuliffe Elementary	705	593	621	655	661	607	570	566	499	497
Moore Elementary	482	588	597	568	553	511	512	482	511	520
Ochoa Elementary	553	600	620	612	546	560	1014	962	957	907
Peters Elementary	500	528	496	455	463	441	420	348	401	434
Rosa Parks Elementary	709	771	794	833	864	844	730	660	602	622
ELEMENTARY SUBTOTAL	7575	7656	7721	7700	7637	7536	7488	6959	6927	6944
6/7th Grade Center	2272	2226	2322	2306	2298	2369	2449	2332	2,241	2,182
8th Grade Center	1126	1205	1173	1174	1197	1140	1218	1168	1,223	1,122
Union Freshman Academy	1217	1236	1301	1238	1267	1264	1217	1196	1,280	1,287
Union High School	3336	3500	3489	3542	3448	3464	3444	3304	3,340	3,355
SECONDARY SUBTOTAL	7951	8167	8285	8260	8210	8237	8328	8000	8084	7946
DISTRICT TOTAL NUMBER OF STUDENTS:	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959	15,011	14,890



Source: State Department of Education

### PROPOSED BUDGET YEAR ENROLLMENT





### ENROLLMENT FORECASTS AND METHODOLOGY

The spread of COVID-19, a novel strain of coronavirus, is altering the behavior of businesses, state and local governments, and people throughout the United States. Further, financial markets have experienced significant volatility attributed to coronavirus concerns. The continued spread of COVID-19 may adversely impact the local, regional, and national economies. The extent to which the coronavirus impacts the District's results will depend on future developments, which are highly uncertain and cannot be predicted. The impact is highly dependent on the breath and duration of the outbreak and could be affected by other factors that cannot currently be predicted. Accordingly, management cannot presently estimate the overall operation and financial impact to the District, but such an impact could have a material adverse effect on the financial condition of the District. To accommodate the pandemic, the Districts enrollment forecasts are based on a five year moving average, before the impact of the pandemic took place.

ENROLLMENT FORECASTS								
SCHOOL	22-23	23-24	24-25					
Andersen Elementary	399	433	453					
Boevers Elementary	424	435	498					
Cedar Ridge Elementary	432	445	474					
Clark Elementary	435	451	524					
DarnabyElementary	555	564	590					
Grove Elementary	546	552	553					
Jarman Elementary	614	616	598					
Jefferson Elementary	549	551	563					
McAuliffe Elementary	521	545	581					
Moore Elementary	504	502	502					
Ochoa Elementary (Briarglen)	942	978	845					
Peters Elementary	394	390	403					
Rosa Parks Elementary	628	664	745					
SUBTOTAL	6,943	7,125	7,328					
Union 6th/7th Grade Center	2,252	2,341	2,383					
Union 8th Grade Center	1,171	1,203	1,175					
Union Freshman Academy	1,254	1,231	1,226					
Union High School	3,333	3,363	3,404					
SUBTOTAL	8,010	8,137	8,188					
DISTRICT TOTALS	14,953	15,262	15,516					

Source: District Records

### **BOND PRINCIPAL AND INTEREST INDEBTNESS**

# BOND PRINCIPAL AND INTEREST INDEBTEDNESS As of June 30, 2022

	DUE	ISSUE				ACCRUED
AGENT	DATE	DATE	PRINCIPAL	INTEREST	TOTAL	INTEREST
D.O.L.		2022-2023 FY		00.055	00.055	10 105 55
BOK		04/01/18		86,250.00	86,250.00	43,125.00
BOK BOK	10/01/22 10/01/22			153,125.00	153,125.00	76,562.50
BOK		04/01/20 04/01/21		172,187.50	172,187.50 146,250.00	86,093.75 73,125.00
BOK		04/01/21		146,250.00 587,250.00	587,250.00	146,812.50
BOK	04/01/23		5,750,000.00	86,250.00	5,836,250.00	140,612.50
BOK	04/01/23	the street of the	6,125,000.00	153,125.00	6,278,125.00	
BOK	04/01/23		7,250,000.00	172,187.50	7,422,187.50	
BOK	04/01/23		6,500,000.00	146,250.00	6,646,250.00	
			25,625,000.00	1,702,875.00	27,327,875.00	
		2023-2024 FY				
вок		04/01/19		91,875.00	91,875.00	
BOK	10/01/23			126,875.00	126,875.00	
BOK	10/01/23			109,687.50	109,687.50	
BOK		04/01/22		293,625.00	293,625.00	
BOK	04/01/24		6,125,000.00	91,875.00	6,216,875.00	
BOK	04/01/24	04/01/20	7,250,000.00	126,875.00	7,376,875.00	
BOK	04/01/24		6,500,000.00	109,687.50	6,609,687.50	
вок	04/01/24		6,525,000.00	293,625.00	6,818,625.00	
			26,400,000.00	1,244,125.00	27,644,125.00	
		2024-2025 FY				
BOK		04/01/20		72,500.00	72,500.00	
BOK	10/01/24			73,125.00	73,125.00	
вок	10/01/24	04/01/22		228,375.00	228,375.00	
BOK	04/01/25	04/01/20	7,250,000.00	72,500.00	7,322,500.00	
BOK	04/01/25	04/01/21	6,500,000.00	73,125.00	6,573,125.00	
BOK	04/01/25	04/01/22	6,525,000.00	228,375.00	6,753,375.00	
			20,275,000.00	748,000.00	21,023,000.00	
		2025-2026 FY				
BOK	10/01/25			36,562.50	36,562.50	
BOK	10/01/25	04/01/22		130,500.00	130,500.00	
BOK	04/01/26	04/01/21	6,500,000.00	36,562.50	6,536,562.50	
BOK	04/01/26	04/01/22	6,525,000.00	130,500.00	6,655,500.00	
			13,025,000.00	334,125.00	13,359,125.00	
		2026-2027 FY				
BOK		04/01/22		65,250.00	65,250.00	
BOK		04/01/22	6,525,000.00	65,250.00	6,590,250.00	
			6,525,000.00	130,500.00	6,655,500.00	
GRAND TO	TAL		91,850,000.00	4,159,625.00	96,009,625.00	
and the La			5.10501000100	1,100,020,00	00,000,020,00	

Source: District Records

# **DROPOUT RATES**

School Site		Enrol	lment			Drop	oouts			Perce	entage	
	2018-19	2019-20	2020-21	2021-22	2018-19	2019-20	2020-21	2021-22	2018-19	2019-20	2020-21	2021-22
7th Grade	1188	1202	1224	1128	4	8	3	17	0.34%	0.67%	0.25%	1.51%
8th Grade	1140	1218	1168	1122	5	11	7	6	0.44%	0.90%	0.60%	0.53%
9th Grade	1264	1217	1196	1287	7	29	18	39	0.55%	2.38%	1.51%	3.03%
10th Grade	1216	1300	1213	1192	23	48	52	48	1.89%	3.69%	4.29%	4.03%
11th Grade	1114	1125	1133	1104	13	47	48	49	1.17%	4.18%	4.24%	4.44%
12th Grade	1134	1019	958	1059	5	5	44	67	0.44%	0.49%	4.59%	6.33%

Source: State Department of Education



# FREE AND REDUCED LUNCH

		Child	Nutrition							
Fiscal	Average	Average								
Year Ended	Daily Membership	Free and Reduced	Free and Reduced	Number of Breakfasts	Number of Lunches					
June 30,	(ADM) ^a	Count	Percentage	Served ^b	Served ^b					
2011	14,835	7,565	51.01%	637,214	1,399,876					
2012	14,836	8,029	54.12%	679,169	1,467,554					
2013	15,190	8,692	57.22%	793,184	1,533,596					
2014	15,486	9,115	58.86%	866,848	1,567,895					
2015	15,700	10,323	65.75%	964,128	1,673,119					
2016	15,919	10,619	66.71%	990,501	1,681,008					
2017	15,887	11,101	69.87%	982,190	1,681,613					
2018	15,797	11,339	71.78%	958,538	1,655,640					
2019	15,655	10,939	69.88%	993,215	1,681,986					
2020	15,726	11,231	71.42%	1,005,628	1,535,393					
2021	14,889	10,701	71.87%	884,247	1,814,249					
2022	14,926	10,624	71.18%	1,032,371	1,598,706					

^a Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education





### KNOW YOUR FARMER, KNOW YOUR FOOD

It might surprise some, but even though Oklahoma is in the heart of Midwest, some kids in the city of Tulsa don't know a great deal about how their food arrives on their dinner plate.

Union's Child Nutrition Department hopes to open children's eyes and help them know their food. "When the popular program featuring Chef Jamie Oliver and his mission of improving school food came out a few years ago, I remember him telling his audience that students did not even know what a potato was, and were shocked to find out that french fries were made from them," said Lisa Griffin, director of Child Nutrition. "Part of his mission was to help students know where their food comes from and what



the food is. I was equally shocked with I heard that even some students at Union did not know about some common foods and their origins, such as a student who did not know that to eat a banana, it needed to be peeled first!" This realization was the roots of a new program called "Know Your Farmer, Know Your Food," which she hopes will be a monthly promotion that features a different fruit and vegetable each month on the menus. "Union Child Nutrition is very passionate about using as much local produce and foods as possible in the meals served to students," Griffin said. "There are many advantages to why we would do this."

Local foods are more nutritious, better tasting, and fresher, she said, adding that purchasing local foods reduces the 'carbon footprint' by reducing the transportation distances required to get food from the farm to the table. In addition, she said purchasing local foods pumps more dollars into the state economy and supports Oklahoma farmers. By relying on local farmers, students receive quality food, are exposed to many new and different kinds of foods, -- and, she said, with the help of their new program, students will learn about where foods come from, hopefully establishing healthy nutrition habits that will last a lifetime. An information board in each school cafeteria will highlight the farmer who supplies Union its monthly produce, as well as recipes. Child Nutrition also hopes to share recipes online, interesting history and tidbits of information, and nutrition information. "We will invite the farmers to visit our schools during lunch to talk with students about their produce. Our chef, Callie Fowler, will develop the recipes, and our dietitians, Libby Anderson and Lauren Bradley, will be providing nutrition information, Griffin said. "And, of course, our cafeteria staff will be producing and serving the featured recipes."

### PERFORMANCE MEASURES USED BY THE SCHOOL DISTRICT

# Message from Superintendent Dr. Kirt Hartzler & the Board of Education Union's District Strategic Plan

Dear Union Community,

It is with great pride that we present this Strategic Plan 2018-2023 to all Union stakeholders. I am grateful to all who have been a part of this strategic planning process. Their thoughtful input and innovative ideas will enable us to continue REACHING – ENGAGING – INSPIRING and responding to the growing needs of our district. This plan is designed to be a dynamic, collaborative, living document that will serve as the foundation in our successful comprehensive pursuit of excellence known as "The Union Way." We believe every student has the right to a high-quality public education, and we are committed to graduating each one college and career ready.

The strength of this plan is the alignment and evaluation of district operations, resources, and programs in early childhood, community schools, STEM, and college and career readiness that assist us in fulfilling our mission. Within this strategic plan, a new learning model "Learning the Union Way," will be launched at all grade levels to focus on literacy, cognitive capacity, engagement, and social/emotional learning.

Thanks to the passage of the multi-year \$128.6 million bond issue, our 1:1 technology initiative, math and literacy adoptions, and instructional and safety programs will be implemented and will enhance our teaching and learning environments. Included in this bond issue were funds to complete Union's newest community school, Ellen Ochoa Elementary, and address our space and facility needs at the high school and district level in fine arts and athletics.

I am truly honored to serve beside such highly committed staff and the Board of Education who are unwavering in our mission and in the success of your child. We also greatly value the trust and support of our families and the Union community, for this we believe — "Together We Make a Difference."

SUPERINTENDENT DR. KIRT HARTZLER
BOARD OF EDUCATION 2018 PRESIDENT JEFF BENNETT AND BOARD MEMBERS KEN
KINNEAR, HEATHER MCADAMS, LISA FORD, AND STACEY ROEMERMAN

#### **Highlights of Recent Steps**

In March, we provided the Board of Education with an update on the district's progress in implementing the strategic plan. Amidst the challenges we are facing with COVID-19, we believe it may be refreshing to hear that we have progressed in several ways over the past six months. As you know, we remain undaunted in our determination to press on as we uphold our core values and commitment to excellence with a focus on 100% graduation, college and career ready.

#### **Teaching and Learning**

- A new department of Social Emotional Learning was established last spring. Since that time, the following steps have been taken:
  - ➤ Hired District SEL counselor, Jessica Hogaboom.
  - > Created SEL webpage to include the Union Virtual Calming Room website. Since going on-line September 1st, over 3,400 users viewed 28,086 pages with a return rate of over 70%.
  - Delivery of a monthly Social and Emotional Family Newsletter and a monthly Social and Emotional Admin/Counselor newsletter began.
  - Created the Union Virtual Office for all administrators, counselors, and teachers to provide resources to support social and emotional learning
  - Worked with the 6th/7th Grade Center team to create a curriculum map and SEL lessons for Tribe Time.
  - > Created a committee to review and revise risk assessment procedures when students are in crisis.
  - > Continue to work with Dr. Chan Hellman to create a Hope-Centered school district.
  - Created and presented professional development on the Science of Hope.
- Along with the efforts of our Technology department, the district completed the one-to-one initiative, putting a device in the hands of every student.
- Learning Management Software Analytics after 9 Weeks:
  - SeeSaw for elementary—395,930 posts added, 87,198 comments made on student work, and 11,267 visits by family members
  - Canvas for secondary 4,127 courses, 515 teachers, 8,481 students
- State Assessment Data: the Oklahoma State Testing Program was suspended for the spring of 2020, so we do not have new state test data to report.
- English Learner ACCESS data shows increases in proficiency rates among ELs:
- Elementary from 7% proficient in 2019 to 10% proficient in 2020
- Secondary from 4% proficient in 2019 to 7% proficient in 2020
- Oklahoma Promise For the eighth consecutive year, Union Public Schools has been recognized by the Oklahoma State Regents for Higher Education as the Oklahoma's Promise State 6A Champion for having 164 seniors from the class of 2019 qualify for the Oklahoma's Promise Scholarship.
- Since its inception in 2014, Union Career Connect has garnered 758 nationally recognized certifications for 316 students in fields which include but are not limited to: Manufacturing, Informational Technology, Culinary, Early Childhood Education, Law Enforcement, and Construction.

- Leadership Union resumed during 2019-20 with a class of 24 participants.
- The College and Career Center Peer Share Assist (PSA) Program began PSA in a student-led mentoring program designed to provide year-long college and career preparatory competencies (college application and FAFSA assistance, class enrollment aid, and post-secondary pathway planning) from high school seniors to lower classmen.
- New clubs increase student engagement:
  - ➤ Hispanic Student Association (HSA) Celebrates and brings awareness to the diverse spectrum of Latin culture. Hosts Spanish-language events with community organizations centered on education, social justice, cultural pride, and outreach to the Union Hispanic community.
  - African American Student Organization (AASO) Hosts events for students to embrace the beauty and strength of black culture and intellect through partnerships with black leaders in the Tulsa community.
  - Social Justice Club Empowers the voices of youth through civic engagement and activism.
- While these statistics will vary from year to year based on student choice, the College and Career Center at UHS is proud of the Class of 2020 for submitting the greatest number of college applications to Oklahoma State University of all high schools in the nation.
- The Early College High School program has 177 students enrolled: 28 seniors who have earned at least 36 hours of college credit, 35 juniors who have earned at least 9 hours of college credit, 50 sophomores who are working on their first 6 hours of college credit, and 64 freshmen, who are learning what it takes to be a college student in high school. Each student enrolled in the ECHS has the opportunity to earn an Associate degree by the time he/she graduates from high school.

#### **Partnerships**

- The Reach Program grant, in an ongoing partnership with George Kaiser Family Foundation, was renewed for \$425,000 per year. Along with other partners, it will contribute over a half-million dollars in support of SEL needs for students in 7th-12th grades. The renewal includes the expansion of sexual health education to all 7th and 9th grade students as well as mental health and college/career services.
- Union's Community Schools Initiative continues to grow expanded learning opportunities for students while meeting basic needs in food, clothing, health, and wellness. Parent engagement at the full-service community schools included over 200 events with 94% of parents participating in conference sessions with teachers.
- The Support Services Division added partnerships to enhance college and career pathways for students with the following: Home Builders Association, Hilti, and Hardesty.
- The Community Health Connections clinic opened at Ochoa Elementary that will serve the medical needs of thousands in the area. The ribbon cutting ceremony happens this month.

#### **Human Capital**

• On the Human Capital objectives, many strides continue to be made despite the current national crisis. All processes have been revised to electronic formats to enable easy, safe communication with staff for new employee orientation, benefits enrollment, and recruiting.

- We experienced one of our lowest turnover rates last year indicating better selection and retention processes.
- We expanded our recruiting outreach to all neighboring states and currently communicate with 51 different universities about opportunities at Union.
- Our benefits continue to be the gold standard for schools across the state, and we are excited about our new partnership with CareATC to help promote health and wellness within the district.
- We have provided an additional \$10,000 annually for tuition reimbursement through grants, and our staff members have responded positively as they continue their own education.
- English Learner certification bonuses have helped to double the number of ESL certified staff at Union.

#### **Business/Operations**

- Despite the challenges presented during the 2020 pandemic, the Finance Division continues to make significant progress on the Strategic Plan goals. Staff worked remotely for about 3½ months and met all deadlines for Payroll, Accounts Payable, Treasury deposits and all other normal fiscal deadlines. Also, during this time the Purchasing and Warehouse staff managed the purchase and distribution of approximately \$300,000 of PPE for district staff and students.
- The Munis receiving module has been implemented at the Warehouse and will be utilized by the sites by the end of FY 20-21. This enhancement will streamline the receiving process and Accounts Payable at all levels.
- The InTouch cashiering and on-line payment system is fully implemented, providing improved security for all district cash handling. During the pandemic, we have utilized the on-line payment system across the district providing employees and patrons the ability to make payments safely.
- E-procurement was launched with one vendor, and two others are in development. These systems allow site and department employees to build a "shopping cart" on a dedicated web site, which then generates a purchase requisition to be routed through workflow approvals to generate a purchase order.
- The records management project has begun with the sorting of over 750 boxes of student records by site. After research into the legal requirements for records retention, a policy recommendation has been developed for Board review in November 2020.
- A new system for monthly Board Treasurer and Financial reports has been implemented to provide enhanced financial reporting.
- Union continues to receive national recognition for excellence in budgeting and financial reporting as our way of demonstrating the Union Way.
- Nutrition Education capacity was expanded to reach more students with videos produced by District Dietitians and the Communications Department 6 videos/year.
- The district increased the use of local foods by adding to the number of farmers and/or products to be used in school cafeterias, building a district greenhouse and/or gardens.
- The Support Services Department led the addition of horticulture and construction courses, helping to ensure every senior is engaged in an experience or course that leads to a post-secondary interest and fostering the transition from high school to college and/or career.

- The Support Services Department added to the number of students working with support services staff.
- The Technology department has led the development of a data privacy framework and is creating a handbook of Technology Procedure Guidelines.
- To ensure on-line security, the dual authentication process is ready to go and awaiting deployment based on the best timing for staff
- Two systems are now in place to monitor computer activity logs.

#### Culture

- A new district videographer has brought a fresh level of expertise and is improving parents' understanding of our offers, such as the distance-learning video that explained improvements over the spring experience.
- The Communications Department has managed a new series of communications about student options, enrollment, technology information, meal distribution, and other areas related to the COVID-19 adjustments.
- Dr. Hartzler has requested the formation of a Diversity, Equity, and Inclusion Council in order to take additional steps to support a healthy and diverse culture. The DEI Council will consist of 20-25 support staff, teacher, and administrative representatives in the district that also reflect the diverse population of our student body. The council is intended to serve as a sounding board that may make recommendations about how to promote and strengthen Union's culture and better serve our diverse student population. The initial meeting is being planned for later this semester.
- Examples of steps taken recently that support diversity, equity, and inclusion:
  - > Evaluation of the continued use of the current mascot by a committee led by our Communications Department.
  - Addition of a District Bilingual Liaison to support and enhance the district's communication to and relation with Spanish speaking families.
  - Recent decision to designate ML King Jr. Day as a day off for all employees.
  - Intentional increase of racial/ethnic/economic inclusion in advanced classes at the 6th grade level has been achieved by using data to identify hundreds of students with potential and kindly "pushing them forward" into advanced classes
  - Using a non-verbal assessment as the primary tool for identifying gifted students.
  - Efforts are being made to increase the diversity in student leadership participation at Union High School such as Inclusive Leadership Training diversity, equity and inclusion training to develop UHS students in Leadership Council to become adaptive leaders in a multicultural world.

These highlights represent recent steps taken to achieve the specific objectives and larger goals of our district strategic plan. While there is still much to be accomplished, it is evident that the Union Way is alive and well in these challenging times.

In conclusion, it a pleasure to remind the board of the 2019 graduation rate of 92.6

# **Union Public Schools**

**REACHING - ENGAGING - INSPIRING** 



Strategic Plan 2018-2023

"Together We Make A Difference"

OCUS AREA	STRATEGIC OBJECTIVE	ACTIONS								
	Increase literacy scores for all students	*Ensure timely and objective-specific Tier 2 and Tier 3 intervention processes *Include appropriate research-based strategies in Tier 1 instruction *Include the four language domains in Tier 1 instruction *Deliver professional learning in literacy for all new hires *Deliver on-going professional learning for all teachers								
	Increase math scores for all students	*Ensure timely and objective-specific Tier 2 and Tier 3 intervention processes *Include appropriate research-based strategies in Tier 1 instruction *Include the four language domains in Tier 1 instruction *Deliver professional learning in math for all new hires *Deliver on-going professional learning for all teachers								
	Increase student engagement in academic settings	Increase problem-based learning Improve strategies for differentiation Increase research-based strategies for engagement Increase attendance rates								
g	Increase student engagement in co- curricular settings	Promote maximum participation in fine arts, athletics, service learning, clubs, and organizations     Increase and promote relevant visual arts programming in grades 6-12								
TEACHING / LEARNING	Ensure every senior is engaged in an experience or course that leads to a post- secondary interest	Assist each 9th grader in creating an e-portfolio for use throughout his/her high school care Support each secondary student in maintaining his/her individual career academic plan (ICA Explore new cutting edge career and college opportunities for students Create more intentional pathways toward credentials in existing course and career opportuence increase the number of students enrolled in college or career prep work Increase the number of students enrolled in Union Career Connect								
TEACH	Foster transition from high school to college and/or career	Improve awareness of Oklahoma Promise, Tulsa Achieves, and steps necessary to transition to college (FAFSA, etc.)  Publicize Career Connect program to grow student and partner participation in the program  Increase awareness of ECHS to support enrollment, grow public/legislative support, and increase dedicated funding by the state								
	Increase advanced math opportunities for underrepresented student subgroups	Nudge fifth grade students (who enrolled in on-level classes) into sixth grade Avanced Math (English) classes based on assessment or other data Create afterschool and summer programming to promote advanced math skills at elementar schools Create afterschool and summer programming to promote advanced math skills in sixth grade								
	Increase the achievement of English Learners in all four domains	Provide professional development for teachers in the four language learner domains Address the specific needs of EL students for all instructional areas and in every lesson Include appropriate research-based strategies in all instruction Include the four language domains in all instruction								
	Increase the achievement of special education students at all grade levels	Include appropriate research-based strategies in all instruction Include the four language domains in all instruction Address the specific needs, modifications, and accommodations of special education students for all instructional areas in every lesson								

PERFORMANCE MEASURE	2018-19	2019-20	2020-21	2021-22	2022-23
*Kindergarten Readiness  *Star Reading  *District CRT  *State Tests  *M mastery of Literacy First skills  *M RSA proficient  *K college ready on the ERW section of the PSAT9, PSAT10, and SAT	Ó	٠	•		•
Star Math District CRT State Tests College ready on the Math section of the PSAT9, PSAT10, and SAT	o	•	•	•	•
School health indicators survey Number of problem-based courses offered Number of students enrolled in problem based courses Attendance rates Chronic absentee rates	O	•			
•Student involvement - participation rates	0	0	•	•	
Completion of college-readiness and AP courses Participation in Union Career Connect and Tulsa Technology Center courses	0	o	0	0	
Number of Oklahoma Promise scholarships Number of Career Connect students and partnerships Number of ECHS students Dedicated funding stream for ECHS by State of Oklahoma	0	•	•	٠	•
Participation rates in after school and summer math courses for fourth and fifth graders Enrollment in advanced math classes	0	a	0		
•ACCESS scores	.0				0
Star Reading and Math District CRT State Tests Manastery of Literacy First skills MRSA proficient McCollege ready on ERW and Math sections of the PSAT9, PSAT10, and SAT	o	a	•	*	•

FOCUS AREA	STRATEGIC OBJECTIVE	ACTIONS
ARNING	Enable timely and universal access to technology resources for all students	Provide one-to-one technology resources for all students in grades 9-12 Provide one-to-one access to technology in all core areas for grades 6-12 Make technology resources available to all classrooms for grades K-5 Explore options for home internet connectivity Expand training and curriculum in digital literacy Expand learning management system (LMS) access to all grade levels
G/LE/	Increase social-emotional learning opportunities for all students	Select and implement appropriate social-emotional learning curriculum     Provide sustained professional development for certified and non-certified staff     Provide continuing trauma informed instruction
TEACHING / LEARNING	Increase student responsibility for learning	<ul> <li>Communication department to support the Teaching and Learning department's efforts in messaging to students through communications campaigns (i.e., attendance, FAFSA completion, Oklahoma's Promise, PSAT, Career Connect, ECHS, college/career options, etc.)</li> </ul>
	Increase and leverage partnerships to enhance college and career pathways for students	Secure partners to:  •Create occupational and career units for elementary programming  •Create career panels at Union 8th Grade Center  •Increase career panels at Union High School  •Increase CareerConnect partners  •Implement individual career academic plan (ICAP) with all students in grades 6-12  •Offer afterschool programming for career exploration
PARTNERSHIPS	Increase and leverage partnerships to provide community resources to students and their families	Charge parent liaisons with aligning partnerships with components of community school philosophy Charge leadership teams with aligning partnerships with components of community school philosophy
PARTNI	Increase and sustain community education opportunities for students and adults	Create relevant out of school programming Charge Community Education to create relevant community programming for adults and patrons as well as students K-12 Provide communications support to Adult Ed, Extended Day, community schools, and other programs to grow participation and support Continue to publicize Union's ongoing work in community schools as a key pillar in the district's strategic plan
	Support legislation that provides adequate resources for public education in service to the children of Oklahoma.	Work with the superintendent to identify issues and opportunities communicate with legislators Heighten interest among Union parents, students, voters/constituents about education issues in our state Write editorials and solicit support for key issues Bring media attention to bear on key issues

PERFORMANCE MEASURE	2018-19	2019-20	2020-21	2021-22	2022-23
Student to device ratio for all grade levels  LMS adoption rates at all grade levels  Number of users in digital curricula	0	•	٠	•	•
Student participation Teacher participation Administrator participation	0	0	0	0	
Attendance rates  FAFSA completion rates  Oklahoma Promise participation rates  PSAT participation/scores  Career Connect participation/completion  ECHS graduation rate/completion/diploma  College going rates  Survey of student attitudes/perceptions	01	•	•	•	•
Student participation Number of partners USEF Sponsors/partners and funding levels	0	0	•	0	
Number of partnerships per component:  •Health / health education  •Mental health / social services  •Neighborhood development  •Lifelong learning  •Youth development / out-of-school time  •Early childhood  •Family / community engagement  •USEF sponsors / partners and funding levels		ò	•		•
Number of additional programs and participation:  •K-5  •6-8  •9-12  •Adults  •Partner and parent participation and support for community schools  •Media interest (local/national) in community schools	•	•	•		•
•Increased teacher pay that is toward the top of the regional average •Elimination of the state's teacher shortage and reliance on emergency certified teachers •Restoration of state funding that has been eroded over 10 years •Level playing field that currently gives online charter schools a financial advantage •Reduction in class sizes	0	•	•	•	•

OCUS AREA	STRATEGIC OBJECTIVE	ACTIONS
	Cultivate leadership at every level	Develop intentional succession plans for leadership at every level  Conduct New to U Academy for leaders that are new to Union  Conduct Leadership Union for aspiring teacher-leaders  Conduct New Teacher Induction to enculturate the Union Way among new teachers
	Teaching and Learning department will recruit and retain a high-quality, diverse teacher workforce	*Attend job fairs *Increase partnerships with local and regional universities for internships *Improve retention incentives *Intentionally recruit teaching candidates from under-represented sub-groups *Provide professional learning opportunities for new teachers *Strengthen mentorship and residency program (for those new to teaching) *Formalize the buddy-teacher process (for those new to Union)
		Attract new employees:  *Utilize a referral system  *Emphasize employee benefits  *Promote the importance of the work due to the purpose  *Market the Union Way
ITAL	Support Services department will attract, develop, and support caring, motivated, innovative, engaging and professional staff	Develop employees:  *Create orientation programs for new employees  *Develop on-boarding / mentoring programs  *Provide ongoing training based on the job responsibilities
HUMAN CAPITAL		Support employees:  Provide training which will enhance growth opportunities  Give feedback on a regular basis  Expand recognition programs and acknowledge desired work performance  Provide support in personal times of need
	Human Resources department will attract, develop, retain, and support caring, motivated, innovative, engaging, and professional faculty and staff	*Improve recruiting outreach *Communications department to assist Human Resources in district recruitment efforts through PR/communications, advertising, and marketing efforts that are reflective of the district's core values
		*Improve hiring timeline
		*Increase diversity among staff
	Human Resources department will attract,	*Increase number of student teachers
	develop, retain, and support caring, motivated, innovative, engaging, and professional faculty and staff	•Enact wellness initiative
		•Improve employee engagement
		Promote Student Loan Forgiveness
		*Compensation
	Enhance salaries	*Benefits
		*Stipends
		Promote tuition reimbursement program

PERFORMANCE MEASURE	2018-19	2019-20	2020-21	2021-22	2022-23
Rate of internal hires and/or promotions  Participation/completion of New to U Academy, Leadership Union, and New Teacher Induction  School health indicators survey					
Number of job fairs attended Number of partnerships Retention rate Number of new hires from under-represented demographic populations Feedback on mentoring and buddy teacher process	0	•	•	•	•
Application totals Job openings	o	0			
Staff satisfaction surveys Turnover rate Exit interviews Developed supervisor training program and mentoring program Total training hours completed Certifications received Attendance at Leadership Union Rate of replacement of leadership positions with internal candidates	ŏ	0	0		
Staff satisfaction surveys Turnover rate Exit interviews Developed supervisor training program and mentoring program Total training hours completed Certifications received Attendance at Leadership Union Rate of replacement of leadership positions with internal candidates	0	0	0		
Number of new recruiting areas Percent of recruits from outside Oklahoma	0				•
Percent of new hires hired by June 10	0-			0	
Diversity rates among staff hired compared to available staff	0			0	
Diversity, Equity, and Inclusion Council created  Number of student teachers	0	0			
Participation in wellness challenges  Participation in wellness challenges  Participation in EAP  Employee clinic utilization rate	0	0	0		
Employee reasons for leaving via Forecast5	0	O .			
• Exit interview survey •Title 1, Low-income, Special Education	- 0				
Comparison of compensation to area districts					
Comparison of Compensation to area districts	0				
Comparison of stipends to area districts					
Participation in tuition reimbursement program	0				

OCUS AREA	STRATEGIC OBJECTIVE	ACTIONS
		*Implement Munis receiving module, providing online receiving to streamline accounts payable processes
	Increase efficiency of district financial	<ul> <li>Complete Phase 2 of InTouch implementation for site cashiering and on-line payments, providing increased customer service and security for district funds</li> </ul>
	operations by implementing additional	Provide streamlined and more efficient procurement processes
	functionality of the Munis financial system and other software solutions	*Implement records management solution for electronic document storage, archiving, and retrieva
		*Develop reporting of site-level expenditures to meet reporting requirements under ESSA
	Provide insight into key district performance areas utilizing data analytics	Analyze teacher compensation, staffing, and turnover in comparison to area school districts
	systems	Develop monthly board financial reporting system that includes comparisons to budget and desire benchmarks and graphics to streamline reporting
	Develop annual operating budgets that	*Set annual budget priorities determined by the board, superintendent, and cabinet that reflect desired levels of resources devoted to classroom and student support needs
	reflect district priorities	*Adopt a new annual budget format based on national, professional standards for excellence in financial reporting
SNS	Provide excellent financial reporting to meet the highest professional standards for technical presentation and	*Apply for national recognition for the district's Comprehensive Annual Financial Report
Ĕ	transparency	*Receive unmodified opinions on the district's annual audit and Single Audit
OPER.		Tracking:  *Develop a tracking system for utility usage by unit for water, natural gas, and electricity that is accessible and applicable  *Share tracking data with stakeholders
BUSINESS / OPERATIONS	Increase energy efficiency to provide cost savings through tracking, planning, and upgrades	Planning:  *Develop a comprehensive long range capital improvement / replacement plan for all roofing systems, building envelopes, windows, HVAC systems, exterior lighting, interior lighting, and other energy savings opportunities  *Communicate savings opportunities to staff and students  *Increase participation in the Demand Response Program
		*Install more efficient systems identified in planning     *Install HVAC controls
		*Improve equipment efficiency during new construction
	Expand the Child Nutrition Program	Implement additional supper meal programs Offer more options at secondary sites Improve food preparation and food quality through training Market food offerings to students and staff
	Protect the district's technology and digital assets and information	Create data privacy framework Create a dual form authentication process Partner with a provider to monitor logs of all traffic and to purchase software to identify weak points
	Develop a disaster recovery / business continuity plan	*Create a committee to begin the process of plan development     *Put a plan in place and communicate effectively to necessary staff
	Increase outside revenue for the district	Increase Uwear sales to outside businesses and to patrons     Increase facility rental revenue by offering a better venue with better service
	Construct and maintain facilities at a high level of quality	Select high-quality, long-lasting materials Consider total cost of ownership of materials selected Train staff on best cleaning and maintenance practices
	Increase HR efficiency	Involve staff and students in design of facilities and renovation projects     Improve HR processes
	increase rik empleiky	*Improve HR metric reporting

PERFORMANCE MEASURE	2018-19	2019-20	2020-21	2021-22	2022-23
Successful launch and streamlined receiving/vendor payment process	0	0	. 0		
Planning, training, and launch of concession inventory and cashier program  Training and launch of elementary site cashier program	0		0		
Implementation of three (3) supplier e-procurement solutions	. 0 -	0.	0	. 0	
Research, plan, and implementation of electronic records management system Storage of historic board agendas and minutes electronically Development of electronic system to store paper records at the district warehouse	0	0	0	0	•
ESSA reports provided to the State Department of Education	0	0			
Report to the superintendent and board on teacher compensation, staffing, and urnover	0	O	9		
Development, testing, and implementation of the new reporting format	0	0			
•Annual analysis of % of general fund devoted to classroom instruction •Annual analysis of % of general fund devoted to employee salaries and benefits				•	
Successful implementation and submission to national school finance organizations for annual budgeting awards	0	0	0	0	
Continue annual recognition by ASBO and GFOA of the district's Comprehensive Annual Financial Report Earning national recognition for the district's Comprehensive Annual Financial Report			0		
Unmodified annual audit opinions					
• Monthly utility usage data	0	•			0
•A completed ten year plan for all systems with estimated needs, costs, and timeline which is reviewed and updated annually  •Average of the PSO Peak Events payment	0	•	•	•	•
•Usage totals comparison of 2022-23 to 2018-19 in all three categories (water, natural gas, electricity) •Cost per square foot comparison based on year installed	ō	•	• (		
Three more supper programs by 2020  Development and implementation of a promotion strategy including video boards, social media, mobile apps, etc.	0	Ö			
Implementation of the action items with annual updates Solutions deployed	0	0	•		•
Plan is developed and communicated sufficiently to all stakeholders	0	0			
Increased revenue	0			0	
Longevity of materials selected Cost per square foot for operations and utilities Facilities are clean and well kept	a	•			
Number of processes moved from paper to electronic	0	0	100		
Development of HR dashboard of reporting metrics	0	0	>0		

FOCUS AREA	STRATEGIC OBJECTIVE	ACTIONS
		Promote leadership and community service opportunities  Explore new ways of ensuring students' basic needs are met at all grade levels  Build district capacity for common behavior expectations  Create new pathways between students for conflict resolution
	Promote and maintain a safe and healthy learning environment for students and staff	Increase safety training for highest risk activities Increase face-to-face training Eliminate or minimize site safety issues Increase security staff to cover all sites and times Communicate emergency procedures to all staff Update surveillance methods and communications systems
		*Communications department to work in conjunction with the Operations department to mitigate crises and ensure accurate communications with parents, community, and the news media re: school safety measures, done always in the best interest of students and their right to confidentialit *Communications department to work proactively with the Operations department and the superintendent to prevent crises before they become public *Use social media to keep key stakeholders informed, monitor for potential threats, and correct misinformation whenever possible
뽎	Promote and nurture healthy district and school culture	Increase understanding of healthy organizational culture Communicate the Union definition of success Seek and provide high quality feedback Treat team members with honesty, integrity, and transparency Submit to shared accountability Ensure a shared vision Expect shared leadership Continued professional learning and reflection on our core values
CULTURE	Increase Support Services departmental support of the district's mission of "100% Graduation, College and Career Ready"	Expand the district offerings for job shadowing, service learning, and job experience through the Career Connect Program     Get buy-in from staff in regard to the role they can play in educating the students and in providing real job experience
	Help Union stakeholders to fully understand and support the district's mission of "100% Graduation, College and Career Ready"	*Reference the district's mission, core values, and elements of the learning model in communications pieces and in PR/publicity  *Share stories (news, video, social media, etc.) about the specific actions Union takes to ensure that every student graduates college and career ready, i.e., Career Connect, ECHS, Adult Ed, Aspire, and extreme efforts to track down students  *Share student and teacher success stories and the many pathways to success
	Protect Union's reputation across all key stakeholders – parents, students, patrons, local/state government officials, etc.	Develop and maintain positive, collaborative relationships with all stakeholders to strengthen support for Union Public Schools Communicate proactively with all audiences with great transparency and with sensitivity to FERPA/student confidentiality issues Plan for crises that can be anticipated and work closely with district leadership to respond quickly and responsibly to threats with the potential to harm students, employees, or the district Cultivate positive relationships with the news media to engender trust and professionalism
	Maintain high trust among Union stakeholders that the district is being good a steward of public dollars/bond funds	*Update Union patrons about progress of bond initiatives, dollars saved, work completed, energy efficiency achieved, etc.  *Continue to cultivate a culture of transparency
	Foster Union pride within schools, the district, and the community	Publicize the extreme measures Union takes in order to ensure all students graduate from High School Showcase Union's innovation, creativity, and overall excellence in the work we do with students and adults Show how our work aligns with the district's strategic plan and core values

PERFORMANCE MEASURE	2018-19	2019-20	2020-21	2021-22	2022-23
Number of student participants in community service opportunities Number of discipline events Number physical altercations Number of safe-school reports Number of bullying reports	O	0	•	*	*
Percent of reduction in staff injuries and workers compensation claims each year Completion of recommended modifications from the Safety First Vision project at all sites identified Post training evaluations Drill and procedure compliance rate Implementation of a bus rider verification system Installation of new video security systems and intercom systems	0	0			
Accurate/positive stories in the news re:  •Union's actions  •Public opinion research to determine trust/safety levels and adequacy of communications  •Favorable comments in social media from parents/students/supporters	•	*		٠	
*School health indicators survey	Q	•	•		
•Graduation Rate •Number of CareerConnect students participating in support services opportunities	0	0			
Patrons vote favorably for the district's bond issues Improved donor giving through USEF/Fund the Need Public opinion research to determine awareness and beliefs about Union among stakeholders	•	•	•		
Public opinion research to determine awareness and beliefs about Union among stakeholders Parent/public support for bond issues or other district initiatives Favorable parent/public response to the handling of crises - letters from parents, positive social media comments, etc. Positive news (or in many instances, no news) due to a generally favorable resolution of the crisis Fair treatment by the news media when the district is under attack	•				
Patrons vote favorably for the district's bond issues  Positive media stories re: bond updates, awards for financial reporting, etc.  Public opinion research to determine Union's reputation among stakeholders		•	•		
• Graduation rates • Public support for bond initiatives • Frants and awards received by the district, our teachers, and students • Recognition by partners, media outlets, positive reviews, etc. (i.e., New York Times article and featured in books or journal articles by prominent education researchers, authors, or experts)		•	•		•

### **OKLAHOMA SCHOOL TESTING PROGRAM**

ct							RE	ADII	NG/E	LA										MA	ТН							SCIE	NC	E
SI	tes			3rd (	irade			4th C	Grade		71	5th C	Grade			3rd (	Grade			4th 0	irade			5th	Grade	e	10	5th C	Grade	9
			2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	202
	Andersen		38	47	32	48	54	36	37	42	55	63	21	51	62	42	37	45	58	36	46	46	51	48	21	58	67	56	18	47
	Boevers		20	16	7	16	14	10	13	10	11	24	13	17	28	38	9	35	27	16	25	19	40	37	25	30	23	20	21	17
	Cedar Ridg	ge	53	61	34	41	49	63	16	37	50	57	46	39	60	63	49	61	62	57	24	47	59	45	41	31	54	41	47	5
	Clark		20	20	11	9	21	26	23	6	27	14	8	25	40	41	16	10	20	43	32	8	18	5	8	34	24	12	14	34
	Darnaby		34	62	22	32	55	52	33	42	49	51	55	54	50	60	37	45	57	67	53	56	48	48	40	60	44	52	52	57
Elementary	Grove		12	29	14	22	24	28	10	13	33	25	19	23	26	32	13	13	22	32	18	21	29	22	19	19	28	21	16	17
ž	Jarman		30	37	14	25	32	34	21	9	22	36	22	19	36	41	13	20	38	45	21	15	22	35	17	17	28	32	27	3
Je .	Jefferson		28	53	14	35	19	13	11	14	21	22	29	25	41	64	21	32	17	18	14	18	13	15	9	22	26	23	23	33
<u>a</u>	McAuliffe		15	16	7	10	11	12	6	6	10	16	14	16	27	11	7	10	7	20	15	8	12	9	7	7	14	28	17	17
ш	Moore		27	51	27	34	63	35	25	29	40	52	29	22	55	59	19	17	65	51	26	29	59	55	25	12	53	57	27	19
	Ochoa		13	12	4	4	19	14	10	6	14	15	6	6	12	10	9	6	16	14	10	11	15	19	6	5	24	20	8	12
	Peters		38	52	33	30	38	33	28	25	47	58	25	35	48	52	26	23	47	42	30	41	53	64	17	29	60	56	25	3!
	Rosa Parks	5	14	15	7	16	11	13	17	7	11	9	14	24	31	18	7	11	12	19	17	2	6	10	11	26	19	13	20	26
	District Co	mposite	25	33	15	23	30	27	19	17	29	32	22	25	38	37	18	23	33	35	24	23	31	29	18	26	34	31	23	30
							RE	ADI	NG/E	LA					MATH										SCIENCE					
Seco	ndary			6th 0	irade		T	7th Grade 8			8th C	Grade			6th (	srade		7th Grade			1		8th	Grade	e	13	8th 0	Grade	9	
			2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	2022	2018	2019	2021	202
District (	Composite		28	28	21	21	26	25	14	17	30	27	16	18	21	23	21	16	32	25	16	19	25	32	18	18	41	42	27	28
11th Grade		READI	NG/E	LA						MA	НТА							SCIE	NCE							HIS	TORY	1		
TITI GIGGE	2018	2019	20	21	20	22	20	18	20	19	20	21	20	22	20	18	20	19	20	21	20	22	20	18	20	019	20	21	20	022
			_	1	7	4	2	6	2	7	-	22	- 2	0	n	/a	2	8	2	0	3	0	n	/a	n	/a	n	/a	1	18

Scores represent the percent of students scoring At or Above Proficient

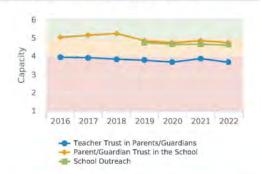
Data includes ALL FAY (Full Academic Year) students in Regular Ed, Special Ed, and ELL.

### PARENT AND STUDENT SATISFACTION SURVEYS



# **Family and School Connectedness**

Family and School Connectedness measures the strength of the relationship between parents/guardians and the school from the perspective of parents/guardians. Parents/Guardians are asked to assess their trust in the school, the school's ability to communicate and keep them informed/involved, and their satisfaction with various aspects of the school that contribute to student learning and development.



**Teacher Trust in Parents/Guardians:** The degree to which teachers feel parents/guardians are reliable, open, honest, competent, and benevolent. Child learning and development is maximized when teachers and parents/guardians are on the same page and form strong relationships.



20%

of teachers feel they can

count on parent/guardian

support.



of teachers feel they can trust parents/guardians.



of teachers think that most of the parents/guardians in the school do a good job.



of teachers feel they can believe what parents/guardians tell them.

Parent/Guardian Trust in the School: Parent/Guardian perceptions of teacher academic standards for all students, teacher concern for students, teacher communication with parents, teacher competence, teacher honesty, and teacher reliability in their actions and commitments.



of parents/guardians say they know they will be listened to at the school.



of parents/guardians feel the school has high standards for



of parents/guardians feel students at the school are well cared for.



of parents/guardians feel the school keeps them well informed.

**School Outreach:** Parent perceptions of their sense of belonging in the school community, their opportunities to provide authentic feedback to school authorities, and the ability of the school to keep them informed of school happenings.



of parents/guardians feel they have opportunities to express concerns about school issues.



of parents/guardians feel they are treated as the primary educator of their child.



of parents/guardians feel teachers encourage them to contact them if their child is having a problem in class.



of parents/guardians feel teachers work with them to meet the learning needs of students.

# **RETENTION RATE**

		Peronr	nel Resourc	es Turnove	r		
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
Certified Staff							
Total Employed	995	982	968	958	1005	1009	1009
Total Terminated	157	125	182	158	118	117	193
Turnover Rate	15.78%	12.73%	18.80%	16.49%	11.74%	11.60%	19.13%
Support Staff							
Total Employed	911	910	855	842	910	885	892
Total Terminated	126	149	194	190	183	140	163
Turnover Rate	13.83%	16.37%	22.69%	22.57%	20.11%	15.82%	18.279
Administrative Staff							
Total Employed	77	81	78	78	81	81	77
<b>Total Terminated</b>	1	7	7	3	2	3	
Turnover Rate	1.30%	8.64%	8.97%	3.85%	2.47%	3.70%	3.90%

2021-2022 Reason for Personnel Changes

Term Reasons	<b>Certified Staff</b>	Admin Staff	Support Staff	<b>Total By Reaso</b>	Percent per Reason
00-No Reason	34	0	39	73	20.33%
00-Temp Contract Ends	12	0	7	19	5.29%
O1-Retiring (ERI included)	32	0	13	45	12.53%
02-Another School In-State	33	0	4	37	10.31%
03-Work out-of-state	6	0	3	9	2.51%
04-Other Employment	33	1	32	66	18.38%
05-Health Reasons	2	0	6	8	2.23%
06-Marriage	0	0	0	0	0.00%
07-Personal Reasons	17	1	37	55	15.32%
08-Deceased	1	0	6	7	1.95%
09-Leave of Absence	7	0	2	9	2.51%
10-Maternity/Childbirth/Homemaking	7	1	2	10	2.79%
11-Moving due to spouse's employment	9	0	2	11	3.06%
12-Reduction in Force	0	0	0	0	0.00%
13-Displaced due to consolidation	0	0	0	0	0.00%
14-Terminated	0	0	10	10	2.79%
Total	193	3	163	359	100.00%

Source: District Records

**Appropriation** An authorization granted by the legislative body of a

government that permits officials to make expenditures and

to incur obligations for specific purposes.

Average Daily Membership (ADM) The aggregate number of days that enrolled students are

present divided by the number of days of school.

**Benefits** Amounts paid by the school system on behalf of employees;

these amounts are not included in the gross salary but are in addition to that amount. Such payments are fringe benefit payments and, while not paid directly to employees, are part

of the cost of personnel services.

**Bond** A written promise to pay a specified sum of money, called the

face value or principal amount, at a specified date in the future (the maturity date), along with periodic interest at a specified rate. Bonds are primarily used to pay for capital

projects and improvements.

**Budget** A plan of financial operation embodying an estimate of

proposed revenue and expenditures for a fiscal year.

**Budget Calendar** A schedule of key dates used in preparation, adoption,

and administration of the budget.

**Community Schools** Community Schools serve as neighborhood centers,

improving the quality of life for students, families, and

surrounding areas.

**Debt Service** All borrowings of the district (such as bonds) including

both principal and interest.

**English Language Learner (ELL or EL)**Students whose primary language is not English.

**Encumbrances** The commitment of budgeted funds to purchase an

item or service, usually in the form of purchase orders.

**Expenditures** Decreases in net financial resources.

Fixed Assets Land, buildings, machinery, furniture, and other

equipment which the school district holds.

**Function** Describes the activity being performed for which a

service or material object is acquired.

Examples: Instruction, counseling services

**Fund** A fiscal and accounting entity with a self-balancing set of

accounts recording cash and other resources together with all

related liabilities and equities or balances.

**Fund Balance** The excess of assets of a fund over its liabilities.

Fiscal Year (FY) 12-month period-begins July 1 and ends June 30.

Generally Accepted Accounting General Accepted Accounting Principles. Uniform

Principles (GAAP) minimum standards for financial accounting and recording.

General Fund The fund used to account for all financial resources except

those required to be accounted for in another fund.

**General Obligation Bonds (GO Bonds)**Bonds issued to finance major projects with resources from

tax collection to repay debt. This type of bond is backed by the full faith, credit, and taxing power of the government.

**Grants** Contributions or gifts of cash or other assets from entity to be

used or expended for a special purpose, activity, or facility.

**Instruction** Instruction includes the activities dealing directly with the

interaction between teachers and students.

**Levy** The total of taxes or special assessments imposed by a

governmental unit.

**Local Educational Agency (LEA)**LEA means a public board of education or other public

authority legally constituted within a State for either administrative control or direction of, or to perform a service function for, public elementary schools or secondary schools in a city, county, township, school district, or other political subdivision of a State, or for a combination of school districts or counties as are recognized in a State as an administrative agency for its public elementary schools or secondary schools

**Long Term Debt**Debt with a maturity of more than one year after the date of

issuance.

Mill The thousandth part of a dollar used in calculating property

taxes.

MUNIS A computer system designed to manage a wide range of

public sector needs, including financials, human resources,

purchasing, and accounts payable.

Net Assessed Value (NAV)

The dollar value assigned to property by the county assessor

for tax purposes and used as a basis of taxation

**Object** Describes the service or goods obtained. Examples: Salaries,

staff travel, electricity, books.

Oklahoma Cost Accounting System A system of accounting that permits local education

(OCAS) agencies (LEAs) to accumulate expenditures and revenue to

meet a variety of specialized management and reporting requirements. Required by the state of Oklahoma as the

method of reporting.

Operating Budget The authorized revenues and expenditures for ongoing

district services, and the primary means by which a district is

controlled.

Personal Protective Equipment (PPE) Equipment used to provide protection in a pandemic. i.e.

masks

**Program** A plan of activities and procedures designed to accomplish a

predetermined objective. Examples: Regular programs, special programs, vocational programs, special students.

**Property** Expenditures that are classified as capital assets. This would

include land and improvements, buildings, equipment,

vehicles, and furniture.

**Revenue** An item or source of income. Increase in governmental fund

net current assets other than expenditure refunds or fund

balance transfers

Social and Emotional Learning (SEL)

A program to promote the wellbeing of students above and

beyond academics.

Special Education (SPED) Activities primarily for students having special needs