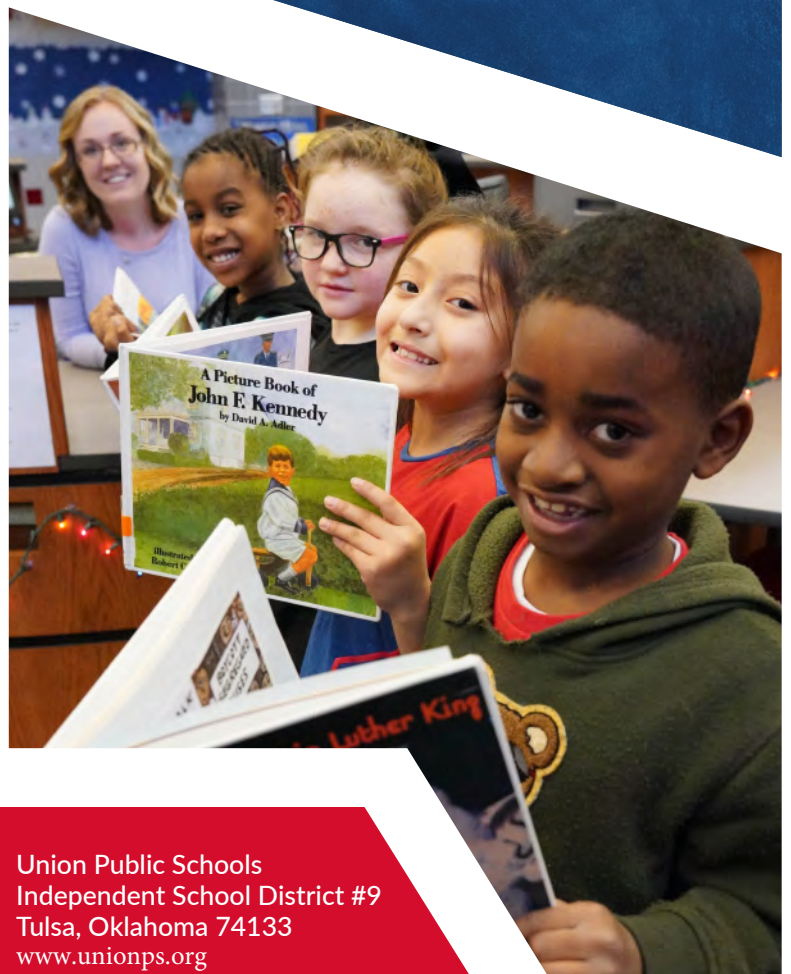




2020-2021 BUDGET

For the fiscal year ending June 30, 2021



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

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Union Public Schools
Independent District #9
Tulsa, Oklahoma

Annual Budget

For the Fiscal Year Ending June 30, 2021

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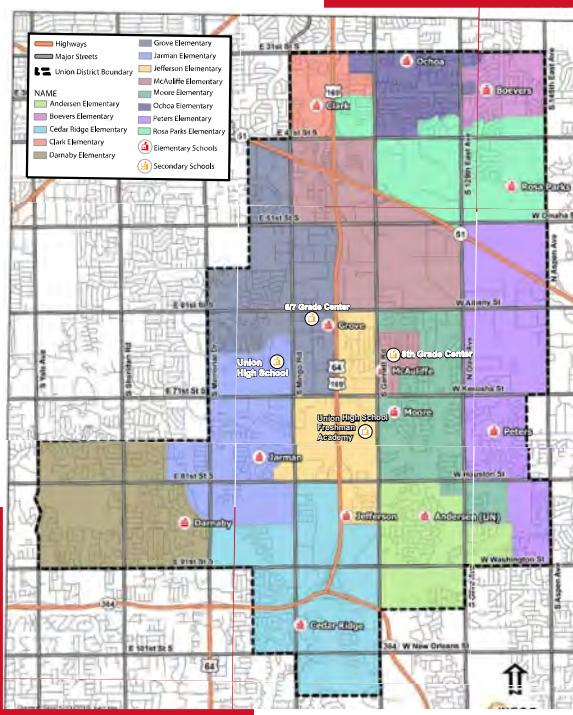
EXECUTIVE SUMMARY

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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 16,000 students, PreK 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), 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 supports such as early 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 PreK through 12th grade. Darnaby 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 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 annual 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 projected 2021-2022 enrollment of 15,432 PK-12 students. Even so, Union Public Schools continues the spirit, pride, and excellence early families and community leaders established nearly a century ago. Those high expectations and impressive results have come to be known simply as "The Union Way."



Introduction

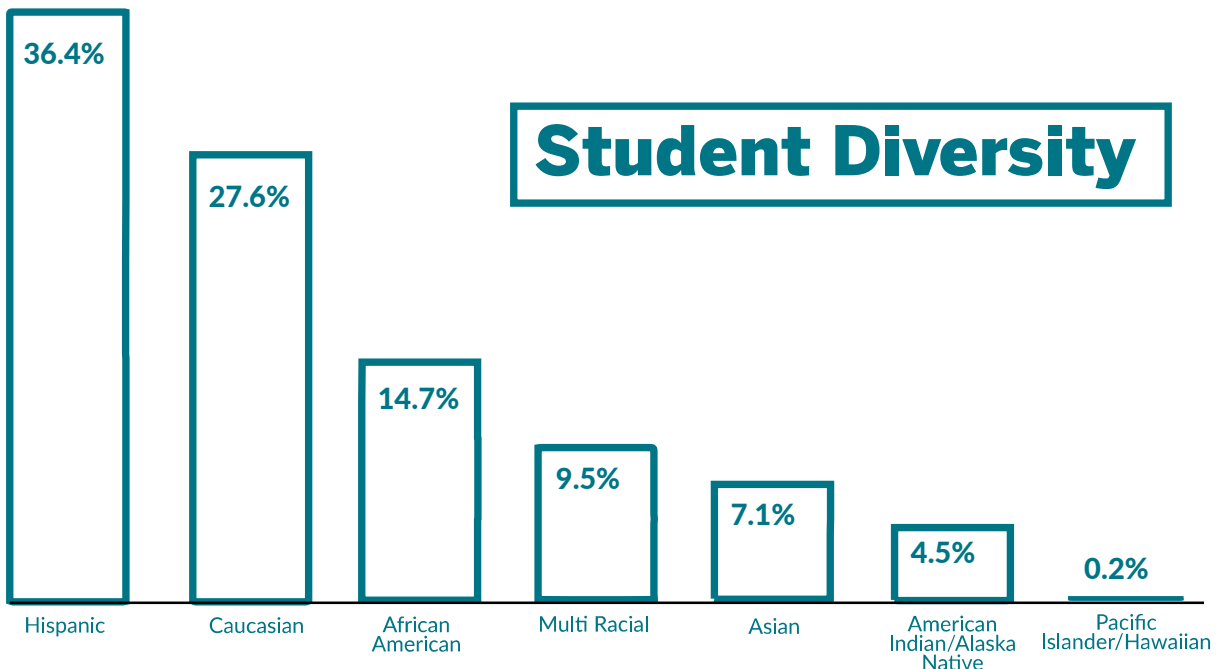
Union Public Schools is an independent school district within the state of Oklahoma. There is no relationship between the state, county, or city governments other than revenue sources. Therefore, the district has not identified any component units that should be included in the district's reporting entity.

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 2019-2020, Union's enrollment rose slightly by 43 students. With a .27 percent increase over the previous year, Union served 15,816 students – 7,488 at the elementary level and 8,328 in grades 6-12.
- Districtwide, 7,649 students (48.4%) were female and 8167 (51.6%) male.
- There were 2,890 identified gifted students in grades 1-12, served by a variety of courses and programs.
 - Of the graduating seniors in 2020 . . .
 - 409 took the ACT with an average composite score of 21.4.
 - 996 took the SAT with an average total score of 936.
- 1,975 Union students (12.5%) were enrolled in special education during the 2019-2020 school year.
- English Learner (EL) services were provided to 2,521 elementary and 1,408 secondary students; of these students, 346 became English-proficient and exited the program. Our diverse population spoke more than 60 different languages. An estimated 25 percent of Union students were classified as English Learners.



Student Statistics

- Our Extended Day Program served an average of 842 students per month at 15 sites. This was a year of “firsts.”
 - We opened our first Rosa Parks Early Childhood Education Program.
 - We began the school year at Rosa Parks EC with 12 students and ended with 23.
 - Ten students received tribal assistance with childcare this school year. At the end of the school year we were able to offer assistance through the Cherokee Nation, Muscogee (Creek) Nation and Peoria Tribe at eight sites.
 - Our Fall Break Camp served 87 students.
 - Spring Break Camp was cut short by the COVID-19 outbreak, but we had 112 students enrolled for the first day of Spring Break Camp.
 - For our EDP Summer camp, we offered our first Virtual EDP Summer Camp and posted lesson plans online for parents to use as a resource to keep their children engaged over the summer. We offered two sets of lesson plans. The first was for Pre-K and Kindergarten students. The second was for grades 1-5. Our staff recorded themselves reading books to students in their backyards, linked cooking, math, science and art videos for students to participate in at home. We were pleased to serve our students in a new way during the pandemic.
- 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 2019-20 school year, Union’s Adult Basic Education (ABE) program enrolled over 1,500 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 our 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, Whirlpool Inc., and local churches.
- 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 2019-2020 school year, nearly 500 individuals earned their HSE diploma with successful completion of the GED or HiSET exam.



Employee Statistics & Achievements

- Union employed 1,015 teachers, 901 support personnel, and 80 administrators. Of the district’s 80 administrators, 91.25% had a master’s degree or higher. Of the teaching and administrative staff, 39.6% held graduate-level degrees – 421 with master’s degrees and 13 with doctorates.
- Forty-three teachers held National Board Certification.
- The district welcomed 118 new teachers for the 2019-2020 school year.



- The ethnic diversity among the staff was African American 7%, American Indian 14%, Asian 3%, and Caucasian/other 82%. Four hundred twenty-five were male and 1,571 female.
- Brittany Hamilton, a third-grade teacher of Rosa Parks Elementary School, was named the 2019-2020 Union Public Schools District Teacher of the Year.
- /indar Ledbetter, cafeteria manager for Union High School, was named Support Employee of the Year. An employee of the district for 29 years, Lindar manages 33 employees and her team daily produces about 1,500 lunches, 700 breakfasts, 100 supper meals, and many a la carte items.
- Oklahoma Coaches Association (OCA) Region 7 Coach of the Year winners:
 - Joey Witcher (Assistant Coach); Joe Redmond (girls basketball);
 - Brett Morgan (slow-pitch softball); Ray Danzy (Junior High);
 - Steve Patterson (track); and Tyler Ashley (tennis).

Employee Statistics & Achievements

- Athletic Director Emily Barkley was elected the Oklahoma Interscholastic Athletic Administrators Association President for 2020-2021. She also received the OIAAA National Federal Citation Award.
- Dan Newman, head athletic trainer received the MAATA-Most Distinguished Athletic Trainer Award and was the Regional Nominee for the Newell Award (The National Athletic Trainer of the Year).
- Steve Patterson was selected to the OCA Hall of Fame.
- Brittany Friske, pom coach, was named Oklahoma State Dance Team Directors' Association East Coach of the Year.
- Steve Dunlap was selected for the 2019 Union Athletic Hall of Fame.
- Todd Borland, executive director of Information Technology for Union Public Schools, was named the 2019 Technology Director of Year by the Oklahoma Technology Association.
- Suzanne Falling, Union High School teacher, was honored as an Impactful Teacher by KOTV/News on 6, the CBS affiliate in Tulsa.
- Superintendent Dr. Kirt Hartzler served as a juror for the 2020 Brock Prize in Education. A jury of nine members selects the laureate of the Brock Prize in Education Innovation, which recognizes the "best innovations in education" in order to expand their impact.
- Assistant Superintendent Sandi Calvin and Union Freshman Academy Counselor Nicole Wheeler both completed the NYC Marathon.
- Ochoa fourth grade teacher Lisa Shotts received the Newsmaker Award winner from the Tulsa Chapter of the Association for Women in Communications. "This is such a distinguished honor and I am still in shock I was chosen and in awe of the other honorees," Shotts said. Shotts was honored for her work as executive director of Gaining Ground, a nonprofit developed to support students in high poverty schools through tutoring, enrichment and summer literacy programs. Shotts was Union's District Teacher of the Year in 2019.
- Union High School business teacher Natasha Smith was named a New Teacher of the Year for the Business, Marketing and IT division of the Oklahoma Association of Career and Technical Education.
- Union High School Freshman Academy Assistant Principal Estella Evans was featured as the first guest speaker for ImpactTulsa's ICAP series. (The ICAP is an Individualized Career Academic Plan that helps students map out and take the steps necessary to be successful after graduating from high school.) Evans shared insights about supporting student



- goal setting and action planning during ICAP implementation in a presentation entitled: Goal-Setting Action Planning: A Pathway toward 100% Graduation.
- For the 2019 Month of Giving Campaign, Union expanded its traditional United Way campaign to create a "Month of Giving" that would allow employees to contribute to the Union Schools Education Foundation (USEF). Union raised a grand total of \$232,519.62 during the Month of Giving, an increase of \$11,160.55 over the previous year. Giving to the United Way remained high at \$145,518, while \$87,001 was raised for Union Schools Education Foundation.
- Union school employees painted interiors at Asbury Corner - Global Gardens for the United Way Day of Caring.
- Union Public Schools was recognized as the #1 fundraiser among education institutions at the annual Tulsa Area United Way recognition luncheon, followed by Broken Arrow Schools and Tulsa Public Schools.
- The UMAC or Union Multipurpose Activity Center was featured as one of the Top 10 high school basketball gyms to see before you die in a story and video on MaxPreps, the leader in high school sporting news.
- Darnaby Elementary School hosted a Project Lead the Way/STEM Showcase tour for area educators who wanted to learn how Darnaby, and by extension Union Public Schools, has become a national model in the field.

Employee Statistics & Achievements

- District Chef Mike Yip was one of nine innovative chefs and foodservice professionals recognized nationally for an array of culinary styles and backgrounds. He was honored for his service in K-12 foodservice the week of June 15 during United Fresh LIVE! as part of the United Fresh Produce Excellence in Foodservice Award Program.
- The U.S. Department of Education is backing the nation's higher education association's research efforts into emerging blockchain or distributed ledger technologies (DLT) for student diplomas and transcripts. Union Public Schools is the first school district in the nation to offer digital diplomas and transcripts, and Todd Borland, Union's director of Technology, was named to the national steering committee.
- The Certificate of Achievement for Excellence in Financial Reporting – the top recognition in governmental accounting and financial reporting – was awarded to the Finance Department by the Government Finance Officers Association (GFOA) of the United States and Canada. They have received the award every year since 1992.
- 8Qbn D6 HDU6Q the & HWEDe of Excellence in Financial 5HSRUing IURn WK\$Vsoication of 6FKool Business 2Id cials ,QWHUQDWLAKQ2), the highKst recognition for a school district offered by A6%2. 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 Pathway to the Meritorious Budget Award (MBA) for the 2019-2020 budget year. This is the second year Union has received this award.



Teaching & Learning

Early Childhood Education

- The number of children participating in programs at the Rosa Parks Early Childhood Education Center were 190 three- and four-year-olds. More than 750 four-year-olds enrolled in Pre-K classes districtwide.

Schools

- Fourteen 5th graders from Peters Elementary attended the Flight Night Drone Competition at Tulsa Technology Center in Jenks and had fun competing in a Star Wars-themed event that included an obstacle course and a programming challenge.
- U.S. Assistant Secretary of Education Frank Brogan toured Darnaby Elementary to learn more about its STEM offerings and programs. Brogan, who leads the country's Office of Elementary and Secondary Education, enjoyed the student demonstrations including one featuring kids in robotics and called their work "impressive."
- More than 1,100 seniors participated in the first-ever Beyond U Conference – Union's first annual College and Career Preparedness Conference – at the Oklahoma State University-Tulsa campus. Seniors were provided the opportunity to attend three sessions of their choice out of 35 different sessions, with topics ranging from College 101 to Stress Management and Destination Medical School.

- Roy Clark Elementary and Jarman Elementary were named 2019-2020 Beacon Schools by Imagine Learning. Imagine Learning empowers schools with personalized learning through a problem-solving digital platform. The awards are part of the esteemed Imagine Learning motivational program, igniting engagement and amplifying confidence for all learners throughout the year. More than 230 schools from across the country were recognized for their exceptional use of Imagine Learning programs. Altogether, more than 16,000 schools implement the evidence-based programs and were eligible for the awards.
- Director Larry Lunardi, representing the Oklahoma Geologic Foundation, donated a collection of rock, mineral, and fossil samples to Union's 6th through 8th grade classes.
- Ochoa Elementary won an award for Outstanding Project in Learning by Design for the school's architecture. Hollis and Miller Architects were the architects on the project.
- Students in the 8th grade PLTW Medical Detectives class solved a crime by finding the blood type of six different blood samples. They had to analyze each sample with Anti-A serum, Anti-B serum, and Anti-Rh serum in order to find out whose blood matched the weapon and whose blood matched the crime scene.

Teaching & Learning

- Three-year-old students dressed up for a Books Alive! event at the Rosa Parks Early Childhood Education Center.
- Andersen 3rd grade student Drew Sparks won the fire safety poster contest. Drew got to ride a fire truck to school.
- Rosa Parks Early Childhood Center had the Zoo to You program come to Mrs. Donalson and Mrs. King's class. The children learned about how animals hide themselves from predators.
- "The wheels on the bus go 'round and 'round..." as the Tulsa City-County Library likes to say. Its new mobile library – called the "Reading Roadshow" – stopped by the Rosa Parks Early Childhood Education Center. Teachers helped three-year-old students into the van to pick books the class can read together for the next several weeks.
- Union High School took 2nd place in the Oklahoma eSports League tournament on October 5, 2019.
- The Union Superintendent's Student Advisory Council joined Superintendent Dr. Kirt Hartzler and Associate Superintendent Charlie Bushyhead in a visit to the State Capitol on March 4, 2020, where they met state legislators.



Community Schools

- Union's Community Schools approach to education seeks to equalize the playing field for all students through a comprehensive approach, providing layered supports for students and families. Schools serve as hubs for programming that include expanded learning opportunities, family engagement, and a variety of social services and comprehensive supports. Community School Coordinators help build relationships between schools and community partners to make schools and communities a place where students and families can thrive.
- During the 2019-2020 school year, eight full-service Community Schools, along with over 60 community organizations, supported student growth and provided resources for families. This approach helps ensure 100% of our students graduate Union with college and career readiness.

After-School Programs

- Union's commitment to after-school programs, in partnership with dozens of community partners, helps create an environment where students have access to innovative learning opportunities that promote the development of 21st Century Skills and the opportunity to build relationships with caring peers and adults, who become part of the student's support system. In doing so, we prepare students to be successful in their education and in their future careers. This goal is closely aligned with the district's mission of 100% graduation with college and career readiness.

During the 2019-2020 school year:

- 2,741 students participated in afterschool programs at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks
- 5,477 total hours of enrichment and academic opportunities were offered to students in after-school SURJUDPV
- 67 STEM programs
- 62 Academic & Tutoring programs
- 64 Health & Wellness programs
- 69 Youth Development/Leadership SURJUDPV
- 28 Fine Arts programs
- 100% of students participated at no cost
- Nearly 40 community partners provided after-school programming.

Impact of after-school programs:

After-school programs were successful in supporting and building 21st century skills for students who participated. An overwhelming majority of the students responded favorably to "Because I came to after-school programs, I am more successful in ..."

- Social & Cultural Skills – 81%
- Enjoy learning about STEM – 78%
- Doing things I did not think I could do before – 73%
- Quality of Life & Self-Direction – 73%
- Being excited about coming to school – 72%
- Can see how STEM can help our community in many ways – 68%
- Flexibility & Adaptability – 66%
- Productivity & Accountability – 62%
- Want to do take more classes related to STEM – 62%
- Leadership & Responsibility – 60%
- Can see myself in a job that uses STEM – 60%



Teaching & Learning

Early Childhood Programs

- In August 2019, a total of 226 students attended Pre-K Camp at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks. Pre-K Camp is offered to help ease the transition to school for incoming students and parents. This program also helps our youngest students develop self-confidence as they learn to manage a newfound separation from family and learn how to respond appropriately to new people and expectations.
- 100% of parents would recommend Pre-K Camp to other parents.
- 100% of parents said Pre-K Camp helped them feel welcome at their children's school.
- 98% of parents said Pre-K Camp helped them understand they plan an important role in their children's learning.
- 97% of parents said Pre-K Camp showed their children what school will be like.
- 96% of parents said Pre-K Camp helped their children get excited about starting school.
- 95% of parents said Pre-K Camp helped their child gain confidence about starting school.
- Baby Book Club gives non-school-aged children and their parents an opportunity to read, play, and interact in meaningful ways. In partnership with Power of Families at Community Service Council and Spot 31 at Hope United Methodist Church, families meet weekly where they receive a free classic children's book, which is read aloud to them, followed by an activity and snack time. Nearly 50 people participated in Baby Book Club at Boevers, Clark, Grove, McAuliffe, and Rosa Parks.
- The Kreuger Book Program at the Tulsa City-County Library provided 484 Pre-K students with one new book each month so they can create their own personal libraries at home. During the 2019-2020 school year, nearly 3,000 books were distributed to Pre-K students at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa and Rosa Parks.

Parent and Family Engagement

- There were nearly 200 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 across the eight schools was 94%.

Basic Needs

Community Schools is an equity strategy intended to serve the whole child by providing students and families with extra layers of support and by removing barriers to basic needs. Many external factors such as insecurities in food, healthcare, and housing can impact a child's ability to be physically, mentally, and emotionally present at school and ready to learn. Community schools at Union connect students and families to resources, which proved especially important this year due to the COVID-19 pandemic.

- Assistance League of Tulsa's signature program, Operation School Bell, provided 448 students with new clothing, shoes, and hygiene kits.
- The Food for Kids Backpack Program provided 426 food-insecure students with food every weekend.
- In partnerships with various organizations and faith-based partners, hundreds of families received meal assistance during the holidays.
- Students and families have access to two school-based health clinics, one at Rosa Parks and one at Ochoa.
- Approximately 1,000 students received free dental screenings.
- Over 4,000 students received free vision screenings through Vizavance.
- Close to 3,000 students received free hearing screenings.
- In partnership with Harrel Eye Care, the district provided 67 vouchers for free eye exams and glasses to students without the means to pay.
- The Union community school coordinator team partnered with Hunger Free Oklahoma to distribute 23,500 meals to adults from April through June.
- The Union community school coordinator team also partnered with the Tulsa Regional STEM Alliance to distribute 20,000 STEM Kits to keep students engaged during the historic school closures from March through May.
- Community school coordinators also partnered with YWCA to distribute gift cards to 82 of our most vulnerable families at the height of the COVID-19 crisis.



Teaching & Learning



STEM (Science, Technology, Engineering, Math) Curriculum

- Fall 2019 marked the opening of the Union Innovation Lab. The facility – formerly Metro Outdoor Living, a retail space – went through a significant Phase I renovation in 2018. The transformation has included seven classrooms, including a virtual/digital gaming room, a computer lab with 3D printers, the Ubotics lab, as well as classroom space and soft seating. A second phase is planned for later. Five teachers in the Innovation Lab work together to create problem-based learning experiences that allow students to master the standards in a content area by solving real-life problems. Classes include Principles of Engineering, Civil Engineering, Environmental Science, Environmental Solutions, Computer Science, and other classes, including a Tulsa Tech class.
- Union's 13 elementary schools and the 6th/7th Grade Center were recognized as Project Lead the Way's (PLTW) Distinguished School Launch Program for 2019-2020. In addition, the 6th/7th Grade Center was named a Distinguished School Gateway Program.
- Over 40 students in grades 6-8 from various PLTW engineering classes attended Tulsa Regional STEM Alliance's STEM Expo. Students participated in hands-on activities sponsored by over 50 local businesses, non-profits and organizations. The annual event aspires to excite middle schoolers' interest in science, technology, engineering, and math.
- Every year, Union 8th and 9th grade teachers invite almost 100 girls to attend the Women in Science Conference. This day celebrates girls' interest in science with engaging hands-on experiences and activities. There is a panel discussion led by prominent women in science and The Science Museum Oklahoma invites the girls in attendance to explore their museum. The conference encourages girls to think about science, careers, build self-confidence and critical thinking skills. Teachers participate in special scalable hands-on activities.
- Robotics, Union's Robotics Team, joined the national competition in January 2020. The season ended just short of completion due to the pandemic, but that did not stop UBotics. The team committed to finishing the build.
- STEM EXPO: Hundreds of Families, community members, students and educators came together for the grand opening of the new Union Innovation Lab, Feb. 11 to celebrate the work of students and to see their showcases in science, technology, engineering and math. Students from every elementary and middle school, and Union High School – ages five to 18 – enjoyed the chance to show off their unique critical thinking skills, creativity, and problem-solving abilities in a variety of booths and exhibits.
- Math and science 6th grade students completed PLTW District transformation training in order to incorporate the problem-based learning and career connections of PLTW into their math and science classes. Every Union 6th grader will have an integrated STEM experience.

College/Career Readiness

- 42 students graduated in the Class of 2020.
- Union High School seniors Keegan Knouse and Anna McMullen were named 2020 Academic All-State Students by the Oklahoma Foundation for Excellence
- Union High School claimed the title of 6A State Champion for the 11th year in a row – awarding the most number of Oklahoma Promise Scholarships for the seniors of 2020.
- While these statistics vary from year to year based on the student body, 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 out of any high school in the nation.
- Union seniors were named 2019-2020 National Merit Semifinalists Jalen Burns, Tiffany Guo, Annslee Hiatt, Keegan Knouse, Anna McMullen and Zachary Xua.
- Senior Breann D. Borlay was recognized as a Commended Student as part of the 2020 National Merit Scholarship Program.



Teaching & Learning

- The 2020 Community Service Graduates are: Emily Barber, Natasha Chaalan, Alisha Chaudhary, Tiffany Guo, Rania Halim, Saylor Hampton, Angeline Huynh, Anika Jallipalli, Amna Javed, Nikhila Kunderu, Danny Li, Emily Long, Lyba Majeed, Shannon Leigh McPhee, Jay Patel, Kayla Pham, Anabel Puentes Garcia, Melissa Ramirez, Mandy Rethford, Maham Saeed, Nadesh Vaithianathan, and Allison Zhang.
- The 2020 Distinguished graduates of Union High School are: Zubair Azaz, Olivia Bacon, Emily Barber, Breann Borlay, Aaron Boyington, Nieava Carrera, Natasha Chaalan, Ana Cherry, Alisa Grigorieva, Saylor Hampton, Angeline Huynh, Anika Jallipalli, Nikhi Kunderu, Danny Li, Shengying Lor, Courtney Moyer, Thu Nguyen, Jay Patel, Kayla Pham, Cassidy Prag, Mandy Rethford, Maryam Suleiman, Tia Tafla, Nadesh Vaithianathan, Rebekah Yeo, and Allison Zhang.
- Twenty-two seniors earned Valedictorian status by ranking in the top 1% of the class as determined by their weighted grade point average, and twenty-seven were named Salutatorians, the top 2%.
- College classes offered at the Union Collegiate Academy (UCA) through a dual-credit partnership with Tulsa Community College grew the total number of college credits student have earned at Union to 18,759 since the program began in 2010.
- Twenty-four Advanced Placement (AP) courses were provided, and 325 students took a total of 577 exams. Two hundred thirty-three students (70.5%) earned a score of “3” or higher. Ninety-one students received “Scholars” recognition, taking 93 tests with an average score of 3.51. Of the 93 scholars, two students earned National AP Scholar recognition with an average test score of 4 on eight or more exams.
- To date, Union’s Early College High School program, one of the first in the state of Oklahoma, in partnership with Tulsa Community College, has 177 students enrolled. Thus far, 28 seniors have earned at least 36 hours of college credit; 35 juniors have earned at least 9 hours RI college credit; 50 sophomores are working on their first six hours of college credit; and 64 freshmen are learning what it takes to be a college student in high school. Each student enrolled in ECHS has the opportunity to earn an associate degree by the time he/she graduates from high school.
- Union piloted its first full-time online school – Union Virtual – for the 2019-2020 school year. The virtual school consisted of 40 students from grades 6-12. Led by Amy McCready and Angela *Rins, students were able to take all or a majority of their classes from home. Several students chose to take an extracurricular activity, like fine arts or athletics, in a face to face setting while attending the rest of their courses in the virtual environment.
- Union still maintained the high school blended environment, Union Virtual Learning Academy, as an option for juniors and seniors. Over 1,000 students participated in the UVLA program during the 2019-2020 school year.
- 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.



Student Engagement: Co-Curricular Activities

- Union High School students put their mechanical skills to the test as they repaired bicycles and donated them to needy children during the Christmas season. “Union CPT (Certified Production Technician) oDnufacturing and City of Tulsa Automotive interns worked together with community partners to repair donated bikes, which were then given to Union elementary students,” said Jenny Flower, Career Connect coordinator. “This event provides our community with the opportunity to give to children who do not have bikes of their own. It also gives our interns a chance to build confidence in the skills they have learned in fixing things, while applying their talents to help bring joy to younger Union students.” The project, called Bikes for Kids, provides real-world experience for students that also benefits the community. Partners involved in the project include AAON, City of Tulsa, City Cycles, Tulsa Community College, and EBSCO Spring. Union’s Director of Construction Fred Isaacs trained the students, preparing them for the work day.

Student Engagement: Co-Curricular Activities

- Union's Native American Student Association (NASA) participated in the Tulsa Native American Celebration and parade at Guthrie Green downtown. Students carried their school banner through the parade and passed candy to children.
- Union High School AFJROTC cadets marched in the City of Tulsa's Veterans Day Parade.
- Seniors Kareem Ahmed and Madeline Addis have been named Mr. and Miss Union for Union High School. Being named Mr. and Miss Union is considered the highest honor a student may receive at Union High School.

Fine Arts Achievements

- High School and Middle School Orchestras earned Superior Ratings in state contests and an overall "Sweepstakes" Award.
- Middle School Choirs earned Superior Ratings in state contests and an overall "Sweepstakes" Award.
- Union High School's One-Act Play won the One-Act Play Competition hosted by Union.
- 56 High School Band students made the All-Region Honor Band.
- Over 40% of band students in grades 7- 9 auditioned for all-district band and 108 students earned a spot in the all-district honor band.
- Speech/Debate students qualified to compete in the National Tournament hosted online in June in a newly created virtual environment.
- Union hosted the Northeast Band Director's Association Junior All-District Honor Band Auditions, Clinic and Concert.
- Union hosted the Second-Annual Middle School Band Festival, featuring five of Union's 7th Grade and 8th Grade Bands, as well as bands from Jenks and Sapulpa Middle Schools.
- The PAC sound system upgrade was completed and used extensively this school year as part of the district's bond initiative.
- The new band building with added Fine Arts space at Union High School is actively being created and designed as part of the district's bond initiative
- Union H.S Renegade Regiment earned Silver-medal finish at the 6A State Championship of marching bands, a Finalist spot in the Bands of America St. Louis Super-Regional, and an 11th Place finish among 90 competing units at the Bands of America Grand National Championship competition in Indianapolis, IN.
- Union continued its partnership with Tulsa Symphony Orchestra to provide music interactions for students at Rosa Parks Early Childhood Center.
- Union Bands hosted a Winter Guard International Regional Championship at the UMAC, with nearly 50 competing units from six states participating.
- Fourteen High School students were named as OkMEA all-state musicians (band, choir, and orchestra).
- All-School Musical "Matilda" performed to large audiences, in spite of a forced cancellation due to inclement weather on opening night. Even with the loss of one performance, the four remaining shows sold more tickets than the previous year.
- ShowTix4U was implemented as a new ticketing system for the musical with much success, allowing increased portions of ticket sales to remain with the district.
- All 8th grade students attended an all-school musical teaser of "Matilda"
- Eric Cornell, Tony-Award Winning Producer for the Broadway revival of "Oklahoma" and 2002 UHS Graduate returned in February to interact with current Union drama students and provided a clinic/lecture about his experiences along the way.
- The Annual Fine Arts recruiting "road show" continues to foster 6th grade participation in Arts classes.



Student Engagement: Co-Curricular Activities



- UHS art students won multiple awards from the Department of Family Services and were presented the awards at a ceremony at The Philbrook in February.
- UHS art student Junior Maria Arellano won the Gold Key Award for her artwork in the Scholastic Art and Writing contest from the Oklahoma Region presented by the OSU Department of Art and Graphic Design and Art History. It includes a \$2,500 scholarship.
- Three 8th Grade art students were recognized for creating outstanding masks in the 2020 Purim Mask contest, sponsored by The Sherwin Miller Museum of Jewish Art. 3rd Place: Amirah Almahri. Honorable Mention: Josue Ochoa and Chantz Okyere.
- Carnegie Hall Link Up Concert and Program serves all 3rd, 4th, and 5th grade students (approximately 3,422 students) in the district. Two successful concerts were performed in February by Tulsa Symphony Orchestra for this initiative.
- UHS Art Club toured Crystal Bridges in the fall semester on a field trip as part of their education program.

- Student engagement districtwide in Fine Arts remained high in 2019-2020, with
 - K-5 student participating in Music & Art: 6,711 students
 - Grades 6-12 Visual Art: 1,909
 - 6-12 Band: 1,197
 - 7-8 Dance: 345
 - 7-12 Drama: 724
 - 6-12 Orchestra: 711
 - 7-12 Speech/Debate: 177
 - 6-12 Vocal Music: 826
 - Total: 12,600 students

Athletic Achievement

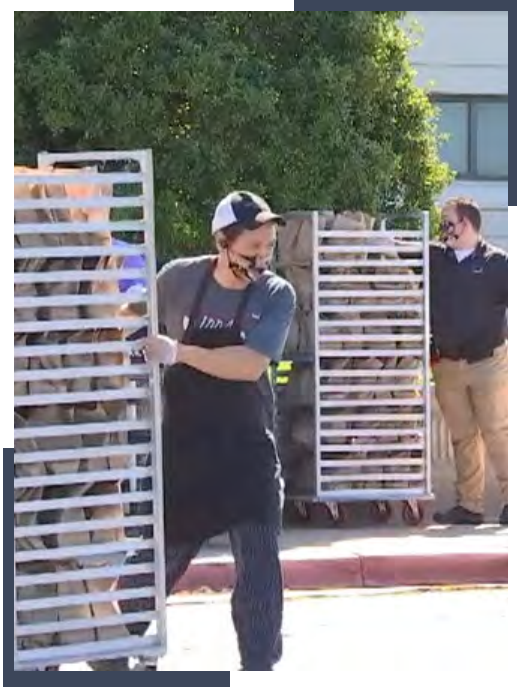
- Union Varsity Pom were the 2019 State Champions.
- Junior Courtney Posey was the 200-Yard Freestyle State Champion in girls swimming.
- In Boys Swimming, Junior Danny Sibley was the 500-Yard Freestyle State Champion; Junior Trenton von Hartitzsch was the 100-Yard Breaststroke State Champion; and Junior Danny Sibley was named as one of three finalists for the Tulsa World All-World Swimmer of the Year.
- Twenty-seven student-athletes signed to play collegiate athletics.
- Union had 23 All-Stater athletes.
- Senior Micah Walker was named OCA Region 7 Male Athlete of the Year and OSSAA State Runner-Up.
- Senior Darrian Carr received the OCA Injured Athlete Scholarship Award.
- Senior Ashley Barber was the OTCA 61 Girls Player of the Year (Class of 2020).
- Senior Courtney Moyer was the OCA Jim Thorpe Player of the Year for girls tennis.
- Senior tennis player Emily Barber received the President's Volunteer Service Award.
- The Boys Swimming Team earned a Distinguished Academic Plaque for a GPA of 3.50 and ranked in the top 5 of Class 6A and Academic Achievement Certificates. Ranked in the top 1/3 of Class 6A with a GPA of 3.25 or above went to Fast-Pitch Softball, Girls Swimming and Wrestling.
- OCA All-State: Jayla Burgess, basketball; Elizabeth Allen, cheer; Joseph Nichols and Jake Rogers, football; Eric Uerling, swimming; Aaron Boyington, Ashley Barber and Emily Barber, tennis; Chris Dugger, Avante Wilkins and Micah Walker, wrestling; Gabe Cantu, Peyton Cook, Josh Dill, Mason Givens, Kyra Choice and Kayla McClellan, track; Adrianna Young, fast-pitch softball; Kallie Lund and Hailey McPherson, slow-pitch softball; Madison Tyler and Bri Vargas, soccer; and Trent DeSmet, baseball.



Operations

Department Statistics

- **Transportation** - More than 10,000 students rode the bus on a regular basis during the 2019-2020 school year. The district maintained a fleet of 118 school buses and 94 support vehicles. Our buses traveled 888,506 total miles – 802,282 miles on regular routes and 86,224 miles on field trips.
- The district ran 15 after-school routes and 33 shuttles, and two vehicles for the McKinney-Vento/Foster Care programs.
- The district purchased 127,532 gallons of diesel fuel and 30,017 gallons of unleaded fuel for a combined cost of \$300,460.
- The **Child Nutrition** Department served 1,270,296 lunches and 737,090 breakfasts during the school year. When schools shut down due to Covid 19, Child Nutrition continued to serve meals free to all children out of four sites, providing almost a million meals – breakfast, lunch and supper. Adult meals were provided free once a week at Ochoa, and free produce and dairy boxes were provided for families once a week through the USDA Food to Family Boxes program.
- The Child Nutrition department – with four chefs and four dietitians – trains around 180 employees in culinary arts and safe food handling. The number of students qualifying for free/reduced lunch has steadily increased over recent years and is currently at 69 percent.
- The district purchased fresh vegetables and fruits and local grass-fed beef from six local farms. Eight elementary schools participated in the Fresh Fruit and Vegetable Grant, which provided fresh fruits and vegetables for snacks each day in the classroom. A pilot program at McAuliffe and Ochoa Elementary schools taught students how to reduce waste foods, as well as how to compost and recycle. The district's two nutrition educators conducted 400 nutrition education classes, two farm-to-student events, six nutrition and activity assemblies, and participated in community nights.
- There are 14 schools participating 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 after-school 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 the district's use of fresh produce on our menus, nutritional education, and promoting consumption of more produce by children.
- The **Custodial Department** employs 103 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 30,000 square feet on a nightly basis, including over 1,000 individual classrooms. In addition:
 - 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 the High School, 6th, and 7th grade gyms.



- Districtwide, custodial equipment is being inventoried in order to accurately identify future needs
- 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-19 transmission prevention.

- Every elementary has been provided with new vacuum equipment, replacing aging and obsolete machines.
- Each site continues the transition 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.

- 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.

Operations



- The **Grounds Department** employs 12 full-time grounds men, one VPall 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 the 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, including all district flowerbeds and trees.
- In addition, Grounds has the following responsibilities:
 - The laydown and removal of large event set-ups across the district, including the portable basketball floor at the UMAC.
 - The ability to reseal and repair smaller sections of asphalt parking lots in-house, which increases the longevity of parking lots and reduces the cost of resurfacing.
 - Inspecting and maintaining all playground equipment across the district.
 - Provides signage and painting for all district parking lots and bus loops across the district.
 - Plowing, clearing, and sanding the entire district during winter severe weather events.
- Grounds has also blurred the line between their division and Maintenance, assisting with painting, plumbing, and power washing projects across the district. Major projects include pouring the large concrete slab for the Alt Ed trash area, two major water leaks at Union's Central Park and baseball, erosion repair and roof drain repair at Rosa Parks, interior painting of Adult Basic Ed, concrete repairs and improvements across the district.
- The **Maintenance Department** employs 11 skilled tradesmen, 23 building engineers, and one district maintenance coordinator. Our tradesmen include five HVAC technicians, two electricians, a plumber, kitchen technician, carpenter, and locksmith. Our 23 building engineers are responsible for maintaining the mechanical systems of their respective sites. They also are responsible for minor repairs.
- Maintenance staff closes nearly 10,000 repair and preventative maintenance work orders every year. Larger projects include sump pump replacement at Union High School, HVAC unit replacements, major water leak repairs, shelving fabrication, roof replacement at Sanders Field concession stand, and installed anchor points for large scale advertising at the UMAC.
- Other projects include:
 - Cooling tower water meters were installed at the High School campus to help monitor and reduce our district water and sewer costs.
 - +9 AC 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.
 - The implementation of a building engineer training and license test preparation program was a goal for the division. The program had its inaugural meeting February 1, 2020. 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 insure 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 11 full-time security officers at the secondary schools, two at the elementary school sites and 24 part-time officers for athletic and special events. One Broken Arrow School Resource Officer ZDs on call daily, in addition to seven off-duty Tulsa Police Department officers on a rotating schedule, allowing one to patrol the district each day.
- District employees completed more than 19,571 assigned training courses and more than 2,831 unassigned safety courses on their own, for a training completion rate of 77 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.
- **Union Multipurpose Activity Center (UMAC)** – Facility scheduling not only encompasses the actual event, but all the communications, operations, and maintenance to prepare, set up, run, and clean after every event. Three employees coordinated 49,682 internal events and 2,219 external rentals involving scheduling, contracts, scheduling conflict resolution, staffing, and set-up and teardown.



ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL

This Pathway to the MBA Award is presented to

UNION PUBLIC SCHOOLS, INDEPENDENT DISTRICT 1-009

for excellence in the preparation and issuance of its budget
for the Fiscal Year 2019-2020.

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



A handwritten signature in black ink, reading 'Claire Hertz'.

Claire Hertz, SFO
President

A handwritten signature in black ink, reading 'David J. Lewis'.

David J. Lewis
Executive Director

2020-2021 Board of Education

Jeff Bennett – Zone 1

Lisa Ford – Zone 2

Heather McAdams – Zone 3

Stacey Roemerman – Zone 4

Ken Kinnear – Zone 5



2020-2021 CABINET MEMBERS



Kirt Hartzler
Superintendent



John Federline
Executive Director of
Secondary Education



Chris Payne
Chief Communications
Officer



Theresa Kiger
Executive Director of
Elementary Education



Charlie Bushyhead
Associate Superintendent



Sandi Calvin
Assistant Superintendent



Gart Morris
Executive Director of
Instructional Technology



Todd Borland
Executive Director of
Technology



Trish Williams
Chief Financial Officer



Lisa Witcher
Senior Executive of
Instructional Services



Jay Loegering
Executive Director of
Human Resources



Todd Nelson
Senior Executive Director
of Research-Design-
Assessment

2020-2021 DISTRICT ADMINISTRATORS

Dr. Kirt Hartzler.....	Superintendent
Dr. Trish Williams.....	Chief Financial Officer
Charlie Bushyhead.....	Associate Superintendent
Sandi Calvin.....	Assistant Superintendent
Chris Payne.....	Chief Communications Officer
Dr. Todd Nelson.....	Senior Executive Director of Research-Assessment-Design
Lisa Witcher.....	Senior Executive Director of Instructional Services
Jay Loegering.....	Executive Director of Human Resources
Todd Borland.....	Executive Director of Technology
John Federline.....	Executive Director of Secondary Education
Gart Morris.....	Executive Director of Instructional Technology
Lee Snodgrass.....	Executive Director of Special Projects
Emily Barkley.....	Director of Athletics
Cathy Bentley.....	Director of Financial Reporting/Treasury
Kelly Brassfield.....	Director of Enrollment
Melissa Brock.....	Director of Human Resources
Christine Andrews.....	Director of Payroll
Sherri Fair.....	Director of Federal Programs
Chasity Gray.....	Director of Professional Learning
Gary Greenhill.....	Director of Transportation
Lisa Griffin.....	Director of Child Nutrition
Julie Harkrider.....	Director of Accounting
Dr. Susan Hartzler.....	Director of Union Adult Learning Center
Fred Isaacs.....	Director of Construction Services
Teresa Kiger.....	Executive Director of Elementary Education
Matthew McCready.....	Director of Fine Arts
Charles Pizarra.....	Director of Bands
Dr. Joshua Robinson.....	Director of Operations
Deborah Wolin.....	Director of Special Services
Ty Wardlow.....	Director of Safety and Security
David Young.....	Director of Purchasing & Supply Management
Scott Pennington.....	Director of Hope-Guidance-Social and Emotional Learning

2020-2021 PRINCIPALS

Dr. Marla Robinson.....	High School
Tony Tempest.....	High School
John Chargois.....	High School
Kenneth Moore.....	Freshman Academy (Ninth Grade Center)
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
Amy Smith.....	Boevers Elementary
Michele Spencer.....	Cedar Ridge Elementary
Alicia Ewing.....	Clark Elementary
Chris Reynolds.....	Darnaby Elementary
Kim Berns.....	Grove Elementary
Shawna Thompson.....	Jarman Elementary
Shana Harris.....	Jefferson Elementary
Jennifer McKnight.....	McAuliffe Elementary
Lindsay Smith.....	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 DEVELOPMENT 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. Prior fiscal years were completed on paper and transferred into the financial system.

LEARNING

The Union Way

Literacy

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



Cognitive Capacity

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/Emotional

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.



Engagement

Engagement refers to the degree of attention, curiosity, interest, optimism, and passion that students show when they are learning. Engagement strategies include intellectual, emotional, physical and social aspects (Glossary of Education Reform).



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 high-quality 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

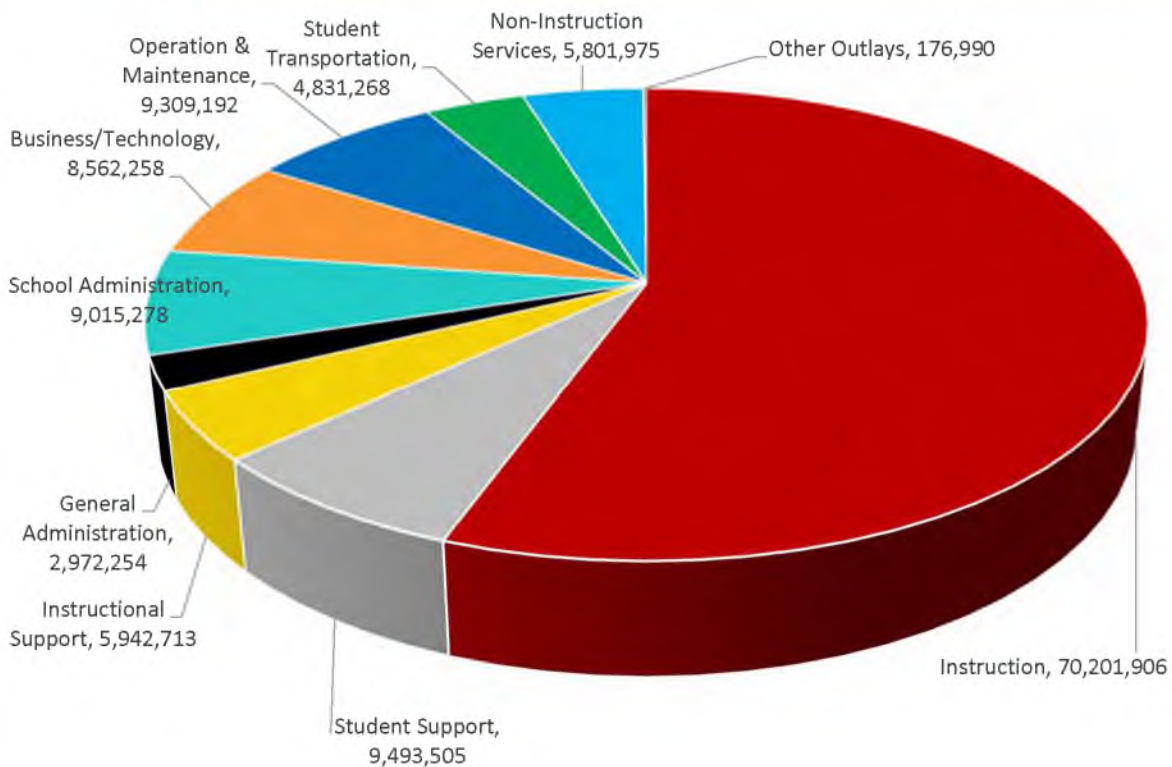
REVENUE AND EXPENDITURES SUMMARY

	General Fund Budget 2020-2021	Building Fund Budget 2020-2021	Child Nutrition Fund Budget 2020-2021	Sinking Fund Budget 2020-2021	Bond Funds Budget 2020-2021	Total All Funds Budget 2020-2021
Revenues						
Local Sources	\$ 38,870,377	\$5,228,314	\$ 2,610,655	\$26,713,093	\$26,300,000	\$ 99,722,439
Intermediate Sources	4,543,236	0	0	0	0	4,543,236
State Sources	68,771,023	0	80,358	0	0	68,851,381
Federal Sources	13,089,145	0	7,912,012	0	0	21,001,157
Total Revenues	125,273,781	5,228,314	10,603,025	26,713,093	26,300,000	194,118,213
Expenditures						
Instruction	69,115,589	0	0		41,438,502	110,554,091
Student Support	10,073,999	0	0			10,073,999
Instructional Support	6,392,909	0	0			6,392,909
General Administration	2,972,254	0	0			2,972,254
School Administration	9,091,056	0	0			9,091,056
Business/Technology	8,481,233	0	0			8,481,233
Operation & Maintenance	9,313,583	8,295,913	0			17,609,496
Student Transportation	4,884,124	0	0			4,884,124
Non-Instruction Services	5,803,331	0	13,426,454			19,229,785
Other Outlays	179,262	0	0	28,883,750		29,063,012
Facilities Acquisitions and Construction	0	1,000,000	0			1,000,000
Total Expenditures	\$ 126,307,340	\$9,295,913	\$ 13,426,454	\$28,883,750	\$41,438,502	\$ 219,351,959

The Districts classification of revenues can be found on pages 76-78.

GENERAL FUND BUDGET

GENERAL FUND BY FUNCTION



REVENUES

	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	11/9/2020 Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Local Sources	35,280,741	36,181,338	38,085,440	38,125,225	38,870,377	38,870,377	37,459,976	37,146,062	37,456,837
Intermediate Sources	4,055,821	4,108,437	4,248,303	4,543,236	4,543,236	4,543,236	4,396,000	4,455,000	4,555,000
State Sources	59,259,048	59,420,505	69,286,870	71,378,323	68,771,023	68,771,023	67,212,678	66,787,795	67,533,623
Federal Sources	7,841,746	8,115,310	9,348,645	9,492,779	13,089,145	13,089,145	12,950,271	13,671,000	13,897,000
Total Revenues	106,437,357	107,825,590	120,969,259	123,539,563	125,273,781	125,273,781	122,018,925	122,059,857	123,442,460

Expenditures

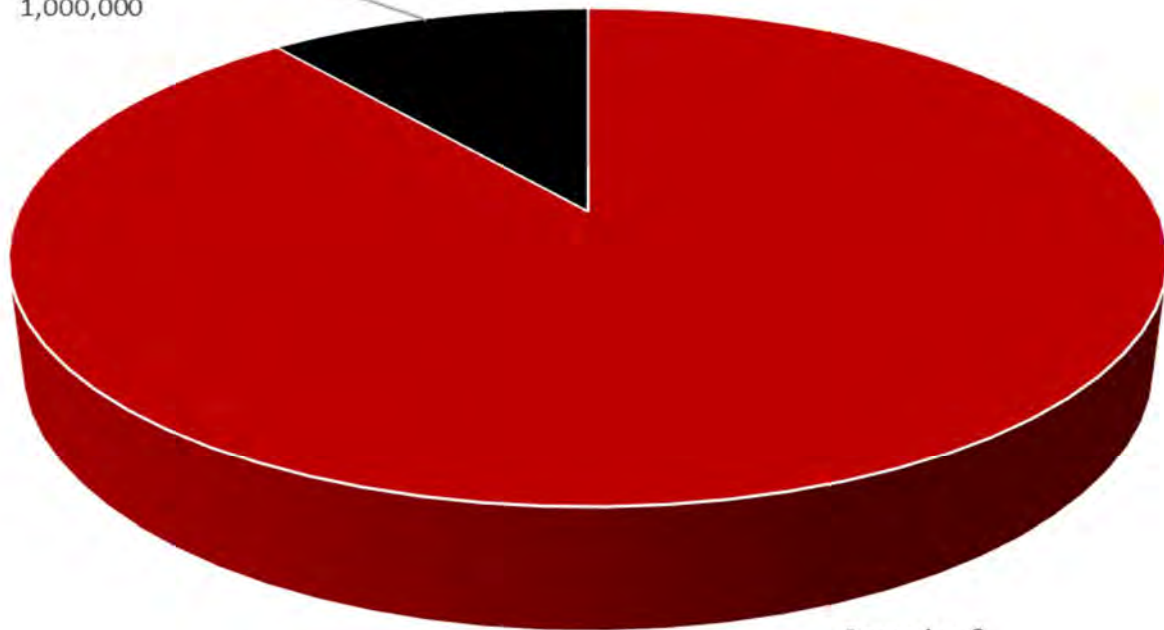
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	11/9/2020 Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Instruction	57,971,281	59,007,115	67,633,827	70,255,223	69,115,589	69,115,589	68,031,057	68,517,144	69,250,568
Student Support	7,058,168	7,373,738	9,317,736	9,749,731	10,073,999	10,073,999	9,199,938	9,265,672	9,364,854
Instructional Support	4,811,714	4,116,381	5,232,565	5,112,927	6,392,909	6,392,909	5,758,947	5,800,095	5,862,181
General Administration	2,312,599	2,655,005	2,442,970	2,568,552	2,972,254	2,972,254	2,880,343	2,900,923	2,931,976
School Administration	8,371,441	8,623,348	9,120,025	9,302,859	9,091,056	9,091,056	8,736,499	8,798,922	8,893,108
Business/Technology	8,317,543	7,347,032	7,883,100	8,158,132	8,481,233	8,481,233	8,297,488	8,356,774	8,446,227
Operation & Maintenance	10,643,284	9,170,551	9,216,510	8,693,970	9,313,583	9,313,583	9,021,324	9,085,782	9,183,039
Student Transportation	3,975,813	4,322,681	4,607,423	4,757,427	4,884,124	4,884,124	4,681,871	4,715,323	4,765,797
Non-Instruction Services	4,152,754	4,206,897	4,320,290	4,870,920	5,803,331	5,803,331	5,622,561	5,662,734	5,723,350
Other Outlays	59,390	74,421	104,635	234,380	179,262	179,262	171,517	172,742	174,592
Total Expenditures	107,673,990	106,897,169	119,879,080	123,704,121	126,307,340	126,307,340	122,401,545	123,276,111	124,595,692

BUILDING FUND BY FUNCTION

REVENUES	Actual	Actual	Actual	Actual	Proposed	11/9/2020 Approved	Forecast	Forecast	Forecast
	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2020-2021	2021-2022	2022-2023	2022-2023
Local Sources	4,295,386	6,725,703	13,174,034	5,272,220	5,228,314	5,228,314	5,324,942	5,378,191	5,431,973
Federal Sources	0	0	0	0	0	0	0	0	0
Total Revenues	4,295,386	6,725,703	13,174,034	5,272,220	5,228,314	5,228,314	5,324,942	5,378,191	5,431,973

Expenditures	Actual	Actual	Actual	Actual	Proposed	11/9/2020 Approved	Forecast	Forecast	Forecast
	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2020-2021	2021-2022	2022-2023	2022-2023
Operation & Maintenance	4,202,818	6,131,223	6,295,070	8,185,511	8,295,913	8,295,913	8,594,787	9,024,526	9,475,753
Facilities Acquisition & Constructions	39,287	344,186	2,516,774	5,113,937	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Total Expenditures	4,242,104	6,475,408	8,811,844	13,299,448	9,295,913	9,295,913	9,594,787	10,024,526	10,475,753

Facilities Acquisition &
Constructions,
1,000,000

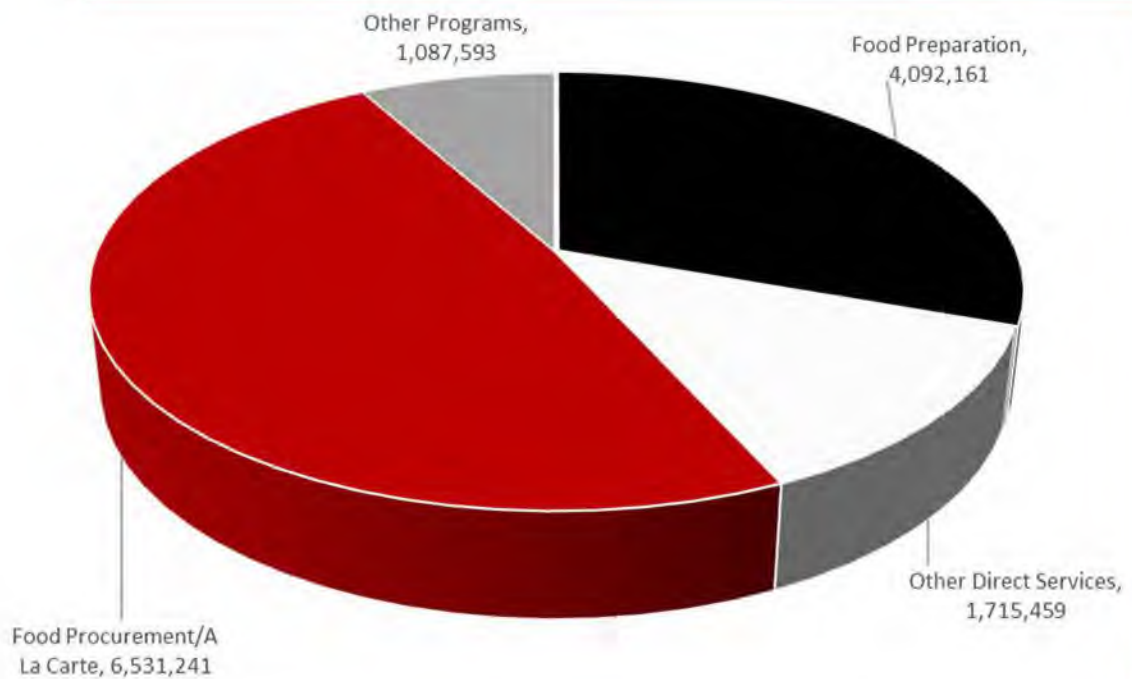


Operation &
Maintenance,
8,295,913

BUILDING FUND BUDGET

CHILD NUTRITION BUDGET

CHILD NUTRITION BY FUNCTION



REVENUES

	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	11/9/2020 Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Local Sources	2,120,333	2,279,451	2,495,723	1,866,418	2,610,655	2,610,655	2,750,000	2,777,500	2,805,275
State Sources	76,212	73,393	68,357	80,358	80,358	80,358	88,394	97,233	106,957
Federal Sources	6,865,134	6,838,170	7,252,920	7,526,297	7,912,012	7,912,012	8,278,927	8,692,873	9,127,517
Total Revenues	9,061,679	9,191,014	9,817,000	9,473,073	10,603,025	10,603,025	11,117,321	11,567,606	12,039,749

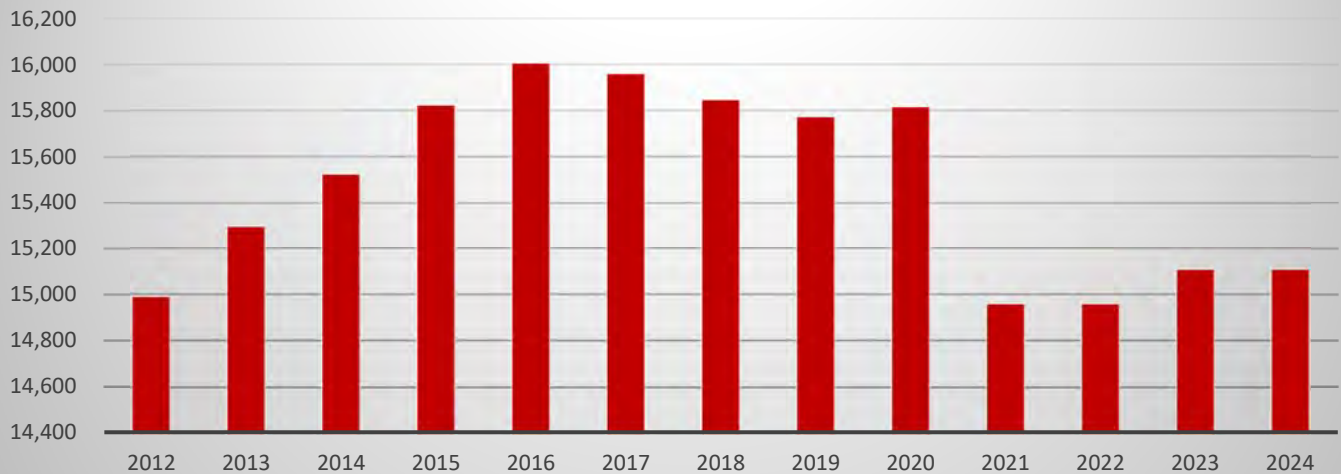
Expenditures

Food Preparation	3,441,944	3,592,407	3,917,720	4,327,688	4,092,161	4,092,161	4,370,965	4,414,675	4,458,821
Other Direct Services	813,486	1,027,217	964,897	1,014,951	1,715,459	1,715,459	1,025,100	1,035,351	1,045,705
Food Procurement/A La Carte	3,413,286	3,388,160	3,832,105	3,464,372	6,531,241	6,531,241	6,857,803	7,200,693	7,560,728
Other Programs	1,319,811	936,101	928,868	1,264,529	1,087,593	1,087,593	0	0	-
Total Expenditures	8,988,527	8,943,885	9,643,590	10,071,540	13,426,454	13,426,454	12,253,868	12,650,719	13,065,254

STUDENT ENROLLMENT TRENDS AND FORECAST

- 9,500 students down: Pandemic prompts 1st enrollment decline in nearly two decades for Oklahoma public schools
- Oklahoma's public school enrollment has seen its first downturn in 19 years because of the COVID-19 pandemic, and the biggest hits have been to pre-K and kindergarten.
- According to the annual Oct. 1 student count, overall enrollment was down 9,537 students, or 1.36%, to 694,113 students total.
- Just a year earlier, the state's student count of 703,650 was noted by officials at the Oklahoma State Department of Education for being the first-ever instance of public school enrollment exceeding 700,000.
- According to data from the National Center for Education Statistics, Oklahoma public school enrollment had been on the rise every year since 2002.

ENROLLMENT HISTORY AND PROJECTIONS

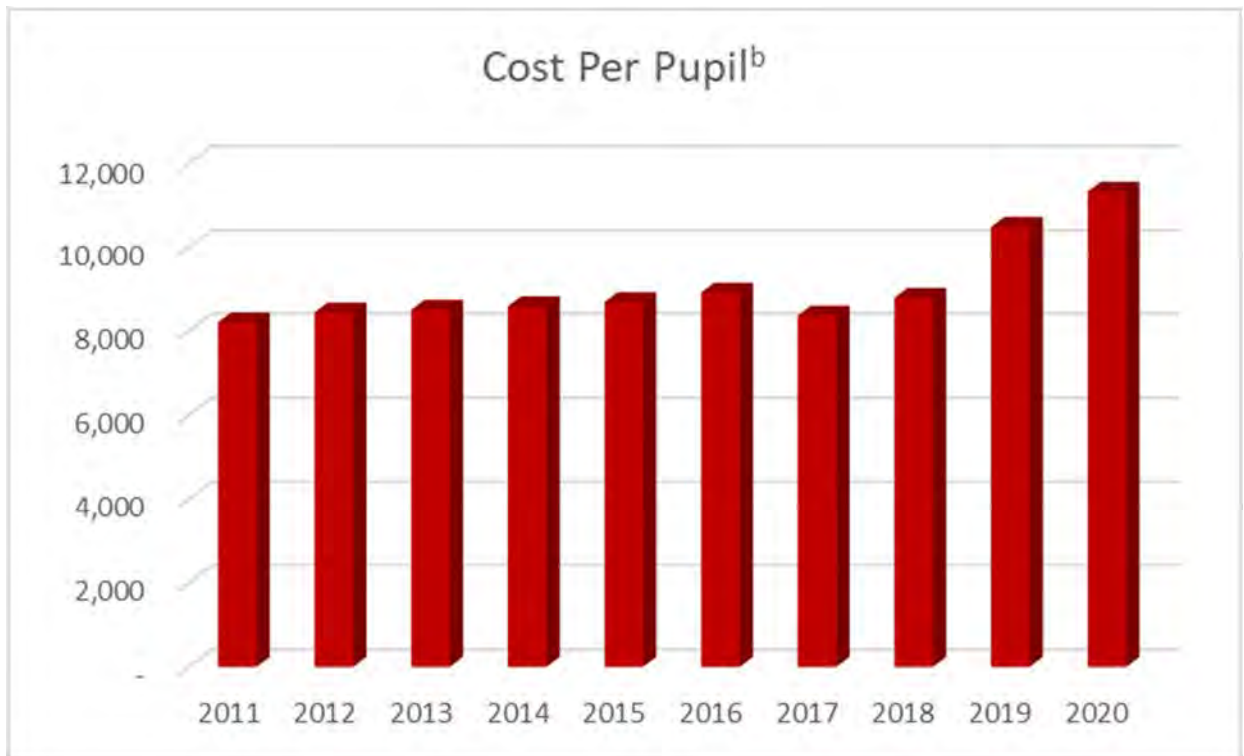
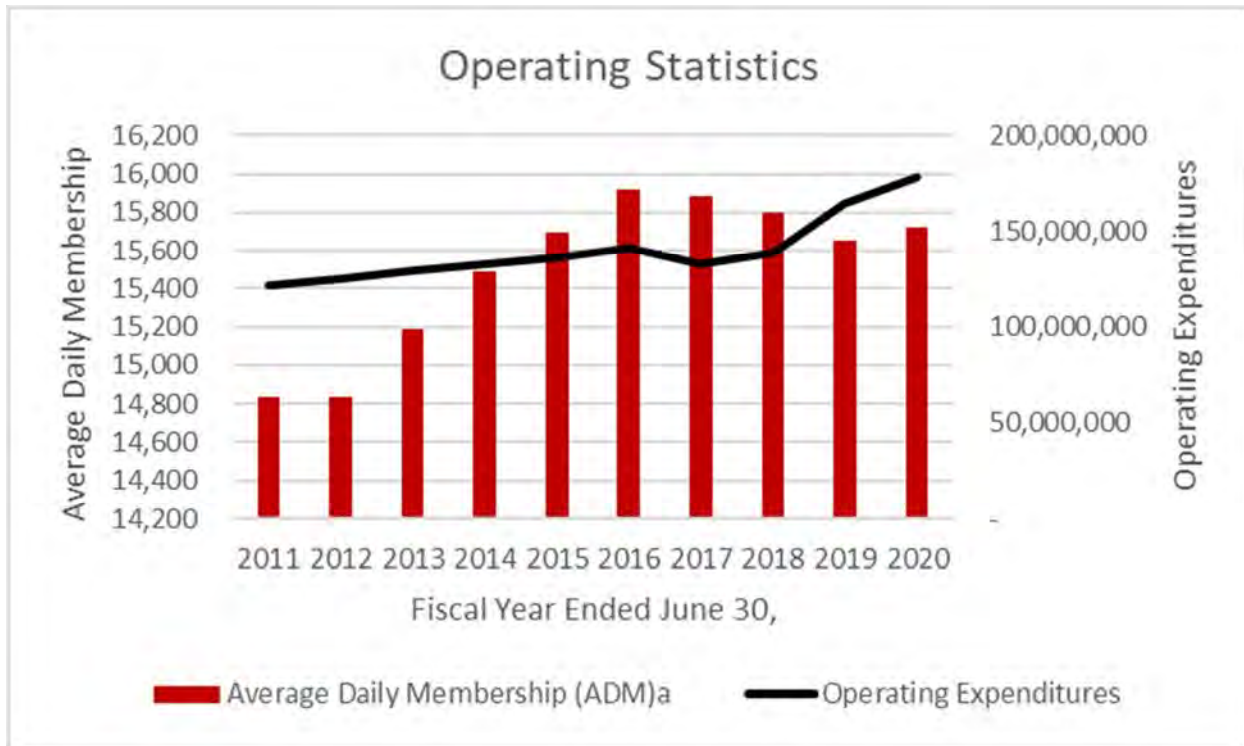


SCHOOL YEAR	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
ENROLLMENT	14,990	15,299	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959	14,959	15,109	15,109
STUDENT INCREASE	59	309	227	297	183	-46	-113	-74	43	-857	-	150	-
PERCENT CHANGE	0.40%	2.06%	1.48%	1.91%	1.16%	-0.29%	-0.71%	-0.47%	0.27%	-5.42%	0.00%	1.00%	0.00%

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



^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

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 ^e
2011	14,835	121,724,658	8,205	-0.10%	953	16:1	962
2012	14,836	125,230,487	8,441	2.87%	936	16:1	929
2013	15,190	129,141,650	8,502	0.72%	949	16:1	967
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

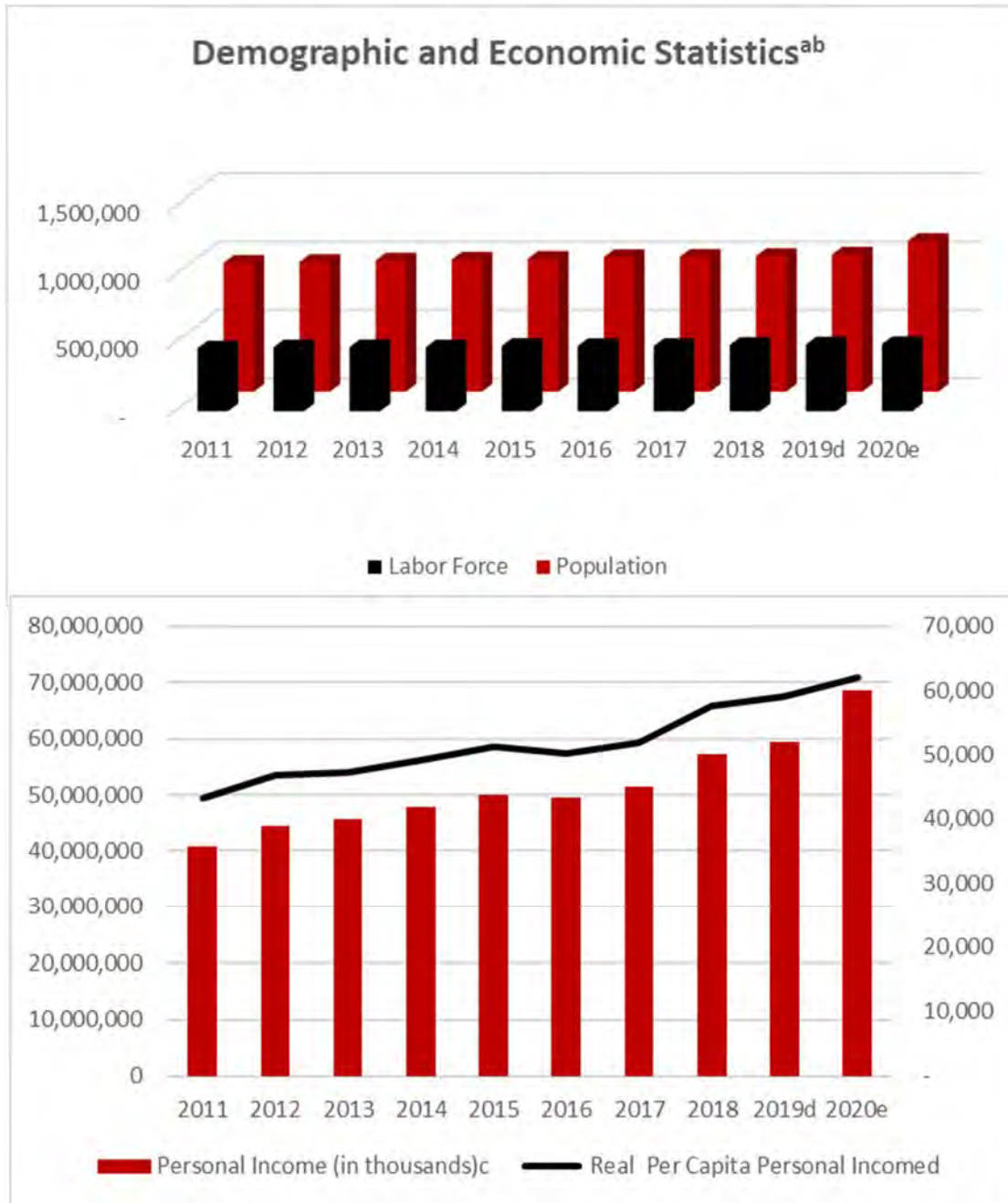
^a Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education.

^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

^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

^e Projection based on data obtained from the Tulsa Metro Chamber

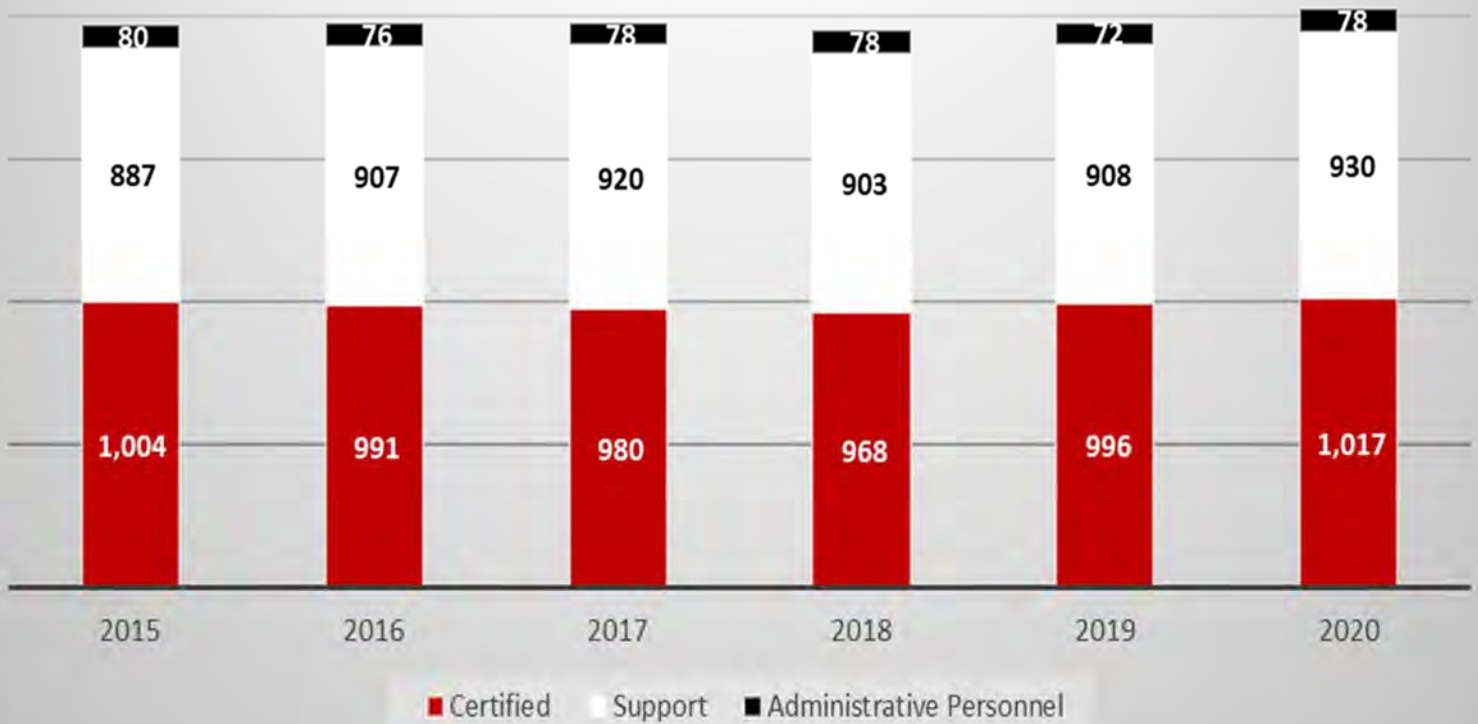
Note: Tulsa MSA comprises seven counties: Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa and Wagoner



PERSONNEL RESOURCES

In FY 20, certified personnel increased by 21 positions, support personnel increased by 22 positions and administrative personnel increased by 6 positions.

Employee Statistics



PERSONNEL RESOURCES

Employee Information Last Ten Fiscal Years

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Certified Personnel										
Bachelor's										
Minimum Salary	31,600	31,600	31,600	31,600	32,050	32,150	32,350	32,697	39,000	39,000
Maximum Salary	49,287	49,829	50,576	51,461	52,461	53,248	53,780	54,856	62,150	62,150
Average Salary	35,980	36,106	35,812	35,754	36,152	36,495	36,478	36,822	43,868	43,868
Number of Teachers	629	622	617	642	674	653	646	632	638	649
Master's										
Minimum Salary	32,800	32,800	32,800	32,800	33,250	33,400	33,600	33,972	41,000	41,000
Maximum Salary	54,014	54,608	55,427	56,397	57,397	58,258	58,841	60,018	66,550	66,550
Average Salary	41,865	42,287	40,961	40,946	41,103	41,017	40,856	41,244	48,987	48,987
Number of Teachers	310	303	322	318	315	326	321	325	344	355
Doctor's										
Minimum Salary	34,000	34,000	34,000	34,000	34,450	34,600	34,800	35,196	46,500	46,500
Maximum Salary	56,429	57,049	57,905	58,918	59,918	60,817	61,425	62,654	70,350	70,350
Average Salary	43,681	46,822	45,857	44,678	47,407	47,259	48,809	51,525	59,385	59,385
Number of Teachers	14	12	10	15	15	12	11	11	14	13
Total Certified Personnel	953	936	949	975	1,004	991	980	968	996	1,017
Support Personnel										
Number of Support	753	784	866	855	887	907	920	903	908	930
Administrative Personnel										
Number of Administrators	71	72	72	81	80	76	78	78	72	78

Note: Salary ranges are per the Union Classroom Teacher's Association (UCTA) Master Contract which is negotiated annually.

Note: Employee counts are taken from the census information that is obtained each Spring for negotiation purposes.

Source: District records

TAX BASE AND RATE TRENDS

Property Tax Levies and Collections Last Ten Fiscal Years

Fiscal Year Ended June 30,	Total Tax Levied for Fiscal Year	Collected within the Fiscal Year of the Levy ^a		Collected in Subsequent Years ^b		Ratio of Total Tax Collection to Levy ^c	Outstanding Delinquent Taxes	Ratio of Delinquent Taxes to Total Levy ^c
		Current Tax Collections	Percent of Current Tax Collected	Delinquent Tax Collections	Total Tax Collection			
2011	49,971,340.00	48,687,849.00	97.43%	858,349.00	49,546,198.00	99.15%	1,981,345	3.96%
2012	50,564,373.00	49,356,793.00	97.61%	1,128,030.00	50,484,823.00	99.84%	1,825,174	3.61%
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%

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
2011	590,418,541	95,351,396	25,262,226	711,032,163	6,555,557,566	10.85%	70.28
2012	594,315,814	90,932,503	20,465,196	705,713,513	6,525,004,824	10.82%	71.65
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

- 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

Property Tax Rate Impact on Property Owners

Rates for Taxpayers in the City of Tulsa

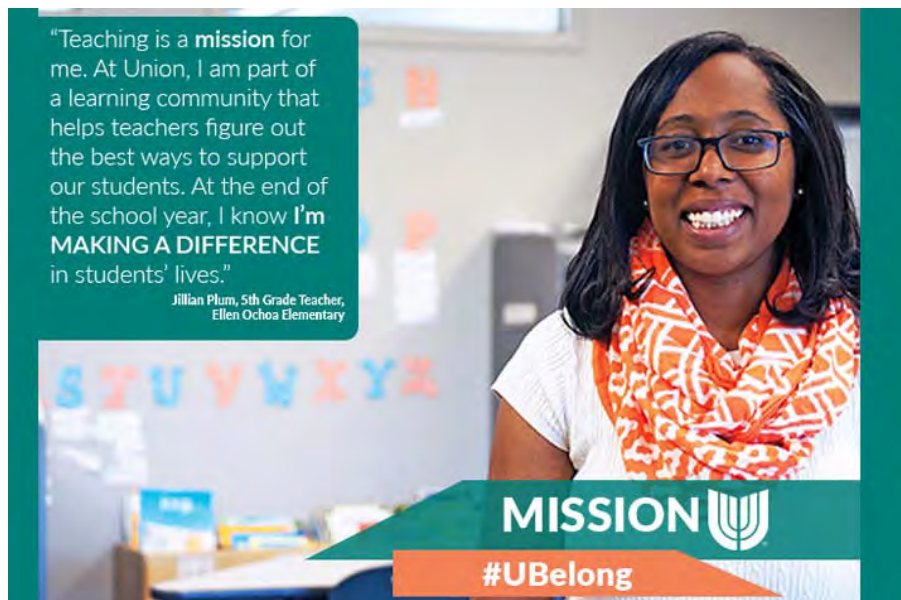
Fiscal Year	Mills	Market Value of Property	Assessment Rate	Assessed Value	Millage Rate	Property Tax Due	Change
2011	130.01	250,000	11%	27,500	0.13001	3,575	
2012	134.44	250,000	11%	27,500	0.13444	3,697	122
2013	134.84	250,000	11%	27,500	0.13484	3,708	11
2014	134.08	250,000	11%	27,500	0.13408	3,687	-21
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

Rates for Taxpayers in the City of Broken Arrow

Fiscal Year	Mills	Market Value of Property	Assessment Rate	Assessed Value	Millage Rate	Property Tax Due	Change
2011	129.47	250,000	11%	27,500	0.12947	3,560	
2012	131.56	250,000	11%	27,500	0.13156	3,618	57
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



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
2011	73,529,341	6,555,557,566	1.12%	14,835	4,956
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

^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 co 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 6/30/2020, the sinking (debt service) fund had a total fund balance of \$14,729,281, 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 \$248,502. 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 \$41,921,012, all of which was restricted for capital projects. The net increase in fund balance during the current year in the bond fund was \$4,032,974. This increase in fund balance is primarily due to the passage a of larger bond issue in prior year, and 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
2011	73,529,341	6,555,557,566	1.12%	40,885,803	0.18%	14,835	4,956	945	778
2012	72,325,000	6,525,004,824	1.11%	44,545,083	0.16%	14,836	4,875	952	760
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

- 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 2017 Tulsa Chamber of Commerce Economic Profile MSA population projection multiplied by 2017 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.

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
2021	\$ 25,125,000	\$ 1,830,313	\$ 26,955,313
2022	25,625,000	1,270,312	26,895,312
2023	19,125,000	823,125	19,948,125
2024	13,375,000	437,500	13,812,500
2025	7,250,000	145,000	7,395,000
	\$ 90,500,000	\$ 4,506,250	\$ 95,006,250

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

Ellen Ochoa Elementary Construction Phase III and Furniture, Fixtures, and Equipment (FF&E)	\$ 6,600,000
Design Lab at Metro Building Renovation and FF&E.....	\$ 3,250,000
Performing Arts Center – Restroom Renovation; Lighting, Sound, and Acoustical Improvements	\$ 1,450,000
District Fine Arts, Athletics, Classroom, and Stadium Renovation and Construction including FF&E	\$42,475,000
Teaching and Learning Instructional Resources (not including technology for classrooms).....	\$ 4,750,000
District Exterior and Interior Renovations (includes playgrounds, marquees, and flooring)	\$ 5,125,000
District Roof Replacements	\$ 7,500,000
District HVAC System Replacements.....	\$ 7,300,000
District Maintenance and Operations Equipment and Other Capital Improvements	\$ 8,400,000
Technology Hardware, Software, and Subscriptions	\$20,600,000
Site and Department Allocations	\$ 6,850,000
Early Childhood Education Center Purchase Payments.....	\$ 2,500,000
Transportation – Buses	\$ 4,600,000
Fees, Professional Services, and Contingency	\$ 7,200,000
5-YEAR TOTAL	\$128,600,000

between schools and the community.

CHANGES IN GENERAL FUND REVENUE

State aid revenue is the District's largest single revenue source representing \$48.6 in Fiscal Year 2020-2021. The state aid allocation will be recalculated in January 2021 and will be adjusted to reflect the actual number of students served as of October 2020 as well as any changes in 2020-2021 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 2019-2020 by approximately \$2,872,454 compared to 2018-2019 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 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 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 2021, the State Aid allocation is \$48,604,852 and WADM is \$3,467.17, which accounts for a difference of \$1.56 million in estimated collections compared to FY19 actuals.

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 \$30,887,386 in 2019-2020. For 2020-2021 the district's total NAV has increased by \$19 million bringing our new NAV to \$894,015,931. This is an increase of 2.18% 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 2021 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 2021 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, 2020, unassigned fund balance of the general fund was \$21,404,717. 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 12.01 percent of total general fund expenditures. The fund balance of the District's general fund decreased by \$513,434 from the prior year, as a result of a decrease in State Aid 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 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 \$13,180,965. The net decreases 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 \$90,867 and a variance in expenditures of \$2,496,466. 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 \$10,963,101, and expenses of \$10,916,102 for the fiscal year 2020. 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 revenues.



ORGANIZATIONAL SECTION

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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.

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.
- 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 ACCOUNTING

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.

BASIS OF ACCOUNTING

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

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.

BASIS OF ACCOUNTING

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, 2020, and were reinstated during fiscal year 2020, for the general fund, building fund, or child nutrition fund.





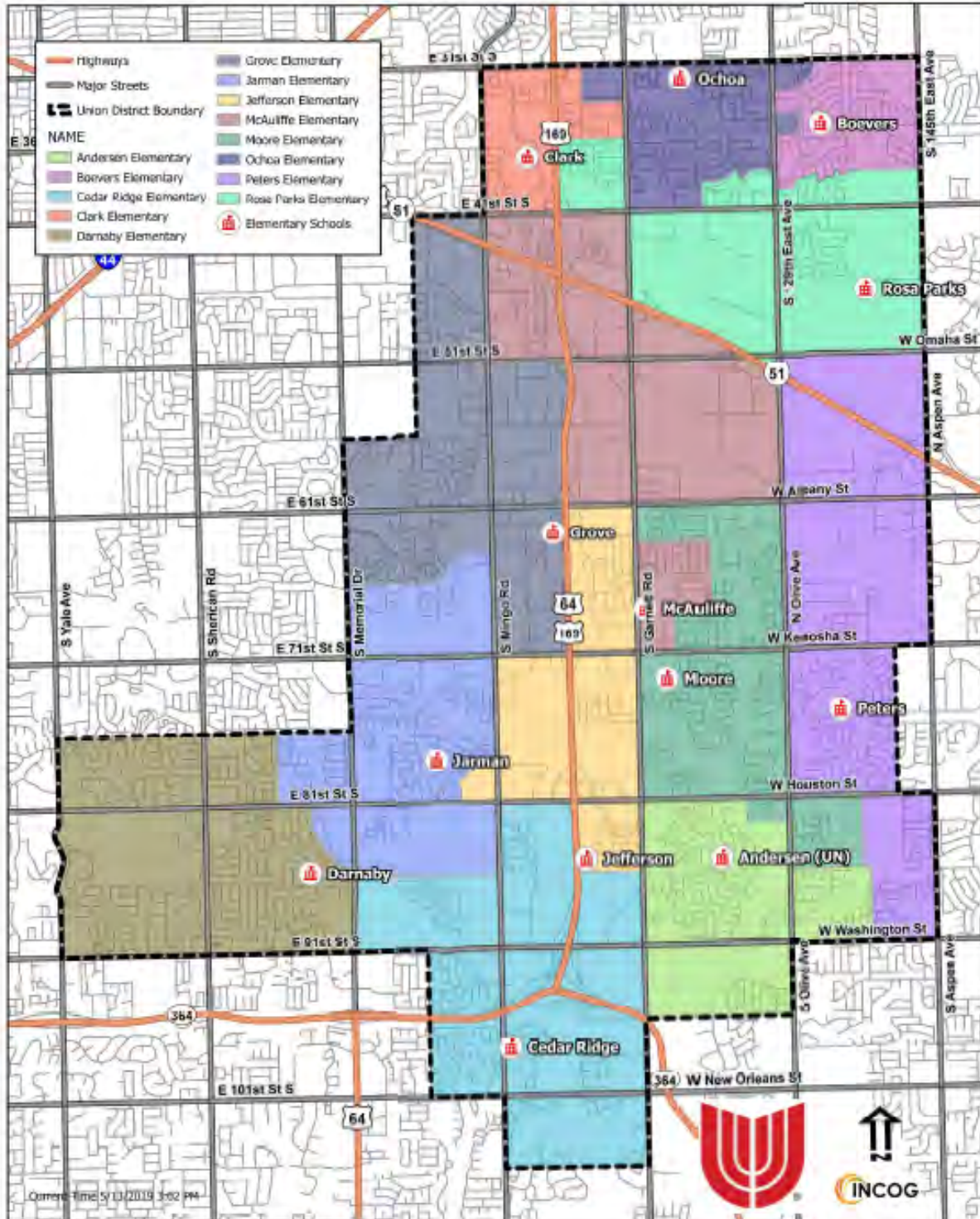
GEOGRAPHICAL AREA SERVED



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.



Elementary School Boundaries - Union Public School District



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 Chargois, 12th Grade Principal
Marla Robinson, 11th Grade Principal
Tony Tempest, 10th Grade Principal
6636 S. Mingo
Tulsa OK 74133
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, 2021 School Building Information

District Building	2016	2017	2018	2019	2020
Elementary:					
Andersen Elementary (1984)					
Square Feet	67,709	67,709	67,709	67,709	67,709
Capacity (students)	600	600	600	600	600
Enrollment	463	429	441	489	410
Percentage of Capacity Used	77.17%	71.50%	73.50%	81.50%	68.33%
Boevers Elementary (1975)					
Square Feet	59,773	59,773	59,773	59,773	59,773
Capacity (students)	600	600	600	600	600
Enrollment	580	575	612	468	418
Percentage of Capacity Used	96.67%	95.83%	102.00%	78.00%	69.67%
Briarglen Elementary (1971) ^h					
Square Feet	61,349	61,349	61,349	61,349	61,349
Capacity (students)	600	600	-	-	-
Enrollment	620	612	-	-	-
Percentage of Capacity Used	103.33%	102.00%	0.00%	0.00%	0.00%
Cedar Ridge Elementary (1994)					
Square Feet	82,000	82,000	82,000	82,000	82,000
Capacity (students)	600	600	600	600	600
Enrollment	500	482	479	470	447
Percentage of Capacity Used	83.33%	80.33%	79.83%	78.33%	74.50%
Clark Elementary (1977)					
Square Feet	71,480	71,480	71,480	71,480	71,480
Capacity (students)	600	600	600	600	600
Enrollment	659	672	696	449	448
Percentage of Capacity Used	109.83%	112.00%	116.00%	74.83%	74.67%
Darnaby Elementary (1979)					
Square Feet	73,458	73,458	73,458	73,458	73,458
Capacity (students)	600	600	600	600	600
Enrollment	610	640	651	595	531
Percentage of Capacity Used	101.67%	106.67%	108.50%	99.17%	88.50%
Grove Elementary (1974) ^a					
Square Feet	77,028	77,028	77,028	77,028	77,028
Capacity (students)	600	600	600	600	600
Enrollment	636	581	543	567	540
Percentage of Capacity Used	106.00%	96.83%	90.50%	94.50%	90.00%
Jarman Elementary (1991)					
Square Feet	68,592	68,592	68,592	68,592	68,592
Capacity (students)	600	600	600	600	600
Enrollment	591	630	583	621	621
Percentage of Capacity Used	98.50%	105.00%	97.17%	103.50%	103.50%
McAuliffe Elementary (1987)					
Square Feet	70,316	70,316	70,316	70,316	70,316
Capacity (students)	600	600	600	600	600
Enrollment	621	655	661	570	566
Percentage of Capacity Used	103.50%	109.17%	110.17%	95.00%	94.33%

SCHOOL BUILDING INFORMATION

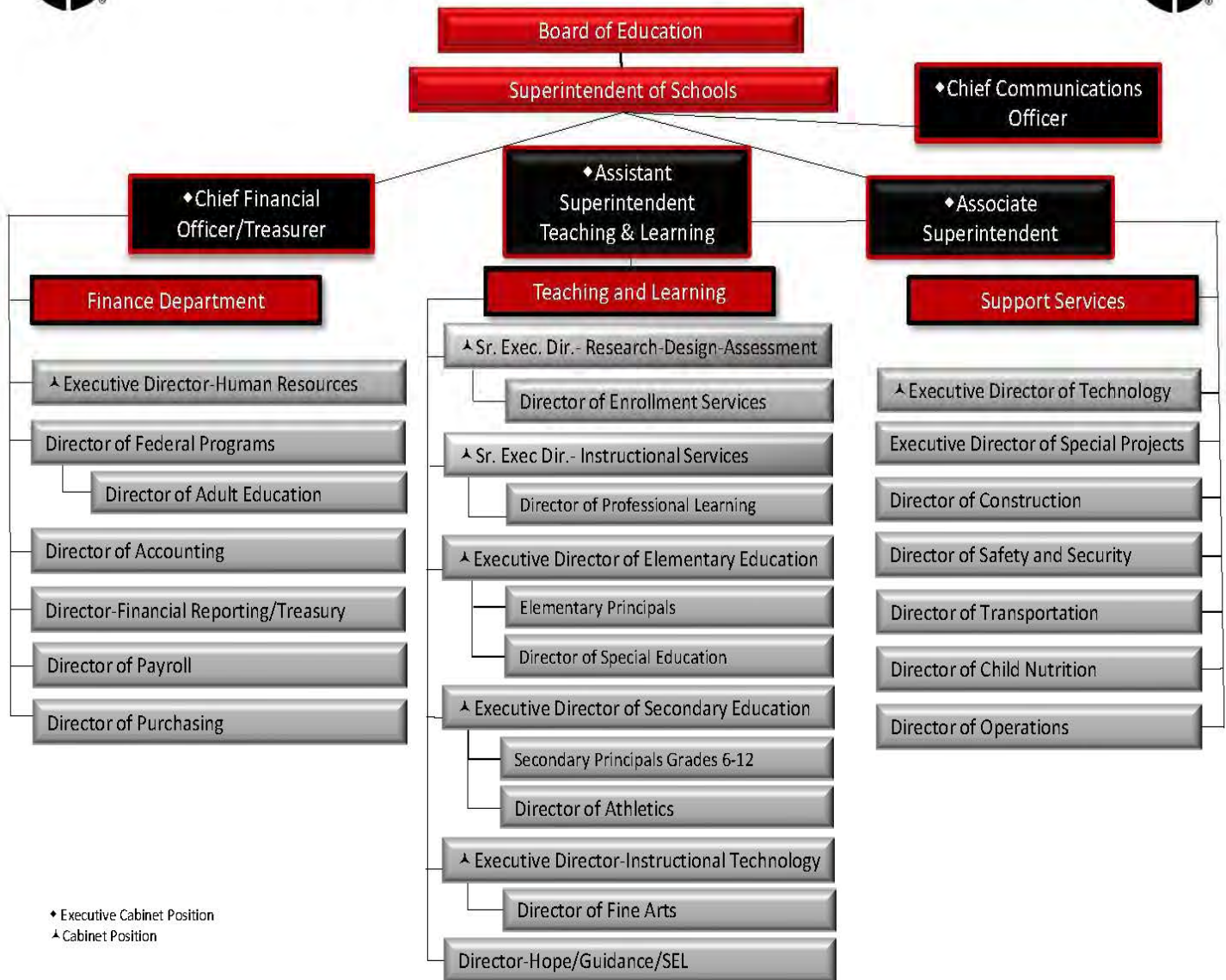
Year Ended June 30, 2021 School Building Information

District Building	2016	2017	2018	2019	2020
Elementary:					
Moore Elementary (2000)					
Square Feet	74,632	74,632	74,632	74,632	74,632
Capacity (students)	600	600	600	600	600
Enrollment	597	568	553	512	482
Percentage of Capacity Used	99.50%	94.67%	92.17%	85.33%	80.33%
Ochoa Elementary 2017					
Square Feet	-	-	70,705	70,705	70,705
Capacity (students)	-	-	592	1,092	1,092
Enrollment	-	-	546	1,014	962
Percentage of Capacity Used	0.00%	0.00%	92.23%	92.86%	88.10%
Peters Elementary (1978)					
Square Feet	70,893	70,893	70,893	70,893	70,893
Capacity (students)	600	600	600	600	600
Enrollment	496	455	463	420	348
Percentage of Capacity Used	82.67%	75.83%	77.17%	70.00%	58.00%
Rosa Parks (2006)^f					
Square Feet	87,550	87,550	87,550	87,550	87,550
Capacity (students)	900	900	900	900	900
Enrollment	794	833	864	730	660
Percentage of Capacity Used	88.22%	92.56%	96.00%	81.11%	73.33%
Thomas Jefferson (2008)					
Square Feet	69,356	69,356	69,356	69,356	69,356
Capacity (students)	600	600	600	600	600
Enrollment	554	568	545	583	526
Percentage of Capacity Used	92.33%	94.67%	90.83%	97.17%	87.67%
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	2,322	2,306	2,298	2,449	2,332
Percentage of Capacity Used	95.16%	94.51%	94.18%	100.37%	95.57%
8th Grade Center (1982)^b					
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	1,173	1,174	1,197	1,218	1,168
Percentage of Capacity Used	90.23%	90.31%	92.08%	93.69%	89.85%
9th Grade Center (1987)^c					
Square Feet	458,590	458,590	463,450	463,450	463,450
Capacity (students)	2,200	2,200	2,200	2,200	2,200
Enrollment	1,301	1,238	1,267	1,217	1,196
Percentage of Capacity Used	59.14%	56.27%	57.59%	55.32%	54.36%
Senior High School (1972)^c					
Square Feet	728,119	728,119	745,220	745,220	745,220
Capacity (students)	3,490	3,490	3,490	3,490	3,490
Enrollment	3,489	3,542	3,448	3,444	3,304
Percentage of Capacity Used	99.97%	101.49%	98.80%	98.68%	94.67%

ADMINISTRATIVE ORGANIZATIONAL CHART



Union Public Schools | 2020-2021 Administrative Organizational Chart



BOARD OF EDUCATION

Board of Education Position

Heather McAdams
President

Stacey Roemerman
President

Lisa Ford

Ken Kinnear
Board Clerk

Jeff Bennett

Elected

Vice

Member

Deputy

Clerk

Appointed Positions

Board Terms

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 elections are held on the second Tuesday in February, with one Board position open for election each year. 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 seat, 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 with the addition of Ochoa Redistricting.

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.

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.

10

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, faith-based 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"



"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 Schedule of Expenditures

	Actual 2019-2020
Salaries	434,202
Benefits	95,753
Contracted Services	95,243
Purchased Property Services	1,295
Other Purchased Services	1,900
Supplies and Materials	21,894
Other objects	3,015
Other Uses of Funds	25,667
	<hr/>
	\$ 678,970

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 2019-2020
Instruction	31,173
Social Work Services	424,574
Other Support Services	59,883
Instructional Curriculum Development	72,001
Inservice Training - Non- Instructional	1,522
	<hr/>
	\$ 589,153

UNION2TCC

EDGE: EARN A DEGREE, GRADUATE EARLY



PILOT EXPANSION

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 Early Schedule of Expenditures

	Actual 2019-2020
Salaries	19,922
Benefits	4,895
Supplies and Materials	1,068
	<u>\$ 25,886</u>



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 2019-2020
Salaries	22,998
Benefits	4,807
Contracted Services	8,689
Purchased Property Services	450
Supplies and Materials	4,608
	<u>\$ 41,552</u>

College and Career Readiness



- 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.

Community Schools



- "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.



STEM

- Union is the first district in Oklahoma to use the award-winning Project Lead The Way program to offer biomedical, engineering, and computer science coursework in grades K-12.

Early Childhood



- 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 three.
- All of Union's elementary schools offer full-day PreK and Kindergarten.

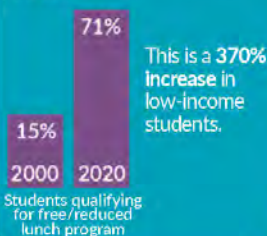


Community Schools

AT UNION 

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.



93% Current graduation rate is one of the highest in the area.
*graduating class of 2019

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

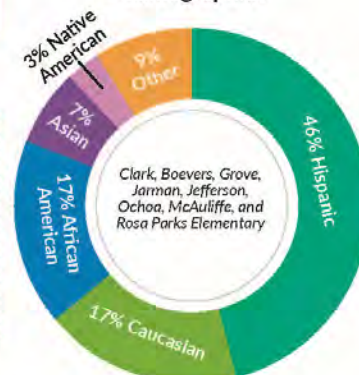
- Social-Emotional Issues
- Food Insecurity
- Access to Health Care
- Basic Needs
- Other Systemic Barriers

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



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.

Current Demographics



- 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
Shloh 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
918-357-6807

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.

Community Schools

Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, & Rosa Parks

BY THE NUMBERS 2019-2020



Eight Full Service Community Schools at Union offer a range of comprehensive supports for students and families from infancy through adulthood. These supports include early childhood programs, expanded learning, social and medical services, and opportunities for family engagement.

Expanded Learning

2,741 students participated

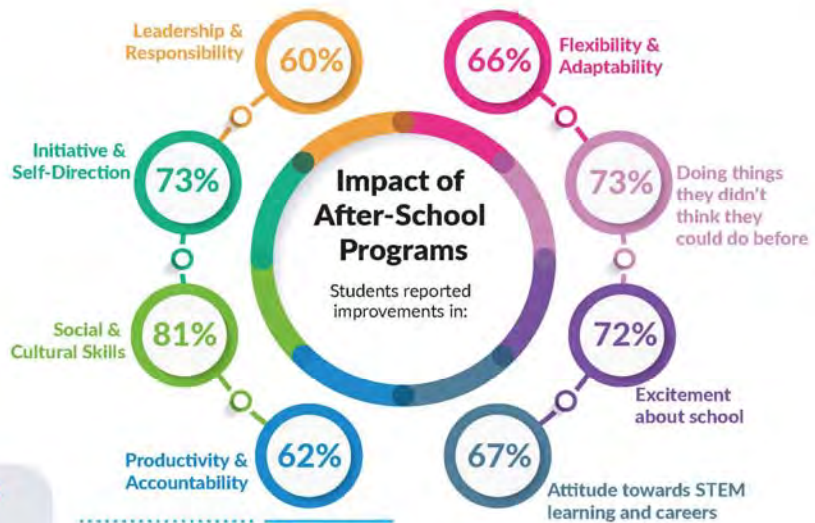
100% participated at no cost

5,477 total hours of enrichment & academic opportunities

40 community partners

67 STEM programs
64 Health & Wellness programs
62 Academic & Tutoring programs
69 Youth Development/Leadership programs

175 students in summer camps



Early Childhood Programs



226 Students

attended Pre-K Camp

96%

of parents said Pre-K Camp helped their children get excited about starting school

97%

of parents said Pre-K Camp showed their children what school will be like

95%

of parents said Pre-K Camp helped their children gain confidence about starting school

98%

of parents said Pre-K Camp helped them understand they play an important role in their children's learning

100%

of parents would recommend Pre-K Camp to other parents

100%

of parents said Pre-K Camp helped them feel welcomed at their children's school



50 people

attended Baby Book Club at Boevers, Clark, & Ochoa



3,708 Books

provided to Pre-K students by the Kreuger Book Program

Parent Engagement

94% parent participation in parent teacher conferences

200 combined opportunities for parent and family engagement

Comprehensive Supports

Operation School Bell gave 448 students new clothing, shoes, & hygiene kits

The Food for Kids Backpack Program provided 426 food-insecure students with food to take home on the weekends

Union and Hunger Free Oklahoma distributed 23,500 adult meals to Union families during April-June

Distributed 20,000 TRSA STEM Kits to keep students engaged during historic school closures

82 vulnerable families received gift cards from YWCA for COVID relief

Health and Wellness

Community Health Connections clinics at Ochoa and Rosa Parks provide quality and accessible health care for students, families, and the community

1,000 students received free dental screenings

Over 4,000 students received free vision screenings

Harrel Eye Care provided 67 students with free eye exams and glasses valued at \$13,400

Financial Support

Implementing the Community Schools strategy has been made possible by the support of many organizations & foundations. We would like to thank:



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 making



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 to enhance support and funding for public education.
- 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 OBJECTIVES

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

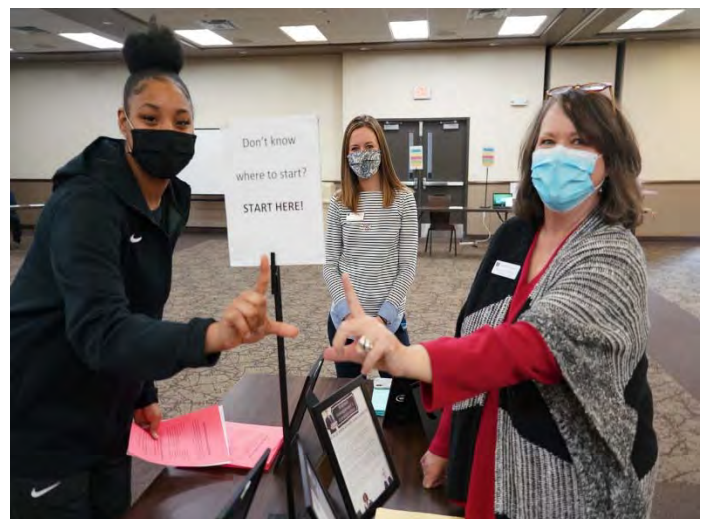
- Inform parents of college requirements
- Explore talents and interests
- Expand social skills
- Reading and mathematics at the proficient and advanced levels
- Build leadership skills

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 2020-2021

Site Name	Site	Current \$ Per Student	October 2018 Count	Calculated Base 2019-2020	Final Base 2019-2020	October 2019 Count	Calculated Base 2020-2021	Proposed Base 2020-2021
Grove Elementary	105	31.00	552	17,112	17,112	567	17,577	17,577
Boevers Elementary	115	31.00	609	18,879	18,972	468	14,508	18,879
Clark Elementary	120	31.00	674	20,894	21,576	449	13,919	20,894
Darnaby Elementary	122	31.00	643	19,933	20,181	595	18,445	19,933
Peters Elementary	125	31.00	441	13,671	14,353	420	13,020	13,671
Andersen Elementary	130	31.00	459	14,229	14,229	489	15,159	15,159
McAuliffe Elementary	135	31.00	607	18,817	20,491	570	17,670	18,817
Jarman Elementary	140	31.00	551	17,081	18,073	621	19,251	19,251
Cedar Ridge Elementary	145	31.00	506	15,686	15,686	470	14,570	15,686
Moore Elementary	150	31.00	511	15,841	17,143	512	15,872	15,872
Rosa Parks Elementary	155	31.00	844	26,164	26,784	730	22,630	26,164
Thomas Jefferson Elementary	160	31.00	579	17,949	17,949	583	18,073	18,073
Ochoa	180	31.00	760	23,560	23,560	1014	31,434	31,434
6th / 7th Grade Center	510	33.00	2,369	78,177	78,177	2,449	80,817	80,817
8th Grade Center	620	33.00	1,140	37,620	39,501	1,218	40,194	40,194
9th Grade Center	720	38.00	1,259	47,842	47,842	1,212	46,056	47,842
High School (10-12)	705	38.00	3,311	125,818	130,818	3,294	125,172	130,818
Alternative High School	725	38.00	158	6,004	6,118	155	5,890	6,004
			15,973	\$ 535,277	\$ 548,565	15,816	\$ 530,257	\$ 557,085

BUDGET PLANNING PROCESS

The following budget development calendar denotes the budget planning process for the 2020-2021 budget:

February 2020 (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 2020 (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 2020 (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 2020 (prior to fiscal year)

2020-2019 budget are reviewed with the Board of Education.

July 2020

Budget projections are completed by the Budget Department to set the new preliminary budget for the 2020-2021 fiscal year.

November 2020

Final 2020-2021 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 2020-2021 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 statutes 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 statutes, 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

Governmental Funds: 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.

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.

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.

DISTRICT FUNDS

Fiduciary Funds: Fiduciary funds are used to account for assets held on behalf of outside parties, including other governments, or on behalf of employees or other funds within the District. When these assets are held under the terms of a formal trust agreement, a pension trust fund, an investment trust fund or a private-purpose trust fund is used. Agency funds generally are used to account for assets that the District holds on behalf of others as their agent and do not involve measurement of results of operations. The District's fiduciary funds have been excluded from the government-wide financial statements.

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.

Union Public Schools only has the following Governmental Funds approved by the Board of Education: General Fund, Building Fund and Child Nutrition Fund. Therefore, they are the only funds included in our budget report. All other funds can be found in the Districts Comprehensive Annual Financial Report (CAFR).

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.

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 – 41100

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 the change.

Local Revenue – Other – 41600

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

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 2020-2021 the budget is \$1,660,000. Actuals for 2019 were \$1,615,851.32, for 2020 were \$1,416,444.90. However, due to the Pandemic, EDP was closed in the spring and summer of 2020 so expected revenue is approximately \$600,000

Facility Rentals:

The District make its facilities available to various community and civic organizations for a fee. In fiscal year 2019 total revenue was \$453,790, in 2020 it was \$293,164. The budget for the current year is \$460,000 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 2018 was \$316,214, 2019 was a significant increase to \$607,866, 2020 was down again to \$171,974. Interest in the current year will be reduced even more.

Local Grants:

The district receives several different local grants that support Union students in school and after school. Without our partners we would be unable to provide many programs. For the year ended 2019 the district received \$\$3,946,920 in local grants, 2020 was \$3,919,865. The budget for 2021 is \$4,010,401.

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.

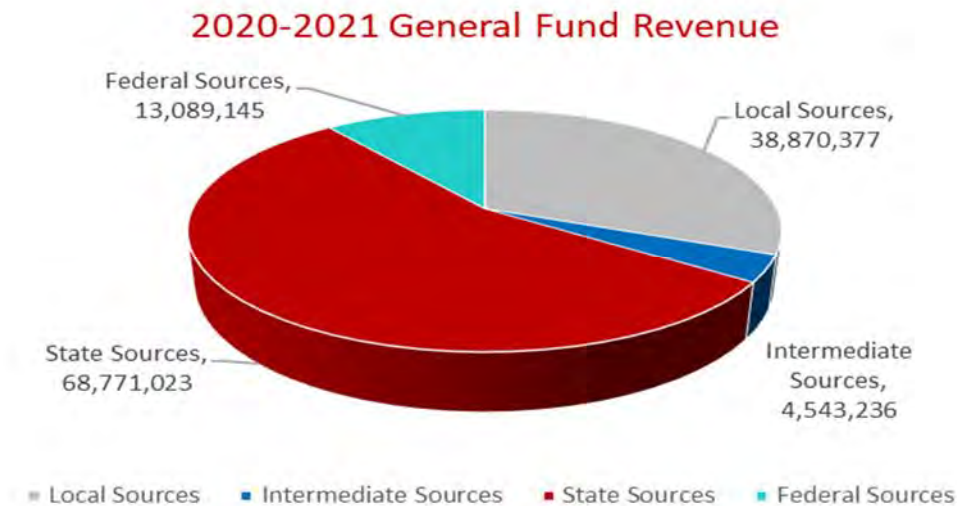
CLASSIFICATION OF REVENUE

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).



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

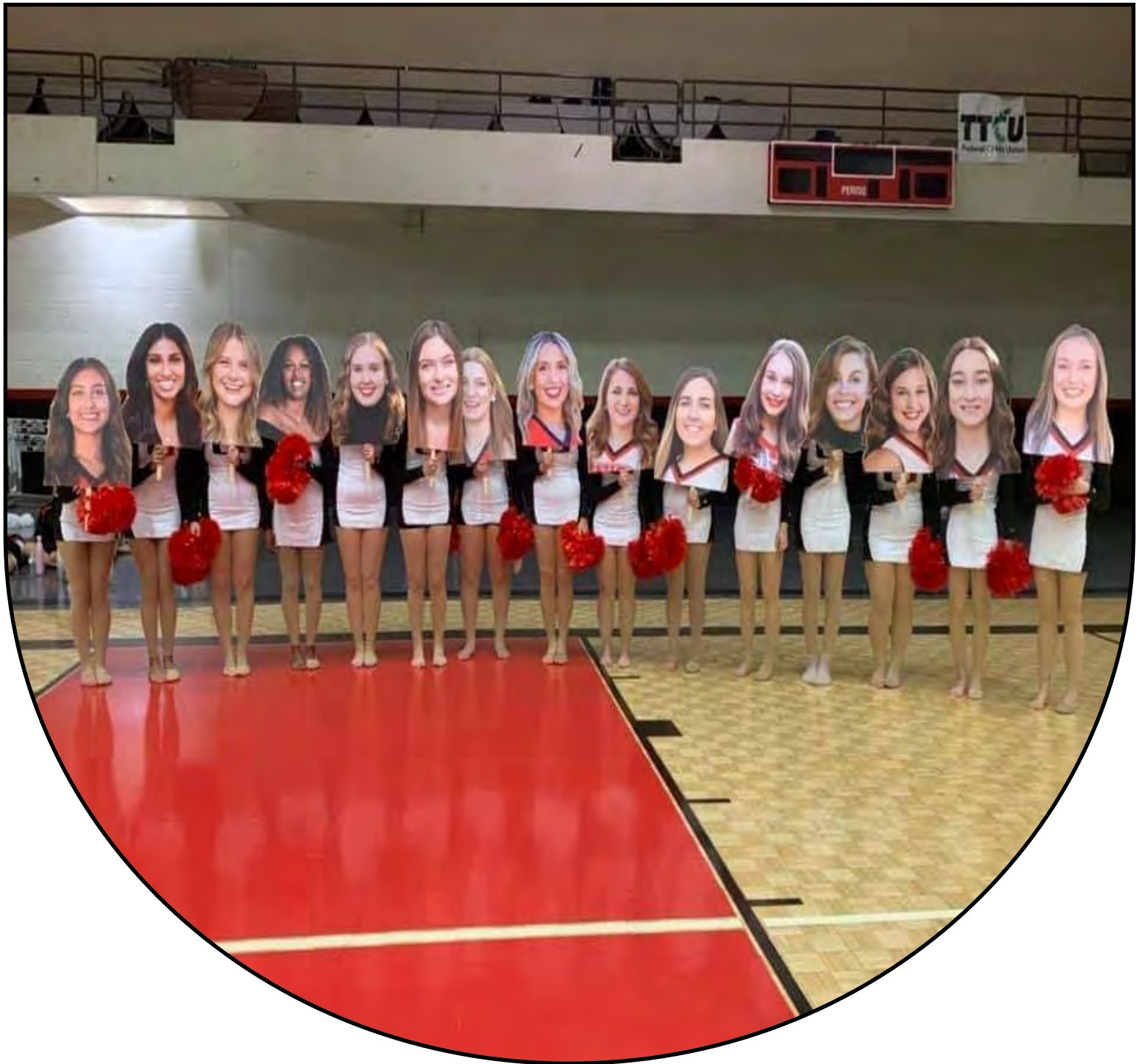
Activities concerned with the supervision, monitoring, vehicle operations, servicing, and maintenance of student transportation.

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

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MAJOR REVENUE SOURCES

State aid is the District's largest single revenue source. The state aid allocation is recalculated in January 2021 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 the change.

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.

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 strike on April 12 after an agreement to increase salaries and state funding for education. The strike resulted in \$6,000 raise for teachers and a \$1,250 raise for support staff, along with increase funding for public education.

Looking at expenditures from the perspective of Function, Instruction comprises over 55% of expenditures, with a budget in the General Fund of \$69,115,589. Operations and Maintenance comes in second at 7%, or \$9,313,583. Student support and Instructional Support are just under 6% with a total combined of \$7,400,308. The smallest spending category is General Administration at \$2,972,909 or 2%.



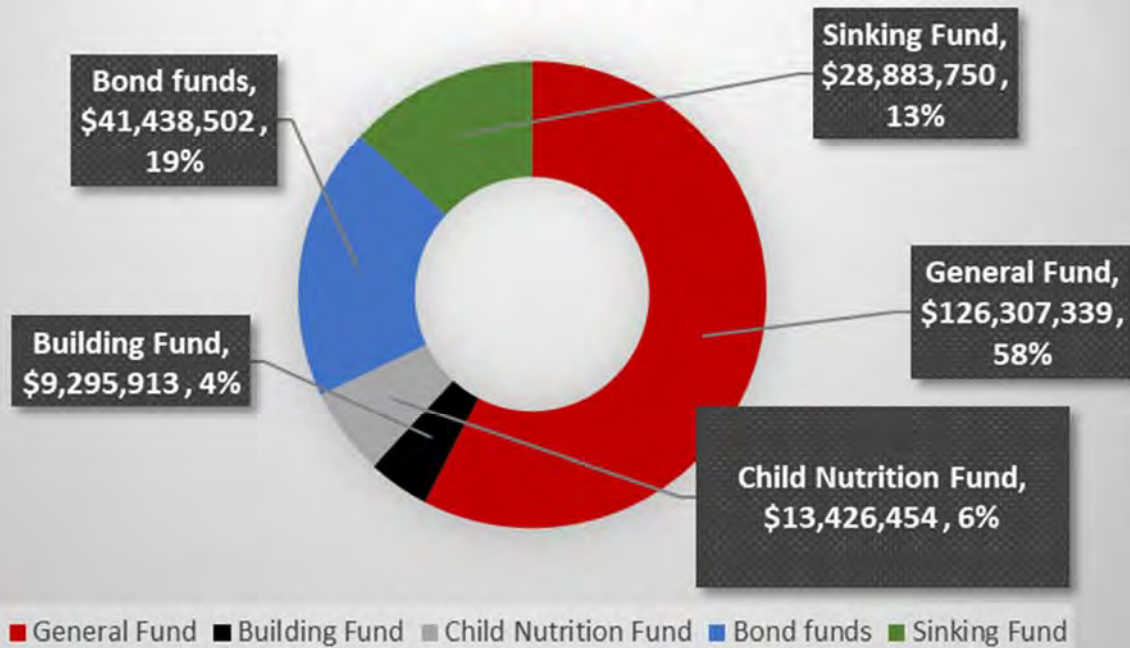
SUMMARY OF REVENUES AND EXPENDITURES – ALL FUNDS

Revenue By Source	Summary of Total Budget - All Funds								
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2021	Forecast 2022-2023	Forecast 2023-2024
<i>Local Revenue</i>									
Ad Valorem Tax	56,057,394	59,609,322	60,226,999	62,983,915	61,875,844	61,875,844	62,061,305	61,789,640	62,138,197
Tuition and Fees	1,785,000	1,600,916	1,717,207	1,360,135	1,785,000	1,785,000	1,785,000	1,785,000	1,785,000
Investments	487,791	1,170,595	1,670,823	996,081	878,539	878,539	701,613	703,613	705,613
Rental, Disposals, and Commissions	641,977	703,099	614,495	487,636	641,500	641,500	641,500	641,500	641,500
Reimbursements	256,695	383,954	211,539	204,593	242,500	242,500	242,500	242,500	242,500
Donations	3,639,986	5,425,820	12,166,333	4,200,023	4,336,279	4,336,279	2,600,000	2,600,000	2,600,000
Athletic Programs	196,463	171,759	148,859	167,427	170,000	170,000	170,000	170,000	170,000
Other Local sources	538,575	605,429	1,012,298	704,251	946,881	946,881	1,203,000	1,218,000	1,238,000
Bond Sale	26,250,835	23,439,706	24,912,090	29,580,000	26,500,000	26,500,000	26,400,000	26,400,000	26,400,000
Meals	1,864,728	1,999,913	2,214,703	1,646,669	2,283,000	2,283,000	2,630,000	2,651,500	2,673,275
<i>Intermediate Revenue</i>									
County Four Mill Levy	3,322,734	3,447,346	3,521,781	3,698,889	3,698,889	3,698,889	3,600,000	3,650,000	3,700,000
County Mortgage Tax	611,815	539,819	606,922	697,475	697,475	697,475	650,000	655,000	700,000
Resale of Property	121,272	121,272	119,601	146,872	146,872	146,872	146,000	150,000	155,000
<i>State Revenue</i>									
State Dedicated Revenue	8,186,957	8,379,011	8,294,343	6,619,728	6,619,728	6,619,728	7,000,000	7,100,000	7,200,000
State Aid	50,327,677	50,321,283	59,419,745	63,089,063	60,523,623	60,523,623	58,663,623	58,082,795	58,663,623
Alternative Education	142,311	149,853	142,164	155,432	141,302	141,302	155,000	160,000	165,000
State Categorical	476,066	483,904	1,256,095	1,357,745	1,342,327	1,342,327	1,250,000	1,300,000	1,350,000
State Matching	76,212	73,393	68,357	80,358	80,358	80,358	88,394	97,233	106,957
Other State Sources of Revenue	41,005	7,944	81,283	44,054	44,055	44,055	44,055	40,000	45,000
State Vocational Programs	85,032	78,510	93,239	112,300	99,988	99,988	100,000	105,000	110,000
<i>Federal Revenue</i>									
Student Meals	6,865,134	6,838,170	7,252,920	7,526,297	7,912,012	7,912,012	8,278,927	8,692,873	9,127,517
Grants in Aid From Federal Gov	344,177	344,338	337,625	374,827	368,858	368,858	370,000	375,000	380,000
Improving Academic Achiev. Of Disad.	3,221,613	3,302,159	4,216,368	4,911,018	5,372,763	5,372,763	5,375,000	5,400,000	5,500,000
Individuals with Disabilities	2,852,772	2,781,081	3,130,595	2,927,062	2,920,222	2,920,222	3,000,000	3,100,000	3,200,000
Every Student Succeeds	64,300	80,125	144,049	124,466	401,669	401,669	355,000	375,000	390,000
Federal Grants Through Other Sources	37,271	62,567	69,081	82,486	57,810	57,810	60,000	61,000	62,000
Other Federal Sources Through State	1,257,870	1,442,329	1,340,524	990,271	1,010,698	1,010,698	3,690,271	4,250,000	4,250,000
Federal Vocational Education	63,744	102,712	110,403	82,648	2,957,125	2,957,125	100,000	110,000	115,000
Other	61,815	76,477	102,668	221,903	62,896	62,896	0	0	0
Total Revenues	169,879,221	173,742,806	195,203,108	195,573,623	194,118,213	194,118,213	191,361,188	191,905,654	193,814,182
<i>Expenditures By Function</i>									
Instruction	61,217,878	63,044,756	72,680,854	74,206,268	110,554,091	110,554,091	95,031,057	94,517,144	95,250,568
Student Support	7,110,695	7,427,641	9,463,293	9,767,102	10,073,999	10,073,999	9,199,938	9,265,672	9,364,854
Instructional Support	5,252,855	4,652,684	6,021,382	5,565,652	6,392,909	6,392,909	5,758,947	5,800,095	5,862,181
General Administration	2,410,023	2,686,764	2,542,228	2,588,056	2,972,254	2,972,254	2,880,343	2,900,923	2,931,976
School Administration	8,500,295	8,708,322	9,157,479	9,376,324	9,091,056	9,091,056	8,736,499	8,798,922	8,893,108
Business/Technology	9,104,976	8,816,587	9,370,920	9,757,538	8,481,233	8,481,233	8,297,488	8,356,774	8,446,227
Operations & Maintenance	15,730,849	16,069,959	17,098,218	18,096,016	17,609,496	17,609,496	18,616,111	19,110,308	19,658,792
Facilities Acq & Construction	39,287	344,186	2,516,774	5,124,671	1,000,000	1,000,000	0	0	0
Appliances, Furniture, Fixtures	6,506	22,718	81,407	16,525	0	0	0	0	0
Building & Construction	19,671,973	16,001,970	12,101,404	17,623,123	0	0	0	0	0
Student Transportation	5,445,905	4,357,131	7,293,494	4,825,038	4,884,124	4,884,124	4,681,871	4,715,323	4,765,797
Food Preparation	3,441,944	3,592,407	3,917,720	4,327,688	4,092,161	4,092,161	4,370,965	4,414,675	4,458,821
Other Direct Services	813,486	1,027,217	964,897	1,014,951	1,715,459	1,715,459	1,025,100	1,035,351	1,045,705
Food Procurement/A La Carte	3,413,286	3,388,160	3,832,105	3,464,372	6,531,241	6,531,241	6,857,803	7,200,693	7,560,728
Non-Instructional Services	4,152,754	4,206,897	4,320,290	4,870,920	5,803,331	5,803,331	5,622,561	5,662,734	5,723,350
Other Outlays	1,412,337	1,136,148	1,430,783	1,943,975	1,266,855	1,266,855	171,517	172,742	174,592
Principal	21,850,000	23,850,000	25,250,000	25,750,000	26,955,313	26,955,313	26,895,313	19,948,125	13,812,500
Interest	1,441,625	1,628,125	1,848,438	1,928,438	1,928,438	1,928,438	1,950,000	1,950,000	1,950,000
Total Expenditures	171,016,674	170,961,671	189,891,686	200,246,656	219,351,959	219,351,959	200,095,513	193,849,481	189,899,199
<i>Net</i>	(1,137,453)	2,781,135	5,311,422	(4,673,033)	(25,233,746)	(25,233,746)	(8,734,325)	(1,943,827)	3,914,983
<i>Beginning Fund Balance</i>	84,114,880	82,977,426	85,758,560	91,069,982	86,396,950	86,396,949	65,230,802	60,766,323	64,551,944
Fund Balance	82,977,427	85,758,561	91,069,982	86,396,949	61,163,203	61,163,202	56,496,478	58,822,496	68,466,927

2020-2021 SUMMARY – ALL FUNDS

Fund	Revenues	Expenditures
General Fund	\$ 125,273,781	\$ 126,307,339
Building Fund	\$ 5,228,314	\$ 9,295,913
Child Nutrition Fund	\$ 10,603,025	\$ 13,426,454
Bond Funds	\$ 26,300,000	\$ 41,438,502
Sinking Fund	\$ 26,713,093	\$ 28,883,750
Total FY 2020-21 - All Funds	\$ 194,118,213	\$ 219,351,958

Expenditures By Fund

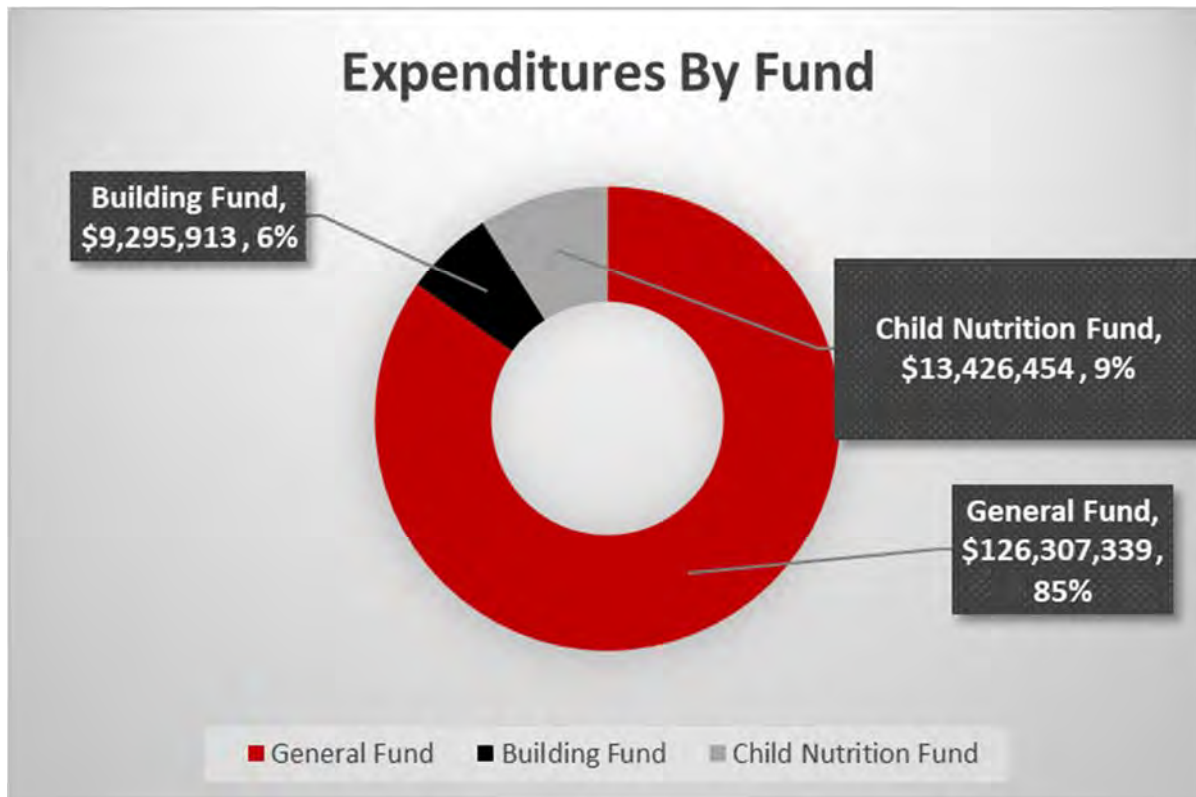


SUMMARY OF REVENUES AND EXPENDITURES – OPERATING FUNDS

Revenue By Source	Summary of Total Budget - All Funds								
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2021	Forecast 2022-2023	Forecast 2023-2024
<i>Local Revenue</i>									
Ad Valorem Tax	32,480,008	33,696,416	34,497,176	35,875,844	35,875,844	35,875,844	36,061,305	35,789,640	36,138,197
Tuition and Fees	1,785,000	1,600,916	1,717,207	1,360,135	1,785,000	1,785,000	1,785,000	1,785,000	1,785,000
Investments	231,212	522,710	1,069,920	395,382	365,446	365,446	201,613	203,613	205,613
Rental, Disposals, and Commissions	641,977	703,099	614,495	487,636	641,500	641,500	641,500	641,500	641,500
Reimbursements	256,695	383,954	211,539	204,593	242,500	242,500	242,500	242,500	242,500
Donations	3,639,986	5,425,820	12,166,333	4,200,023	4,336,279	4,336,279	2,600,000	2,600,000	2,600,000
Athletic Programs	196,463	171,759	148,859	167,427	170,000	170,000	170,000	170,000	170,000
Other Local sources	538,575	605,429	1,012,298	704,251	946,881	946,881	1,203,000	1,218,000	1,238,000
Meals	1,864,728	1,999,913	2,214,703	1,646,669	2,283,000	2,283,000	2,630,000	2,651,500	2,673,275
<i>Intermediate Revenue</i>									
County Four Mill Levy	3,322,734	3,447,346	3,521,781	3,698,889	3,698,889	3,698,889	3,600,000	3,650,000	3,700,000
County Mortgage Tax	611,815	539,819	606,922	697,475	697,475	697,475	650,000	655,000	700,000
Resale of Property	121,272	121,272	119,601	146,872	146,872	146,872	146,000	150,000	155,000
<i>State Revenue</i>									
State Dedicated Revenue	8,186,957	8,379,011	8,294,343	6,619,728	6,619,728	6,619,728	7,000,000	7,100,000	7,200,000
State Aid	50,327,677	50,321,283	59,419,745	63,089,063	60,523,623	60,523,623	58,663,623	58,082,795	58,663,623
Alternative Education	142,311	149,853	142,164	155,432	141,302	141,302	155,000	160,000	165,000
State Categorical	476,066	483,904	1,256,095	1,357,745	1,342,327	1,342,327	1,250,000	1,300,000	1,350,000
State Matching	76,212	73,393	68,357	80,358	80,358	80,358	88,394	97,233	106,957
Other State Sources of Revenue	41,005	7,944	81,283	44,054	44,055	44,055	44,055	40,000	45,000
State Vocational Programs	85,032	78,510	93,239	112,300	99,988	99,988	100,000	105,000	110,000
<i>Federal Revenue</i>									
Student Meals	6,865,134	6,838,170	7,252,920	7,526,297	7,912,012	7,912,012	8,278,927	8,692,873	9,127,517
Grants in Aid From Federal Gov	344,177	344,338	337,625	374,827	368,858	368,858	370,000	375,000	380,000
Improving Academic Achiev. Of Disad.	3,221,613	3,302,159	4,216,368	4,911,018	5,372,763	5,372,763	5,375,000	5,400,000	5,500,000
Individuals with Disabilities	2,852,772	2,781,081	3,130,595	2,927,062	2,920,222	2,920,222	3,000,000	3,100,000	3,200,000
Every Student Succeeds	64,300	80,125	144,049	124,466	401,669	401,669	355,000	375,000	390,000
Federal Grants Through Other Sources	37,271	62,567	69,081	82,486	57,810	57,810	60,000	61,000	62,000
Other Federal Sources Through State	1,257,870	1,442,329	1,340,524	990,271	1,010,698	1,010,698	3,690,271	4,250,000	4,250,000
Federal Vocational Education	63,744	102,712	110,403	82,648	2,957,125	2,957,125	100,000	110,000	115,000
Other	61,815	76,477	102,668	221,903	62,896	62,896	0	0	0
Total Revenues	119,794,421	123,742,309	143,960,293	138,284,854	141,105,120	141,105,120	138,461,188	139,005,654	140,914,182
<i>Expenditures By Object</i>									
Salaries	76,457,098	76,667,807	88,107,846	92,014,181	90,527,741	90,527,741	86,655,654	87,349,908	88,456,100
Benefits	28,321,248	29,296,357	31,662,081	33,112,983	32,147,823	32,147,823	31,445,706	31,653,917	32,016,036
Purchased Professional & Technical Servi	1,300,666	1,505,871	1,263,571	1,368,174	2,156,508	2,156,508	1,715,233	1,748,568	1,759,032
Purchased Property services	2,178,553	2,141,281	4,296,238	7,338,563	2,436,179	2,436,179	2,205,166	2,283,339	2,338,678
Other Purchased Services	1,911,983	2,302,184	1,999,840	2,541,573	2,992,848	2,992,848	3,638,337	3,747,496	3,806,518
Supplies and Materials	9,283,691	9,465,704	10,242,351	9,442,792	16,216,247	16,216,247	17,020,450	17,564,798	18,122,976
Property Expenses	777,848	206,451	29,198	403,189	1,570,714	1,570,714	483,000	497,169	511,062
Other	673,535	730,805	733,391	853,654	981,647	981,647	1,086,655	1,106,163	1,126,296
Total Expenditures	120,904,622	122,316,460	138,334,516	147,075,109	149,029,707	149,029,707	144,250,201	145,951,358	148,136,698
<i>Net</i>	(1,110,201)	1,425,849	5,625,777	(8,790,255)	(7,924,587)	(7,924,587)	(5,789,013)	(6,945,704)	(7,222,516)
<i>Beginning Fund Balance</i>	32,762,394	31,652,193	33,078,042	38,703,819	29,913,564	29,913,564	21,988,977	16,199,964	9,254,260
Fund Balance	31,652,193	33,078,042	38,703,819	29,913,564	21,988,977	21,988,977	16,199,964	9,254,260	2,031,744

2020-2021 SUMMARY – OPERATING FUNDS

Fund	Revenues	Expenditures
General Fund	\$ 125,273,781	\$ 126,307,339
Building Fund	\$ 5,228,314	\$ 9,295,913
Child Nutrition Fund	\$ 10,603,025	\$ 13,426,454
Total FY 2020-21	\$ 141,105,120	\$ 149,029,706



GENERAL FUND REVENUE SCHEDULE

2020-2021 General Fund Revenue

Source Sub Source	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Local Revenue									
Ad Valorem Tax	28,420,007	29,484,364	30,185,029	31,391,363	31,391,363	31,391,363	31,391,363	31,077,449	31,388,224
Tuition and Fees	1,785,000	1,600,916	1,717,207	1,360,135	1,785,000	1,785,000	1,785,000	1,785,000	1,785,000
Interest	150,556	338,121	649,929	198,807	176,613	176,613	176,613	176,613	176,613
Rental, Disposals, and Comm	641,977	580,559	614,495	487,636	641,500	641,500	641,500	641,500	641,500
Reimbursements	256,695	383,954	211,539	204,593	242,500	242,500	242,500	242,500	242,500
Donations & Misc	3,354,712	3,155,674	3,946,920	3,919,865	4,010,401	4,010,401	2,600,000	2,600,000	2,600,000
Athletic Programs	196,463	171,735	148,859	167,427	170,000	170,000	170,000	170,000	170,000
Other	475,330	466,016	611,463	395,400	453,000	453,000	453,000	453,000	453,000
Total Local Revenue	35,280,740	36,181,339	38,085,441	38,125,226	38,870,377	38,870,377	37,459,976	37,146,062	37,456,837
Intermediate Revenue									
County Four Mill Levy	3,322,734	3,447,346	3,521,781	3,698,889	3,698,889	3,698,889	3,600,000	3,650,000	3,700,000
County Mortgage Tax	611,815	539,819	606,922	697,475	697,475	697,475	650,000	655,000	700,000
Resale of Property Fund	121,272	121,272	119,601	146,872	146,872	146,872	146,000	150,000	155,000
Total Intermediate Revenue	4,055,821	4,108,437	4,248,304	4,543,236	4,543,236	4,543,236	4,396,000	4,455,000	4,555,000
State Revenue									
State Dedicated revenue	8,186,957	8,379,011	8,294,343	6,619,728	6,619,728	6,619,728	7,000,000	7,100,000	7,200,000
State Aid	50,327,677	50,321,283	59,419,745	63,089,063	60,523,623	60,523,623	58,663,623	58,082,795	58,663,623
Alternative Education	142,311	149,853	142,164	155,432	141,302	141,302	155,000	160,000	165,000
State Categorical	476,066	483,904	1,256,095	1,357,745	1,342,327	1,342,327	1,250,000	1,300,000	1,350,000
Other State Sources Of Revenue	41,005	7,944	81,283	44,054	44,055	44,055	44,055	40,000	45,000
State Vocational Programs	85,032	78,510	93,239	112,300	99,988	99,988	100,000	105,000	110,000
Total State Revenue	59,259,048	59,420,505	69,286,869	71,378,322	68,771,023	68,771,023	67,212,678	66,787,795	67,533,623
Federal Revenue									
Grants in Aid From Federal Gov	344,177	344,338	337,625	374,827	368,858	368,858	370,000	375,000	380,000
Title I	3,221,613	3,302,159	4,216,368	4,911,018	5,372,763	5,372,763	5,375,000	5,400,000	5,500,000
Individuals with Disabilities	2,852,772	2,781,081	3,130,595	2,927,062	2,920,222	2,920,222	3,000,000	3,100,000	3,200,000
No Child Left Behind	64,300	80,125	144,049	124,466	401,669	401,669	355,000	375,000	390,000
Federal Grants Through Other	37,271	62,567	69,081	82,486	57,810	57,810	60,000	61,000	62,000
Other Federal Sources Through Stat	1,257,870	1,442,329	1,340,524	990,271	1,010,698	1,010,698	3,690,271	4,250,000	4,250,000
Federal Vocational Education	63,744	102,712	110,403	82,648	2,957,125	2,957,125	100,000	110,000	115,000
Total Federal Revenue	7,841,747	8,115,311	9,348,645	9,492,778	13,089,145	13,089,145	12,950,271	13,671,000	13,897,000
Total Revenue	106,437,356	107,825,592	120,969,259	123,539,562	125,273,781	125,273,781	122,018,925	122,059,857	123,442,460

BUILDING FUND REVENUE SCHEDULE

2020-2021 Building Fund Revenue

Source Sub Source	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Local Revenue									
Ad Valorem Tax	4,060,001	4,212,052	4,312,147	4,484,480	4,484,481	4,484,481	4,669,942	4,712,191	4,749,973
Interest	51,526	132,899	346,746	135,379	113,833	113,833	5,000	6,000	7,000
Rentals, Disposals and Commission	0	122,540	0	0	0	0	0	0	0
Donations	0	2,000,000	7,975,000	0	0	0	0	0	0
Other Local Sources	<u>183,859</u>	<u>258,212</u>	<u>540,140</u>	<u>652,360</u>	<u>630,000</u>	<u>630,000</u>	<u>650,000</u>	<u>660,000</u>	<u>675,000</u>
Total Local Revenue	<u>4,295,386</u>	<u>6,725,703</u>	<u>13,174,033</u>	<u>5,272,219</u>	<u>5,228,314</u>	<u>5,228,314</u>	<u>5,324,942</u>	<u>5,378,191</u>	<u>5,431,973</u>
Total Revenue	<u>4,295,386</u>	<u>6,725,703</u>	<u>13,174,033</u>	<u>5,272,219</u>	<u>5,228,314</u>	<u>5,228,314</u>	<u>5,324,942</u>	<u>5,378,191</u>	<u>5,431,973</u>



CHILD NUTRITION FUND REVENUE SCHEDULE

2020-2021 Child Nutrition Fund Revenue

Source Sub Source	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Local Revenue									
Interest	29,130	51,690	73,245	61,195	75,000	75,000	20,000	21,000	22,000
Other Local Sources	226,475	227,848	207,775	158,553	252,655	252,655	100,000	105,000	110,000
Meals	<u>1,864,728</u>	<u>1,999,913</u>	<u>2,214,703</u>	<u>1,646,669</u>	<u>2,283,000</u>	<u>2,283,000</u>	<u>2,630,000</u>	<u>2,651,500</u>	<u>2,673,275</u>
Total Local Revenue	2,120,333	2,279,451	2,495,723	1,866,417	2,610,655	2,610,655	2,750,000	2,777,500	2,805,275
State Revenue									
State Matching	<u>76,212</u>	<u>73,393</u>	<u>68,357</u>	<u>80,358</u>	<u>80,358</u>	<u>80,358</u>	<u>88,394</u>	<u>97,233</u>	<u>106,957</u>
Total State Revenue	76,212	73,393	68,357	80,358	80,358	80,358	88,394	97,233	106,957
Federal Revenue									
Student Meals	<u>6,865,134</u>	<u>6,838,170</u>	<u>7,252,920</u>	<u>7,526,297</u>	<u>7,912,012</u>	<u>7,912,012</u>	<u>8,278,927</u>	<u>8,692,873</u>	<u>9,127,517</u>
Total Federal Revenue	6,865,134	6,838,170	7,252,920	7,526,297	7,912,012	7,912,012	8,278,927	8,692,873	9,127,517
Total Revenue	<u>9,061,679</u>	<u>9,191,014</u>	<u>9,817,000</u>	<u>9,473,072</u>	<u>10,603,025</u>	<u>10,603,025</u>	<u>11,117,321</u>	<u>11,567,606</u>	<u>12,039,749</u>

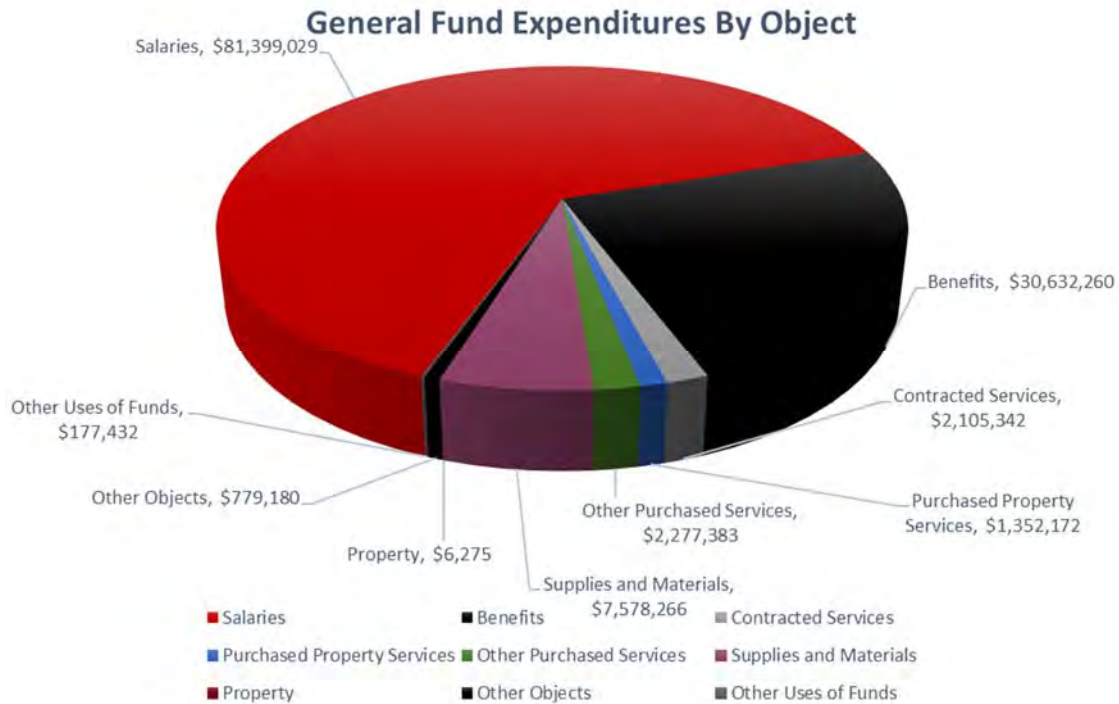


GENERAL FUND SUMMARY

REVENUES	ACTUAL 2016-2017	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Ad Valorem - Current	28,420,007	29,484,364	30,185,029	31,391,363	31,391,363	31,391,363	31,391,363	31,077,449	31,388,224
Local Sources - Other	6,860,733	6,696,975	7,900,412	6,733,863	7,479,014	7,479,014	6,068,613	6,068,613	6,068,613
Intermediate	4,055,821	4,108,437	4,248,304	4,543,236	4,543,236	4,543,236	4,396,000	4,455,000	4,555,000
State Sources	59,259,048	59,420,505	69,286,869	71,378,322	68,771,023	68,771,023	67,212,678	66,787,795	67,533,623
Federal Sources	7,841,747	8,115,311	9,348,645	9,492,778	13,089,145	13,089,145	12,950,271	13,671,000	13,897,000
TOTAL REVENUES	106,437,356	107,825,592	120,969,259	123,539,562	125,273,781	125,273,781	122,018,925	122,059,857	123,442,460
EXPENDITURES									
Instruction	57,971,281	59,007,115	67,633,827	70,255,223	69,115,589	69,115,589	68,031,057	68,517,144	69,250,568
Student Support	7,058,168	7,373,738	9,317,736	9,749,731	10,073,999	10,073,999	9,199,938	9,265,672	9,364,854
Instructional Support	4,811,714	4,116,381	5,232,565	5,112,927	6,392,909	6,392,909	5,758,947	5,800,095	5,862,181
General Administration	2,312,599	2,655,005	2,442,970	2,568,552	2,972,254	2,972,254	2,880,343	2,900,923	2,931,976
School Administration	8,371,441	8,623,348	9,120,025	9,302,859	9,091,056	9,091,056	8,736,499	8,798,922	8,893,108
Business/Technology	8,317,543	7,347,032	7,883,100	8,158,132	8,481,233	8,481,233	8,297,488	8,356,774	8,446,227
Operations & Maintenance	10,643,284	9,170,551	9,216,510	8,693,970	9,313,583	9,313,583	9,021,324	9,085,782	9,183,039
Student Transportation	3,975,813	4,322,681	4,607,423	4,757,427	4,884,124	4,884,124	4,681,871	4,715,323	4,765,797
Non-Instructional Services	4,152,754	4,206,897	4,320,290	4,870,920	5,803,331	5,803,331	5,622,561	5,662,734	5,723,350
Other Outlays	59,390	74,421	104,635	234,380	179,262	179,262	171,517	172,742	174,592
TOTAL EXPENDITURES	107,673,990	106,897,169	119,879,080	123,704,121	126,307,340	126,307,340	122,401,545	123,276,111	124,595,692
EXCESS REV (EXP)	(1,236,634)	928,423	1,090,179	(164,559)	(1,033,559)	(1,033,559)	(382,620)	(1,216,254)	(1,153,232)
FUND BALANCE 07/1	16,129,071	14,892,437	15,820,859	16,911,038	16,746,479	16,746,479	15,712,920	15,330,300	14,114,046
FUND BALANCE 06/30	14,892,437	15,820,861	16,911,038	16,746,479	15,712,920	15,712,920	15,330,300	14,114,046	12,960,814



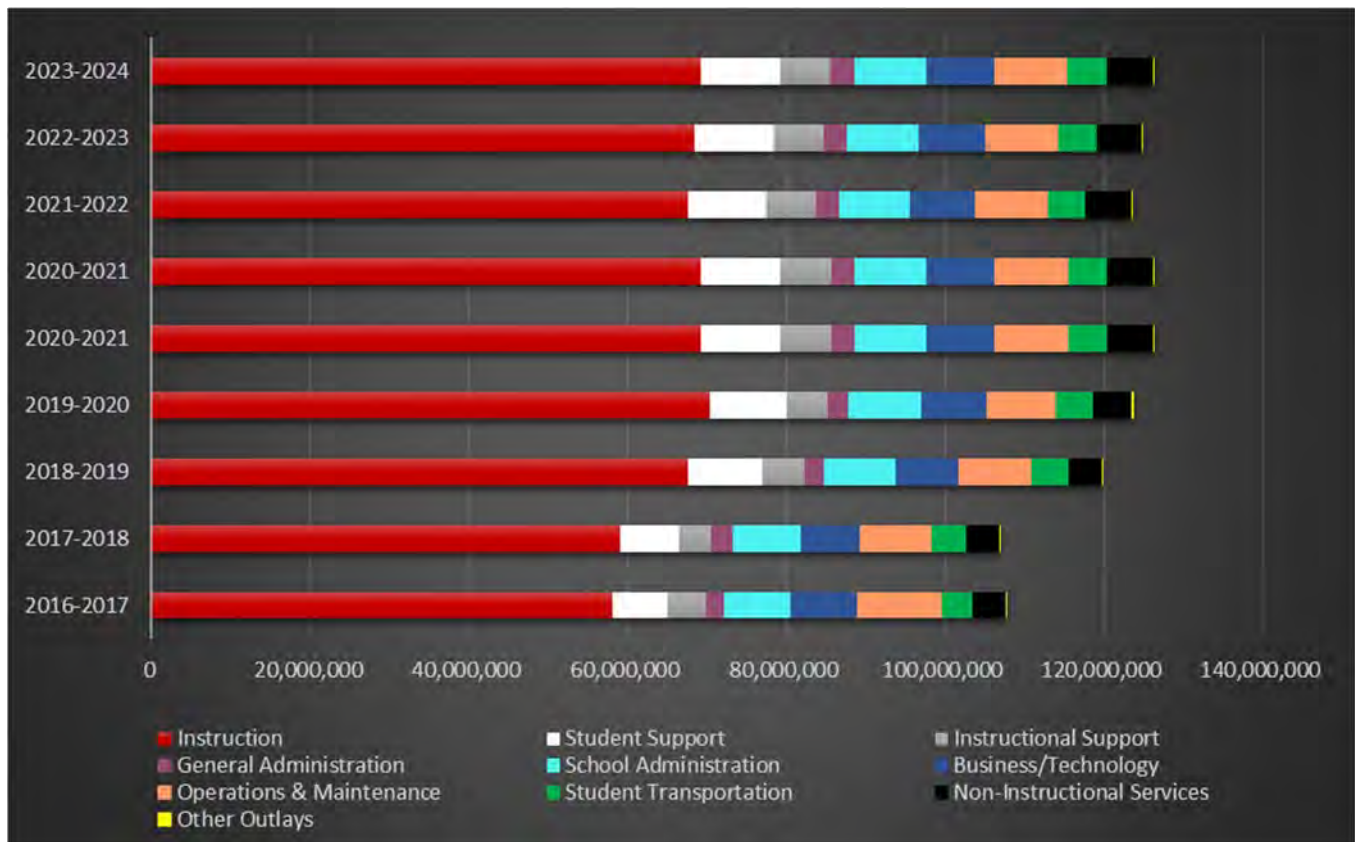
CURRENT YEAR GENERAL FUND EXPENDITURES



Object	Approved 2020-2021	% of Budget
Salaries	\$ 81,399,029	64.45%
Benefits	\$ 30,632,260	24.25%
Contracted Services	\$ 2,105,342	1.67%
Purchased Property Services	\$ 1,352,172	1.07%
Other Purchased Services	\$ 2,277,383	1.80%
Supplies and Materials	\$ 7,578,266	6.00%
Property	\$ 6,275	0.00%
Other Objects	\$ 779,180	0.62%
Other Uses of Funds	\$ 177,432	0.14%
Total Expenditure Budget	\$ 126,307,339	

GENERAL FUND SCHEDULE OF EXPENDITURES BY FUNCTION

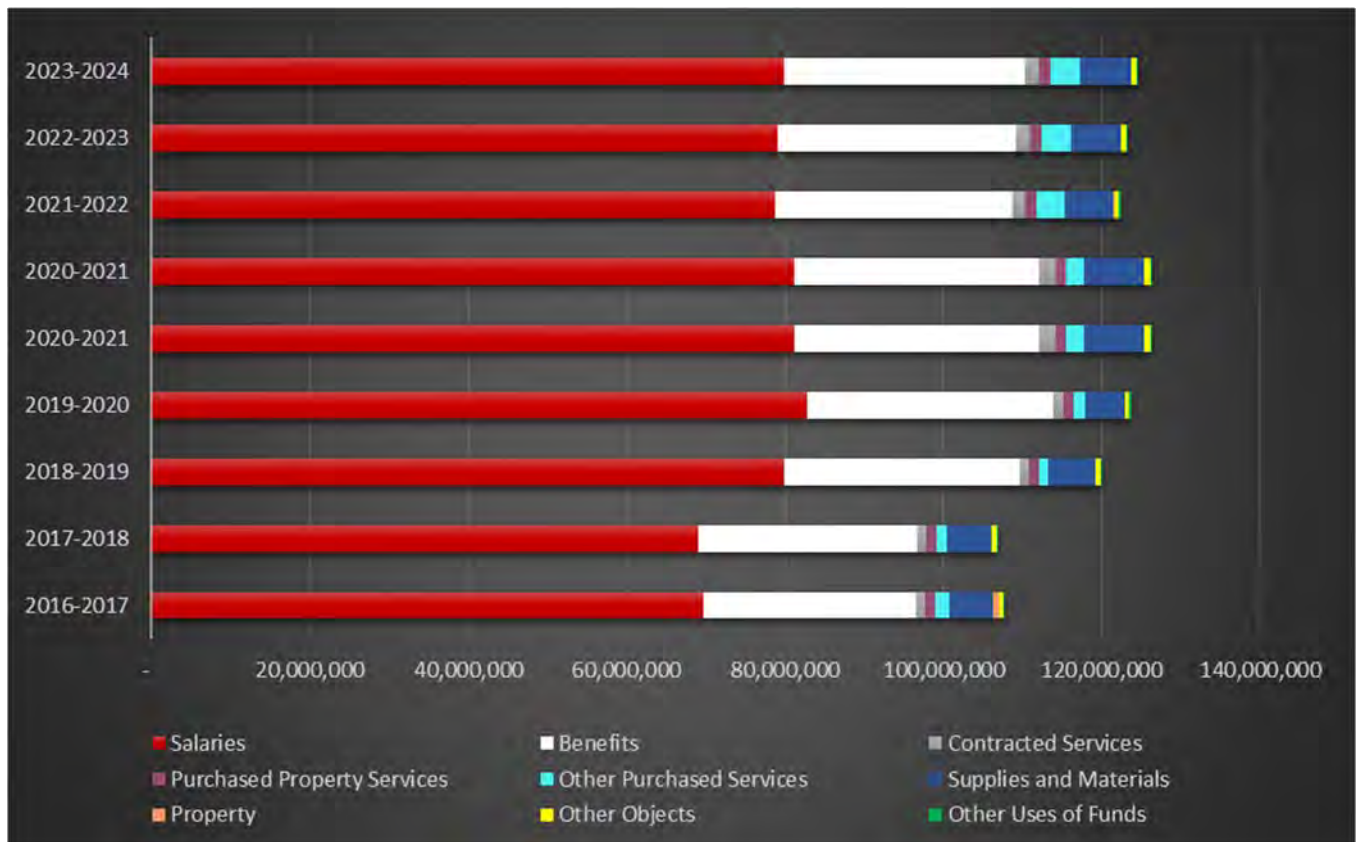
General Fund By Function									
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Instruction	57,971,281	59,007,115	67,633,827	70,255,223	69,418,436	69,418,436	68,031,057	68,517,144	69,250,568
Student Support	7,058,168	7,373,738	9,317,736	9,749,731	10,069,225	10,069,225	9,199,938	9,265,672	9,364,854
Instructional Support	4,811,714	4,116,381	5,232,565	5,112,927	6,245,396	6,245,396	5,758,947	5,800,095	5,862,181
General Administration	2,312,599	2,655,005	2,442,970	2,568,552	2,810,073	2,810,073	2,880,343	2,900,923	2,931,976
School Administration	8,371,441	8,623,348	9,120,025	9,302,859	9,101,735	9,101,735	8,736,499	8,798,922	8,893,108
Business/Technology	8,317,543	7,347,032	7,883,100	8,158,132	8,492,358	8,492,358	8,297,488	8,356,774	8,446,227
Operations & Maintenance	10,643,284	9,170,551	9,216,510	8,693,970	9,317,236	9,317,236	9,021,324	9,085,782	9,183,039
Student Transportation	3,975,813	4,322,681	4,607,423	4,757,427	4,880,169	4,880,169	4,681,871	4,715,323	4,765,797
Non-Instructional Services	4,152,754	4,206,897	4,327,206	4,870,920	5,793,451	5,793,451	5,622,561	5,662,734	5,723,350
Other Outlays	59,390	74,421	97,718	234,380	179,262	179,262	171,517	172,742	174,592
Total Expenditure by Function	\$107,673,987	\$106,897,169	\$119,879,080	\$123,704,121	\$126,307,339	\$126,307,339	\$122,401,545	\$123,276,111	\$124,595,692



GENERAL FUND SCHEDULE OF EXPENDITURES BY OBJECT

General Fund By Object

	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Salaries	69,681,116	69,106,246	79,819,036	82,749,488	81,202,298	81,202,298	78,747,429	79,141,167	79,932,578
Benefits	26,799,335	27,613,944	29,873,823	31,078,985	30,829,841	30,829,841	29,923,744	30,073,363	30,374,096
Contracted Services	1,183,840	1,112,110	1,036,173	1,263,286	2,105,342	2,105,342	1,701,543	1,734,435	1,744,435
Purchased Property Services	1,275,091	1,356,808	1,378,295	1,321,572	1,352,172	1,352,172	1,397,000	1,449,000	1,477,000
Other Purchased Services	1,899,494	1,226,175	1,106,786	1,517,696	2,277,383	2,277,383	3,578,557	3,685,780	3,742,780
Supplies and Materials	5,469,329	5,701,074	5,926,587	4,944,692	7,577,416	7,577,416	6,168,076	6,298,893	6,423,893
Property	726,101	56,288	18,265	-	6,275	6,275	72,300	73,168	73,168
Other Objects	580,294	650,102	622,397	618,862	779,180	779,180	612,000	617,000	622,000
Other Uses of Funds	59,390	74,421	97,718	209,539	177,432	177,432	200,896	203,307	205,740
Total Expenditure By Object	\$ 107,673,990	\$ 106,897,168	\$ 119,879,080	\$ 123,704,120	\$ 126,307,339	\$ 126,307,339	\$ 122,401,545	\$ 123,276,113	\$ 124,595,690



GENERAL FUND BY CATEGORY

General Fund Schedule of Expenditures									
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Instruction									
Salaries	40,741,687	41,016,862	48,145,471	50,241,292	47,658,621	47,658,621	46,228,862	46,460,007	46,924,607
Benefits	15,308,228	15,831,637	17,192,870	18,000,038	17,351,667	17,351,667	16,831,117	16,915,273	17,084,425
Contracted Services	161,516	165,349	206,420	169,181	755,677	755,677	589,857	596,935	596,935
Purchased Property Service	86,470	78,301	79,653	67,413	83,965	83,965	70,000	70,000	70,000
Other Purchased Services	175,488	106,115	84,034	416,214	268,340	268,340	200,000	250,000	300,000
Supplies and Materials	1,240,549	1,717,446	1,875,465	1,296,709	2,873,326	2,873,326	2,000,000	2,100,000	2,200,000
Property	159,288	0	0	0	0	0	0	0	0
Other objects	98,055	91,405	49,914	64,377	91,160	91,160	65,000	70,000	75,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	<u>\$ 57,971,281</u>	<u>\$ 59,007,115</u>	<u>\$ 67,633,827</u>	<u>\$ 70,255,224</u>	<u>\$ 69,082,756</u>	<u>\$ 69,082,756</u>	<u>\$ 65,984,836</u>	<u>\$ 66,462,214</u>	<u>\$ 67,250,967</u>
Student Support									
Salaries	5,001,911	5,231,604	6,850,957	7,210,885	7,494,796	7,494,796	7,269,952	7,306,302	7,379,365
Benefits	1,839,430	1,964,043	2,337,068	2,423,438	2,414,801	2,414,801	2,342,357	2,354,069	2,377,610
Contracted Services	87,780	76,877	30,428	49,998	43,706	43,706	50,000	50,000	50,000
Purchased Property Service	2,881	2,186	1,911	2,726	400	400	2,000	2,000	2,000
Other Purchased Services	14,815	26,375	10,370	12,373	24,510	24,510	15,000	15,000	15,000
Supplies and Materials	96,586	45,013	67,446	42,755	84,553	84,553	75,000	80,000	85,000
Property	4,691	0	0	0	0	0	0	0	0
Other objects	10,074	27,639	19,556	7,556	11,233	11,233	15,000	15,000	15,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	<u>\$ 7,058,168</u>	<u>\$ 7,373,737</u>	<u>\$ 9,317,736</u>	<u>\$ 9,749,731</u>	<u>\$ 10,073,999</u>	<u>\$ 10,073,999</u>	<u>\$ 9,769,309</u>	<u>\$ 9,822,371</u>	<u>\$ 9,923,974</u>
Instructional Support									
Salaries	2,927,830	2,889,352	3,691,461	3,484,458	4,490,960	4,490,960	4,356,231	4,378,012	4,421,792
Benefits	955,541	953,379	1,151,852	1,088,228	1,330,325	1,330,325	1,290,415	1,296,867	1,309,836
Contracted Services	100,837	40,640	186,183	338,139	226,909	226,909	200,000	200,000	200,000
Purchased Property Service	10,154	7,317	8,605	11,700	15,100	15,100	10,000	12,000	15,000
Other Purchased Services	34,082	46,121	40,318	31,289	136,705	136,705	35,000	40,000	42,000
Supplies and Materials	413,304	96,613	108,642	95,608	141,496	141,496	100,000	110,000	115,000
Property	328,407	0	0	0	6,275	6,275	0	0	0
Other objects	41,560	82,959	45,504	63,505	72,340	72,340	65,000	65,000	65,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	<u>\$ 4,811,715</u>	<u>\$ 4,116,381</u>	<u>\$ 5,232,565</u>	<u>\$ 5,112,927</u>	<u>\$ 6,420,110</u>	<u>\$ 6,420,110</u>	<u>\$ 6,056,646</u>	<u>\$ 6,101,879</u>	<u>\$ 6,168,628</u>
General Administration									
Salaries	1,198,791	1,403,039	1,471,112	1,480,885	1,490,890	1,490,890	1,446,163	1,453,394	1,467,928
Benefits	365,900	506,792	444,348	458,540	467,116	467,116	453,102	455,368	459,922
Contracted Services	329,114	314,844	205,939	268,781	408,034	408,034	275,000	300,000	305,000
Purchased Property Service	7,663	8,885	4,035	2,241	16,314	16,314	10,000	10,000	10,000
Other Purchased Services	347,055	344,132	270,463	312,482	498,800	498,800	325,000	350,000	355,000
Supplies and Materials	20,925	33,772	8,953	4,555	45,575	45,575	25,000	30,000	35,000
Property	4,731	0	0	0	0	0	0	0	0
Other objects	38,419	43,541	38,122	41,068	45,525	45,525	45,000	45,000	45,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	<u>\$ 2,312,598</u>	<u>\$ 2,655,005</u>	<u>\$ 2,442,972</u>	<u>\$ 2,568,552</u>	<u>\$ 2,972,254</u>	<u>\$ 2,972,254</u>	<u>\$ 2,579,266</u>	<u>\$ 2,643,762</u>	<u>\$ 2,677,850</u>
School Administration									
Salaries	6,070,798	6,211,743	6,562,254	6,764,830	6,676,072	6,676,072	6,475,790	6,508,169	6,573,250
Benefits	2,202,248	2,328,815	2,429,920	2,459,489	2,278,472	2,278,472	2,210,118	2,221,168	2,243,380
Contracted Services	0	0	2,733	720	5,000	5,000	2,500	2,500	2,500
Purchased Property Service	1,066	1,550	60,166	13,147	2,705	2,705	10,000	10,000	10,000
Other Purchased Services	23,126	20,813	24,853	21,229	58,288	58,288	2,268,557	2,295,780	2,295,780
Supplies and Materials	73,503	60,368	38,918	43,272	69,298	69,298	68,076	68,893	68,893
Property	592	0	0	0	0	0	72,300	73,168	73,168
Other objects	109	60	1,180	173	670	670	0	0	0
Other Uses of Funds	0	0	0	0	0	0	614	622	622
	<u>\$ 8,371,442</u>	<u>\$ 8,623,349</u>	<u>\$ 9,120,024</u>	<u>\$ 9,302,860</u>	<u>\$ 9,090,505</u>	<u>\$ 9,090,505</u>	<u>\$ 11,107,955</u>	<u>\$ 11,180,300</u>	<u>\$ 11,267,593</u>

GENERAL FUND BY CATEGORY

General Fund									
Schedule of Expenditures									
	Actual	Actual	Actual	Actual	Proposed	Approved	Forecast	Forecast	Forecast
	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2020-2021	2021-2022	2022-2023	2023-2024
Business Services									
Salaries	5,389,608	4,633,467	4,929,420	5,263,031	5,044,011	5,044,011	4,892,691	4,917,154	4,966,326
Benefits	1,917,991	1,676,114	1,749,211	1,866,103	1,817,309	1,817,309	1,762,790	1,771,604	1,789,320
Contracted Services	223,441	266,649	255,827	197,307	279,186	279,186	279,186	280,000	285,000
Purchased Property Service	40,604	27,453	40,153	26,810	46,660	46,660	40,000	40,000	40,000
Other Purchased Services	176,556	189,463	266,851	250,710	542,970	542,970	250,000	250,000	250,000
Supplies and Materials	194,694	167,042	193,632	162,826	234,750	234,750	200,000	200,000	200,000
Property	150	0	0	0	0	0	0	0	0
Other objects	374,499	386,844	448,005	391,345	527,471	527,471	400,000	400,000	400,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	\$ 8,317,543	\$ 7,347,032	\$ 7,883,099	\$ 8,158,132	\$ 8,492,357	\$ 8,492,357	\$ 7,824,667	\$ 7,858,758	\$ 7,930,646
Operations & Maintenance									
Salaries	3,650,235	2,923,447	3,011,776	2,744,251	2,529,448	2,529,448	2,453,565	2,465,833	2,490,491
Benefits	1,910,019	1,800,269	1,840,817	1,816,612	1,819,009	1,819,009	1,764,438	1,773,261	1,790,993
Contracted Services	31,071	23,634	27,800	28,152	69,426	69,426	50,000	50,000	50,000
Purchased Property Service	1,092,861	1,199,839	1,121,802	1,142,318	1,111,749	1,111,749	1,200,000	1,250,000	1,275,000
Other Purchased Services	845,321	213,022	195,072	249,085	439,183	439,183	200,000	200,000	200,000
Supplies and Materials	2,903,248	2,951,247	3,003,949	2,702,281	3,341,667	3,341,667	3,000,000	3,000,000	3,000,000
Property	206,578	56,288	12,500	0	0	0	0	0	0
Other objects	3,950	2,805	2,794	11,273	3,100	3,100	3,000	3,000	3,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	\$ 10,643,283	\$ 9,170,551	\$ 9,216,510	\$ 8,693,972	\$ 9,313,582	\$ 9,313,582	\$ 8,671,003	\$ 8,742,093	\$ 8,809,484
Student Transportation									
Salaries	2,347,152	2,486,488	2,707,193	2,834,806	2,723,273	2,723,273	2,641,575	2,654,783	2,681,330
Benefits	838,947	975,343	1,070,368	1,134,796	1,215,474	1,215,474	1,179,010	1,184,905	1,196,754
Contracted Services	1,099	6,718	4,191	5,198	2,500	2,500	5,000	5,000	5,000
Purchased Property Service	32,288	28,674	59,728	52,743	45,700	45,700	50,000	50,000	50,000
Other Purchased Services	273,950	271,584	204,206	216,147	272,790	272,790	275,000	275,000	275,000
Supplies and Materials	471,977	545,153	552,255	505,894	617,387	617,387	600,000	610,000	620,000
Property	1,911	0	0	0	0	0	0	0	0
Other objects	8,491	8,722	9,483	7,843	7,000	7,000	9,000	9,000	9,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	\$ 3,975,815	\$ 4,322,682	\$ 4,607,424	\$ 4,757,427	\$ 4,884,124	\$ 4,884,124	\$ 4,759,584	\$ 4,788,687	\$ 4,837,084
Non-Instructional Services									
Salaries	2,353,104	2,310,244	2,449,392	2,725,051	3,074,846	3,074,846	2,982,601	2,997,514	3,027,489
Benefits	1,461,032	1,577,552	1,657,369	1,831,742	2,155,047	2,155,047	2,090,396	2,100,848	2,121,856
Contracted Services	248,981	217,398	109,853	205,812	314,904	314,904	250,000	250,000	250,000
Purchased Property Service	1,103	2,604	2,125	2,475	29,580	29,580	5,000	5,000	5,000
Other Purchased Services	9,101	8,551	10,617	8,167	35,798	35,798	10,000	10,000	10,000
Supplies and Materials	54,544	84,420	77,327	90,792	167,535	167,535	100,000	100,000	100,000
Property	19,752	0	5,765	0	0	0	0	0	0
Other objects	5,137	6,128	7,841	6,882	20,680	20,680	10,000	10,000	10,000
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	\$ 4,152,754	\$ 4,206,897	\$ 4,320,289	\$ 4,870,921	\$ 5,798,390	\$ 5,798,390	\$ 5,447,997	\$ 5,473,362	\$ 5,524,346
Other Outlays									
Salaries	0	0	0	0	0	0	0	0	0
Benefits	0	0	0	0	0	0	0	0	0
Contracted Services	0	0	6,800	0	0	0	0	0	0
Purchased Property Service	0	0	117	0	0	0	0	0	0
Other Purchased Services	0	0	0	0	0	0	0	0	0
Supplies and Materials	0	0	0	0	1,829	1,829	0	0	0
Property	0	0	0	0	0	0	0	0	0
Other objects	0	0	0	24,841	0	0	0	0	0
Other Uses of Funds	59,390	74,421	97,718	209,539	177,432	177,432	200,282	202,685	205,118
	\$ 59,390	\$ 74,421	\$ 104,635	\$ 234,380	\$ 179,261	\$ 179,261	200,282	202,685	205,118
Total General Fund Budget	107,673,989	106,897,170	119,879,081	123,704,126	126,307,338	126,307,338	122,401,545	123,276,112	124,595,691

BUILDING FUND SUMMARY

	ACTUAL 2016-2017	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
REVENUES									
Ad Valorem	4,000,488	4,212,052	4,312,147	4,484,480	4,412,484	4,412,484	4,669,942	4,712,191	4,749,973
Local Sources - Other	179,414	2,380,752	8,515,140	652,360	235,830	235,830	650,000	660,000	675,000
Interest - Interfund	115,484	132,899	346,746	135,379	580,000	580,000	5,000	6,000	7,000
TOTAL REVENUES	4,295,386	6,725,703	13,174,033	5,272,219	5,228,314	5,228,314	5,324,942	5,378,191	5,431,973
EXPENDITURES									
Operations & Maintenance	4,202,818	6,131,223	6,295,070	8,174,778	8,295,913	8,295,913	9,594,787	10,024,526	10,475,753
Facilities Acq & Construction	39,287	344,186	2,516,774	5,124,671	1,000,000	1,000,000	0	0	0
TOTAL EXPENDITURES	4,242,104	6,475,409	8,811,844	13,299,449	9,295,913	9,295,913	9,594,787	10,024,526	10,475,753
EXCESS REV (EXP)	53,282	250,294	4,362,189	(8,027,230)	(4,067,599)	(4,067,599)	(4,269,845)	(4,646,335)	(5,043,780)
FUND BALANCE 07/1	10,863,935	10,917,217	11,167,511	15,529,700	7,502,470	7,502,470	7,502,470	7,502,470	7,502,470
FUND BALANCE 06/30	10,917,217	11,167,511	15,529,700	7,502,470	3,434,871	3,434,871	3,232,625	2,856,135	2,458,690



BUILDING FUND

2020-2021 Building Fund Expenditure Schedule

	Building Fund By Object								
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Salaries	3,206,793	3,860,103	4,260,655	4,962,255	3,468,466	3,468,466	3,579,981	3,740,324	3,908,685
Benefits	707,941	826,801	871,854	1,039,545	726,611	726,611	749,972	783,562	818,832
Supplies and Materials	318,370	1,788,504	3,679,335	6,936,531	4,848,426	4,848,426	5,004,308	5,228,445	5,463,790
Other Objects	9,000	0	0	361,117	252,410	252,410	260,525	272,194	284,446
Total Expenditure by Object	4,242,104	6,475,408	8,811,844	13,299,448	9,295,913	9,295,913	9,594,787	10,024,526	10,475,753

	Building Fund By Function								
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Proposed 2019-2020	Proposed 2019-2020	Approved 2019-2020	Forecast 2021-2022	Forecast 2022-2023	Forecast 2022-2023
Operations & Maintenance	4,202,818	6,131,223	6,295,070	8,174,778	8,295,913	8,295,913	9,594,787	10,024,526	10,475,753
Facilities Acq & Construction	39,287	344,186	2,516,774	5,124,671	1,000,000	1,000,000	0	0	0
Total Expenditure by Function	4,242,104	6,475,408	8,811,844	13,299,448	9,295,913	9,295,913	9,594,787	10,024,526	10,475,753

2020-2021 Building Fund Revenue Summary

Local Revenue

AdValorem	4,412,484
Interest	580,000
Other Local Sources	235,830
Local Revenue	5,228,314

Total Revenue **5,228,314**

CHILD NUTRITION SUMMARY

	ACTUAL 2016-2017	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
REVENUES									
Local Sources	2,120,333	2,279,451	2,495,723	1,866,418	2,610,655	2,610,655	2,750,000	2,777,500	2,805,275
State Sources	76,212	73,393	68,357	80,358	80,358	80,358	88,394	97,233	106,957
Federal Sources	6,865,134	6,838,170	7,252,920	7,526,297	7,912,012	7,912,012	8,278,927	8,692,873	9,127,517
TOTAL REVENUES	9,061,678	9,191,015	9,816,999	9,473,073	10,603,025	10,603,025	11,117,321	11,567,606	12,039,749
EXPENDITURES									
Food Preparation	3,441,944	3,592,407	3,917,720	4,327,688	4,092,161	4,092,161	4,370,965	4,414,675	4,458,821
Other Direct Services	813,486	1,027,217	964,897	1,014,951	1,715,459	1,715,459	1,025,100	1,035,351	1,045,705
Food Procurement/A La Carte	3,413,286	3,388,160	3,832,105	3,464,372	6,531,241	6,531,241	6,857,803	7,200,693	7,560,728
Other CN Programs	1,319,811	936,101	928,868	1,264,529	1,087,593	1,087,593	0	0	0
TOTAL EXPENDITURES	8,988,527	8,943,885	9,643,590	10,071,540	13,426,454	13,426,454	12,253,868	12,650,719	13,065,254
EXCESS REV (EXP)	73,151	247,130	173,409	(598,467)	(2,823,429)	(2,823,429)	(1,136,547)	(1,083,113)	(1,025,505)
FUND BALANCE 07/1	5,769,388	5,842,539	6,089,670	6,263,079	5,664,612	5,664,612	2,841,183	1,704,636	1,704,636
FUND BALANCE 06/30	5,842,539	6,089,669	6,263,079	5,664,612	2,841,183	2,841,183	1,704,636	621,523	679,131



CHILD NUTRITION FUND

2020-2021 Child Nutrition Fund Revenue Summary

Local Revenue

Interest	75,000
Other Local Sources	252,655
Student Meals	2,283,000

Local Revenue	2,610,655
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State Revenue

State Matching	80,358
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State Revenue	80,358
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Federal Revenue

Fresh Fruit and Vegetable	7,912,012
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Federal Revenue	7,912,012
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Total Revenue	<u>10,603,025</u>
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2020-2021 Child Nutrition Fund Expenditure Schedule

Child Nutrition By Object

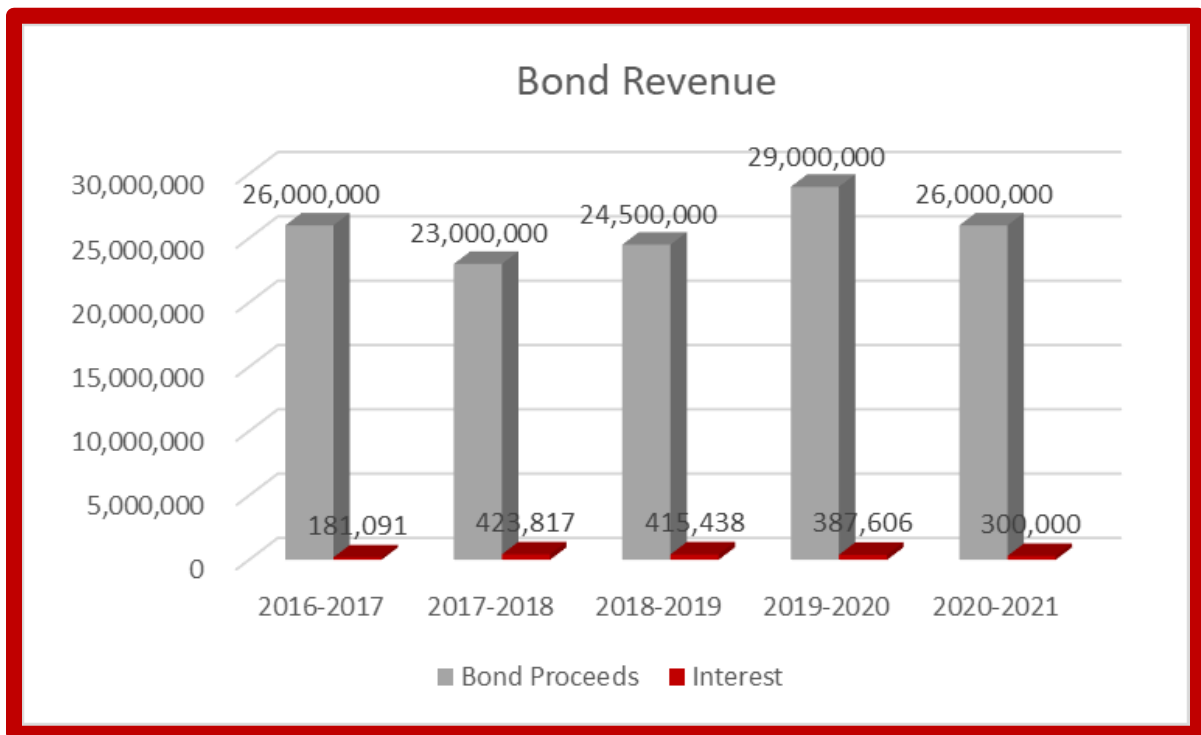
	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Salaries	3,569,189	3,701,458	4,028,154	4,302,438	4,742,418	4,742,418	4,328,243	4,468,417	4,614,837
Benefits	813,973	855,612	916,404	994,452	845,863	845,863	771,991	796,992	823,108
Contracted Services	31,489	13,525	3,782	41,216	15,000	15,000	13,690	14,133	14,596
Purchased Property Services	895,462	654,977	527,739	951,583	885,500	885,500	808,166	834,339	861,678
Other Purchased Services	11,989	34,402	31,539	33,601	65,500	65,500	59,780	61,716	63,738
Supplies and Materials	3,589,829	3,527,467	4,111,765	3,680,924	6,407,673	6,407,673	5,848,065	6,037,460	6,235,293
Property	51,746	150,163	10,933	52,805	450,000	450,000	410,700	424,001	437,894
Other Objects	24,851	6,282	13,275	14,520	14,500	14,500	13,234	13,662	14,110
Total Expenditure by Object	8,988,527	8,943,885	9,643,590	10,071,540	13,426,454	13,426,454	12,253,868	12,650,719	13,065,254

Child Nutrition By Function

	Actual 2016-2017	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Proposed 2020-2021	Approved 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
Food Preparations	3,441,944	3,592,407	3,917,720	4,327,688	4,092,872	4,092,872	4,370,965	4,414,675	4,458,821
Other Direct Services	813,486	1,027,217	964,897	1,014,951	1,711,414	1,711,414	1,025,100	1,035,351	1,045,705
Food Procurement/A La Carte	3,413,286	3,388,160	3,832,105	3,464,372	6,534,575	6,534,575	6,857,803	7,200,693	7,560,728
Other CN Programs	1,319,811	936,101	928,868	1,257,154	1,087,593	1,087,593	0	0	0
Total Expenditure By Function	8,988,527	8,943,885	9,643,590	10,064,165	13,426,454	13,426,454	12,253,868	12,650,719	13,065,254

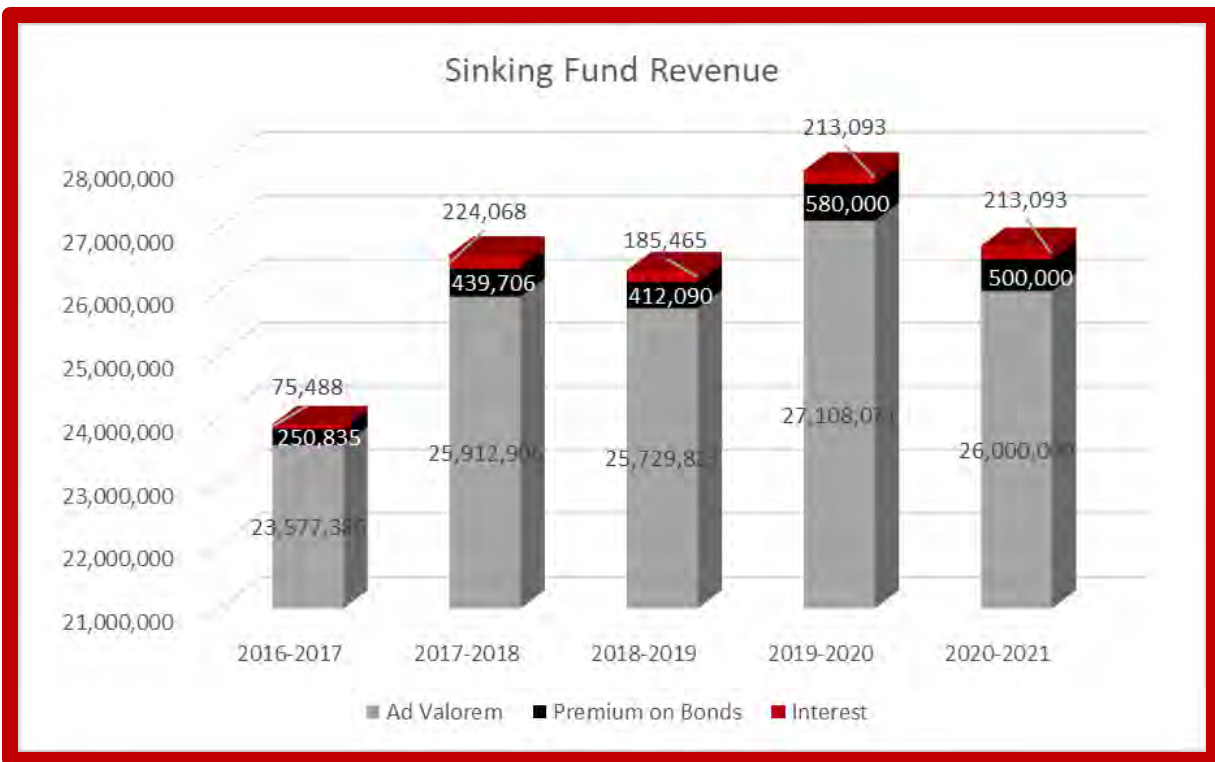
BOND FUND SUMMARY

	ACTUAL 2016-2017	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Proposed 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
REVENUES								
Bond Proceeds	26,000,000	23,000,000	24,500,000	29,000,000	26,000,000	26,000,000	26,000,000	26,000,000
Interest	181,091	423,817	415,438	387,606	300,000	250,000	300,000	300,000
TOTAL REVENUES	26,181,091	23,423,817	24,915,438	29,387,606	26,300,000	26,250,000	26,300,000	26,300,000
EXPENDITURES								
Instruction	3,246,597	4,037,641	5,047,027	3,951,045	6,422,338	4,184,590	4,029,605	4,029,605
Student Support	52,527	53,903	145,557	17,371	28,236	18,397	17,716	17,716
Instructional Support	441,141	536,303	788,817	452,725	735,895	479,486	461,727	461,727
General Administration	97,423	31,759	99,258	19,505	31,705	20,658	19,893	19,893
School Administration	128,853	84,974	37,455	73,465	119,415	77,807	74,926	74,926
Business/Technology	787,433	1,469,555	1,487,820	1,599,406	2,599,800	1,693,946	1,631,208	1,631,208
Operations & Maintenance	884,747	768,185	1,586,639	1,227,268	1,994,897	1,299,811	1,251,670	1,251,670
Student Transportation	1,470,092	34,450	2,686,070	67,611	109,900	71,607	68,955	68,955
Appliances, Furniture, Fixtures	6,506	22,718	81,407	16,525	26,861	17,502	16,853	16,853
Buildings & Construction	19,671,973	16,001,970	12,101,404	17,623,123	28,646,009	18,664,821	17,973,532	17,973,532
Other	33,136	125,626	397,280	445,066	723,445	471,374	453,915	453,915
TOTAL EXPENDITURES	26,820,428	23,167,084	24,458,734	25,493,109	41,438,502	27,000,000	26,000,000	26,000,000
EXCESS REV (EXP)	(639,337)	256,733	456,704	3,894,497	(15,138,502)	(750,000)	300,000	300,000
FUND BALANCE 07/1	37,909,876	37,270,539	37,527,272	37,983,976	41,878,472	26,739,970	25,989,970	26,289,970
FUND BALANCE 06/30	37,270,539	37,527,272	37,983,976	41,878,472	26,739,970	25,989,970	26,289,970	26,589,970

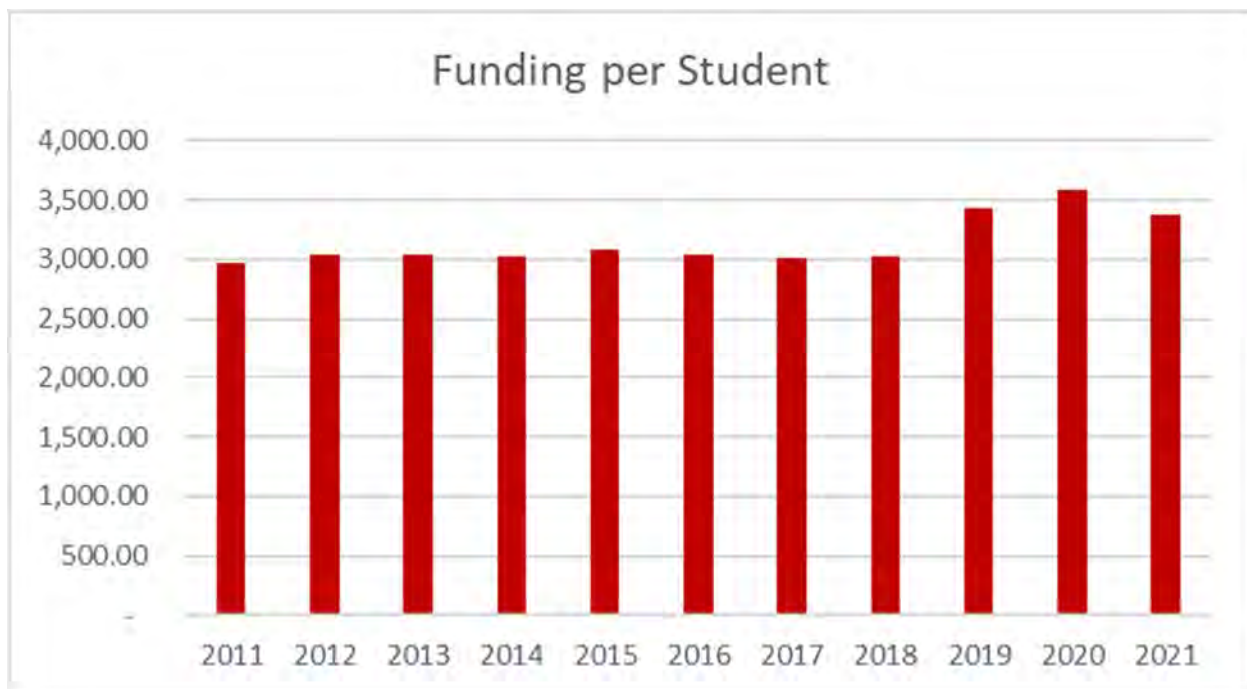
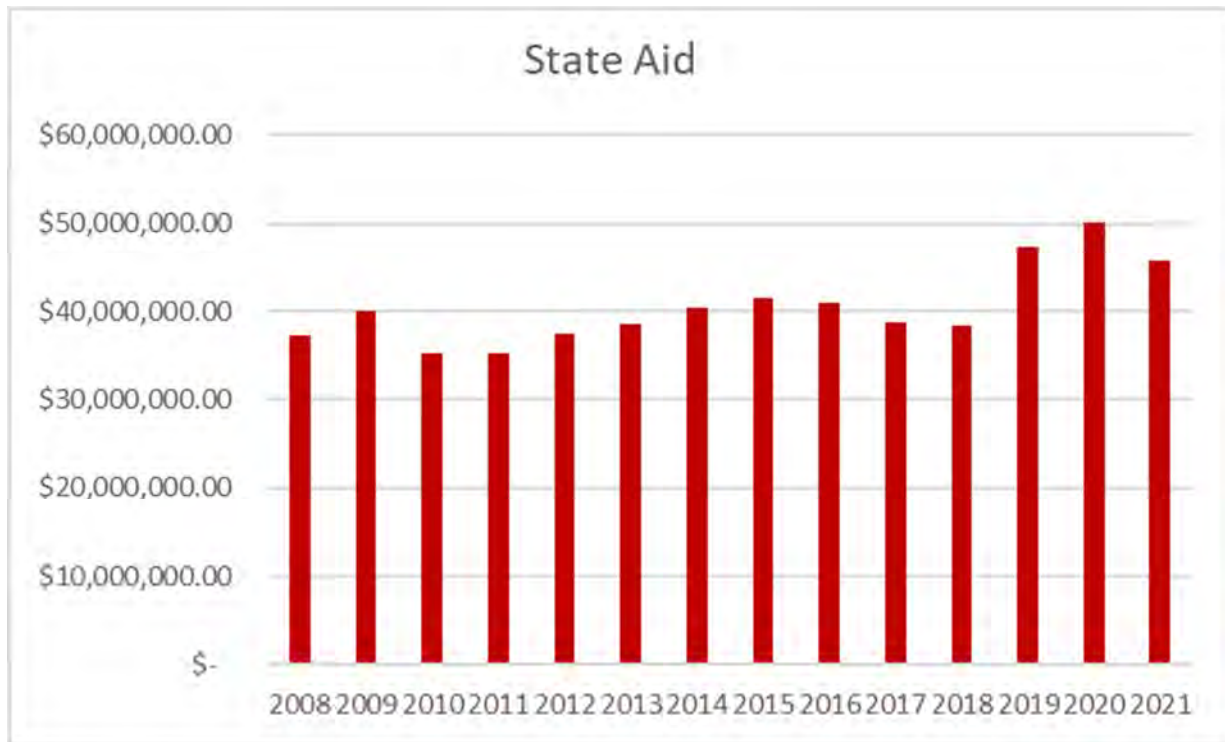


SINKING FUND SUMMARY

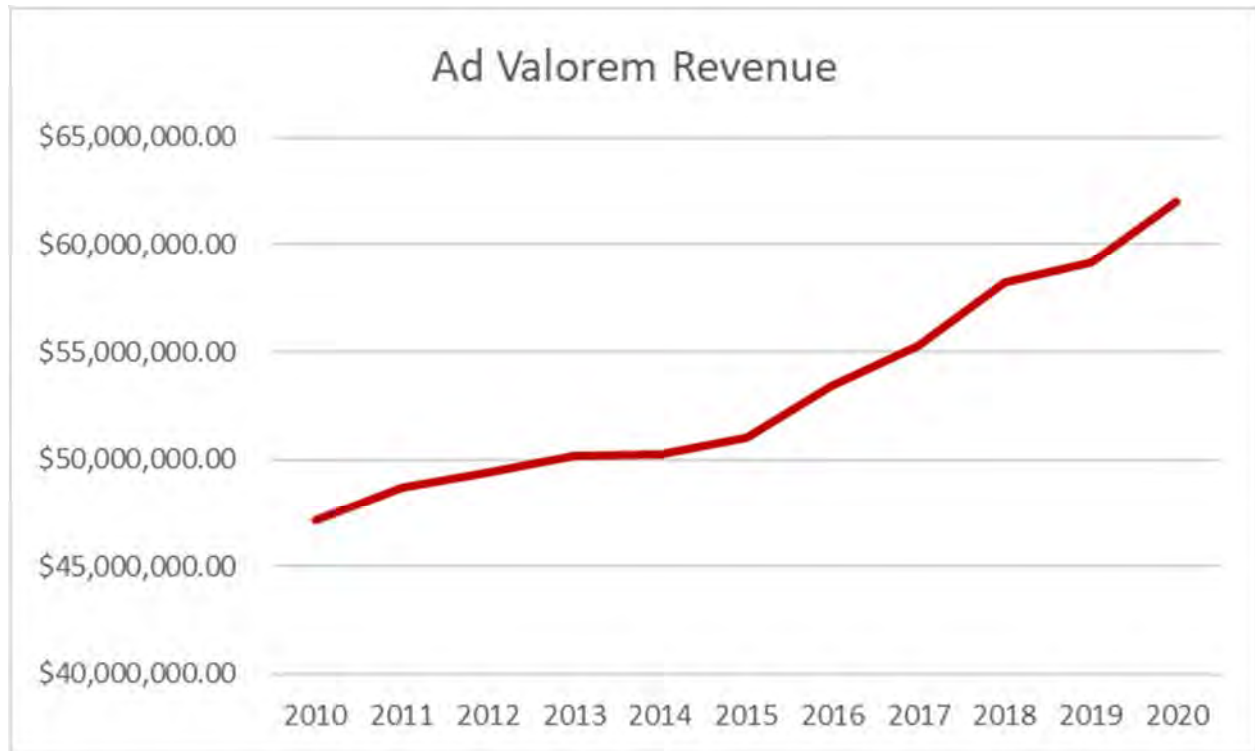
	ACTUAL 2016-2017	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Proposed 2020-2021	Forecast 2021-2022	Forecast 2022-2023	Forecast 2023-2024
REVENUES								
Ad Valorem	23,577,386	25,912,906	25,729,823	27,108,071	26,000,000	26,000,000	26,000,000	26,000,000
Premium on Bonds	250,835	439,706	412,090	580,000	500,000	400,000	400,000	400,000
Interest	75,488	224,068	185,465	213,093	213,093	250,000	200,000	200,000
TOTAL REVENUES	23,903,709	26,576,680	26,327,378	27,901,164	26,713,093	26,650,000	26,600,000	26,600,000
EXPENDITURES								
Principal	21,850,000	23,850,000	25,250,000	25,750,000	26,955,313	26,895,313	19,948,125	13,812,500
Interest	1,441,625	1,628,125	1,848,438	1,928,438	1,928,438	1,950,000	1,950,000	1,950,000
TOTAL EXPENDITURES	23,291,625	25,478,125	27,098,438	27,678,438	28,883,750	28,845,313	21,898,125	15,762,500
EXCESS REV (EXP)	612,084	1,098,555	(771,060)	222,727	(2,170,657)	(2,195,313)	4,701,875	10,837,500
FUND BALANCE 07/1	13,442,610	14,054,694	15,153,249	14,382,189	14,604,916	12,434,259	10,238,946	14,940,821
FUND BALANCE 06/30	14,054,694	15,153,249	14,382,189	14,604,916	12,434,259	10,238,946	14,940,821	25,778,321



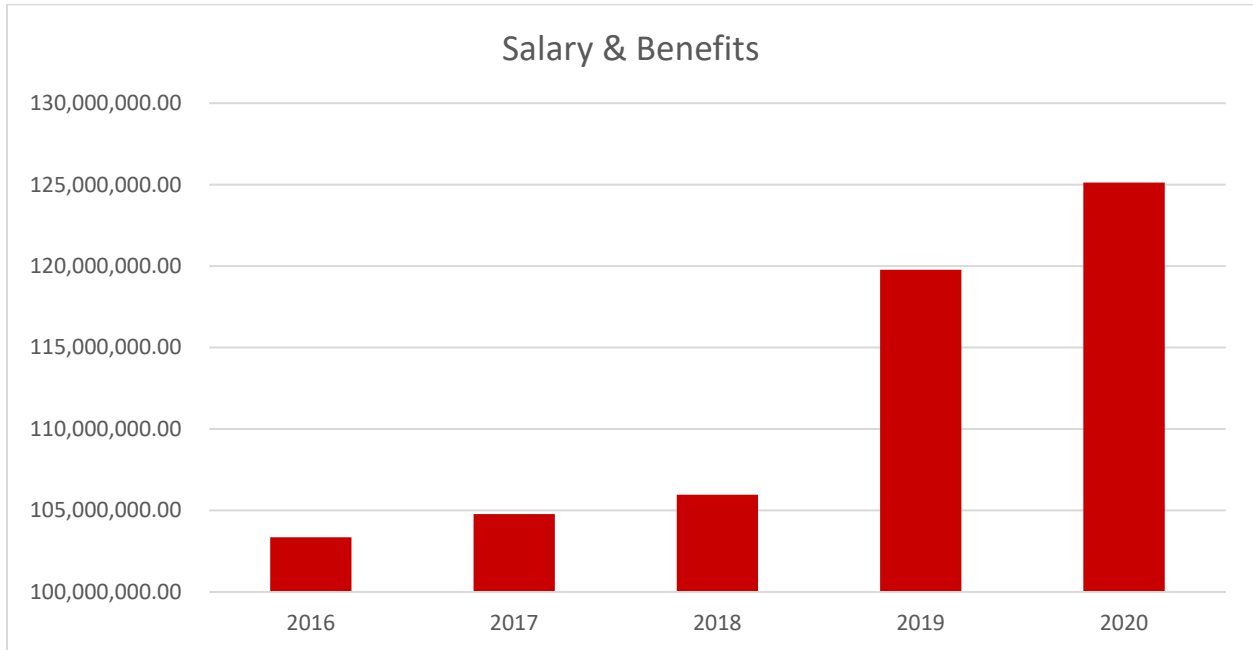
MAJOR REVENUE TRENDS



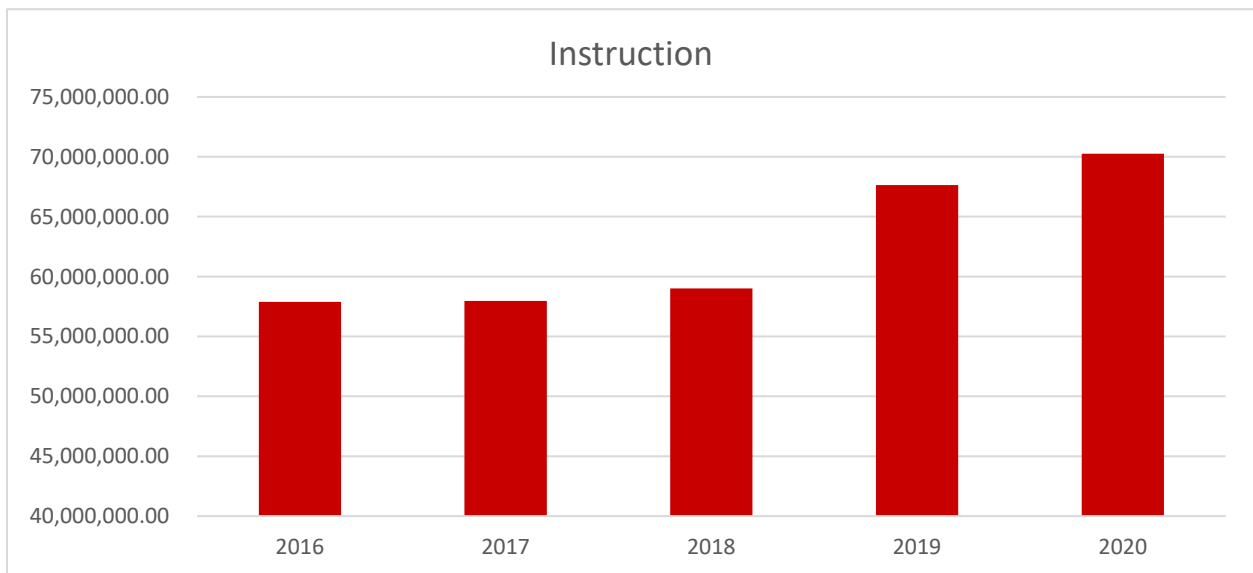
MAJOR REVENUE TRENDS



MAJOR EXPENDITURE TRENDS



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 \$6,000 raise for teachers and a \$1,250 raise for support staff, along with increase funding for public education.



FINANCIAL 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 2020, the district's governmental funds reported combined ending fund balances of \$102,846,875, with \$1,801,038 of this total amount constituting non-spendable fund balance reserved for inventories. In addition, \$71,831,888 is restricted for specific purposes: \$7,663,528 in the building fund for uses mandated by the Oklahoma Constitution including building erection and maintenance, security, utilities, and fire/casualty premiums; \$14,729,281 in the sinking fund for debt service, and \$41,921,012 in the bond fund for capital projects. Assigned fund balance totals \$5,312,794 for compensating balances, early retirement incentive, and insurance recovery. Unassigned fund balance totals \$21,404,717 and is available for spending at the district's discretion.

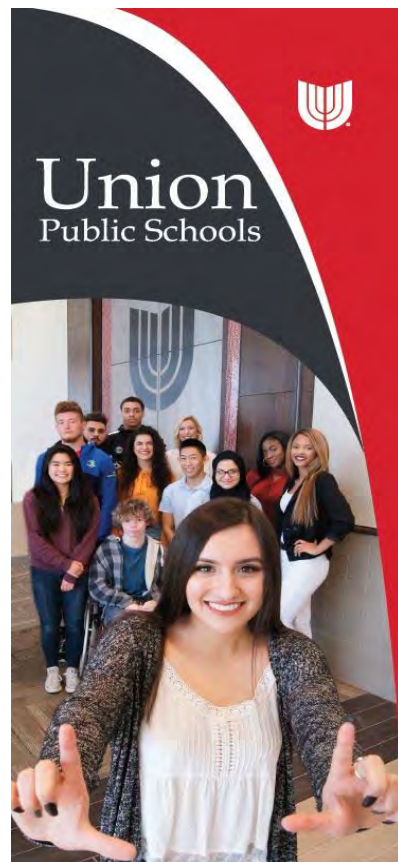
The general fund is the chief operating fund of the district. At the end of the current fiscal year, unassigned fund balance of the general fund was \$21,404,717. As a measure of the general fund's liquidity, it may be useful to compare both unassigned fund balance and total fund balance to total fund expenditures. Unassigned fund balance represents 12.01 percent of total general fund expenditures and total fund balance represents 15.54 percent of total general fund expenditures. The fund balance of the District's general fund decreased by \$513,434 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 2020 general fund revenue budgets were revised during the year based on adjustments to revenue collections. The fiscal year saw a \$731,753 decrease in local revenue sources, a \$682,333 decrease in state aid and property tax collections, and \$1,203,590 in Federal Sources .

FINANCIAL 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 \$13,180,965. The net decrease in fund balance during the current year in the building fund was \$2,508,956. The decrease in the fund balance is due to the expenditure of 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 \$90,867 and a variance in expenditures of \$2,496,466. 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 \$10,963,101, and expenses of \$10,916,102 for the fiscal year 2020. 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 revenues.

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 \$123,539,563 with original budget estimates of \$125,629,977 and final budget estimates of \$123,158,220. 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 2019-20, 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 13.56 percent.



2021 BOND PROJECTS

The Year Ahead



New Stadium: Racing to Completion

As the steel skeleton of Union's new stadium begins to emerge from the dirt, it's hard to believe the project is so far along. "And it's right on schedule," said Lee Snodgrass, executive director of special projects for Union. "So far, we are on track to complete the west bleachers and that part of the stadium complex by July 2021."

Snodgrass, along with Fred Isaacs, director of construction, conducted a tour of the stadium in-progress. They took us to the very top of the facility – about 80 feet up – where we could check out the breathtaking view from the press box. (More accurately, what will become the press box, as it's just a rough sketch now). The view is amazing. On a clear day, you can see well beyond ORU's CityPlex Towers to the west.

"The stadium will be completed in time for the 2021 football season, as well as the new parking lot south of the high school," said Associate Superintendent Charlie Bushyhead.

"A temporary scoreboard will need to be rented, and the Fine Arts Building that houses the marching band will not yet be completed. Otherwise, the stadium for all practical purposes will be done."

The Fine Arts/Band Building – with an estimated 12-month build time – will begin construction in May or June of 2021. It will be completed in time for the 2022 football season. "We will have drawings of the new band building by the end of this year," said Bushyhead, with bids likely going out in March 2021. The band building will be 12-month project. "Construction of the band building, is scheduled to begin May 2021."

Turf installation could begin as early as this summer. Replacement of the scoreboard will begin near the completion of the band building, around March 2022, with a completion date of June 2022.

Believing in



Dear Union Patrons:
When historians look back at 2020, it's likely they will say, "That's the year when everything changed." Fortunately, Union had the foresight to invest in a five-year bond campaign in 2018, which positioned us well to weather unexpected storms.

What an unpredictable year 2020 has been! While "pivoting" seems to be the verb of the year, 2020 has expanded our vocabulary with new terms like social distancing, contact tracing, and herd immunity. There have been a few disappointments, but there has also been joy, laughter and a few tears. Our theme for this year's Teacher Kick-Off was "Press On," and Union students, teachers, families and staff embraced it. I am thankful for their strength, fortitude and optimism. We take joy where we find it, even if it means celebrating graduation virtually, or doing so against the backdrop of a stadium that's been half torn down.

Some things I've been proud of this year:

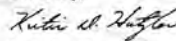
- Thanks to the investments we made in the 1-to-1 initiative ("one device for every child"), we were well prepared for distance learning. The distribution of hundreds of laptops and iPads was a monumental undertaking. Somehow, we managed to fully implement 1-to-1 four years earlier than expected due to strong bond planning and our district's ingenuity.
- One year after the launch of Union Virtual, 35 percent of students across the district – more than 5,000 – chose virtual instruction. This enabled us to provide better social distancing for those who elected to take in-person learning in Fall 2020.

- The smashing success of STEM Expo 2020 and the grand opening of the Union Innovation Lab.
- Our Child Nutrition Department's free meal distribution, serving over 950,800 meals from the end of Spring Break through August.
- The signing of the stadium's steel I-beam by seniors of the Class of 2021. We embraced the opportunity to give them something extra when it seems like so many things have been taken away.

I hope you enjoy this progress report covering Year 3 of our five-year bond. Despite the many challenges right now, there are so many exciting things to come. Thankfully, we have bold leadership at the board level and a supportive community that is deeply invested in our work. Your approval in 2018 of a \$128.6 million multi-year bond has put us on track to effect improvements that will carry us through 2022.

Please enjoy this report of the work done this year and the many positive changes just around the corner. Until then, keep PRESSING ON!

Sincerely,



Kirt Hartzler, Ed.D., Superintendent



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

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

Ellen Ochoa Elementary Construction Phase III and Furniture, Fixtures, and Equipment (FF&E)	\$ 6,600,000
Design Lab at Metro Building Renovation and FF&E.....	\$ 3,250,000
Performing Arts Center – Restroom Renovation; Lighting, Sound, and Acoustical Improvements.....	\$ 1,450,000
District Fine Arts, Athletics, Classroom, and Stadium Renovation and Construction including FF&E ...	\$42,475,000
Teaching and Learning Instructional Resources (not including technology for classrooms).....	\$ 4,750,000
District Exterior and Interior Renovations (includes playgrounds, marquees, and flooring).....	\$ 5,125,000
District Roof Replacements	\$ 7,500,000
District HVAC System Replacements	\$ 7,300,000
District Maintenance and Operations Equipment and Other Capital Improvements.....	\$ 8,400,000
Technology Hardware, Software, and Subscriptions.....	\$20,575,000
Site and Department Allocations.....	\$ 6,850,000
Early Childhood Education Center Purchase Payments.....	\$ 2,500,000
Transportation – Buses.....	\$ 4,600,000
Fees, Professional Services, and Contingency	\$ 7,200,000

5-YEAR TOTAL \$128,575,000

*Note: The numbers presented in the table above are estimates.

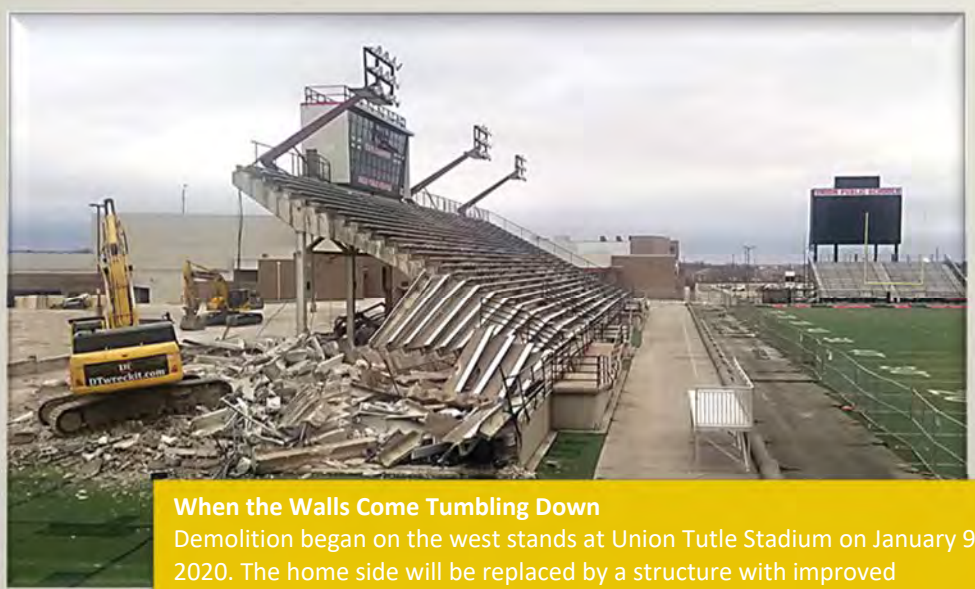
MEASURABLE BOND GOALS COMPLETED

Monumental changes took place in 2020. In a few short weeks beginning in January, half of Union's Tuttle Stadium was leveled. By November, the stadium's new profile, etched in steel, gave us a taste of great things to come.

Here are the projects that were completed in 2020 (Year 3 of 5):

A New Stadium Takes Shape

Rising from the dust of Union's former stadium is the skeletal framework of the mammoth structure that will take its place. "By the end of the year, 2020, all of the steel structure will be in place" said Fred Issacs, Union's Director of Construction. "By then, all of the concrete precast bleachers will have been installed. Then we will begin closing in the building {in brick} and will have the west side completed in June 2021.



When the Walls Come Tumbling Down

Demolition began on the west stands at Union Tuttle Stadium on January 9, 2020. The home side will be replaced by a structure with improved accessibility along with a new wrestling room, press box, visitor's locker room and concession stands.



Baseball/Softball Complex

Originally planned for 2022, renovations to Union's baseball and softball fields at Union Freshman Academy were moved up due to the early availability of funds. "This has been quite an undertaking," said Lee Snodgrass, due to drainage issues. The playing surface has been flattened and converted from grass to turf. New, lower dugouts – similar to the major leagues – have been created. Sports fencing and netting around the home plate have been added. "and both facilities are ADA-compliant, which we've never had before."



MEASURABLE BOND GOALS COMPELTED



Union Innovation Lab opens with 2020 STEM Expo

Union celebrated the grand opening of the Innovation Lab with the 2020 STEM Expo, a stunning new signature event for the district. On Feb. 11, students and families from every elementary school, middle school, and Union High School – ages 5 to 18 – showcased their unique critical thinking skills, creativity, and problem-solving abilities. More than 1,000 people attended the event, giving it a smashing start.

Among the popular presentations were the High School's Ubotics team, Union Alternative School's renovated bus, a 7th grade drone demonstration, cat dissections by Advanced Physiology students, roller coaster demonstrations, and code-writing elementary students.

The facility – formerly Metro Outdoor Living, a retail space – went through a significant Phase I renovation. The transformation includes seven classrooms, including a virtual/digital gaming room, a computer lab with 3D printers, the Ubotics lab, as well as classroom space and soft seating. A second phase is planned for later.

Five teachers in the Innovation Lab work together to create a problem-based learning experience that allows students to master the standards in the content area by solving real-life problems. Classes include Principals of Engineering, Environmental Science, Environmental Solutions, Computer Science, and other classes including a Tulsa Tech class.



Bond Funds Provide Technology During Pandemic

A pandemic wasn't anticipated when planning Union's bond initiative in 2018. The dollars raised by this historic 5-year bond, however, have proven indispensable in coping with the pandemic. It was especially helpful in providing students districtwide with laptop computers and iPads when the district shifted to distance learning in April.

"If the bond dollars reserved for technology hadn't been available, I don't know what we would have done," said Todd Borland, Executive Director of Information Technology. "In purchasing new computers for students in grades 9-12 for the 1-to-1 program, we were able to move older models down to students in grades 5-8 and cascade existing laptops from grades 6-8 down to 3rd and 4th grade students. It really saved us in trying to equitably distribute technology for distance learning."

The district purchased 4,580 laptops for students at Union High School and Union Freshman Academy.



Other Completed Bond Projects

New playgrounds at Andersen and Boevers Elementary. Digital marquees completed at Andersen, Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Moore, and Rosa Parks. Roof repairs: first phase of roof enhancements completed at Union High School and the Freshman Academy. The high school roof is approximately 900,000 sq. ft. of surface area, "So we only made a small dent in what's needed," said Associate Superintendent Charlie Bushyhead.



Bond Dollars at Work

Scan with your phone's camera or visit Apple or Google App stores to download a free QR code reader.

Watch Video



2021 BOND PROJECTS

The Year Ahead

Beyond completion of the new stadium, here are some other exciting projects underway in 2021.

Roofing Projects

Union High School:
\$1 million in funds will be awarded in January. There are approximately 35 roofing sections.

Andersen Elementary:
Full replacement of the roof and insulation.

Building Automation System

Union will be implementing a new system to more efficiently control energy in buildings over the next couple of years. It will include automatic temperature setbacks at unoccupied times and controlled settings when occupied.

HVAC Projects

Union High School, Peters and Jarman Elementary

Greenhouse at Sanders Field

Utilizing grant money, Union will install a "hoop house" greenhouse that will serve as a growing facility for crops that will be used by Child Nutrition. Hoop houses are steel frames (hoops) covered in heavy plastic film, but otherwise open to the ground. This one will be approximately 30 ft. x 60 ft. The Horticulture Department will work with a Bixby farmer to grow vegetables that will be used in Union's food service program.



Indoor Golf Facility

The former wrestling/weight room at the Freshman Academy will be converted to an indoor practice area for the golf team. Golf nets and simulators will be installed in the space so the team can practice during the winter months. The weight room will be moved to another location at the Freshman Academy.



Performing Arts Center

"Back of house" renovations, modernizing the men and women's dressing rooms, sinks and showers.

Union Innovation Lab

Minor build-out for construction courses.

Playground Equipment

New playground equipment at Peters Elementary.



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.

	Balance				Balance	Due Within
	June 30, 2019	Additions	Deductions		June 30, 2020	One Year
Governmental Activities						
Bonds Payable	\$ 87,250,000	\$ 29,000,000	\$ (25,750,000)	\$ 90,500,000	\$ 25,125,000	
Premium on debt	1,208,169	580,000	(410,599)	1,377,570	0	
Compensated absences	4,608,722	792,260	(252,875)	5,148,107	2,498,601	
Early retirement incentives	1,535,140	269,478	(780,926)	1,023,692	540,574	
	<u>\$ 94,602,031</u>	<u>\$ 30,641,738</u>	<u>\$ (27,194,400)</u>	<u>\$ 98,049,369</u>	<u>\$ 28,164,175</u>	

A brief description of the outstanding general obligation bond issues at June 30, 2020 is set forth below:

	Amounts Outstanding
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2016, original issue \$27,000,000 interest rate of 1.25% to 2.0% due in installments of \$6,750,000 annually, final payment of \$6,750,000 due April 1, 2021.	\$ 6,750,000
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2017, original issue \$26,000,000 interest rate of 2.0% due in installments of \$6,500,000 annually, final payment of \$6,500,000 due April 1, 2022.	13,000,000
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2018, original issue \$23,000,000, interest rate of 2.0% to 3.0% due in installments of \$5,750,000 annually, final payment of \$5,750,000 due April 1, 2023.	17,250,000
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2019, original issue \$24,500,000, interest rate of 2.0% to 3.0% due in installments of \$6,125,000 annually, final payment of \$6,125,000 due April 1, 2024.	24,500,000
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2020, original issue \$29,000,000, interest rate of 1.0% to 2.0% due in installments of \$7,250,000 annually, final payment of \$7,250,000 due April 1, 2025.	<u>29,000,000</u>
	<u><u>\$ 90,500,000</u></u>

DEBT OBLIGATIONS

Maturities of long-term debt are as follows

Year ending June 30,	Principal	Interest	Total
2021	\$ 25,125,000	\$ 1,830,313	\$ 26,955,313
2022	25,625,000	1,270,312	26,895,312
2023	19,125,000	823,125	19,948,125
2024	13,375,000	437,500	13,812,500
2025	7,250,000	145,000	7,395,000
	<u>\$ 90,500,000</u>	<u>\$ 4,506,250</u>	<u>\$ 95,006,250</u>



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).

	Total OPEB Liability	Plan Difuciary Net Position	Net OPEB Liability
Total OPEB Liability - beginning of year	\$6,188,870	\$ -	\$6,188,870
Changes for the year			
Service cost	411,044	-	411,044
Interest	231,777	-	231,777
Differences between expected and actual experience	(454,986)	-	(454,986)
Changes of assumptions	268,997	-	268,997
Employer Contributions	-	394,452	(394,452)
Benefit payments	(394,452)	(394,452)	-
Net change in total OPEB liability	62,380	-	62,380
Total OPEB Liability - end of year	\$6,251,250	\$ -	\$6,251,250

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 7.80% for any employees' salaries covered by federal funds for the years ended June 30, 2020. The District's contributions to OTRS in 2020 were \$7,726,922, 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 2020 totaling approximately \$893,000.

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, 2020 the State paid approximately \$615,000 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	\$ 5,284,496	\$ (4,411,444)
Changes of assumptions	5,404,761	(3,474,137)
Net difference between projected and actual earnings on pension plan investments	698,162	-
Changes in proportion and differences between District contributions and proportionate share of contributions	6,675,566	(1,774,091)
Total deferred amounts to be recognized in pension expense in future periods	18,062,985	(9,659,672)
District contributions subsequent to the measurement date	7,726,922	-
Total	<u>\$ 25,789,907</u>	<u>\$ (9,659,672)</u>



INFORMATIONAL SECTION

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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 one 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 14, 1993, Tulsa County voters became the first county in Oklahoma to approve the

NET ASSESSED VALUATION CONTINUED

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

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
2011	590,418,541	95,351,396	25,262,226	711,032,163	6,555,557,566		10.85%	70.28
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%	72.34
2021	760,697,383	110,747,589	22,570,959	894,015,931	8,313,347,466	1.00%	10.75%	72.34
2022 est	745,483,435	111,855,065	22,119,540	879,458,040	8,396,480,941	1.00%	10.47%	72.34
2023 est	752,938,270	112,973,616	22,340,735	888,252,620	8,480,445,750	1.00%	10.47%	72.34
2023 est	760,467,652	114,103,352	22,564,143	897,135,147	8,565,250,208	1.00%	10.47%	72.34

^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

DIRECT AND OVERLAPPING PROPERTY TAX RATES

Direct and Overlapping Property Tax Rates Last Ten Fiscal Years

Rates for Taxpayers in the City of Tulsa^a

Fiscal Year	Direct Rates				Overlapping Rates				Total Direct & Overlapping Rates
	General	Union School District Building	Sinking	Total Direct Rates	Tulsa County	Tulsa Comm College	Tulsa VoTech	Tulsa City	Total Overlapping Rates
2012	36.05	5.15	30.45	71.65	22.24	7.21	13.33	20.01	62.79
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	20.16	62.94
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	20.24	63.02
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	21.46	64.23
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	22.79	65.55
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	21.20	63.98
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	22.44	65.22
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	22.14	65.42
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	22.12	65.32
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	17.78	61.57

Rates for Taxpayers in the City of Broken Arrow^b

Fiscal Year	Direct Rates				Overlapping Rates				Total Direct & Overlapping Rates
	General	Union School District Building	Sinking	Total Direct Rates	Tulsa County	Tulsa Comm College	Tulsa VoTech	Broken Arrow City	Total Overlapping Rates
2012	36.05	5.15	30.45	71.65	22.24	7.21	13.33	17.13	59.91
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	16.50	59.28
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	17.32	60.10
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	17.14	59.91
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	17.10	59.86
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	16.92	59.70
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	16.84	59.62
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	15.61	58.89
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	15.66	58.86
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	16.19	59.98

^aApproximately 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 128.70 mills.

^bApproximately 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 128.60 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 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

PROPERTY TAX RATE IMPACT ON PROPERTY OWNERS

Property Tax Rate Impact on Property Owners

Rates for Taxpayers in the City of Tulsa

Fiscal Year	Mills	Market Value of Property	Assessment Rate	Assessed Value	Millage Rate	Property Tax Due	Change
2011	130.01	100,000	11%	11,000	0.13001	1,430	
2012	134.44	100,000	11%	11,000	0.13444	1,479	49
2013	134.84	100,000	11%	11,000	0.13484	1,483	4
2014	134.08	100,000	11%	11,000	0.13408	1,475	-8
2015	134.42	100,000	11%	11,000	0.13442	1,479	4
2016	136.56	100,000	11%	11,000	0.13656	1,502	24
2017	135.09	100,000	11%	11,000	0.13509	1,486	-16
2018	138.15	100,000	11%	11,000	0.13815	1,520	34
2019	137.34	100,000	11%	11,000	0.13734	1,511	-9
2020	137.66	100,000	11%	11,000	0.13766	1,514	4
2021	133.00	100,000	11%	11,000	0.13300	1,463	-51

Rates for Taxpayers in the City of Broken Arrow

Fiscal Year	Mills	Market Value of Property	Assessment Rate	Assessed Value	Millage Rate	Property Tax Due	Change
2011	129.47	100,000	11%	11,000	0.12947	1,424	
2012	131.56	100,000	11%	11,000	0.13156	1,447	23
2013	131.18	100,000	11%	11,000	0.13118	1,443	-4
2014	131.16	100,000	11%	11,000	0.13116	1,443	0
2015	130.10	100,000	11%	11,000	0.13010	1,431	-12
2016	130.87	100,000	11%	11,000	0.13087	1,440	8
2017	130.81	100,000	11%	11,000	0.13081	1,439	-1
2018	132.55	100,000	11%	11,000	0.13255	1,458	19
2019	130.81	100,000	11%	11,000	0.13081	1,439	-19
2020	131.20	100,000	11%	11,000	0.13120	1,443	4
2021	131.41	100,000	11%	11,000	0.13141	1,446	2

PROPERTY TAX AND COLLECTIONS

Property Tax Levies and Collections Last Ten Fiscal Years

Fiscal Year Ended June 30,	Total Tax Levied for Fiscal Year	Collected within the Fiscal Year of the Levy ^a		Collected in Subsequent Years ^b		Ratio of Total Tax Collection to Levy ^c	Outstanding Delinquent Taxes	Ratio of Delinquent Taxes to Total Levy ^c
		Current Tax Collections	Percent of Current Tax Collected	Delinquent Tax Collections	Total Tax Collection			
2011	49,971,340.42	48,687,848.97	97.43%	858,348.75	49,546,197.72	99.15%	1,981,345	3.96%
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	96.92%	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 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%
2022 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%
2023 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.

^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.

^cIn 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

CALCULATING A TAX BILL

SAMPLE TAX BILL FOR CITY OF TULSA - 2021

	Gross			
Taxable Value	Assessed Value	Exemption	Net Assessed Value	Tax Rate Mills
\$ 100,000	11,000	0	11,000	133.00

Distribution of your Ad Valorem Tax

School 4-mill	\$ 396.55	Tulsa Technology Center	\$ 146.63	City	\$ 195.58
School District	\$ 389.18	Tulsa Community College	\$ 79.31	County	\$ 255.75

Tax Amount Due \$ 1,463.00



STATE AID CALCULATION

UNION PUBLIC SCHOOLS

State Aid Calculation Sheet

FY21 Initial

FOUNDATION AID

Foundation Weighted ADM	25,673.87		
Foundation Aid Factor	1,764.49		\$ 45,301,286.88
Less Chargeables:			
Ad Valorem		\$ 14,042,431.59	
Foundation Mills	0.01605		
County 4 Mil Levy (75%)	3,609,807.49	\$ 2,707,355.62	
School Land Earnings		2,042,650.20	
Gross Production		8,636.92	
Motor Vehicle		4,534,582.70	
Rea Tax		-	
TOTAL CHARGEABLES			\$ (23,335,657.03)
NET FOUNDATION AID (ZERO IF LESS THAN ZERO)			\$ 21,965,629.85

TRANSPORTATION AID:

Regular Average Daily Haul	9,225.96		
Per Capita Amount	\$ 33.00		
Transportation Factor	1.39		\$ 423,194.79

SALARY INCENTIVE AID:

Incentive Aid Guarantee Factor	85.10		
Weighted ADM	25,673.87	\$ 2,184,846.3370	
Adjusted District Valuation	874,917,856.00	\$ 874,917.8560	
Incentive Mills	20		\$ 26,198,569.62

REDUCTIONS:

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

TOTAL NET STATE AID

\$ 48,587,394.25

Calculated Per Student Factor	\$ 3,466.49
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INITIAL ALLOCATION - CHARGEABLE CALCULATIONS

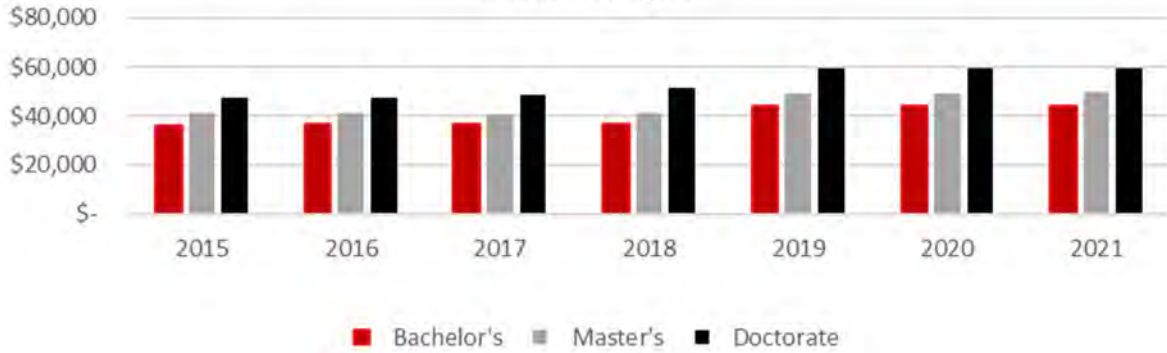
Union Public Schools
Initial Allocation - Chargeable Calculations
FY21

		COUNTY 4 MIL	GROSS PRODUCTION	MOTOR VEHICLE	SCHOOL LAND
FY19	July	12,069.60	1,155.99	522,171.73	184,321.90
FY19	August	8,844.93	1,076.04	547,230.08	115,118.00
FY19	September	13,677.47	1,193.28	534,714.52	191,095.20
FY19	October	8,734.62	1,080.64	463,596.34	195,569.16
FY19	November	10,743.61	949.81	509,757.39	144,095.53
FY19	December	288,590.00	1,254.70	467,196.31	159,643.69
FY19	January	2,048,393.48	1,011.99	470,175.24	261,292.14
FY19	February	468,408.02	936.64	413,390.45	217,882.13
FY19	March	117,146.86	759.89	433,051.32	139,289.06
FY19	April	328,608.99	695.49	514,998.61	172,945.47
FY19	May	184,165.54	663.35	546,908.00	131,527.47
FY19	June	32,397.53	940.09	494,751.14	416,854.28
FY20	July	63,240.22	772.56	394,701.16	175,241.13
FY20	August	8,456.09	762.96	448,294.48	118,534.08
FY20	September	9,123.02	829.00	424,969.65	163,502.98
FY20	October	13,455.91	818.59	370,176.08	163,157.45
FY20	November	6,568.91	687.38	399,931.39	143,321.36
FY20	December	136,694.40	820.91	309,511.19	152,760.33
FY20	January	2,319,792.08	687.85	409,590.08	252,294.03
FY20	February	433,411.87	749.04	392,923.52	174,493.77
FY20	March	102,828.25	798.12	307,752.46	219,989.97
FY20	April	295,519.83	757.56	445,075.56	185,747.69
FY20	May	188,319.38	583.65	285,215.43	105,732.43
FY20	June	121,478.92	369.30	346,441.70	187,874.98

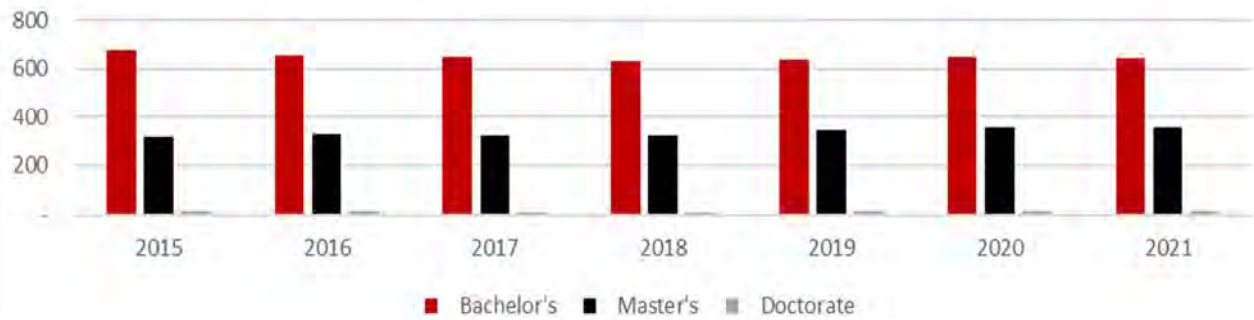
1Mos PY + 11Mos CY	\$	3,609,807.49	\$	8,636.92	\$	4,534,582.70	\$	2,042,650.20
SDE Chargeable Amount	\$	3,609,807.49	\$	8,636.92	\$	4,534,582.70	\$	2,042,650.20
Difference	\$	-	\$	-	\$	-	\$	-

PERSONNEL RESOURCES

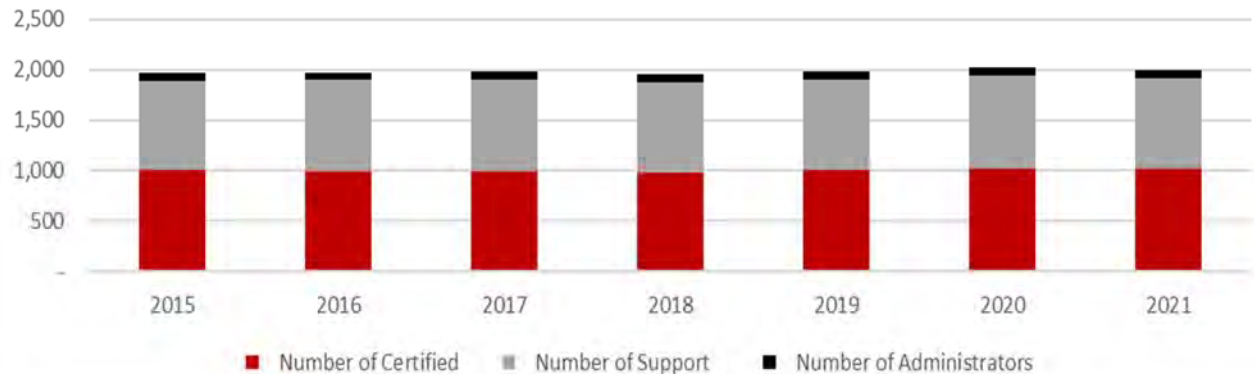
Certified Personnel Average Salary
Based on Degree



Certified Personnel
College Degree



Total Staff



PERSONNEL RESOURCES – PRIOR YEAR SALARY BY FUNCTION

PRIOR YEAR ACTUAL SALARY BY FUNCTION			
TOTAL SALARY BY FUNCTION	2018	2019	2020
51000 - INSTRUCTION	\$ 41,016,862	\$ 48,145,471	\$ 50,241,292
52112 - ATTENDANCE SERVICES	\$ 381,226	\$ 471,379	\$ 499,110
52113 - SOCIAL WORK SERVICES	\$ -	\$ 369,368	\$ 354,562
52120 - GUIDANCE SERVICES	\$ 1,678,034	\$ 2,110,832	\$ 2,252,107
52132 - MEDICAL SERVICES	\$ 776,876	\$ 923,931	\$ 890,736
52135 - OCCUPATIONAL THERAPY	\$ 135,907	\$ 201,656	\$ 205,405
52140 - PSYCHOLOGICAL SERVICES	\$ 579,147	\$ 832,574	\$ 937,238
52152 - SPEECH PATHOLOGY SERVICES	\$ 685,243	\$ 892,363	\$ 968,571
52170 - PHYSICAL THERAPY	\$ 67,725	\$ 66,982	\$ 79,431
52194 - PARENTAL ADVISORY	\$ 417,918	\$ 463,819	\$ 473,476
52199 - OTH SUPPORT SERVICES STUDENT	\$ 509,529	\$ 518,054	\$ 550,249
52212 - INSTR CURR DEVELOPMENT SVC	\$ 1,312,708	\$ 1,817,817	\$ 1,745,125
52213 - INSTR STAFF TRAINING SVC	\$ 701,406	\$ 866,324	\$ 827,683
52220 - LIBRARY MEDIA SERVICES	\$ 592,396	\$ 753,439	\$ 656,157
52230 - INSTR RELATED TECHNOLOGY	\$ 176,390	\$ 125,598	\$ 130,298
52240 - ACADEMIC STU ASSESSMENT	\$ 106,451	\$ 128,283	\$ 125,195
52312 - BOARD MINUTES CLERK SERVICES	\$ 18,299	\$ 17,921	\$ 12,875
52313 - BOARD TREASURER SERVICES	\$ 112,737	\$ 121,341	\$ 126,053
52321 - OFFICE OF SUPERINTENDENT	\$ 518,791	\$ 531,555	\$ 627,281
52330 - STATE FED RELATIONS SERVICES	\$ 213,858	\$ 303,000	\$ 314,810
52340 - OTHER GENERAL AND ADMIN SVC	\$ 539,353	\$ 497,295	\$ 399,866
52410 - OFFICE OF PRINCIPAL SERVICES	\$ 5,604,754	\$ 5,922,024	\$ 6,103,460
52490 - OTHR SUP SVC SCHOOL ADM	\$ 606,989	\$ 640,230	\$ 661,370
52511 - BUSINESS OFFICE	\$ 254,296	\$ 269,267	\$ 280,671
52512 - BUDGETING SERVICES	\$ 215,781	\$ 242,367	\$ 246,262
52513 - RCVG FUNDS	\$ 92,406	\$ 107,178	\$ 147,184
52514 - PAYROLL SERVICES	\$ 327,199	\$ 347,379	\$ 423,153
52515 - FINANCIAL ACCOUNTING SERVICES	\$ 562,856	\$ 597,940	\$ 635,551
52517 - PROPERTY ACCOUNTING SERVICES	\$ 169,697	\$ 180,255	\$ 185,671
52519 - OTHER FISCAL SPT SERVICES	\$ 229,711	\$ 213,862	\$ 220,583
52520 - PURCH WRHSE DISTRB SERVICES	\$ 369,697	\$ 391,823	\$ 441,708
52530 - PRINTING PUBLSHN DISTRBNG	\$ 43,825	\$ 44,072	\$ 57,834
52544 - EVALUATION SERVICES	\$ 7,210	\$ 9,682	\$ 7,816
52560 - INFORMATION SERVICES	\$ 290,828	\$ 311,007	\$ 287,252
52571 - RECRUITMENT PLACEMENT	\$ 400,864	\$ 451,566	\$ 458,644
52572 - PERSONNEL SERVICES	\$ 258,324	\$ 272,557	\$ 286,900
52573 - INSERVICE TRAINING NONINSTRT	\$ 502	\$ 9,520	\$ 5,645
52575 - OTHER STAFF SERVICES	\$ 30,844	\$ 32,112	\$ 33,674
52580 - ADMIN TECHNOLOGY SERVICES	\$ 1,062,793	\$ 1,175,701	\$ 1,310,094
52582 - SYS APPLICTN DEV	\$ 298,632	\$ 255,134	\$ 216,387
52620 - OPERATION OF BLDG SERVICES	\$ 5,280,523	\$ 5,601,033	\$ 5,909,987
52630 - CARE UPKEEP OF GROUNDS SVC	\$ 385,332	\$ 428,980	\$ 461,645
52640 - CARE UPKEEP OF EQUIPMENT SVC	\$ 117,513	\$ 126,349	\$ 122,812
52660 - SECURITY SERVICES	\$ 987,841	\$ 1,103,399	\$ 1,200,186
52670 - SAFETY	\$ 12,343	\$ 12,670	\$ 11,874
52720 - VEHICLE OPERATION SVC STUDENT	\$ 1,900,859	\$ 2,074,519	\$ 2,181,145
52730 - MONITORING SERVICES STUDENT	\$ 291,067	\$ 324,463	\$ 351,927
52740 - VEHICLE MAINT SERVICES STUDENT	\$ 294,563	\$ 308,210	\$ 301,734
53120 - FOOD PREP DISPENSING SERVICES	\$ 2,942,187	\$ 3,205,446	\$ 3,547,130
53130 - FOOD SUPPLY DELIVERY SERVICES	\$ 145,159	\$ 157,705	\$ 181,307
53140 - OTHER DIR RLTD CN SERVICES	\$ 187,474	\$ 216,634	\$ 221,638
53150 - FOOD MILK PURCH REIMB STUD	\$ 183,012	\$ 195,392	\$ 142,151
53180 - NUT EDU AND STAFF DEVELOP	\$ 193,479	\$ 182,486	\$ 161,115
53190 - OTH CHILD NUT PROG OPERATIONS	\$ 85,631	\$ 98,016	\$ 86,582
53300 - COMMUNITY SVCS OPERATIONS	\$ 2,274,761	\$ 2,421,867	\$ 2,687,566
Grand Total	\$ 76,649,807	\$ 88,089,846	\$ 91,996,181

PERSONNEL RESOURCES – CURRENT YEAR SALARY BUDGET BY FUNCTION

2021 SALARY BUDGET BY FUNCTION

51000 - INSTRUCTION	\$ 47,796,188	52517 - PROPERTY ACCOUNTING SERVICES	\$ 211,848
52112 - ATTENDANCE SERVICES	\$ 486,398	52519 - OTHER FISCAL SPT SERVICES	\$ 211,512
52113 - SOCIAL WORK SERVICES	\$ 382,208	52520 - PURCH WRHSE DISTRB SERVICES	\$ 447,285
52120 - GUIDANCE SERVICES	\$ 2,756,448	52530 - PRINTING PUBLSHN DISTRBNG	\$ 56,496
52132 - MEDICAL SERVICES	\$ 863,065	52544 - EVALUATION SERVICES	\$ 9,682
52135 - OCCUPATIONAL THERAPY	\$ 202,960	52560 - INFORMATION SERVICES	\$ 292,742
52140 - PSYCHOLOGICAL SERVICES	\$ 841,169	52571 - RECRUITMENT PLACEMENT	\$ 417,772
52152 - SPEECH PATHOLOGY SERVICES	\$ 790,139	52572 - PERSONNEL SERVICES	\$ 269,727
52170 - PHYSICAL THERAPY	\$ 77,915	52575 - OTHER STAFF SERVICES	\$ 31,726
52194 - PARENTAL ADVISORY	\$ 555,723	52580 - ADMIN TECHNOLOGY SERVICES	\$ 1,279,682
52199 - OTH SUPPORT SERVICES STUDENT	\$ 538,769	52582 - SYS APPLICTN DEV	\$ 223,141
52212 - INSTR CURR DEVELOPMENT SVC	\$ 2,061,227	52620 - OPERATION OF BLDG SERVICES	\$ 6,920,822
52213 - INSTR STAFF TRAINING SVC	\$ 1,393,656	52630 - CARE UPKEEP OF GROUNDS SVC	\$ 455,743
52220 - LIBRARY MEDIA SERVICES	\$ 750,749	52640 - CARE UPKEEP OF EQUIPMENT SVC	\$ 125,867
52230 - INSTR RELATED TECHNOLOGY	\$ 126,447	52660 - SECURITY SERVICES	\$ 1,114,086
52240 - ACADEMIC STU ASSESSMENT	\$ 118,537	52670 - SAFETY	\$ 15,254
52312 - BOARD MINUTES CLERK SERVICES	\$ 12,930	52720 - VEHICLE OPERATION SVC STUDENT	\$ 2,108,130
52313 - BOARD TREASURER SERVICES	\$ 117,524	52730 - MONITORING SERVICES STUDENT	\$ 347,162
52321 - OFFICE OF SUPERINTENDENT	\$ 571,703	52740 - VEHICLE MAINT SERVICES STUDENT	\$ 267,981
52330 - STATE FED RELATIONS SERVICES	\$ 293,268	53110 - FOOD MILK PURCH ALA CARTE CATE	\$ 540,281
52340 - OTHER GENERAL AND ADMIN SVC	\$ 495,465	53120 - FOOD PREP DISPENSING SERVICES	\$ 3,433,776
52410 - OFFICE OF PRINCIPAL SERVICES	\$ 6,085,641	53130 - FOOD SUPPLY DELIVERY SERVICES	\$ 162,078
52490 - OTHR SUP SVC SCHOOL ADM	\$ 592,155	53140 - OTHER DIR RLTD CN SERVICES	\$ 242,696
52511 - BUSINESS OFFICE	\$ 246,435	53150 - FOOD MILK PURCH REIMB STUD	\$ 136,495
52512 - BUDGETING SERVICES	\$ 235,134	53180 - NUT EDU AND STAFF DEVELOP	\$ 167,176
52513 - RCVG FUNDS	\$ 142,485	53190 - OTH CHILD NUT PROG OPERATIONS	\$ 97,019
52514 - PAYROLL SERVICES	\$ 366,758	53300 - COMMUNITY SVCS OPERATIONS	\$ 3,037,424
52515 - FINANCIAL ACCOUNTING SERVICES	\$ 583,585		

Grand Total = \$92,108,288

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
2011	945,927	40,885,803	43,223	458,911	6.2%
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	987,465	49,488,783	50,117	475,681	5.0%
2017	990,706	51,359,190	51,841	476,252	4.5%
2018	995,747	57,352,040	57,597	484,343	3.7%
2019 ^d	1,006,076	59,497,322	59,138	487,305	3.3%
2020 ^e	1,106,683	68,588,892	61,977	489,741	3.3%

^a Tulsa MSA specific demographic data

^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

^e Projection based on data obtained from the Tulsa Metro Chamber

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

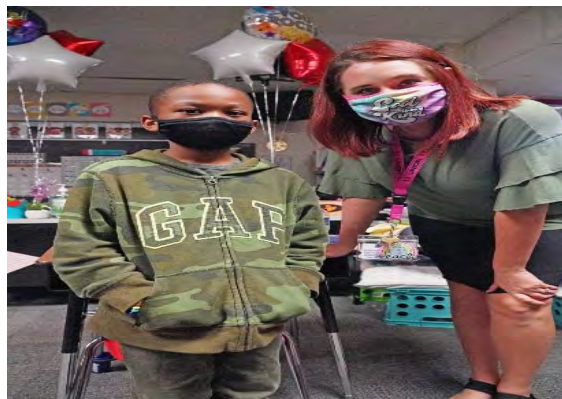
PRESENT ENROLLMENT

Enrollment as of October 1, 2020	
SCHOOL	# OF STUDENTS
Andersen Elementary	410
Boevers Elementary	418
Cedar Ridge Elementary	447
Clark Elementary	448
Darnaby Elementary	531
Grove Elementary	540
Jarman Elementary	621
Jefferson Elementary	526
McAuliffe Elementary	566
Moore Elementary	482
Ochoa Elementary	962
Peters Elementary	348
Rosa Parks Elementary	660
Union 6th/7th Grade Center	2,332
Union 8th Grade Center	1,168
Union Freshman Academy	1,196
Union High School	3,304
DISTRICT TOTAL NUMBER OF STUDENTS:	14,959

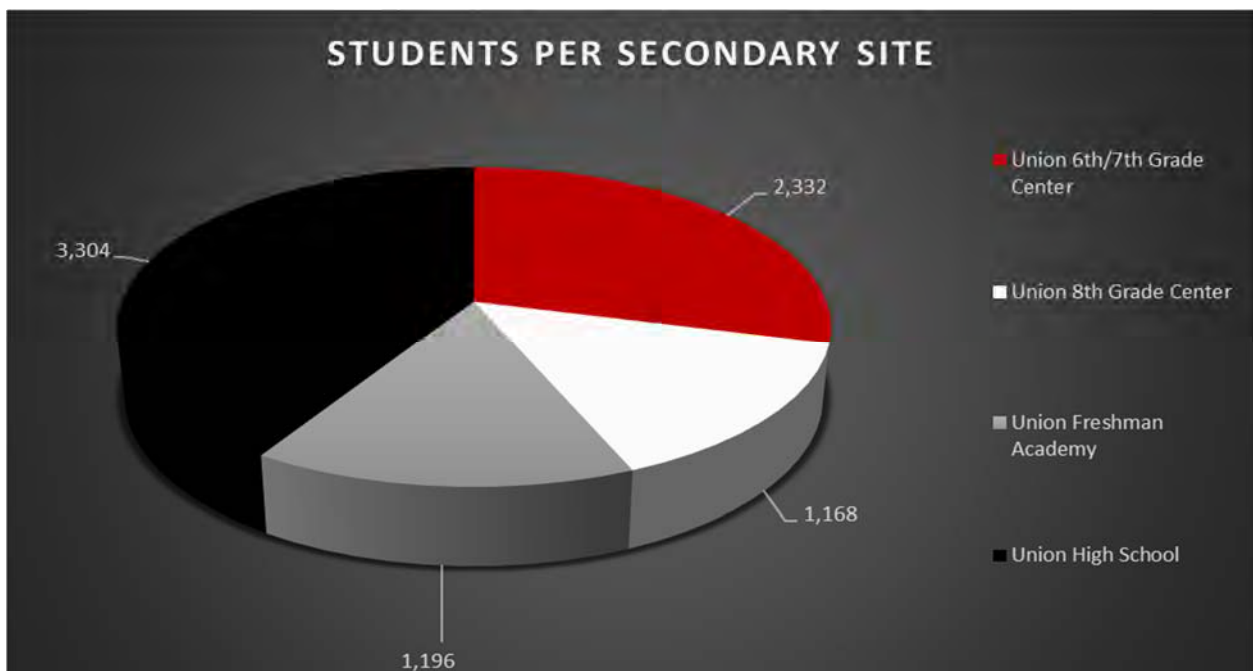
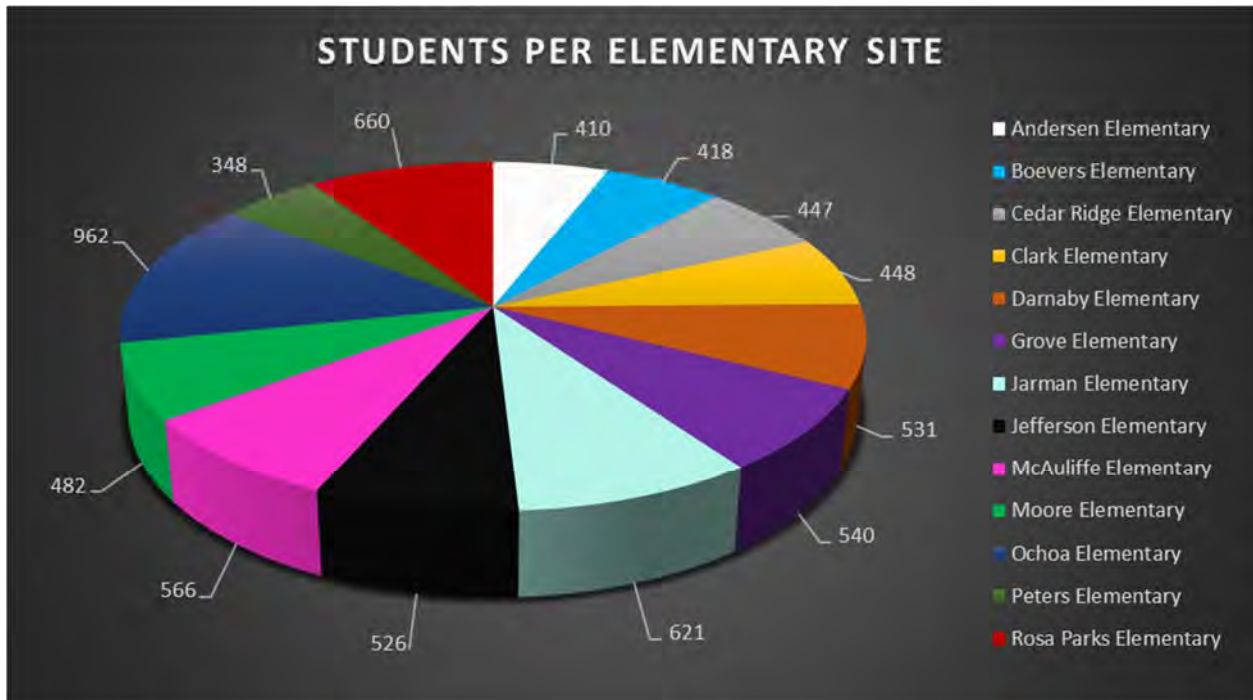


STUDENT ENROLLMENT HISTORY BY SCHOOL SITE

SCHOOL SITE	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21
Andersen Elementary	477	466	463	429	441	459	489	410
Boevers Elementary	558	592	580	575	612	609	468	418
Cedar Ridge Elementary	518	504	500	482	479	506	470	447
Clark Elementary	638	609	659	672	696	674	449	448
Darnaby Elementary	647	622	610	640	651	643	595	531
Grove Elementary	611	625	636	581	543	552	567	540
Jarman Elementary	601	600	591	630	583	551	621	621
Jefferson Elementary	576	558	554	568	545	579	583	526
McAuliffe Elementary	705	593	621	655	661	607	570	566
Moore Elementary	482	588	597	568	553	511	512	482
Ochoa Elementary	553	600	620	612	546	560	1,014	962
Peters Elementary	500	528	496	455	463	441	420	348
Rosa Parks Elementary	709	771	794	833	864	844	730	660
ELEMENTARY SUBTOTAL	7,575	7,656	7,721	7,700	7,637	7,536	7,488	6,959
Union 6th/7th Grade Center	2,272	2,226	2,322	2,306	2,298	2,369	2,449	2,332
Union 8th Grade Center	1,126	1,205	1,173	1,174	1,197	1,140	1,218	1,168
Union Freshman Academy	1,217	1,236	1,301	1,238	1,267	1,264	1,217	1,196
Union High School	3,336	3,500	3,489	3,542	3,448	3,464	3,444	3,304
SECONDARY SUBTOTAL	7,951	8,167	8,285	8,260	8,210	8,237	8,328	8,000
DISTRICT TOTALS	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959



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. Therefore, enrollment forecasts will show no changes for the next three school years.

ENROLLMENT FORECASTS			
SCHOOL	21-22	22-23	23-24
Andersen Elementary	410	410	410
Boevers Elementary	418	418	418
Cedar Ridge Elementary	447	447	447
Clark Elementary	448	448	448
Darnaby Elementary	531	531	531
Grove Elementary	540	540	540
Jarman Elementary	621	621	621
Jefferson Elementary	526	526	526
McAuliffe Elementary	566	566	566
Moore Elementary	482	482	482
Ochoa Elementary	962	962	962
Peters Elementary	348	348	348
Rosa Parks Elementary	660	660	660
SUBTOTAL	6,959	6,959	6,959
Union 6th/7th Grade Center	2,332	2,332	2,332
Union 8th Grade Center	1,168	1,168	1,168
Union Freshman Academy	1,196	1,196	1,196
Union High School	3,304	3,304	3,304
SUBTOTAL	8,000	8,000	8,000
DIST TOTALS	14,959	14,959	14,959

BOND PRINCIPAL AND INTEREST INDEBTNESS

BOND PRINCIPAL AND INTEREST INDEBTEDNESS

As of June 30, 2020

AGENT	DUE DATE	ISSUE DATE	PRINCIPAL	INTEREST	TOTAL	ACCRUED INTEREST
2020-2021 FY						
BOK	10/01/20	04/01/16		67,500.00	67,500.00	33,750.00
BOK	10/01/20	04/01/17		130,000.00	130,000.00	65,000.00
BOK	10/01/20	04/01/18		233,593.75	233,593.75	116,796.88
BOK	10/01/20	04/01/19		275,625.00	275,625.00	137,812.50
BOK	04/01/21	04/01/20		416,875.00	416,875.00	104,218.75
BOK	04/01/21	04/01/16	6,750,000.00	67,500.00	6,817,500.00	
BOK	04/01/21	04/01/17	6,500,000.00	130,000.00	6,630,000.00	
BOK	04/01/21	04/01/18	5,750,000.00	233,593.75	5,983,593.75	
BOK	04/01/21	04/01/19	6,125,000.00	275,625.00	6,400,625.00	
			25,125,000.00	1,830,312.50	26,955,312.50	
2021-2022 FY						
BOK	10/01/21	04/01/17		65,000.00	65,000.00	
BOK	10/01/21	04/01/18		147,343.75	147,343.75	
BOK	10/01/21	04/01/19		214,375.00	214,375.00	
BOK	10/01/21	04/01/20		208,437.50	208,437.50	
BOK	04/01/22	04/01/17	6,500,000.00	65,000.00	6,565,000.00	
BOK	04/01/22	04/01/18	5,750,000.00	147,343.75	5,897,343.75	
BOK	04/01/22	04/01/19	6,125,000.00	214,375.00	6,339,375.00	
BOK	04/01/22	04/01/20	7,250,000.00	208,437.50	7,458,437.50	
			25,625,000.00	1,270,312.50	26,895,312.50	
2022-2023 FY						
BOK	10/01/22	04/01/18		86,250.00	86,250.00	
BOK	10/01/22	04/01/19		153,125.00	153,125.00	
BOK	10/01/22	04/01/20		172,187.50	172,187.50	
BOK	04/01/23	04/01/18	5,750,000.00	86,250.00	5,836,250.00	
BOK	04/01/23	04/01/19	6,125,000.00	153,125.00	6,278,125.00	
BOK	04/01/23	04/01/20	7,250,000.00	172,187.50	7,422,187.50	
			19,125,000.00	823,125.00	19,948,125.00	
2023-2024 FY						
BOK	10/01/23	04/01/19		91,875.00	91,875.00	
BOK	10/01/23	04/01/20		126,875.00	126,875.00	
BOK	04/01/24	04/01/19	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	
			13,375,000.00	437,500.00	13,812,500.00	
2024-2025 FY						
BOK	10/01/24	04/01/20		72,500.00	72,500.00	
BOK	04/01/25	04/01/20	7,250,000.00	72,500.00	7,322,500.00	
			7,250,000.00	145,000.00	7,395,000.00	
GRAND TOTAL			90,500,000.00	4,506,250.00	95,006,250.00	

DROPOUT RATES

Drop Out Rates

School Site	Enrollment			Dropouts			Percentage		
	2017-18	2018-19	2019-20	2017-18	2018-19	2019-20	2017-18	2018-19	2019-20
7th Grade	1143	1188	1202	3	4	3	0.26%	0.34%	0.25%
8th Grade	1197	1140	1218	3	5	4	0.25%	0.44%	0.33%
9th Grade	1267	1264	1217	11	7	27	0.87%	0.55%	2.22%
10th Grade	1183	1216	1300	28	23	32	2.37%	1.89%	2.46%
11th Grade	1208	1114	1125	23	13	36	1.90%	1.17%	3.20%
12th Grade	1057	1134	1013	14	5	2	1.32%	0.44%	0.20%



FREE AND REDUCED LUNCH

Child Nutrition

Fiscal Year Ended June 30,	Average Daily Membership (ADM) ^a	Free and Reduced Count ^b	Free and Reduced Percentage	Number of Breakfasts Served ^b	Number of Lunches 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	15,726	11,231	71.42%	1,005,628	1,535,393

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

^b Obtained from District records



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."

**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 92.67%.

OKLAHOMA SCHOOL TESTING PROGRAM

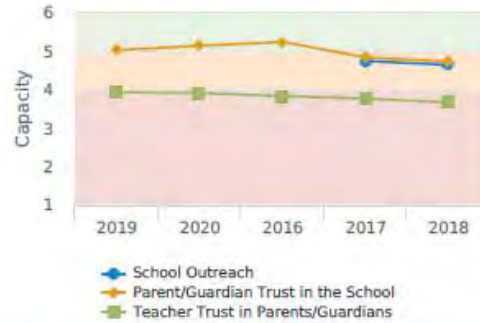
Scores represent the percent of students scoring At or Above Proficient
Data includes ALL FAY (Full Academic Year) students in Regular Ed, Special Ed, and ELL.

Sites		READING/ELA									MATH									SCIENCE		
		3rd Grade			4th Grade			5th Grade			3rd Grade			4th Grade			5th Grade			5th Grade		
		2017	2018	2019	2017	2018	2019	2017	2018	2019	2017	2018	2019	2017	2018	2019	2017	2018	2019	2017	2018	2019
Elementary	Andersen	53	38	47	57	54	36	54	55	63	62	62	42	60	58	36	70	51	48	70	67	56
	Boevers	13	20	16	11	14	10	21	11	24	29	28	38	27	27	16	44	40	37	28	23	20
	Cedar Ridge	69	53	61	46	49	63	67	50	57	73	60	63	66	62	57	72	59	45	60	54	41
	Clark	16	20	20	32	21	26	20	27	14	23	40	41	61	20	43	23	18	5	34	24	12
	Darnaby	52	34	62	60	55	52	60	49	51	67	50	60	55	57	67	64	48	48	61	44	52
	Grove	20	12	29	28	24	28	35	33	25	18	26	32	33	22	32	32	29	22	29	28	21
	Jarman	35	30	37	26	32	34	35	22	36	35	36	41	33	38	45	25	22	35	38	28	32
	Jefferson	24	28	53	24	19	13	31	21	22	46	41	64	19	17	18	25	13	15	40	26	23
	McAuliffe	20	15	16	18	11	12	19	10	16	21	27	11	26	7	20	17	12	9	21	14	28
	Moore	56	27	51	43	63	35	49	40	52	67	55	59	53	65	51	58	59	55	54	53	57
	Ochoa/Briarglen	22	13	12	9	19	14	10	14	15	12	12	10	10	16	14	5	15	19	20	24	20
	Peters	40	38	52	44	38	33	44	47	58	46	48	52	41	47	42	65	53	64	60	60	56
	Rosa Parks	14	14	15	8	11	13	14	11	9	28	31	18	5	12	19	11	6	10	12	19	13
	District Composite	31	25	33	30	30	27	33	29	32	38	38	37	35	33	35	36	31	29	38	34	31
Sites		READING/ELA									MATH									SCIENCE		
		2017			2018			2019			2017			2018			2019			2017	2018	2019
Secondary	6th Grade	34			28			28			33			21			23					
	7th Grade	29			26			25			27			32			25					
	8th Grade	32			30			27			32			25			32			44	41	42



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.



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.

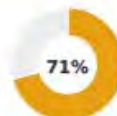
Parent/Guardian Trust in the School: Parent/Guardian perceptions of teacher academic standards for all students, teacher concern for students, teacher communication with parents, teacher competence, teacher honesty, and teacher reliability in their actions and commitments.



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



of parents/guardians feel the school has high standards for students.



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

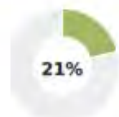


of parents/guardians feel the school keeps them well informed.

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.



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.

RETENTION RATE

Personnel Resources Turnover

2013-2014 2014-2015 2015-2016 2016-2017 2017-2018 2018-2019 2019-2020

Certified Staff

Total Employed	976	1011	995	982	968	958	1005
Total Terminated	128	45	157	125	182	158	118
Turnover Rate	13.11%	4.45%	15.78	12.73%	18.80%	16.49%	11.74%

Support Staff

Total Employed	845	889	911	910	855	842	910
Total Terminated	138	67	126	149	194	190	183
Turnover Rate	16.33%	7.54%	13.83%	16.37%	22.69%	22.57%	20.11%

Administrative Staff

Total Employed	69	80	77	81	78	78	81
Total Terminated	4	3	1	7	7	3	2
Turnover Rate	5.80%	3.75%	1.30%	8.64%	8.97%	3.85%	2.47%

2019-2020 Reasons for Personnel Changes

Term Reasons	Certified Staff	Admin Staff	Support Staff	Total By Reason Code	Percent per Reason
00-No Reason	13	0	30	43	14.19%
00-Temp Contract Ends	30	0	40	70	23.10%
01-Retiring (ERI included)	16	0	12	28	9.24%
02-Another School In-State	13	1	3	17	5.61%
03-Work out-of-state	3	0	7	10	3.30%
04-Other Employment	11	1	25	37	12.21%
05-Health Reasons	1	0	6	7	2.31%
06-Marriage	0	0	0	0	0.00%
07-Personal Reasons	18	0	37	55	18.15%
08-Deceased	1	0	1	2	0.66%
09-Leave of Absence	0	0	0	0	0.00%
10-Maternity/Childbirth/Homemaking	5	0	3	8	2.64%
11-Moving due to spouse's employment	7	0	4	11	3.63%
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	15	15	4.95%
Total	118	2	183	303	100.00%

GLOSSARY

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.

GLOSSARY

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 Principles (GAAP)	General Accepted Accounting Principles. Uniform 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.

GLOSSARY

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 (OCAS)	A system of accounting that permits local education 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

GLOSSARY

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

