2021-2022 BUDGET

Union Public Schools

Independent School District #9

Tulsa, OK 74133

www.unionps.org











Union Public Schools
Independent School District #9
Tulsa, Oklahoma

Annual Budget

For the Fiscal Year Ending June 30, 2022

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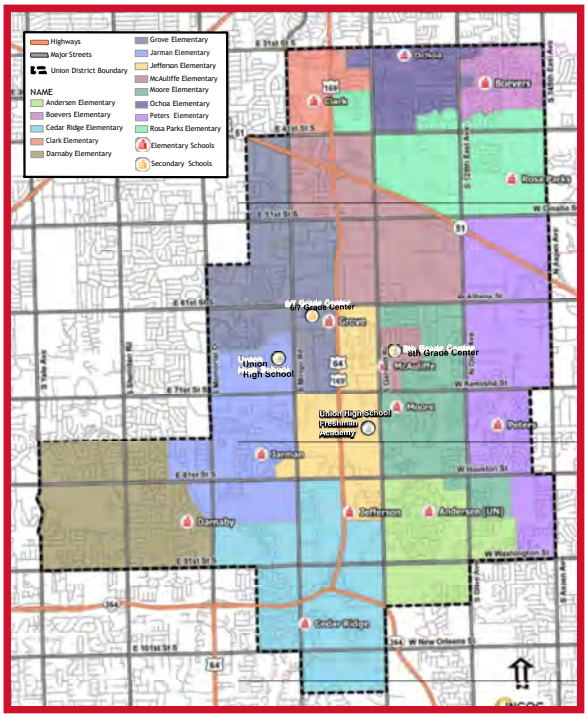
EXECUTIVE SUMMARY

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



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

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

Using what is considered the gold standard for STEM curriculum, Project Lead The Way (PLTW), Union was the first in the state, and among only a handful of districts nationwide, to offer STEM to students Pre-K through 12th grade. 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 mulit-year series bond issues that fund state-of-the-art buildings and equipment for its students.

Introduction

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 more than a century ago. Those high expectations and impressive results have come to be known simply as "The Union Way." Union Public Schools is an independent school district within the state of Oklahoma. There is no relationship between the state, county, or city governments other than revenue sources. Therefore, the district has not identified any component units that should be included in the district's reporting entity.

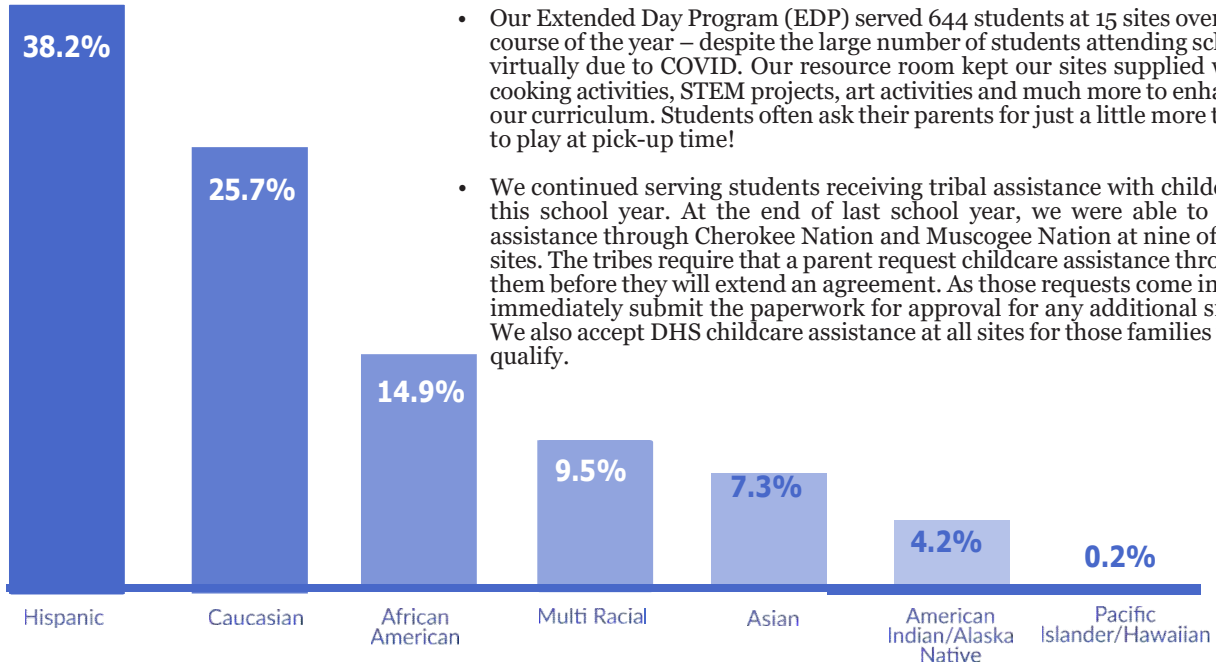
Charter schools are primary or secondary schools that receive public money but are not subject to the regulations that apply to other public schools. Under Oklahoma law, charter schools operate as a local education agency. Charter schools are funded through the state aid formula, just like public schools. This reduces the overall funding available to traditional public school districts in the state aid formula. There are 30 charter schools in the state of Oklahoma. None of them reside within the Union Public Schools boundaries.



Student Statistics

- In 2020-2021, Union's enrollment dropped by 857 students. With a 5.4% percent decrease over the previous year, Union served 14,959 students – 6,959 at the elementary level and 8,000 in grades 6-12.
- Districtwide, 7,342 students (49.1%) were female and 7,617 (50.9%) male.
- In terms of racial origin, 4.2% were American Indian/Alaska Native, 14.9% African American, 9.5% multi-racial, 0.2% Pacific Islander/Hawaiian, 7.3% Asian, 25.7% Caucasian, and 38.2% of Hispanic ethnicity.
- There were 2,763 identified gifted students in grades 1-12, served by a variety of courses and programs.
  Of the graduating seniors in 2021 . . .
  - 413 took the ACT, with an average composite score of 22.2.
  - 254 took the SAT, with an average total score of 1,022.
  (Many students had waivers due to the pandemic).
- More than 1,945 students (13%) were enrolled in special education.
- English Learner (EL) services were provided to 2,547 elementary and 1,462 secondary students; of these students, 176 became English-proficient and exited the program. Our diverse population spoke more than 60 different languages. An estimated 27 percent of Union students were classified as English Learners.
- Our Extended Day Program (EDP) served 644 students at 15 sites over the course of the year – despite the large number of students attending school virtually due to COVID. Our resource room kept our sites supplied with cooking activities, STEM projects, art activities and much more to enhance our curriculum. Students often ask their parents for just a little more time to play at pick-up time!
- We continued serving students receiving tribal assistance with childcare this school year. At the end of last school year, we were able to add assistance through Cherokee Nation and Muscogee Nation at nine of our sites. The tribes require that a parent request childcare assistance through them before they will extend an agreement. As those requests come in, we immediately submit the paperwork for approval for any additional sites. We also accept DHS childcare assistance at all sites for those families that qualify.

Student Diversity



Student Statistics

- Fall and Spring Break camps were not offered this year. The COVID numbers were too high at those times to risk bringing students and staff from across the district to one location. However, we were able to open the EDP Summer Camp at Grove and served 161 students throughout the summer. We brought the activities and virtual field trips to Grove this year, rather than travelling outside the building. Our only "field trip" was walking to the 6/7 Grade pool each Tuesday and Thursday. That provided a good change of pace, enjoyed by all!

- Staff development opportunities for EDP staff were limited to online training events offered by DHS and the University of Oklahoma Center for Early Childhood Professional Development. Topics included Bullying in the Public Schools – Setting the Appropriate Tone for Prevention/Intervention; Trust-Based Relational Intervention (TBRI) for Out of School Time Professionals; district safety training and the Pyramid Model school-age training. We were able to do School-Age Trauma and CPR/First Aid training in small groups in person. All training was approved for formal training credit through the University of Oklahoma Center for Early Childhood Development. Each staff member is required to be a member of the CECPD registry and take 20-30 hours of training annually.



- For more than 25 years, Union Public Schools has served the community with an adult basic education program to assist adults through GED (General Educational Development)/HiSET (High School Equivalency Test) Preparation classes and/or English language learning for non-native English speakers. During the 2020-2021 school year, Union's Adult Basic Education (ABE) program enrolled approximately 1,000 students in these classes.

- Through partnerships with local Workforce Development offices and other community agencies, the Union Adult Learning Center (UALC) embraces the opportunity to serve students not only in Tulsa, but also in the neighboring communities of Claremore, Muskogee, Owasso, and Pryor. These partners include, but are not limited to, Community Action Project of Tulsa (CAP), Workforce Tulsa, Tulsa Technology Center, Tulsa Community College, Goodwill Industries, Salvation Army, Women in Recovery, Family and Children's Services, Rogers State University, Workforce Pryor, Workforce Muskogee, Muskogee Public Schools, Owasso Public Schools, Whirlpool Inc., and local churches.

- The Pearson Vue Testing Center at UALC offers various certification testing for individuals including Teacher Certification testing and high school equivalency testing (HiSet). During the 2020-2021 school year, nearly 2,200 HiSet, GED and/or Pearson tests were given, with approximately 200 individuals earning their High School Equivalency

Employee Statistics & Achievements

- Union employed 1,008 teachers, 852 support personnel, and 83 administrators. Of the district's 83 administrators, 90.4% had a master's degree or higher. Of the teaching and administrative staff, 41.5% held graduate-level degrees – 437 with master's degrees and 19 with doctorates.



- Twenty- five teachers held National Board Certification.
- The district welcomed 111 new teachers for the 2020-2021 school year.
- The ethnic diversity among the staff was 7% African American, 15% American Indian, 3% Asian, and 80% Caucasian/other. 411 were male and 1,541 female.
- Director of Operations Joshua Robinson earned his doctorate degree in Educational Administration, Curriculum, and Supervision Ed.D. from the University of Oklahoma.
- Director of College & Career Center, Marla Robinson earned her doctorate degree in School Administration from Oklahoma State University.
- Director of Fine Arts. Matt McCready earned his doctorate degree in Educational Leadership from Oklahoma State University.
- Associate Director of Union Adult Learning Center, Amy McCready, earned her doctorate degree in School Administration from Oklahoma State University.

Employee Statistics & Achievements



- Rebecka Peterson, a math teacher at Union High School, was named the 2020-2021 Union Public Schools District Teacher of the Year.
- Myriam Puleo, homeless liaison for Union Schools, was named Support Employee of the Year.
- Union videographer Chris McNamara received the 2020 regional Edward R. Murrow Award for overall excellence from the Radio Television Digital News Association (RTDNA) for his work at KOTV-News on 6 prior to joining the Communications team in July.
- Athletic Director Emily Barkley received the Bruce D. Whitehead Distinguished Service award from the Oklahoma Interscholastic Athletic Administrators Association (OIAAA).
- Union coaches received the following awards: .
  Joe Redmond – Basketball, Frontier Valley Conference Coach of the Year
  Brett Morgan – Slow-Pitch Softball; celebrated 100 wins as a head coach

  OCA Region 7 Tennis Coach of the Year – Tyler Ashley
  OCA Region 7 Basketball Coach of the Year – Joe Redmond
  OCA Region 7, Junior High Coach of the Year – Isaiah Washington
  OCA Region 7, Baseball Coach of the Year – Shawn Newkirk
  OCA Region 7 Representative – Scott Young
  OCA Region 7, Swim Coach of the Year – Lynne Gorman
  Tulsa World Coach of the Year– Union Swim Coach Lynne Gorman
- Chris Sharpe, IT Assistant Manager, was named OK eSports League Coach of the Year
- Benjamin Peralta, Todd Nelson and Chris Payne of Union Public Schools were among 10 educators to receive the Tomás Rivera Latinx Excellence in Education Hero Award, presented by The Greater Tulsa Area Hispanic/Latinx Affairs Commission.
- Moore Elementary enrichment specialist Brenda Maier's latest book, The Little Blue Bridge, was featured by Scholastic Books as part of its ALA Midwinter Scholastics Author Illustrator Preview Event in January. Her first book, The Little Red Fort, was chosen as one of Scholastic's top recommended titles for World Read Aloud Day 2021 on February 3.
- The Certificate of Achievement for Excellence in Financial Reporting – the top recognition in governmental accounting and financial reporting – was awarded to Union's Finance Department by the Government Finance Officers Association (GFOA) of the United States and Canada. They have received the award every year since 1992.
- Union also earned the Certificate of Excellence in Financial Reporting from the Association of School Business Officials International (ASBO), the highest recognition for a school district offered by ASBO. They have received the award every year since 1991.
- The Association of School Business Officials International (ASBO) recognized Union Public Schools for excellence in budget presentation with the Pathway to the Meritorious Budget Award (MBA) program for the 2018-2019 and 2019-2020 budget year. Union received the Meritorious Budget Award (MBA) for excellence in budget presentation

Teaching & Learning

Early Childhood Education

- One hundred fifty three-and four-year-olds participated in programs at the Rosa Parks Early Childhood Education Center. Districtwide, 650 four-year-olds enrolled in Pre-K classes.

Schools

- Union Public Schools launched a new Intro to Construction class at the Freshman Academy with help from the Home Builders Association, Hardesty Family Foundation, and Hilti.
- Union alum Greg Moore of Jiffy Lube presented a $500 check to the Union College and Career Center. They were awarded the $500 prize because Union High School had the most applicants out of all Tulsa area schools for the Jiffy Lube "What Drives You" scholarship last year.

Teaching & Learning

- Union Public Schools hosted a listening tour about its Community Schools initiative for state officials, including State Superintendent of Public Instruction Joy Hofmeister. The tour was created for Oklahoma districts that are considering implementing aspects of Union's model. Joining Hofmeister on a tour of Ellen Ochoa Elementary and the nearby Community Health Connection Clinic was Justin Brown, state secretary of Human Services & Early Childhood Initiatives, and Eric Dickerson, special advisor to the Director at the Oklahoma Department of Human Resources, as well as Jim McCarthy, chief executive officer for Community Health Connection.

- McAuliffe Elementary was recertified as a Leader in Me School by the Franklin Covey Education Team. Lighthouse recertification is achieved only when a school shows sustainable evidence of growth and innovation within the Leader in Me Framework. As it is a significant benchmark, applying for this certification typically occurs four to five years after a school begins the process. The certification is evidence that schools have produced outstanding results in school and student outcomes by implementing the process with fidelity and excellence. It is also because of the extraordinary impact the schools are having on staff, students, parents, and the greater community.

Community Schools

- Union's Community Schools philosophy seeks to equalize the playing field for students and families by removing barriers to learning and by providing access to basic needs and layered supports.

- During the 2020-2021 school year, Union partnered with over 60 community organizations to support our students and families. Community School Coordinators coordinate a range of comprehensive supports for students and families from infancy through adulthood. Schools serve as hubs for programming that includes expanded learning opportunities, early childhood programs, family engagement, and a variety of social services and supports.

After-School Programs

- One critical component of the Community Schools strategy is offering students a wide range of expanded learning opportunities at the school site. How children spend their time outside of school matters just as much as how they spend their time in school. Union's afterschool programs 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.

During the 2020-2021 school year:

- 741 students participated in virtual and in-person afterschool programs at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks elementary schools
- 103 students participated in Summer Enrichment Camps
- 1,016 total hours of enrichment and academic opportunities were offered to students in afterschool programs
- 33 STEM programs
- 23 academic and tutoring programs
- 14 health and wellness programs
- 23 youth development/leadership programs
- 9 fine arts programs; and
- 100% of students participated at no cost



Impact of afterschool programs:

Afterschool programs were successful in supporting and building 21st Century Skills for students who participated. Students responded favorably to the statement: "Because I attended afterschool programs, I am better at ..."

- Leadership & Responsibility – 63%
- Initiative & Self-Direction – 86%
- Social & Cultural Skills – 83%
- Productivity & Accountability – 79%
- Flexibility & Adaptability – 80%

Students also reported improvements in:

- Doing things they did not think they could do before – 90%
- Initiative & Self-Direction – 86%
- Excitement about coming to school – 91%
- Attitude towards STEM learning and classes – 77%
- Attitude towards a potential STEM career – 67%
- Understanding how STEM can help improve their communities – 83%
- Excitement towards learning about STEM – 90%

Teaching & Learning

Early Childhood Programs

- The Kreuger Book Program at the Tulsa City-County Library provided Pre-K students with new age-appropriate books each month so they can create their own personal libraries at home. During the 2020-2021 school year, 4,239 books were distributed to Pre-K students at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks elementary schools.

Parent and Family Engagement

- There were nearly 50 combined virtual and in-person opportunities for parent and family engagement at Boevers, Clark, Grove, Jarman, Jefferson, McAuliffe, Ochoa, and Rosa Parks.
- The combined Parent-Teacher Conference participation rate was 95%.

Basic Needs

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

- Assistance League of Tulsa's signature program, Operation School Bell, provided 449 students with new clothing, shoes, and hygiene kits.
- The Food for Kids Backpack Program provided 326 food-insecure students with food every weekend.
- Union partnered with James Mission and other faith-based partners to distribute holiday presents to 720 students.
- Nearly 250 families received meal assistance during the holidays.
- Students and families have access to two school-based health clinics (one at Rosa Parks and another at Ochoa Elementary).
- 2,391 students received free vision screenings through Vizavance.
- 1,666 students received free hearing screenings.
- In partnership with Harrel Eye Care, the district provided 50 vouchers for free eye exams and glasses to students without the means to pay.
- Union partnered with YWCA to provide financial assistance for 93 families facing socioeconomic barriers.

STEM (Science, Technology, Engineering, Math) Curriculum

- Robotics continues to grow at Union, beginning with several FIRST Lego League groups at the elementary level. The Bazinga Project and Project Agnizab for grades 8-12 are aimed primarily at middle school students, creating our FIRST Tech Challenge robotics team. Both compete to solve real-world problems using STEM and problem-solving skills, learning to work together as a team. UBotics, Union's High School Robotics Team for grades 9-12, come together to design, program, and build a robot that meets specific criteria to accomplish tasks in FIRST Robotics Competitions.



College/Career Readiness

- 907 students graduated in the Class of 2021.
- Union High School seniors Shrea Tyagi and Anna Hemm were named 2021 Academic All-State Students by the Oklahoma Foundation for Excellence.
- For nine consecutive years, Union Public Schools has been recognized by the Oklahoma State Regents for Higher Education as the Oklahoma's Promise 2020 State 6A Champion for having 167 seniors from the class of 2020 qualify for the Oklahoma's Promise Scholarship.
- Twelve seniors were named 2020-2021 National Merit Finalists: Courtney Bloom, John Brown, Kaitlyn Darrow, Hannah Fuller, Cadence Garcia, Madeline Loyd, Abigail Ren, Daniel Sibley, Shrea Tyagi, Connor Wallace, Jackson Williams, and Joseph Ye.

Teaching & Learning



- Five seniors won National Merit Scholarships: Courtney Bloom, Hannah Fuller, Madeline Loyd, Abigail Ren, and Connor Wallace.
- Seniors Ethan Sen and Kendra VonHartitzsch were recognized as Commended Students as part of the 2021 National Merit Scholarship Program.
- The 2021 Community Service graduates are: Insia Akberali, Briceira Bernal, Warisha Choudhary, Addison Darby, Yolanda Guerrero, Selin Kelesh, Grace Lam, Mary Le, Jennifer Nguyen, Julian Ober, Abigail Ren, Edy Reynolds, Ethan Sen, Braxton Tempest, Kendra VonHartitzsch, and Joseph Ye. Community Service graduates have completed more than 200 hours of community service during their four years of high school. 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%.
- The 2021 Distinguished Graduates for outstanding academic achievement and service to school and community are: Nafisa Ahmed, Insia Akberali, Botifeni Bajela, Briceira Bernal, Warisha Choudhary, Kali Christopher, Addison Darby, Hannah Fuller, Yolanda Guerrero, Kylie Hammack, Anna Hemm, Selin Kelesh, Grace Lam, Karen Meza, Abhirami Narayanan, Nathan Nguyen, Nhan Nguyen, Teresa Nguyen, Julian Ober, Emma Plunkett, Edy Reynolds, Kimberlin Rosas, Ethan Sen, Alexa Smith, Baxton Tempest, Shrea Tyagi, Tatiana Villanueva, Kendra VonHartitzsch, Connor Wallace, Evan Xiao, and Joseph Ye.

- Since its inception in 2014, Union Career Connect has garnered 950 nationally recognized certifications for 370 students in fields which include, but are not limited to: Manufacturing, Information Technology, Culinary, Early Childhood Education, Law Enforcement, and Construction.
- Twenty-four Advanced Placement (AP) courses were provided, and 319 students took a total of 584 exams. Two hundred thirteen students (67%) earned a score of "3" or higher. Eighty-four students received AP Scholars recognition, with an average score of 3.64. Of the 84 scholars, 33 students earned National AP Scholar with Distinction recognition with an average test score of 4.20 on five or more exams.
- Students attending college classes offered at the Union Collegiate Academy (UCA) through a dual credit partnership with Tulsa Community College have earned 20,493 credits since the program began in 2010.
- The EDGE (Earn a Degree, Graduate Early) program, one of the first "early college" programs in Oklahoma – in partnership with Tulsa Community College – has 175 students enrolled. There are 31 seniors who have earned at least 36 hours of college credit, 45 juniors who have earned at least 9 hours of college credit, 47 sophomores who are working on their first 6 hours of college credit, and 62 freshmen who are learning what it takes to be a college student in high school. Each student enrolled in EDGE can earn an associate degree by the time he/she graduates from high school.





Student Engagement: Co-Curricular Activities



- Seniors of the Class of 2021 left their mark on the steel beam that was placed in a topping out ceremony for the new stadium during halftime at the Varsity Football Game for Seniors' Night. Flags were flown from the beam bearing their signatures when it was put into place by a large crane. Topping out ceremonies are a builders' rite traditionally held when the last beam is placed atop a structure during its construction.

- On Monday, November 9, 2021, the Union Board of Education voted unanimously to discontinue the use of the Redskins mascot and logo in response to a recommendation made by a 35-member committee. The committee was appointed by the Board on August 10 and included student leaders, teachers, support personnel, administrators, parents, members of the district's Native American committee, alumni, and representatives from each board district. Four members of the committee were non-voting, including two tribal representatives and two board members.

- Julian Ober from Union High School was named a state delegate to the 59th annual U.S. Senate Youth Program (USSYP), which brings together outstanding student leaders from every state.

- Union Alternative School students completed the renovation of an old school bus into a functioning RV that was auctioned off into the community. The project was started during the 2018-2019 school year. Students, parents, teachers, and community volunteers worked on everything from woodwork and electrical to appliances and piping. Science teacher Debra Beattie spearheaded the project, with the school completing the renovation using grants and donations of money and materials totaling $10,000.

Fine Arts Achievements

- UHS Senior Emma Plunkett won "Best of Show" at the Mayfest 2020 Youth Exhibit at AHHA Tulsa (formerly the Arts & Humanities Council of Tulsa). She later won another art award in April 2021 for 3D.

- Union High School and Freshmen Academy Repertory Theatre students presented their fall productions at the Admiral Twin Drive-In on October 6. Making the most of COVID-19 restrictions, they presented a double feature of "War of the Worlds" (a retelling of the famous 1938 radio drama) and the classic Twilight Zone episode "The Monsters Are Due on Maple Street." Both were presented with an old-timey feel like radio shows of the past.

- Fifty six High School Band students made the All-Region Honor Band.



- Twenty-three High School Band students were named to the All-Region Honor Band.

- Thirteen Union High School students were honored as OkMEA All-State musicians (band, choir, and orchestra).

- All-School Musical "Something Rotten" performed two shows to smaller audiences (due to social distancing requirements caused by the pandemic), consisting mostly of family members of the cast and crew. The staff was elated to be able to provide a public performance opportunity for students and families despite tough circumstances.

- Speech and Debate students qualified to compete in the National Tournament hosted online in June in a virtual environment. The students will be part of two different teams competing in the World Schools Debate, an international contest. Representing Union will be freshmen Raashi Karande, William Spatz, Chris Dunn, and Alex Raza; sophomore Makayla Goode; and juniors Tammy Dao, Fraz Javid, and Ankit Jallipalli.

Student Engagement: Co-Curricular Activities

- Middle School Musical "Aladdin" performed to sold-out, pandemic-reduced audiences consisting mostly of family members of the cast and crew. 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. 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.

- Union High School Theater hosted the One-Act Play Competition in April (not October, as usual).

- Union continued its partnership with Tulsa Symphony Orchestra to provide music interactions for students at Rosa Parks Early Childhood Center.

- Carnegie Hall's Link Up Program serves students in grades 3-5 (approximately 3,422 students in the district). This traditionally in-person concert was performed virtually in May by the Tulsa Symphony Orchestra.

- The Union Theater Department produced "Shakespeare in the Park" at Union's Central Park in May to allow for a public, large-scale performance.
  K-5 students participating in Music and Art: 6,298 students
  Grades 6-12 Visual Art: 1,457
  6-12 Band: 972
  7-9 Dance: 119
  7-12 Drama: 691
  6-12 Orchestra: 509
  7-12 Speech/Debate: 82
  6-12 Vocal Music: 498
  Total: Approximately 10,626 students





Athletic Achievement

- Union Volleyball, OSSAA Regional Runner-Up
- Union Cross Country – Shawn Rutledge, OSSAA Cross Country Individual Regional Runner-Up
- Makenzie Malham – Oklahoma Girls Soccer Gatorade Player of the Year – Soccer
- Union Girls Soccer, OSSAA District Champions
- Union Baseball, OSSAA District 6A-3 Champions & OSSAA Regional Champions
- Union Varsity Cheer, National Champions, Game Day Division – NCA
- Union Pom, DTU National Championship Runner-Ups
- Union Football
  OSSAA State Semi-Finalist
  OSSAA District 6A-2 MVP, Union Football's A.J. Green
  OSSAA District 6A-2, All-District Team, Marlee Forsberg, Tsiah Dorn, Shea Dan, Caleb Caylao, and Shane Field

Student Engagement: Co-Curricular Activities

Athletic Achievement



- Union Basketball
  - Inola Invitational MVP, Union Basketball's Kaylen Nelson
  - Bishop Kelley Invitational All-Tournament Team, Union's Basketball Trent Pierce
  - Putnam City Invitational MVP, Union Basketball's Kaylen Nelson
  - Putnam City Invitational All-Tournament Team, Union Basketball's Jordynn Conner
  - Union Invitational All-Tournament Team, Union Basketball's Kaylen Nelson & T.K. Pitts
  - Union Invitational All-Tournament Team, Trent Pierce
  - Girls Basketball, OSSAA Class 6A Regional & Area Champions, State Semi-Finalists
  - Boys Basketball, OSSAA Class 6A Regional Runner-Ups
  - T.K. Pitts, Frontier Valley Conference Defensive Player of the Year & 1st Team All-Conference
  - Kaylen Nelson, FVC 1st Team All-Conference
  - Taylor Malham and Sydni Smith, FVC 3rd Team All-Conference
  - Jordynn Conner, FVC Honorable Mention
  - A.J. Reed & Trent Pierce, FVC, 3rd Team All-Conference
- Union Wrestling
  - District Champions
  - Junior High Wrestling, District Champions
  - State Qualifiers
    - 120 lbs., Jarrod Gilliam
    - 145 lbs., Mikey Foster
    - 132 lbs., Riley Trickett, alternate
    - 152 lbs., Noah Smith
    - 182 lbs., Gavin Koehler
- Union Girls Wrestling
  - Chanelle Alburg, first female in school history to qualify for state, placing 4th at regionals
- Union Swimming
  - 200-Meter Medley Relay Team, A. McMahon (11), McGovern (9), Uerling (10), and Posey (12) – new school record
  - Courtney Posey, set a new school record in the 200-meter individual medley (IM)
  - Danny Sibley, set a new school record in the 100-meter freestyle
  - Danny Sibley, set a new school record in the 200-meter IM
  - Danny Sibley, set a new school record in the 500-meter freestyle
  - Abigail McMahon, set a new school record in the 100-meter backstroke
  - Ella McGovern, set a new school record in the 100-meter breaststroke
- Union Swimming
  - Trenton vonHartitzsch, set a new school record in the 100-meter breaststroke
  - 400-Meter Freestyle Relay Team, Posey, Vu, A. McMahon, and M. McMahon – new school record
  - 200-Meter Freestyle Relay Team, McGovern, vonHartitzsch, Uerling, Vu – new school record
  - McGovern set a new school record in the 50-meter freestyle
  - 400-meter Freestyle Relay Team – Sibley, vonHartitzsch, LaFollette, Wise – new school record
  - Danny Sibley, Regional Champion, 100-yard breaststroke
  - Courtney Posey, Regional Champion, 200-yard freestyle
  - Kelly Vu, Regional Champion, 200-yard IM
  - Posey/vonHartitzsch/McGovern/Vu Regional Champions, 200-yard freestyle relay
  - A. McMahon, Regional Champion, 100-yard backstroke
  - McGovern, Regional Champion, 100-yard breaststroke
  - Girls OSSAA Regional Runner-Up
  - Individual OSSAA State Champion, Danny Sibley, 200-yard freestyle and 500-yard freestyle
  - Individual OSSAA State Champion, Trenton vonHartitzsch, 200-yard IM and 100-yard breaststroke
  - Girls OSSAA Class 6A State Runner-Ups

Student Engagement: Co-Curricular Activities

- Union Tennis
  - Sloan French, Curtis Richmond Scholarship
  - Girls Tennis, OSSAA Regional Runner-ups
  - Ashwin Chandrasekar – Regional Champion
  - Kevin Gannon/Nolan Hance – #1 Doubles – Regional Champions
  - Mario Pacilio – Regional Champion
  - Sloan French/Keshav Parameswaran – Regional Champions
  - Boys Tennis Team – Regional Champions
  - Ashwin Chandrasekar – State Runner-Up
  - Mario Pacilio – State Runner-Up
  - Boys Tennis Team – 3rd Place at State

- Union Golf
  - Freshman Jesse Tandoy, Union Invitational Champion
  - Senior Jeremy Tandoy, Frontier Valley Conference Champion
  - Senior Jesse Tandoy, Frontier Valley Conference Runner-Up
  - Girls Golf – 3rd Place OSSAA Regional Tournament
  - Jeremy Tandoy, OSSAA Regional Runner-Up

- Union Track & Field – Frontier Valley Conference
  - Girls 4x200 Relay Team, FVC Champions
  - Girls Shot Put & Discus, Norwood, FVC Champion
  - Girls 4x100 Relay Team, FVC Champions
  - Boys Discus and Shot Put – Gabe Ford, FVC Champion
  - Boys High Jump – Ethan Sorrels, FVC Champion
  - Boys 4x100 Relay Team – FVC Champions
  - Girls 100-meter dash – Kayveonna Jackson, FVC Champion
  - Boys 100-meter dash – Jayden Rowe, FVC Champion
  - Girls 200-meter dash – Sidney Smith, FVC Champion
  - Boys 4x400 Relay Team – FVC Champions
  - Boys Team – FVC Champions
  - Girls Team – FVC Runner-Up

- Union Track Regionals
  - Amiyah Norwood – Shot Put Champion
  - Girls 4x200 Relay Team – Champions
  - Boys 4x200 Relay Team – Champions
  - Gabe Ford – Shot Put Champion
  - Ethan Sorrels – Pole Vault Champion
  - Boys 4x100 Relay Team – Champions
  - Girls 4x100 Relay Team – Champions
  - Kayveonna Jackson – 100-meter dash – Champion
  - AJ Green – 100-meter dash – Champion



  - Sarah Cochran – 300-meter hurdles – Champion
  - Sidney Smith – 200-meter dash – Champion
  - Jayden Rowe – 200-meter dash – Champion
  - Shawn Rutledge – 1600-meter run – Champion
  - Boys 4x400 Relay Team – Champions
  - Girls 4x400 Relay Team – Champions
  - Boys Team – Regional Champions
  - Girls Team – Regional Runner-Ups

- Union Track – OSSAA State Track Meet
  - Reginald Wilson – State Runner-Up Discus
  - Gabe Ford – State Runner-Up Shot Put
  - Boys 4x200 Relay Team – Runner-Up
  - Boys 4x100 Relay Team – State Champions and State Record Holders
  - Girls 4x400 Relay Team – State Runner-up
  - Boys Team – State Runner-Up

- Union Track – OSSAA State Track Meet
  - Reginald Wilson – State Runner-Up Discus
  - Gabe Ford – State Runner-Up Shot Put
  - Boys 4x200 Relay Team – Runner-Up
  - Boys 4x100 Relay Team – State Champions and State Record Holders
  - Girls 4x400 Relay Team – State Runner-up
  - Boys Team – State Runner-Up

- 14 Student-Athletes signing a National Letter of Intent
  - Basketball
    - Mat Tyawna Harper, Southwestern University, Georgetown, Texas
    - Kaylen Nelson, Old Dominion University, Norfolk, Virginia
  - Cross Country
    - Shawn Rutledge, Oklahoma Baptist University, Shawnee, Oklahoma

Student Engagement: Co-Curricular Activities



- 14 Student-Athletes signing a National Letter of Intent (continued)
  - Soccer
    - Brooke Amos, Rogers State University, Claremore, Oklahoma
    - Francheska Badillo, Northeastern State University, Tahlequah, Oklahoma
  - Softball
    - Carissa Knight, Allen Community College, Iola, Kansas
    - Delaney Mills, Northeastern State University, Tahlequah, Oklahoma
    - Maya Sheldon, Kansas City Community College, Kansas City, Kansas
  - Swimming
    - Courtney Posey, New York University, New York, New York
    - Danny Sibley, Washington University, St. Louis, Missouri
  - Tennis & Volleyball
    - Cayley Willis, Oklahoma Wesleyan University, Bartlesville, Oklahoma
  - Track & Field
    - DaYan Aromaye, Coffeyville Community College, Coffeyville, Kansas
    - Ethan Sorrels, University of Arkansas-Little Rock, Little Rock, Arkansas
  - Wrestling
    - Jarrod Gilliam, Briar Cliff University, Sioux City, Iowa

- Oklahoma Coaches Association All-State Athletes
  - Kaylen Nelson, Basketball (Girls)
  - Michaella Atteberry, Cheerleading
  - Tsiah Dorn, Football
  - Shane Fields, Football
  - Maya Sheldon, Softball
  - Courtney Posey, Swimming (Girls)
  - Daniel Sibley, Swimming (Boys)
  - Sloan French, Tennis (Boys)
  - Jayden Rowe, Track (Boys)
  - Hayden Brockett, Track (Boys)
  - A.J. Green, Track (Boys)
  - DaYan Aromaye, Track (Boys)
  - Jarrod Gilliam, Wrestling (Boys)
  - Gavin Koehler, Wrestling (Boys)
- Oklahoma Coaches Association Scholarship Awards
  - Aly Blackwell, Volleyball, OCA Scholar Athlete Scholarship
  - Mat'Tyawna Harper, Basketball (Girls), Bob R. Williams Scholarship
- OSSAA Academic Awards
  - Cheerleading, Academic Achievement Award, cumulative GPA of 3.25 or above
  - Cross Country (Boys), Academic Achievement Award, cumulative GPA of 3.25 or above
  - Cross Country (Girls), Academic Achievement Award, cumulative GPA of 3.25 or above



- Fast-Pitch Softball, Academic Achievement Award, cumulative GPA of 3.25 or above
- Game Day Cheer, Academic Achievement Award, cumulative GPA of 3.25 or above
- Soccer (Goys), Academic Achievement Award, cumulative GPA of 3.25 or above
- Soccer (Girls), Academic Achievement Award, cumulative GPA of 3.25 or above
- Swimming (Girls), Academic Achievement Award, cumulative GPA of 3.25 or above
- Tennis (Boys), Academic Achievement Award, cumulative GPA of 3.25 or above
- Volleyball, Academic Achievement Award, cumulative GPA of 3.25 or above
- Wrestling (Boys), Academic Achievement Award, cumulative GPA of 3.25 or above

Operations

Department Statistics

- **Transportation** – More than 7,600 students rode the bus on a regular basis during the 2020-21 school year. Our route buses completed 346 routes per day, transporting students to and from school. The district maintained a fleet of 118 school buses and 94 support vehicles. The district ran 727 trips, 12 Tulsa Tech daily shuttles and two vehicles dedicated to the McKinney-Vento/Foster Care programs

- The district purchased 139,027 gallons of diesel fuel and 41,496 gallons of unleaded fuel for a combined cost of $305,581.

- The **Child Nutrition Department** served 884,247 breakfasts, 1,282,602 lunches, and 531,647 supper meals during the 2020-21 school year. Child Nutrition is currently providing free breakfast, lunch, and supper for all students, and are averaging about 5,700 breakfasts, 9,800 lunches, and 900 supper meals per day.

- The Child Nutrition department trained about 170 employees in culinary arts and safe food handling, has four chefs, and four dietitians. The number of students qualifying for free/reduced lunch has steadily increased over recent years and is currently at 67%.



- The district purchased fresh vegetables and fruits and local grass-fed beef from six local farms. These local products have been served on the menus every day and we will continue to offer local products each month. Child Nutrition purchases have enabled farmers to increase their revenue, continue farming, and hire additional farm help.

- Nine elementary schools participated in the Fresh Fruit and Vegetable Grant, which provided fresh produce for snacks every day in the classroom.

- The district's two nutrition educators developed seven nutrition videos called "Food for U" that are used in classrooms and in homes of virtual learners. These videos are very interactive, and provide interesting history, science, math, geography, and cooking connections with foods. Union High School and elementary students participated in these videos. Union Dietitians also developed video lessons on a new nutrition field called nutritional psychiatry, which will be utilized by teachers to help students understand the importance of nutrition on emotions and feelings and will bolster Union's efforts in the areas of Hope, and social/emotional learning. The new program is called Food Mood Connection, and will be introduced at the 6/7 Grade, and eventually be offered in all schools.

- Seventeen Union schools are 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 afterschool programs that tend to drive class attendance and performance.

- Union was recognized by the United Fresh Produce Association as the "Produce Excellence in Foodservice for Schools" national award-winner for our use of fresh produce, nutrition education, and for promoting the consumption of more produce by children. Union was also awarded a USDA Farm to School Grant of $100,000 to provide a district gardener, a farmer consultant, and a hoop house to grow vegetables and herbs; the grant also provides STEM learning experiences and Career Connect agricultural experiences for students, involves more farmers in the Farm to School Program to increase the usage of more local products, and to provide mentoring from the consultant farmer to improve farming practices.

- The **Custodial Department** employs 106 full-time custodians, a district custodial coordinator, and a district building engineer. Over 3.5 million square feet of floor space is cleaned nightly. On average, each full-time custodian cleans more than 35,000 square feet on a nightly basis. This includes over 1,000 individual classrooms.

- Larger custodial projects include the stripping and refinishing of tile surfaces across the district and the refinishing of the 7th Grade and Rosa Parks gymnasiums.

- Districtwide, custodial equipment inventory continues. This enables us to accurately identify future needs.

- Daily custodial checklists have been updated and implemented to place a higher emphasis on surface disinfection.

- Every custodian has been provided an electrostatic ionizing backpack sprayer to be able to deep clean and disinfect large areas in a short period of time. This is especially important in the event of widespread illnesses at schools and for COVID transmission prevention.

Operations





- Every elementary school has been provided with new vacuum equipment, replacing aging and obsolete machines.
- Every site district wide has transitioned to the Buckeye "E" chemical mixing and dispenser system. This allows custodians to mix and dispense their various cleaning products accurately and efficiently.
- The Buckeye Honors program has been initiated. This provides online and hands-on training for equipment and flooring maintenance. Custodial staff worked diligently to stock and prepare the new Football Stadium for its inaugural 2021 season.
- 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.
- The **Grounds Division** employs 12 full-time grounds men, one small-engine mechanic, and one district grounds coordinator. The Grounds Division maintains over 450 acres of land. During peak mowing season, each grounds man is responsible for maintaining over 40 acres of land. The grounds division is responsible for mowing, edging, blowing, fertilizing, and treating all district grass and naturally surfaced athletic fields. All landscaping design and maintenance is handled in-house. This includes all district flowerbeds and trees.

Grounds is also responsible for

- The inspecting and maintaining all playground equipment across the district.
- Plowing, clearing, and sanding the entire district during severe winter weather events. This past year was particularly challenging with two major winter storms.
- Resealing and repairing smaller sections of our asphalt parking lots in-house. This increases the longevity of the lot and reduces the cost of resurfacing.
- Providing signage and painting for all district parking lots and bus loops across the district.
- Assisting with painting, plumbing, and power-washing projects across the district.
- Major projects including pouring the large concrete slab for the Alt Ed (Alternative Education) trash area, two major water leaks at Union Central Park and baseball, erosion and roof drain repair at Rosa Parks, interior painting of Adult Ed (Adult Education), concrete repairs, and improvements across the district.

Maintenance

- The Maintenance Division employs 11 skilled tradesmen, 23 building engineers, and one District Maintenance Coordinator. Our tradesmen include five HVAC technicians, two electricians, one plumber, one kitchen technician, one carpenter, and one locksmith. Our 23 building engineers are responsible for maintaining the mechanical systems of their respective sites. They also are responsible for minor repairs.
- Our maintenance staff closes nearly 10,000 repair and preventative maintenance work orders every year.
- Larger projects include UMAC (Union Multipurpose Activity Center) electrical upgrades, HVAC unit replacements, major water leak repairs, shelving fabrication, small roof replacements, and repairs.
- Cooling tower water meters were installed at Union High School, the Eighth Grade Center, and Union Freshman Academy campuses to help monitor and reduce our district water and sewer costs.
- Our HVAC technicians and electricians worked diligently to reduce energy consumption during PSO peak events, resulting in tens of thousands of dollars returned to the district in the way of rebates.
- Implementing a building engineer training and license test preparation program has been a goal for the division. The goal of the program is to prepare future building engineer candidates from the ranks of our custodial and grounds staff, as well as to ensure all building engineers obtain a minimum 3rd class stationary engineers license.

Operations

- Drainage and site concrete improvements were completed at the Operations Department, 8th Grade Center, Union High School, Freshman Academy and Cedar Ridge Elementary.



Winter Freeze Event

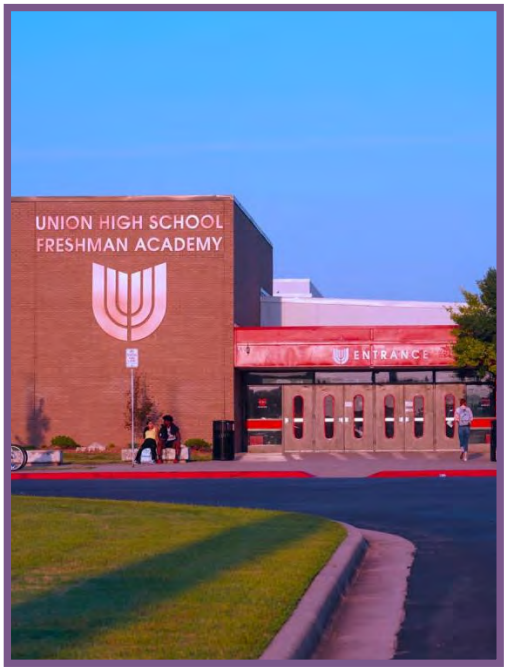
- The entire Operations staff worked tirelessly to respond to the historic freeze event of February 2021. Over 30 individual pipe breaks were repaired, and the resulting water damage was mitigated in impressive fashion. Not a single day of instruction was missed due to operational readiness.

Safety and Security

- The district employed a director of security and a security coordinator, as well as 12 full-time security officers at the secondary schools, two at the elementary school sites and 25 part-time officers for athletic and special events. One Broken Arrow School Resource Officer was on call daily, in addition to nine off-duty Tulsa Police Department officers on a rotating schedule, allowing one to patrol the district each day.

- District employees completed more than 18,802 assigned training courses and more than 2,305 unassigned safety courses on their own, for a training completion rate of 82 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 required to prepare, set up, run, and clean up every event. Two employees coordinated 43,355 internal events and 5,614 external rentals involving scheduling, contracts, scheduling conflict resolution, staffing, and set-up and tear-down. The Facilities Department also schedules, stocks, and operates UMAC Concessions, serving 37 UMAC events last year.



Construction/Facilities

2020-2021 Projects (Completed):

- Completion of West Union Stadium and turf
- Union High School
  - Fire water line repair
  - West stadium complex, wrestling area, training area, and locker rooms
  - Roof enhancements (various throughout the district)
  - Track resurfacing and marking
  - New 700-ton chiller replacement (UMAC)
  - East Stadium refurbishment
- Baseball/Softball field improvements – dugouts and turf
- Freshman Academy
  - Roof enhancements
  - New atrium glass and storefront doors at the balcony
- Innovation Lab
  - Roof enhancements
  - Interior demolition for establishing construction classes
- Other Sites
  - Sixth/Seventh Grade Center – HVAC pool pack unit
  - Union Enrollment Center – freeze repair
  - Fencing at Ochoa, Union High School Track, and Eighth Grade Center

Community Support

- Chris McNeil was appointed to serve the remaining term for Zone 2 on the Board of Education, taking the place of Lisa Ford who resigned at the end of November.
- Joey Reyes was elected to a five-year term representing Zone 1 on the Board of Education.
- Board member Dr. Chris McNeil earned his Doctorate in Osteopathic Medicine from Oklahoma State University.
- The teachers, administrators and staff of Union Public Schools pledged an incredibly generous $80,890.13 to USEF during the 2020 Month of Giving. These funds were then directed to Union programs throughout the district. The Foundation did not hold its annual Night of FOCUS due to the pandemic in 2020, but did welcome 31 teams to its hugely successful Golf Invitational Tournament in April at Cedar Springs Country Club. The tournament raised a grand total of $93,450 for district-wide programs. The accompanying online auction raised an additional $12,915.
- Mayor G.T. Bynum, Superintendent Dr. Kirt Hartzler, and other community members celebrated the opening of the new Community Health Connection Clinic on the campus at Ellen Ochoa Elementary, with a ribbon-cutting ceremony. This new clinic – funded by the Vision Tulsa campaign – will provide much-needed medical, dental, behavioral health and pharmacy services to the Northeast Oklahoma community.
- The Hardesty Family Foundation, Inc., and the Home Builders Association (HBA) donated $7,500 to the new construction class at the Union High school Freshman Academy.
- Taylor Fowler, Area Manager and Leslie Breedlove, Director of Operations for the local Cici's Pizza franchise, presented Associate Superintendent Charlie Bushyhead with a check for $3,761. On September 3, Cici's held a "Pizza for PPE" fundraiser to aid area schools in raising funds to purchase much-needed personal protection equipment. Owner Greg Costley wanted to come up with a way to assist educators in covering these added safety costs due to the Covid-19 pandemic. Cici's generously donated a percentage of proceeds from five Tulsa-area locations and presented a check to Union.
- The Union Schools Education Foundation awarded 67 educational grants in fall 2020 valued at $67,863.99. The projects to be funded ranged from $119 to a district-wide grant continuing the support of math manipulatives for all first grade classes for $9,602.34.
- In addition to funding educational grants, the Foundation also pledged support for several programs in 2020-2021. Unfortunately, due to the pandemic, not all programs were able to utilize the funds, so the Board of Trustees made decisions on how best to benefit the district during this time. USEF continued support for Union High School's College & Career Center, Union Pre-K Camp, Union High School Leadership, Teacher and Support Person of the Year, Graduation Celebration, and donated over $32,000 toward PPE expenses including providing 10,000 face masks to students and educators. Total support pledged to the district in 2020-2021 was over $80,000.

Business/Technology Highlights

The IT Department:

Closed 9,476 work orders from September 2020 to June 2021

Replaced 1,200 expiring student laptops

Replaced 1/3 of all teacher laptops

Purchased and deployed a backup/ disaster recovery system

Purchased and configured 350 new teacher laptops

Held the 8th Annual TASTS conference, a free Educational Technology symposium for vendors and participants. Traditionally, the event brings together almost 100 vendors and over 300 participants.

Held first Oklahoma eSports League (OeSL) playoffs at the UMAC

Sold 1,170 devices to the public at the surplus sale

Replaced nearly 250 Interactive Panels

Replaced all secretary/receptionist computers

Replaced building engineer computers and those in the custodial staff break room

As a result of the COVID-19 pandemic:

Collected/distributed thousands of computers to students/parents due to need for distance/virtual learning

Collected and distributed devices curbside

Purchased 4,000 laptops to finish the 1:1 project ("one device for every student")

Rolled out a new phone system and replaced 2,000 employee phones

Completed wireless upgrade to ensure optimal performance.

Provided a remote work environment with remote connectivity and remote phone extensions

ASSOCIATION OF SCHOOL BUSINESS OFFICIALS INTERNATIONAL

This Meritorious Budget Award is presented to

UNION PUBLIC SCHOOLS INDEPENDENT DISTRICT I-009

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

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

MERITORIOUS BUDGET AWARD

W. Edward Chabal
President

David J. Lewis
Executive Director

2021-2022 Board of Education

Joey Reyes – Zone 1

Dr. Chris McNeil – Zone 2

Heather McAdams – Zone 3

Stacey Roemerman – Zone 4

Ken Kinnear – Zone 5



2021-2022 CABINET MEMBERS



Kirt Hartzler
Superintendent



Charlie Bushyhead
Associate Superintendent



Sandi Calvin
Assistant Superintendent



John Federline
Assistant Superintendent



Trish Williams
Chief Financial Officer



Chris Payne
Chief Communications Officer



Gart Morris
Executive Director of Instructional Technology



Theresa Kiger
Executive Director of Elementary Education



Todd Nelson
Senior Executive Director of Research-Design-Assessment



Todd Borland
Executive Director of Information Technology



Jay Loegering
Executive Director of Human Resources

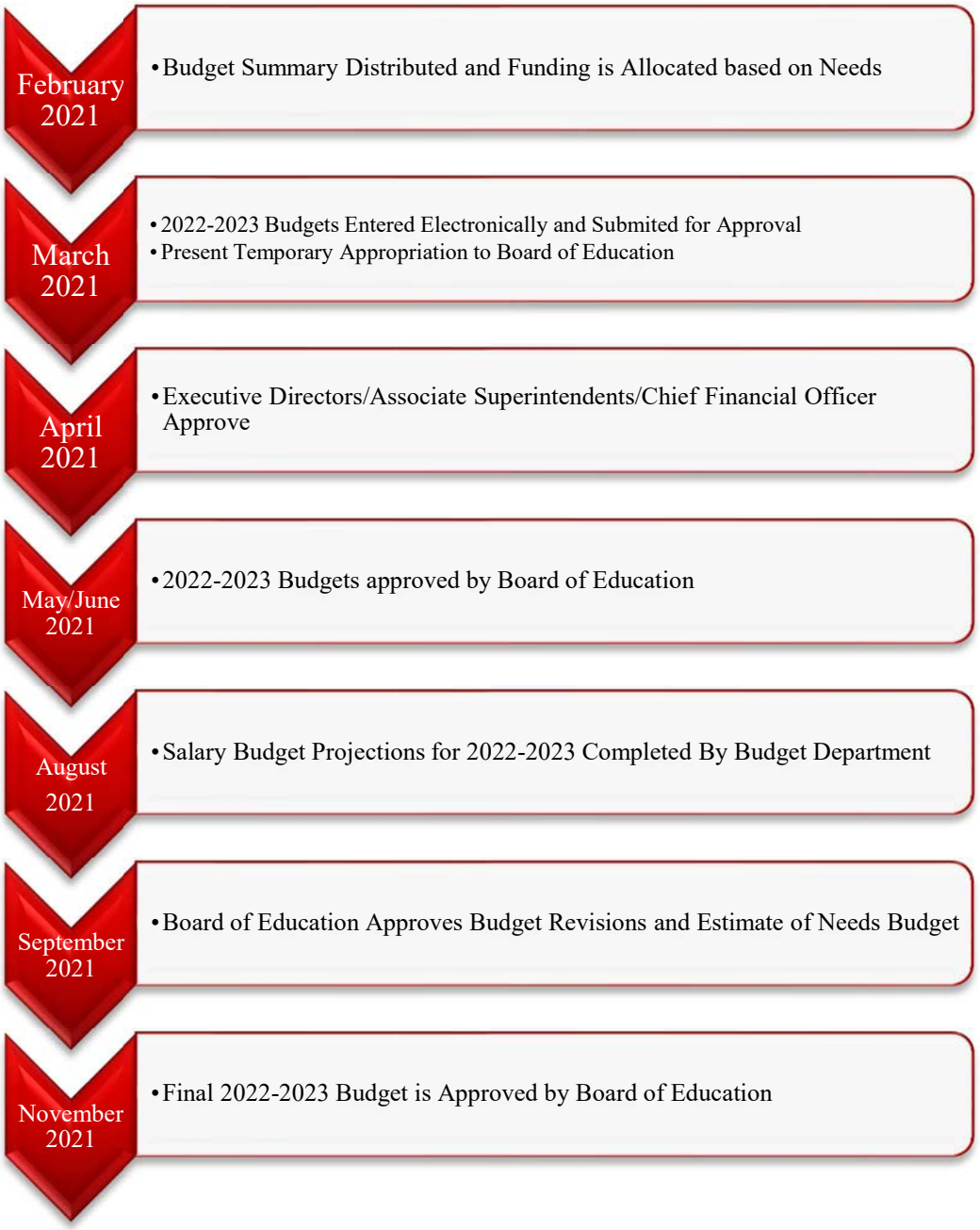
2021-2022 DISTRICT ADMINISTRATORS

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

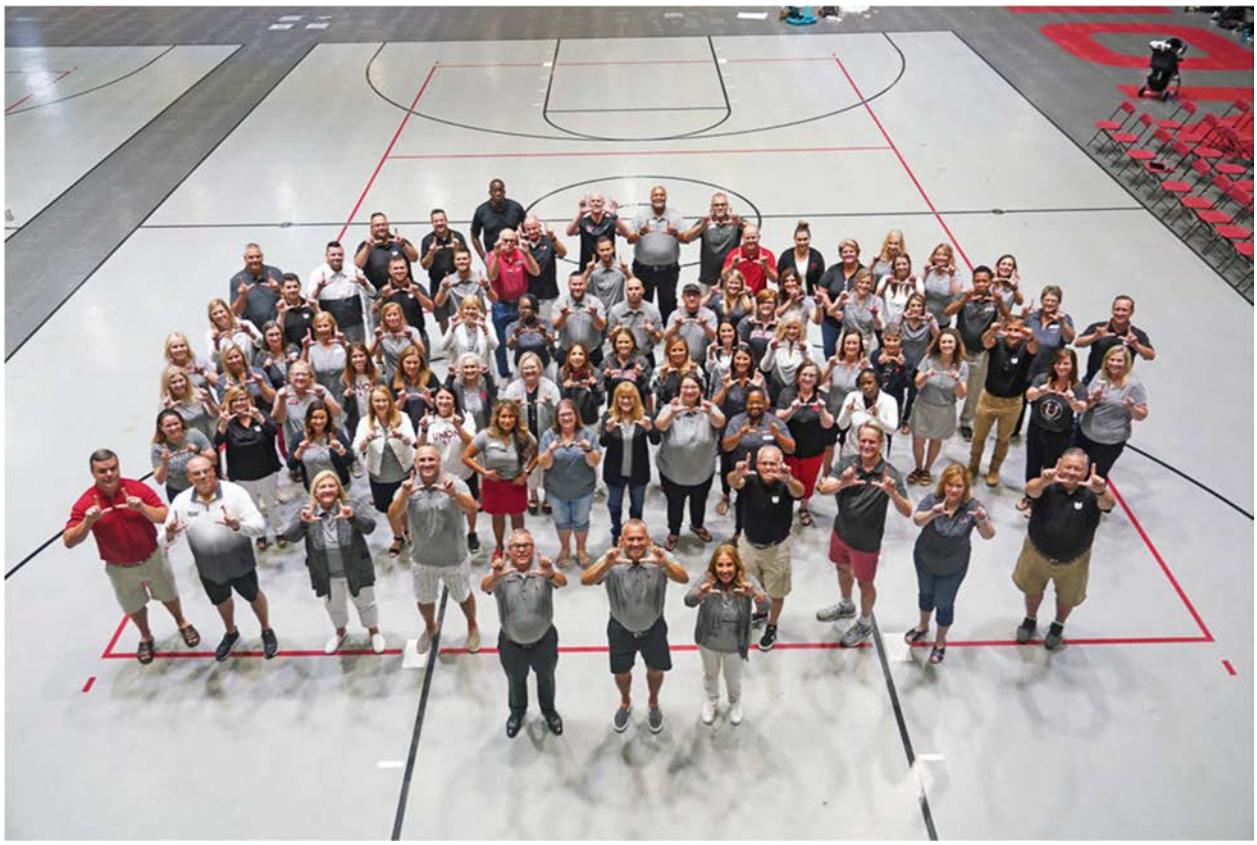
2021-2022 PRINCIPALS

Tony Tempest……High School
John Chargois……High School
Briane Grass……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
Becky King……Moore Elementary
Rita Long……Ellen Ochoa Elementary
Tracy Weese……Peters Elementary
Heather Federline……Rosa Parks Elementary
Alycia Pennington……Rosa Parks Early Childhood Education Center

BUDGET 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.




Choirs

LEARNING
The Union Way

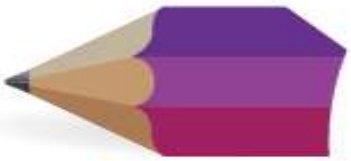


Literacy

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

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*).

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

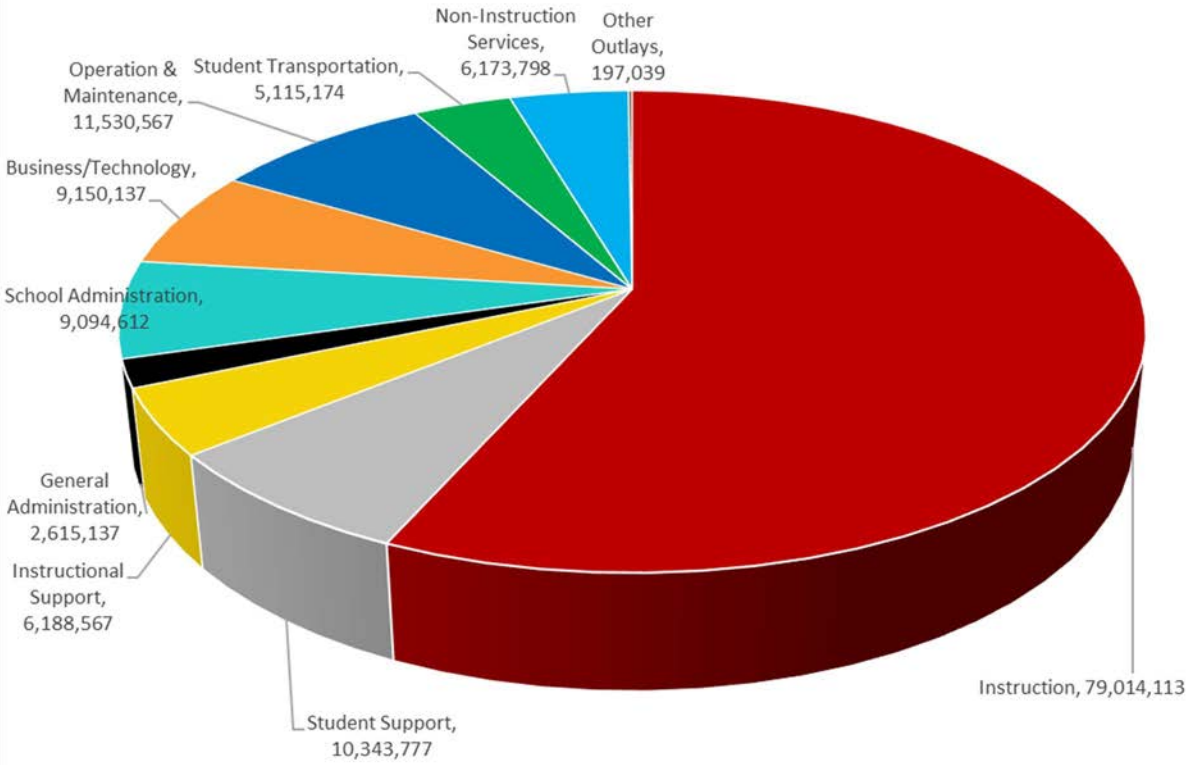
- Proficiency on state assessments
- PSAT 9th and 10th grades
- SAT 11th grade
- Attendance
- Percentage on track for graduation
- College readiness course completion
- Graduation rate
- Student engagement

	General Fund Budget 2021-2022	Building Fund Budget 2021-2022	Child Nutrition Fund Budget 2021-2022	Sinking Fund Budget 2021-2022	Bond Funds Budget 2021-2022	Total All Funds Budget 2021-2022
Revenues						
Local Sources	$ 38,623,528	$5,292,818	$ 766,600	$26,668,953	$26,064,651	$ 97,416,550
Intermediate Sources	5,019,298	0	0	0	0	5,019,298
State Sources	71,039,738	0	79,825	0	0	71,119,563
Federal Sources	25,605,883	0	11,147,000	0	0	36,752,883
Total Revenues	**140,288,447**	**5,292,818**	**11,993,425**	**26,668,953**	**26,064,651**	**210,308,294**
Expenditures						
Instruction	79,014,113	0	0		35,504,054	114,518,167
Student Support	10,343,777	0	0			10,343,777
Instructional Support	6,188,567	0	0			6,188,567
General Administration	2,615,137	0	0			2,615,137
School Administration	9,094,612	0	0			9,094,612
Business/Technology	9,150,137	0	0			9,150,137
Operation & Maintenance	11,530,567	6,083,536	0			17,614,103
Student Transportation	5,115,174	0	0			5,115,174
Non-Instruction Services	6,173,798	0	12,176,454			18,350,252
Other Outlays	197,039	0	0	27,187,813		27,384,852
Facilities Acquisitions and Construction	0	0	0			0
Total Expenditures	**$139,422,921**	**$6,083,536**	**$ 12,176,454**	**$27,187,813**	**$35,504,054**	**$220,374,778**

The Districts classification of revenues can be found on pages 86-87.

GENERAL FUND BUDGET

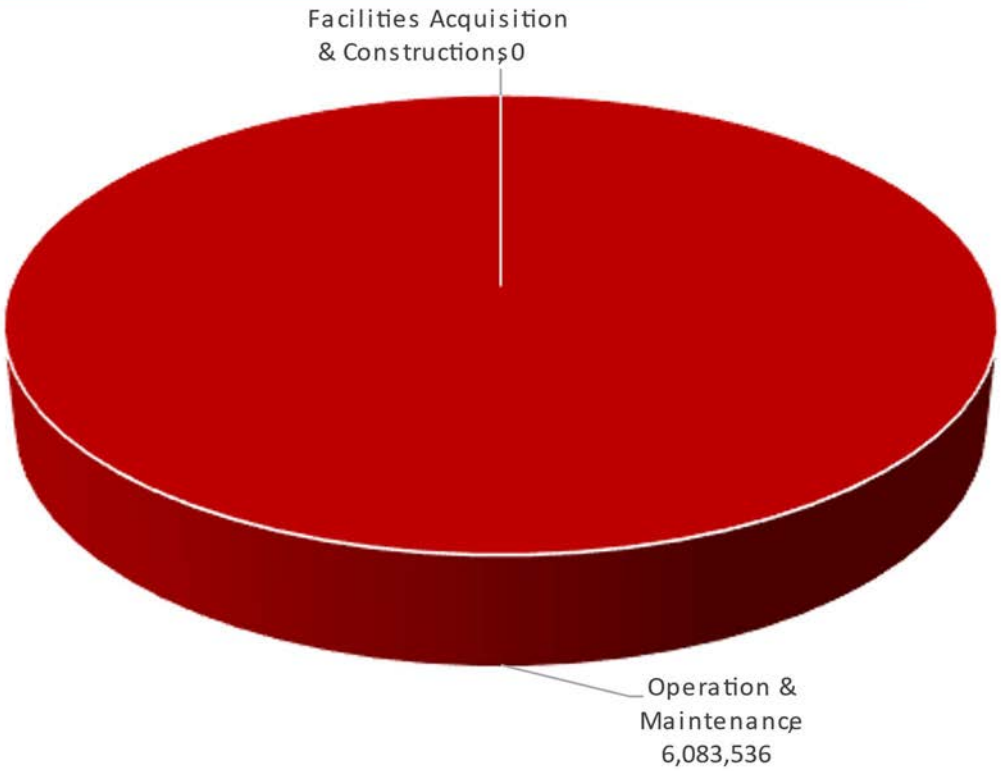
General Fund by Function



REVENUES	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Sources	$ 36,181,338	$ 38,085,440	$ 38,125,225	$ 37,520,455	$ 38,623,528	$ 38,623,528	$ 39,009,763	$ 39,399,861	$ 39,793,860
Intermediate Sources	4,108,437	4,248,303	4,543,236	4,966,445	5,019,298	5,019,298	5,069,491	5,120,186	5,171,388
State Sources	59,420,505	69,286,870	71,378,323	69,052,048	71,039,738	71,039,738	69,618,943	70,315,133	71,721,435
Federal Sources	8,115,310	9,348,645	9,492,779	17,878,666	25,605,883	25,605,883	22,277,118	23,390,974	23,157,064
Total Revenues	$ 107,825,590	$ 120,969,259	$ 123,539,563	$ 129,417,614	$ 140,288,447	$ 140,288,447	$ 135,975,316	$ 138,226,154	$ 139,843,747

Expenditures	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Instruction	$ 59,007,115	$ 67,633,827	$ 70,255,223	$ 74,044,051	$ 79,014,113	$ 79,014,113	$ 76,643,690	$ 77,410,127	$ 78,184,228
Student Support	7,373,738	9,317,736	9,749,731	10,733,346	10,343,777	10,343,777	10,033,464	10,133,798	10,235,136
Instructional Support	4,116,381	5,232,565	5,112,927	6,181,922	6,188,567	6,188,567	6,002,910	6,062,939	6,123,568
General Administration	2,655,005	2,442,970	2,568,552	2,682,929	2,615,137	2,615,137	2,536,683	2,562,050	2,587,670
School Administration	8,623,348	9,120,025	9,302,859	9,962,296	9,094,612	9,094,612	8,821,774	8,909,991	8,999,091
Business/Technology	7,347,032	7,883,100	8,158,132	8,538,965	9,150,137	9,150,137	8,875,633	8,964,389	9,054,033
Operation & Maintenance	9,170,551	9,216,510	8,693,970	9,604,834	11,530,567	11,530,567	11,184,650	11,296,496	11,409,461
Student Transportation	4,322,681	4,607,423	4,757,427	5,029,463	5,115,174	5,115,174	4,961,719	5,011,336	5,061,449
Non-Instruction Services	4,206,897	4,320,290	4,870,920	5,039,585	6,173,798	6,173,798	5,988,584	6,048,470	6,108,955
Other Outlays	74,421	104,635	234,380	54,427	197,039	197,039	191,128	193,039	194,969
Total Expenditures	$ 106,897,169	$ 119,879,080	$ 123,704,121	$ 131,871,818	$ 139,422,921	$ 139,422,921	$ 135,240,233	$ 136,592,636	$ 137,958,562

Building Fund by Function

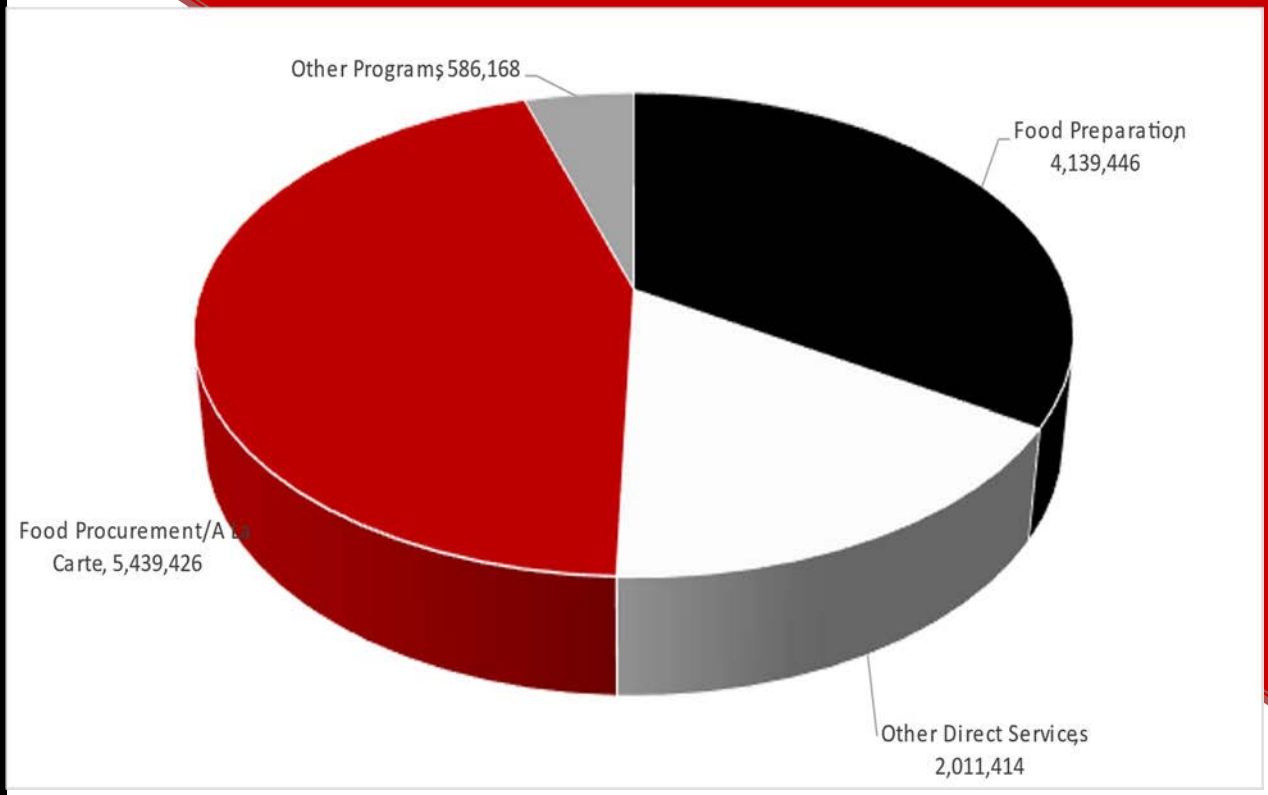


REVENUES	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Sources	$ 6,725,703	$ 13,174,034	$ 5,272,220	$ 5,124,618	$ 5,292,818	$ 5,292,818	$ 5,345,746	$ 5,399,204	$ 5,453,196
Federal Sources	0	0	0	0	0	0	0	0	0
Total Revenues	$ 6,725,703	$ 13,174,034	$ 5,272,219	$ 5,124,618	$ 5,292,818	$ 5,292,818	$ 5,345,746	$ 5,399,204	$ 5,453,196

Expenditures	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Operation & Maintenance	$ 6,131,223	$ 6,295,070	$ 8,185,511	$ 7,650,960	$ 6,083,536	$ 6,083,536	$ 6,144,371	$ 6,205,815	$ 6,267,873
Facilities Acquisition & Constructions	344,186	2,516,774	5,113,937	626,235	0	0	0	0	0
Total Expenditures	$ 6,475,408	$ 8,811,844	$ 13,299,448	$ 8,277,194	$ 6,083,536	$ 6,083,536	$ 6,144,371	$ 6,205,815	$ 6,267,873

CHILD NUTRITION BUDGET

Child Nutrition Fund by Function

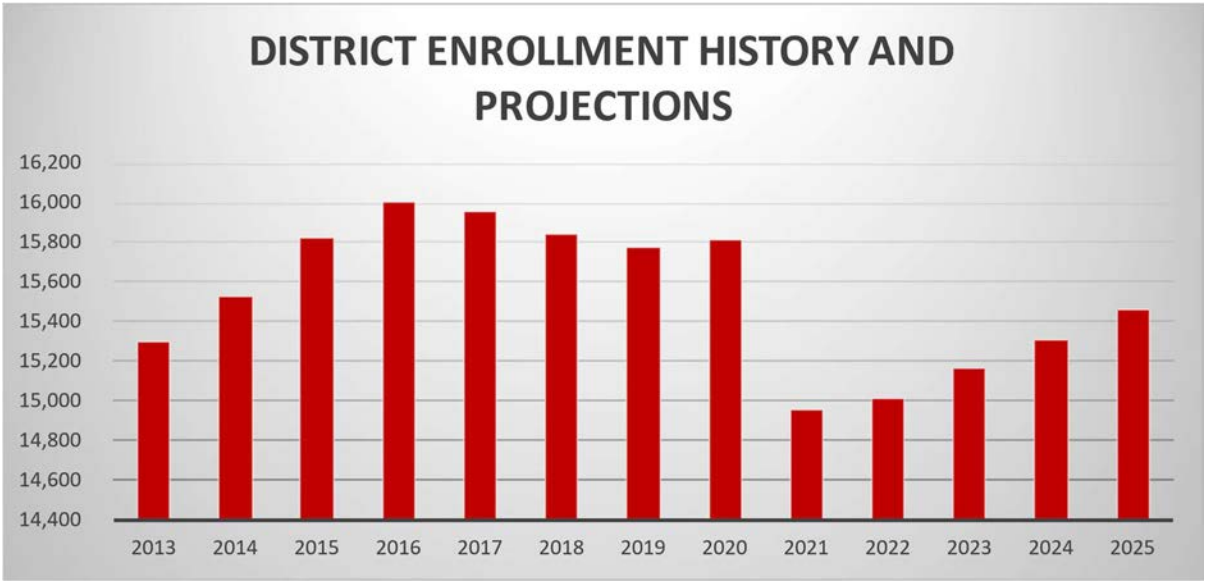


REVENUES	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Sources	$ 2,279,451	$ 2,495,723	$ 1,866,418	$ 559,885	$ 766,600	$ 766,600	$ 774,266	$ 782,009	$ 789,829
State Sources	73,393	68,357	80,358	8,633	79,825	79,825	80,623	81,429	82,244
Federal Sources	6,838,170	7,252,920	7,526,297	11,220,597	11,147,000	11,147,000	11,258,470	11,371,055	11,484,765
Total Revenues	$ 9,191,015	$ 9,816,999	$ 9,473,073	$11,789,115	$11,993,425	$11,993,425	$12,113,359	$12,234,493	$12,356,838

Expenditures	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	11/8/2021 Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Food Preparation	$ 3,592,407	$ 3,917,720	$ 4,327,688	$ 4,348,466	$ 4,139,446	$ 4,139,446	$ 4,180,840	$ 4,222,649	$ 4,264,875
Other Direct Services	1,027,217	964,897	1,014,951	940,246	2,011,414	2,011,414	2,031,528	2,051,843	2,072,362
Food Procurement/A La Carte	3,388,160	3,832,105	3,464,372	3,483,942	5,439,426	5,439,426	5,493,820	5,548,758	5,604,246
Other Programs	936,101	928,868	1,264,529	622,974	586,168	586,168	592,030	597,950	603,929
Total Expenditures	$ 8,943,885	$ 9,643,590	$10,071,540	$ 9,395,628	$12,176,454	$12,176,454	$12,298,218	$12,421,200	$12,545,412

STUDENT ENROLLMENT TRENDS AND FORECAST

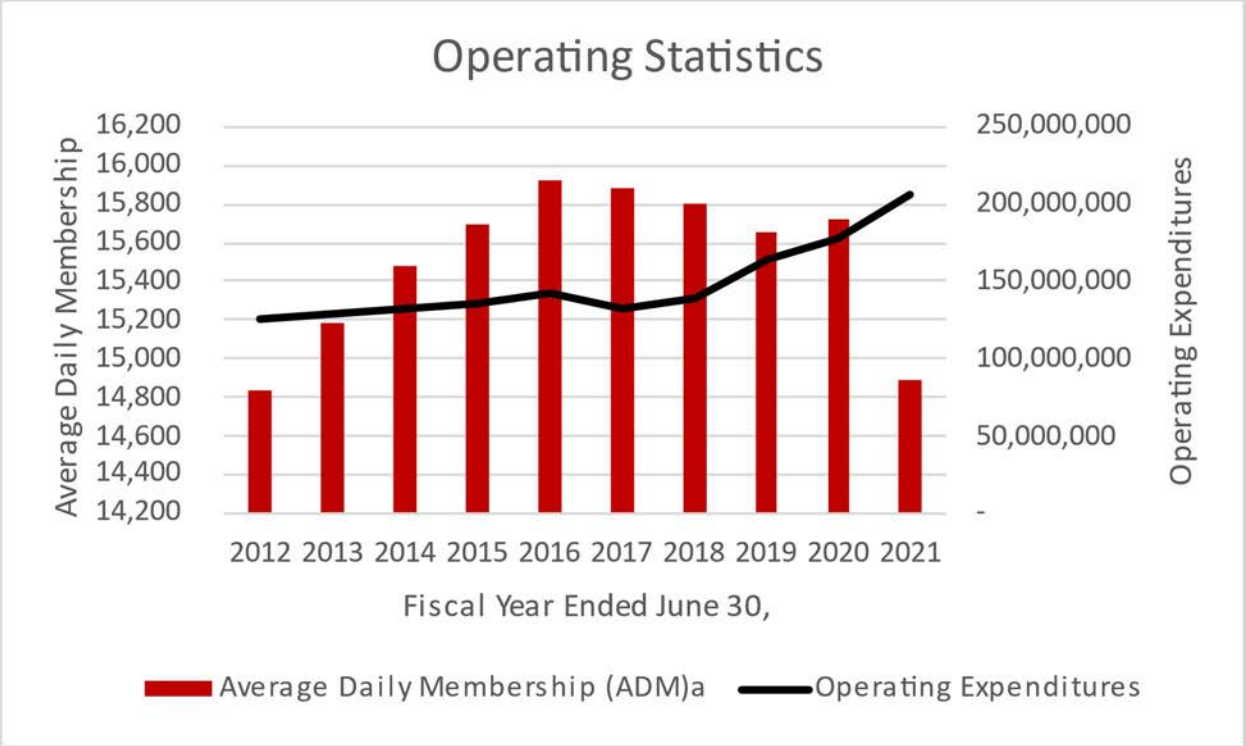
- Student Enrollment: State enrollment has increased 4,500 students from 2020-2021 but is still down from 2019-2020 total enrollment.
- Oklahoma's public school enrollment has brought back about half of students lost due to pandemic.
- According to the annual Oct. 1 student count, overall enrollment was down 4,954 students, or 0.71%, to 698,696 students' total.
- Just two years 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.

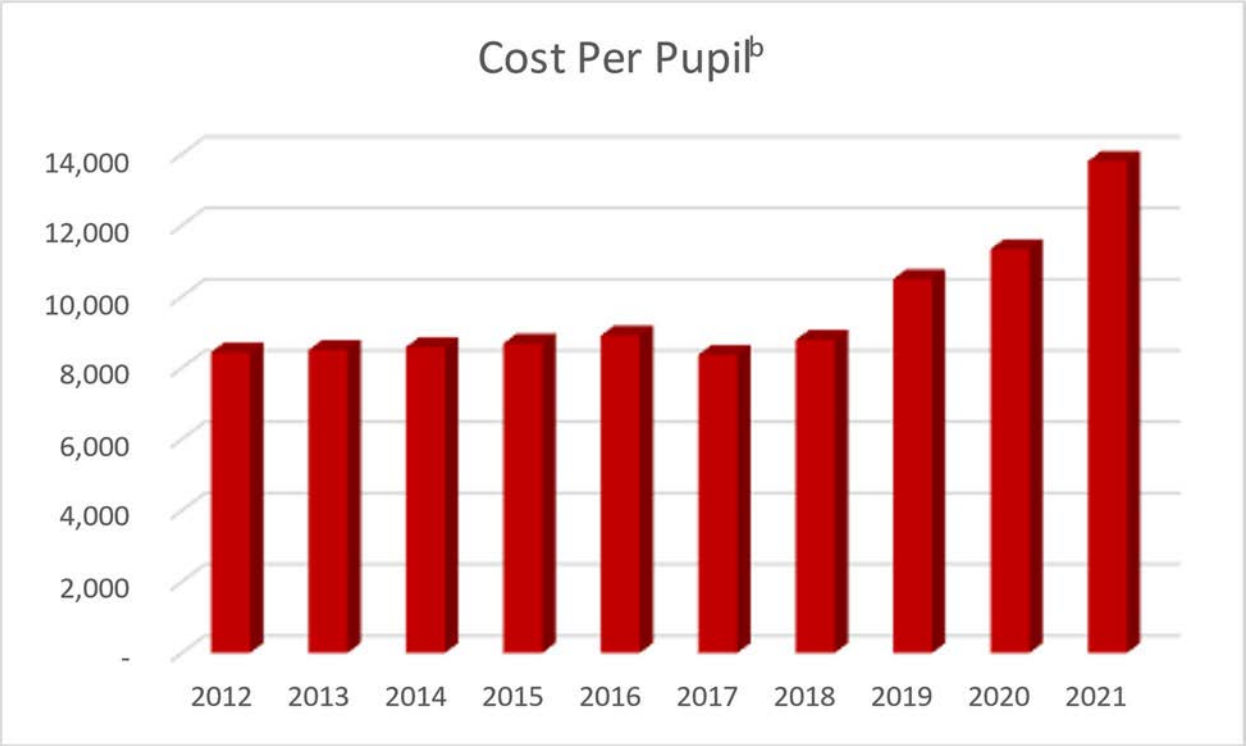


SCHOOL YEAR	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
ENROLLMENT	15,299	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959	15,011	15,481	15,671	15,880
STUDENT INCREASE	309	227	297	183	-46	-113	-74	43	-857	52	470	190	209
PERCENT CHANGE	2.06%	1.48%	1.91%	1.16%	-0.29%	-0.71%	-0.47%	0.27%	-5.42%	0.35%	3.13%	1.23%	1.33%

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





[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
Last Ten Fiscal Years

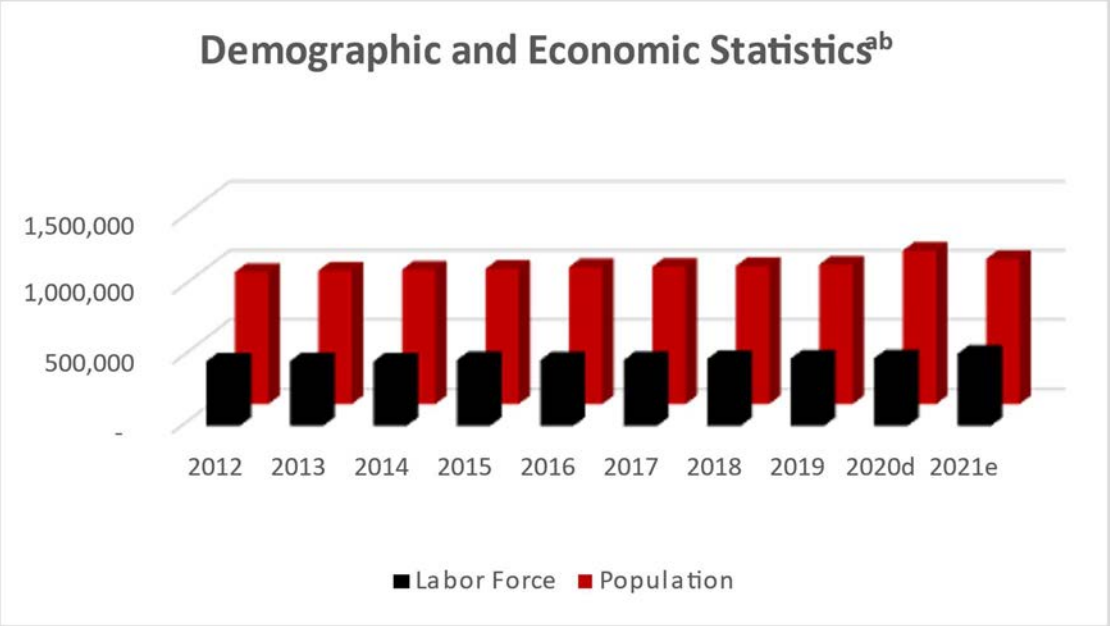
Fiscal Year Ended June 30,	Average Daily Membership (ADM)[a]	Operating Expenditures	Cost Per Pupil[b]	Percentage Change[c]	Teaching Staff[d]	Pupil/ Teacher Ratio	Number of Graduates[e]
2012	14,836	125,230,487	8,441	2.87%	936	16:1	929
2013	15,190	129,141,650	8,502	0.72%	949	16:1	967
2014	15,486	132,928,940	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
2021	14,889	205,491,187	13,802	21.81%	1,008	15:1	907

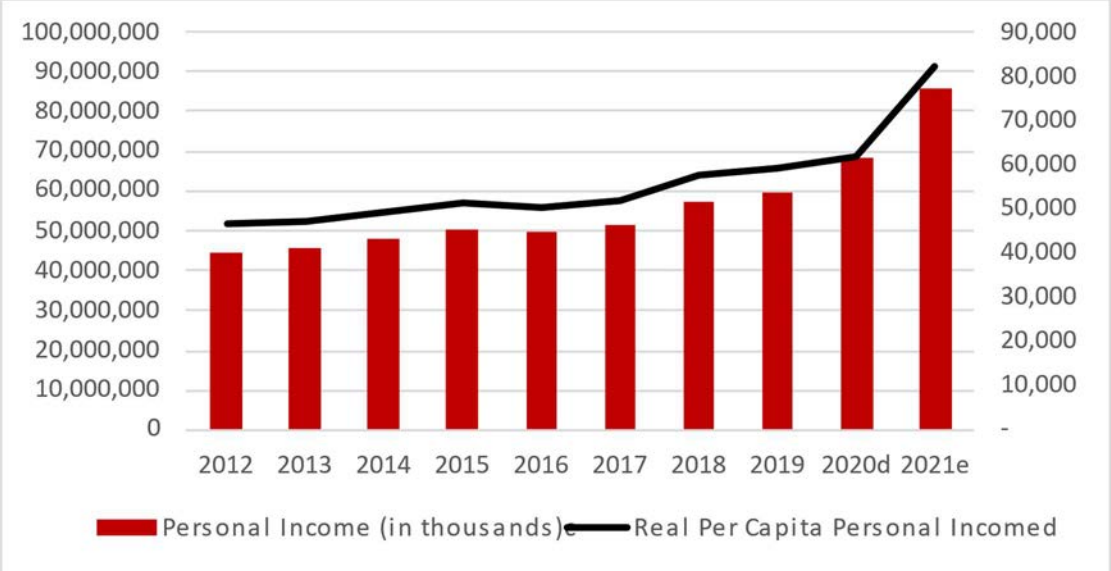
[a] Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education.

[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.





[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*

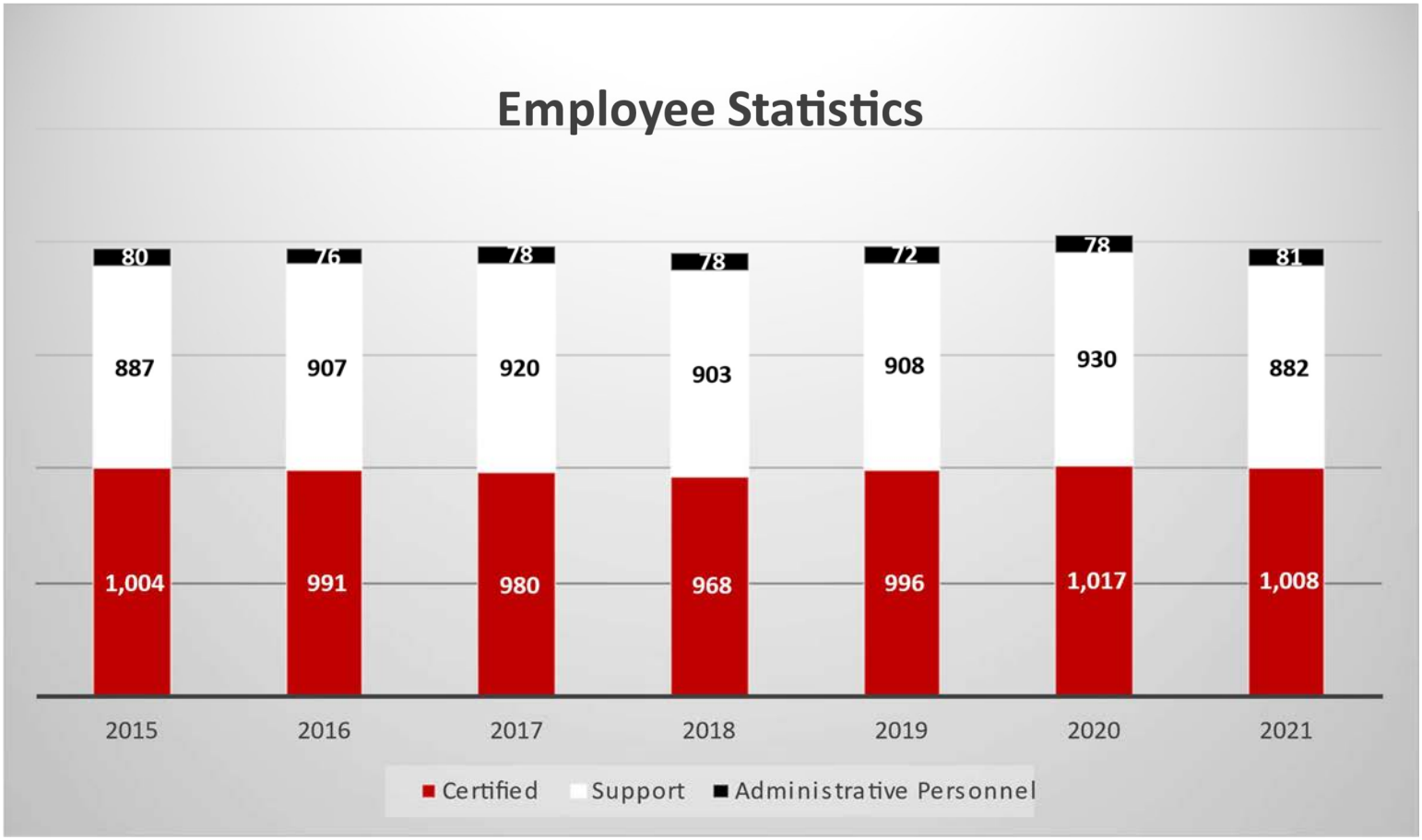
[d] *Estimate based on data obtained from the Tulsa Metro Chamber*

[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 21, certified personnel decreased by 9 positions, support personnel decreased by 48 positions and administrative personnel increased by 3 positions.



Employee Information
Last Ten Fiscal Years

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Certified Personnel										
Bachelor's										
Minimum Salary	31,600	31,600	31,600	32,050	32,150	32,350	32,697	39,000	40,220	40,220
Maximum Salary	49,829	50,576	51,461	52,461	53,248	53,780	54,856	62,150	64,370	64,370
Average Salary	36,106	35,812	35,754	36,152	36,495	36,478	36,822	43,868	45,132	45,248
Number of Teachers	622	617	642	674	653	646	632	638	648	633
Master's										
Minimum Salary	32,800	32,800	32,800	33,250	33,400	33,600	33,972	41,000	42,220	42,220
Maximum Salary	54,608	55,427	56,397	57,397	58,258	58,841	60,018	66,550	68,770	68,770
Average Salary	42,287	40,961	40,946	41,103	41,017	40,856	41,244	48,987	50,184	49,856
Number of Teachers	303	322	318	315	326	321	325	344	356	366
Doctor's										
Minimum Salary	34,000	34,000	34,000	34,450	34,600	34,800	35,196	46,500	47,720	47,720
Maximum Salary	57,049	57,905	58,918	59,918	60,817	61,425	62,654	70,350	72,570	72,570
Average Salary	46,822	45,857	44,678	47,407	47,259	48,809	51,525	59,385	61,758	59,909
Number of Teachers	12	10	15	15	12	11	11	14	13	9
Total Certified Personnel	936	949	975	1,004	991	980	968	996	1,017	1,008
Support Personnel										
Number of Support	784	866	855	887	907	920	903	908	930	882
Administrative Personnel										
Number of Administrators	72	72	81	80	76	78	78	72	78	81

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			
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%
2021	63,859,558.00	62,851,899.00	98.42%	1,394,179.00	64,246,078.00	100.61%	2,382,610	3.73%

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

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]
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
2021	760,697,383	110,747,589	22,570,959	894,015,931	8,231,037,095	10.86%	71.43

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 Property Owners

Rates for Taxpayers in the City of Tulsa

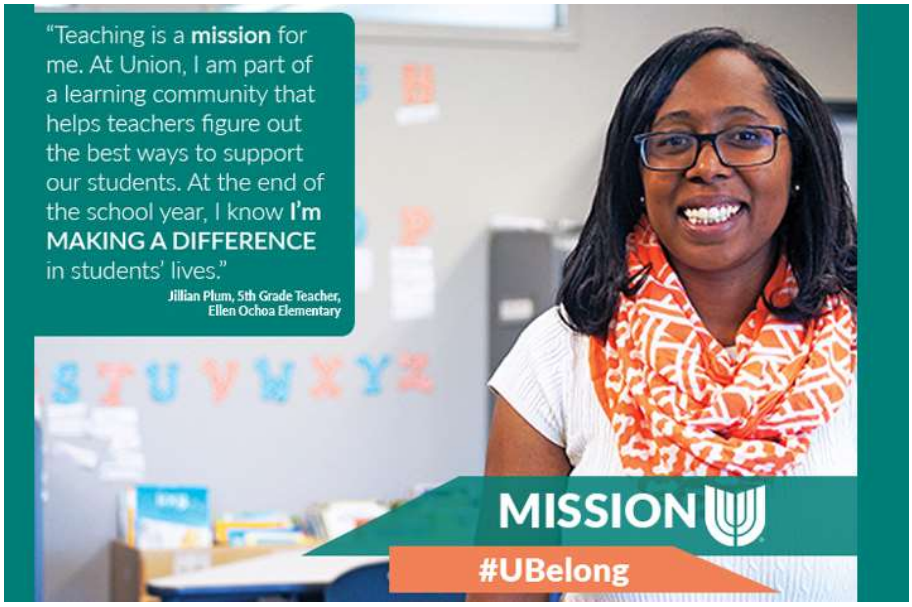
Fiscal Year	Mills	Market Value of Property	Assessment Rate	Assessed Value	Millage Rate	Property Tax Due	Change
2011	130.01	250,000	11%	27,500	0.13001	3,575	
2012	134.44	250,000	11%	27,500	0.13444	3,697	122
2013	134.84	250,000	11%	27,500	0.13484	3,708	11
2014	134.08	250,000	11%	27,500	0.13408	3,687	-21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

Fiscal Year Ended June 30,	Total General Obligation Bonds[a]	Total Estimated Actual Value[b]	Ratio of Total Debt to Estimated Actual Valuation[b]	Average Daily Membership (ADM)[c]	Ratio of Total Debt Per Student[c]
2012	72,325,000	6,525,004,824	1.11%	14,836	4,875
2013	72,678,038	6,562,775,286	1.11%	15,190	4,785
2014	72,803,641	6,671,918,494	1.09%	15,486	4,701
2015	79,142,155	6,905,133,965	1.15%	15,700	5,041
2016	85,897,257	7,085,583,042	1.21%	15,919	5,396
2017	89,967,590	7,368,526,233	1.22%	15,887	5,663
2018	89,200,374	7,564,864,003	1.18%	15,797	5,647
2019	88,458,169	7,841,339,927	1.13%	15,655	5,650
2020	91,877,570	8,068,048,672	1.14%	15,726	5,842
2021	92,827,426	8,231,037,095	1.13%	14,889	6,235

[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.

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

Note: The District issues only general obligation bonds

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

As of 6/30/2021, the sinking (debt service) fund had a total fund balance of $14,684,348, 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 $79,432. 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 decrease in fund balance during the 2021-2022 fiscal year in the bond fund was $4,451,106. This decrease in fund balance is primarily due to reduced capital outlay expenditures.

CHANGES IN LONG TERM DEBT

Ratios of Outstanding Debt by Type
Last Ten Fiscal Years

Fiscal Year Ended June 30,	Total Governmental Activities General Obligation Bonds[a]	Total Estimated Actual Value[b]	Ratio of Total General Debt to Estimated Actual Valuation[b]	Total Personal Income (in thousands)[c]	Ratio of Total General Debt Per Personal Income	Average Daily Membership (ADM)[d]	Total General Debt Per Student[d]	Tulsa MSA Population (in thousands)	Total Debt per Capita
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
2021	92,827,426	8,231,037,095	1.13%	85,993,501	0.11%	14,889	6,235	1,107	887

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
2022	$ 25,625,000	$ 1,562,813	$ 27,187,813
2023	25,625,000	1,115,625	26,740,625
2024	19,875,000	656,785	20,531,785
2025	13,750,000	291,250	14,041,250
2026	6,500,000	73,125	6,573,125
	$ 91,375,000	**$ 3,699,598**	**$ 95,074,598**

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.

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

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

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

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

State aid revenue is the District's largest single revenue source representing $60 million in Fiscal Year 2021-2022. The state aid allocation will be recalculated in January 2022 and will be adjusted to reflect the actual number of students served as of October 2021 as well as any changes in 2021-2022 property valuations. The state aid and state flexible benefit allowances have historically been the District's most stable sources of revenue, except for the years of 2001-2002 and 2002-2003, which resulted in a $3.4 million loss. State aid revenue increased in 2020-2020 by approximately $21407515 compared to 2019-2020 collections.

In 2009-2010, the State began to reduce state aid, but the decrease was supplemented with federal ARRA stabilization funds. The federal government provided this funding under the belief that states would utilize these funds to offset the reduction in state aid for two years (2009-2010 and 2010-2011), with state aid funding levels, beginning in 2011-2012, returning to 2008-2009 funding levels. However, the state of Oklahoma did not increase state aid back to the 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 $32,415,695 in 2020-2021. For 2021-2022 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 2022 mid-term revision to the state aid allocation. While the District will retain any annual increase in ad valorem revenue, the state aid allocation will be 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 2022 for any net new children who enrolled during the first quarter of the school year which will help offset the change.

SIGNIFICANT EXPENSE CHANGES

The general fund is the chief operating fund of the district. At the end of June 30, 2021, unassigned fund balance of the general fund was $14,332,276. 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 $2,414,203 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 $4,349,895. The net decrese 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.






UNION
POM



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, 2021, and were reinstated during fiscal year 2022, for the general fund, building fund, or child nutrition fund.




MARSHALL T. MOORE
ELEMENTARY SCHOOL


Rules
DAILY
ROUTINE
Weekly
Schedule
TODAY




Don't know
where to start?
START HERE!

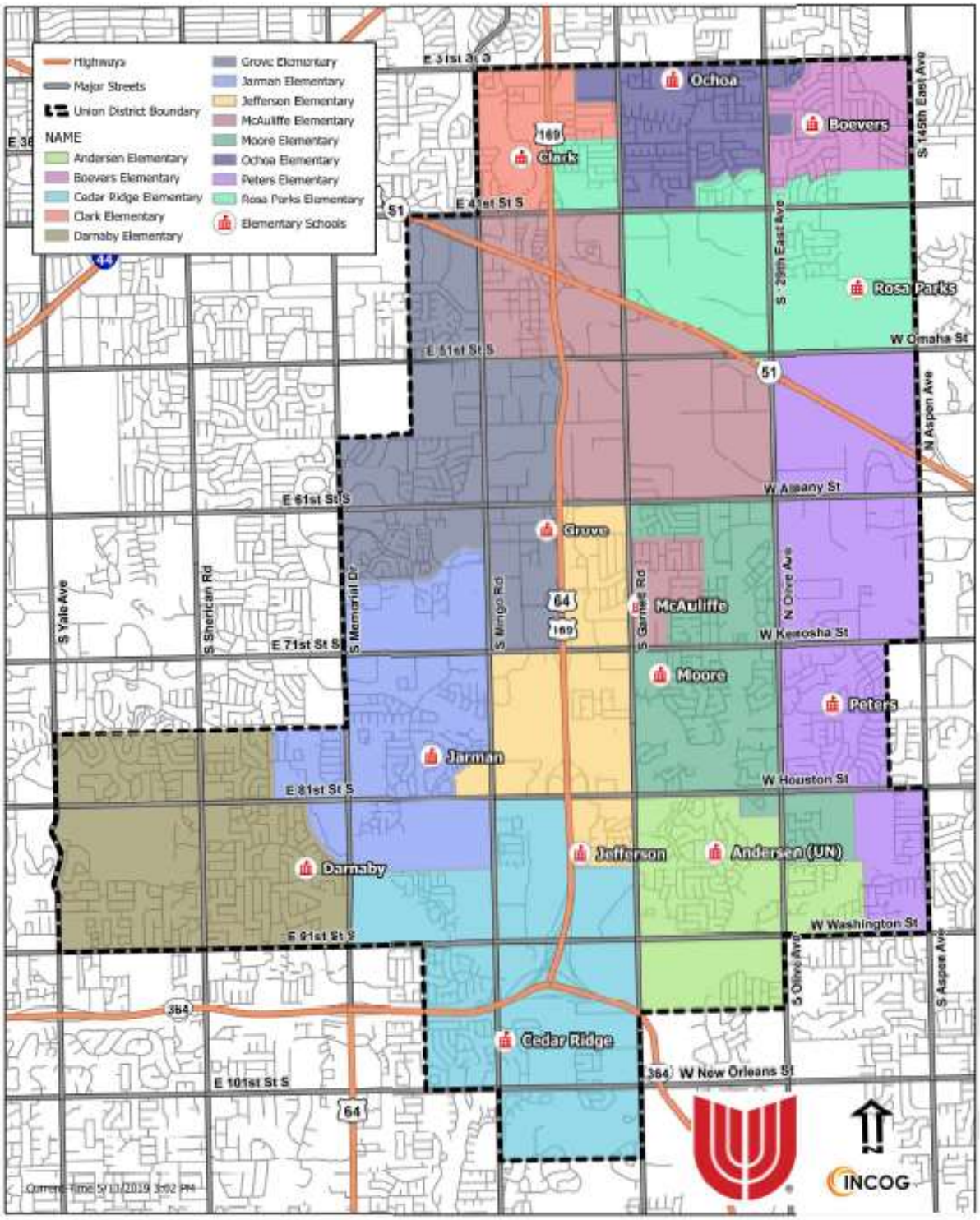
GEOGRAPHICAL AREA SERVED

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

Year Ended June 30, 2022
School Building Information

District Building	2018	2019	2020	2021	2022
Elementary:					
Andersen Elementary (1984)					
Square Feet	67,709	67,709	67,709	67,709	67,709
Capacity (students)	600	600	600	600	600
Enrollment	441	459	489	410	400
Percentage of Capacity Used	73.50%	76.50%	81.50%	68.33%	66.67%
Boevers Elementary (1975)					
Square Feet	59,773	59,773	59,773	59,773	59,773
Capacity (students)	600	600	600	600	600
Enrollment	612	609	468	418	420
Percentage of Capacity Used	102.00%	101.50%	78.00%	69.67%	70.00%
Briarglen Elementary (1971)[h]					
Square Feet	61,349	61,349	61,349	61,349	61,349
Capacity (students)	-	-	-	-	-
Enrollment	-	-	-	-	-
Percentage of Capacity Used	0.00%	0.00%	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	479	506	470	447	417
Percentage of Capacity Used	79.83%	84.33%	78.33%	74.50%	69.50%
Clark Elementary (1977)					
Square Feet	71,480	71,480	71,480	71,480	71,480
Capacity (students)	600	600	600	600	600
Enrollment	696	674	449	448	455
Percentage of Capacity Used	116.00%	112.33%	74.83%	74.67%	75.83%
Darnaby Elementary (1979)					
Square Feet	73,458	73,458	73,458	73,458	73,458
Capacity (students)	600	600	600	600	600
Enrollment	651	643	595	531	566
Percentage of Capacity Used	108.50%	107.17%	99.17%	88.50%	94.33%
Grove Elementary (1974)[a]					
Square Feet	77,028	77,028	77,028	77,028	77,028
Capacity (students)	600	600	600	600	600
Enrollment	543	552	567	540	549
Percentage of Capacity Used	90.50%	92.00%	94.50%	90.00%	91.50%
Jarman Elementary (1991)					
Square Feet	68,592	68,592	68,592	68,592	68,592
Capacity (students)	600	600	600	600	600
Enrollment	583	551	621	621	607
Percentage of Capacity Used	97.17%	91.83%	103.50%	103.50%	101.17%
McAuliffe Elementary (1987)					
Square Feet	70,316	70,316	70,316	70,316	70,316
Capacity (students)	600	600	600	600	600
Enrollment	661	607	570	566	499
Percentage of Capacity Used	110.17%	101.17%	95.00%	94.33%	83.17%

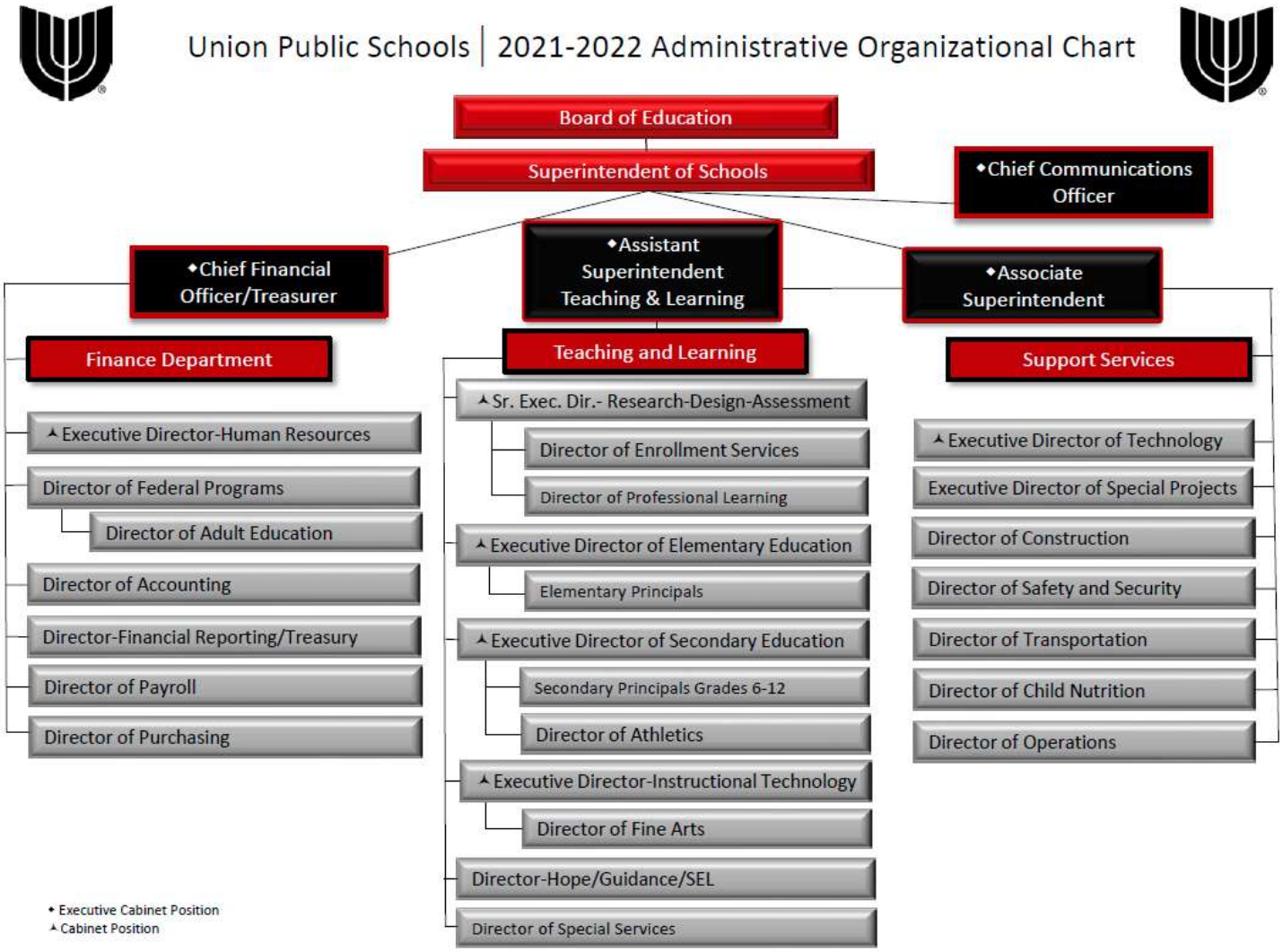
SCHOOL BUILDING INFORMATION

District Building	2018	2019	2020	2021	2022
Elementary:					
Moore Elementary (2000)					
Square Feet	74,632	74,632	74,632	74,632	74,632
Capacity (students)	600	600	600	600	600
Enrollment	553	511	512	482	511
Percentage of Capacity Used	92.17%	85.17%	85.33%	80.33%	85.17%
Ochoa Elementary 2017					
Square Feet	70,705	70,705	70,705	70,705	70,705
Capacity (students)	592	1,092	1,092	1,092	1,092
Enrollment	546	560	1,014	962	957
Percentage of Capacity Used	92.23%	51.28%	92.86%	88.10%	87.64%
Peters Elementary (1978)					
Square Feet	70,893	70,893	70,893	70,893	70,893
Capacity (students)	600	600	600	600	600
Enrollment	463	441	420	348	401
Percentage of Capacity Used	77.17%	73.50%	70.00%	58.00%	66.83%
Rosa Parks (2006)[f]					
Square Feet	87,550	87,550	87,550	87,550	87,550
Capacity (students)	900	900	900	900	900
Enrollment	864	844	730	660	602
Percentage of Capacity Used	96.00%	93.78%	81.11%	73.33%	66.89%
Thomas Jefferson (2008)					
Square Feet	69,356	69,356	69,356	69,356	69,356
Capacity (students)	600	600	600	600	600
Enrollment	545	579	583	526	543
Percentage of Capacity Used	90.83%	96.50%	97.17%	87.67%	90.50%
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	2,298	2,369	2,449	2,332	2,241
Percentage of Capacity Used	94.18%	97.09%	100.37%	95.57%	91.84%
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	1,197	1,140	1,218	1,168	1,223
Percentage of Capacity Used	92.08%	87.69%	93.69%	89.85%	94.08%
9th Grade Center (1987)[c]					
Square Feet	463,450	463,450	463,450	463,450	463,450
Capacity (students)	2,200	2,200	2,200	2,200	2,200
Enrollment	1,267	1,264	1,217	1,196	1,280
Percentage of Capacity Used	57.59%	57.45%	55.32%	54.36%	58.18%
Senior High School (1972)[c]					

DISTRICT ADMINISTRATORS

Dr. Kirt Hartzler.....Superintendent
Dr. Trish Williams.....Chief Financial Officer
Charlie Bushyhead.....Associate Superintendent
Sandi Calvin.....Assistant Superintendent
John Federline.....Assistant Superintendent
Chris Payne.....Chief Communications Officer
Gart Morris.....Executive Director of Instructional Technology
Theresa Kiger.....Executive Director of Elementary Education
Dr. Todd Nelson.....Senior Executive Director of Research-Assessment-Design
Todd Borland.....Executive Director of Technology
Jay Loegering.....Executive Director of Human Resources
Lee Snodgrass.....Executive Director of Special Projects
Emily Barkley.....Director of Athletics
Melissa Brock.....Director of Human Resources
Becky Byers.....Director of Financial Reporting/Treasury
Christine Andrews.....Director of Payroll
Susan Pettit.....Director of Transportation
Dr. Joshua Robinson.....Director of Operations
Lindsay Smith.....Director of Special Services
Ty Wardlow.....Director of Safety and Security
David Young.....Director of Purchasing & Supply Management
Cathy Damen.....Associate Director of Special Services
Steven Dunlap.....Associate Athletic Director
Sherri Fair.....Director of Federal Programs
Kirk Fridrich.....Associate Athletic Director & Head Football Coach
Lisa Griffin.....Director of Child Nutrition
Chasity Gray.....Director of Professional Learning
Julie Harkrider.....Director of Accounting
Fred Isaacs.....Director of Construction Services
Dr. Amy McCready.....Director of Union Learning Center
Dr. Matthew McCready.....Director of Fine Arts
Scott Pennington.....Director of Hope-Guidance-Social and Emotional Learning
Charles Pisarra.....Director of Union Bands
Bradyn Powell.....Associate Director of Child Nutrition

ADMINISTRATIVE ORGANIZATIONAL CHART



Board of Education	Elected Position
Stacey Roemerman	President
Kin Kinnear	Vice President
Heather McAdams	Board Clerk
Chris McNeil	Deputy Board Clerk
Appointed Positions:	
Dr. Kirt Hartzler	Superintendent
Dr. Trish Williams	Chief Financial Officer

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.



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

BUDGETARY GOALS

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

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



The level of budgetary control is maintained by fund, project, and function of the OCAS (Oklahoma Cost Accounting System.) Individual line items may be adjusted without Board action, but total budgeted expenditures may not exceed appropriations at the major fund level without Board approval. The district utilizes an encumbrance system as a technique of budgetary control with encumbered appropriations lapsing at year end.

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.

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 2020-2021
Salaries	$ 651,749
Benefits	139,464
Contracted Services	130,809
Purchased Property Services	27,990
Other Purchased Services	136
Supplies and Materials	64,177
Other objects	3,522
Other Uses of Funds	30,140
	$1,047,987

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 2020-2021
Social Work Services	$ 401,140
Guidance Services	80,336
Inservice Training - Non- Instructional	2,689
	$ 484,164

UNION2TCC
EDGE: EARN A DEGREE, GRADUATE EARLY
TULSA COMMUNITY COLLEGE
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 2020-2021
Salaries	$ 24,512
Benefits	5,997
Contracted Services	26,400
Supplies and Materials	811
	$ 57,720

COST OF SIGNIFICANT GOALS – PROJECT LEAD THE WAY

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

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

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

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

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

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

Project Lead the Way
Schedule of Expenditures

	Actual 2020-2021
Salaries	$ 7,055
Benefits	1,828
Contracted Services	5,000
Supplies and Materials	69
	$ 13,952



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.

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

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



- "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.

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.



This is a **370% increase** in low-income students.

Students qualifying for free/reduced lunch program

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:

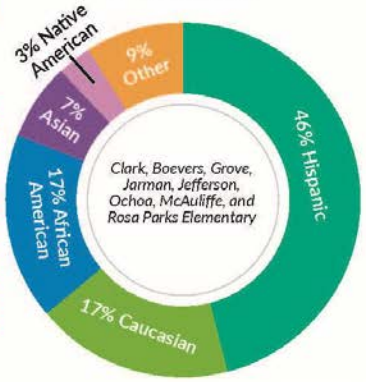
- Social-Emotional Issues
- Food Insecurity
- Access to Health Care
- Basic Needs
- Other Systemic Barriers

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

- Early Childhood Programs
- Expanded Learning Opportunities
- Social & Mental Health Services
- On-site Medical Clinics
- College & Career Preparation

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

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	**Ellen Ochoa** *Andrea Zambrano & Derek Frey* 918-357-4330	**Jarman** *Scott McCrary* 918-357-4335	**Roy Clark** *Linda Stevenson* 918-357-8550
Grove *Shiloh Wolff* 918-357-4334	**McAuliffe** *Daisy Pokhrel-Duran* 918-357-6561	**Jefferson** *Scott McCrary* 918-357-4339	**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

Impact of After-School Programs

Students reported improvements in:

- Leadership & Responsibility: 60%
- Flexibility & Adaptability: 66%
- Initiative & Self-Direction: 73%
- Doing things they didn't think they could do before: 73%
- Social & Cultural Skills: 81%
- Excitement about school: 72%
- Productivity & Accountability: 62%
- Attitude towards STEM learning and careers: 67%

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 PreK 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:

ASBURY, Gelvin Foundation, Fesa Mart, KUMON, LICE CLINICS, Microsoft, Morelos, Osteopathic, PARAGON FILMS, QuikTrip, Robertson Tire, Rotary Club of Tulsa, SemGroup, SOUTH POINTE HONDA, SKY ZONE, Tulsa Regional STEM Alliance, TTCU Federal Credit Union, Union Schools Education FOUNDATION, Walmart, the Y

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



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**

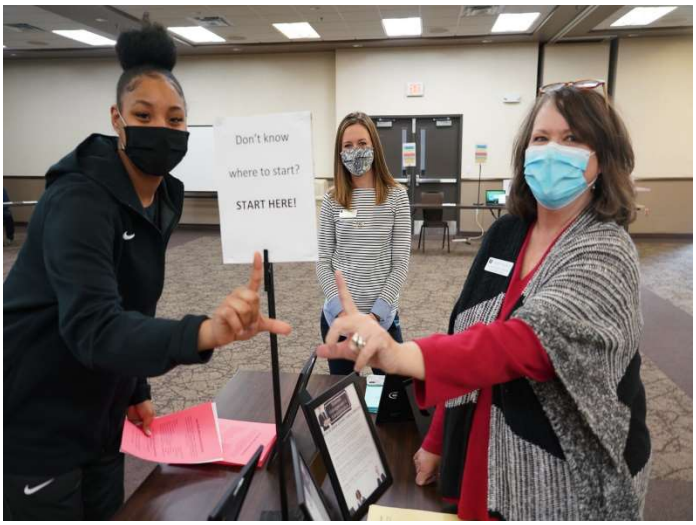
  - Foster an atmosphere of respect and effective communication.

  - Promote a commitment to equity and excellence.

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






Don't know
where to start?
START HERE!

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

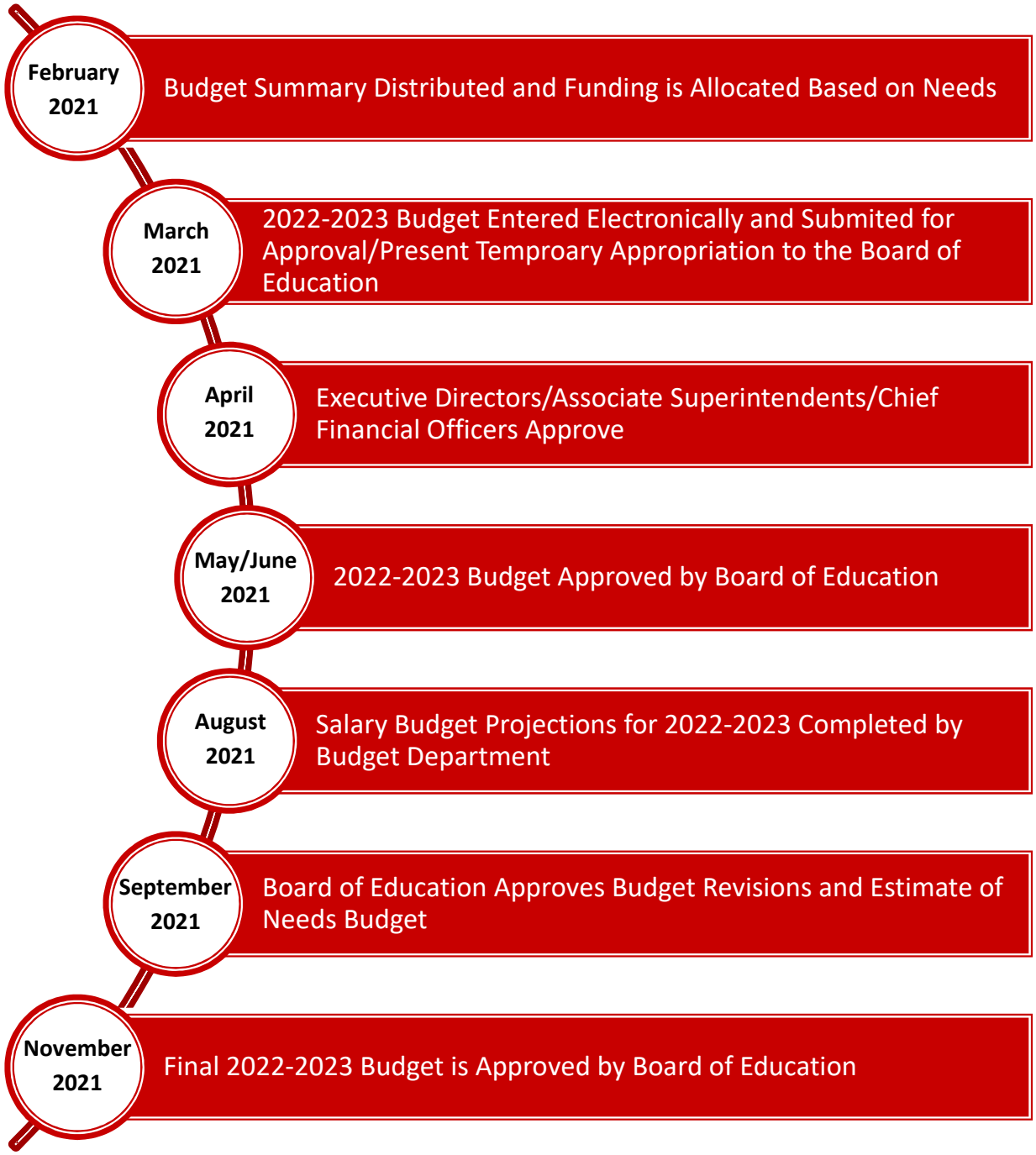
SCHOOL SITE BUDGET ALLOCATIONS

FY 2021-2022

Site Name	Site	Current $ Per Student	October 2019 Count	Calculated Base 2020-21	Final Base 2020-21	October 2020 Count	Calculated Base 2021-2022	Proposed Base 2021-2022
Grove Elementary	105	31.00	567	17,577	17,577	540	16,740	17,577
Boevers Elementary	115	31.00	468	14,508	18,879	418	12,958	14,508
Clark Elementary	120	31.00	449	13,919	20,894	448	13,888	13,919
Darnaby Elementary	122	31.00	595	18,445	19,933	531	16,461	18,445
Peters Elementary	125	31.00	420	13,020	13,671	348	10,788	13,020
Andersen Elementary	130	31.00	489	15,159	15,159	410	12,710	15,159
McAuliffe Elementary	135	31.00	570	17,670	18,817	566	17,546	17,670
Jarman Elementary	140	31.00	621	19,251	19,251	621	19,251	19,251
Cedar Ridge Elementary	145	31.00	470	14,570	15,686	447	13,857	14,570
Moore Elementary	150	31.00	512	15,872	15,872	482	14,942	15,872
Rosa Parks Elementary	155	31.00	730	22,630	26,164	660	20,460	22,630
Thomas Jefferson Elementary	160	31.00	583	18,073	18,073	526	16,306	18,073
Ochoa	180	31.00	1,014	31,434	31,434	962	29,822	31,434
6th / 7th Grade Center	510	33.00	2,449	80,817	80,817	2,332	76,956	80,817
8th Grade Center	620	33.00	1,218	40,194	40,194	1,168	38,544	40,194
9th Grade Center	720	38.00	1,212	46,056	47,842	1,186	45,068	46,056
High School (10-12)*	705	38.00	3,294	125,172	130,818	3,163	120,194	130,172
Alternative High School	725	38.00	155	5,890	6,004	151	5,738	5,890
			15,816	$ 530,257	$ 557,085	14,959	$ 502,229	$ 535,257

**Includes an additional $5,000 for UView Budget*

BUDGET PLANNING PROCESS



BUDGET PLANNING PROCESS

The following budget development calendar denotes the budget planning process for the 2021-2022 budget:

February 2021 (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 2021 (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 2021 (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 2021 (prior to fiscal year)

2020-2021 budget are reviewed with the Board of Education.

July 2021

Budget projections are completed by the Budget Department to set the new preliminary budget for the 2021-2022 fiscal year.

November 2021

Final 2021-2022 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.

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 2021-2022 BUDGET IS BEING ADOPTED ACCORDING TO THE PROVISIONS OF BOARD POLICY 3050. IN SUCH TERMS, "IT IS THE POLICY OF THE BOARD OF EDUCATION OF UNION PUBLIC SCHOOLS INDEPENDENT DISTRICT NO. 9 TO ADOPT OPERATING BUDGETS FOR THE GENERAL FUND, BUILDING FUND, AND CHILD NUTRITION FUND PRIOR TO OCTOBER 1 OF THE FISCAL YEAR."

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

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

Internal Control Management of the district is responsible for establishing and maintaining an internal control structure designed to ensure that the assets of the district are protected from loss, theft or misuse and to ensure that adequate accounting data is compiled to allow for the preparation of financial statements in conformity with generally accepted accounting principles (GAAP). The internal control structure is designed to provide reasonable, but not absolute, assurance that these objectives are met. The concept of reasonable assurance recognizes that **1)** the cost of control should not exceed the benefits likely to be derived; and **2)** the valuation of costs and benefits requires estimates and judgments by management.

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.

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

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

The District reports the following non-major governmental funds:

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

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

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

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

Governmental Funds Continued:

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

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

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

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 he 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.

Local Revenue Continued:

Extended Day Tuition:

Union has a tuition based Extended Day Program where we offer after school supervision for Union Elementary Students. For the Fiscal year 2021-2022 the budget is $2,001,515. Actuals for 2020 were $1,258,660, for 2021 were $943,217.82.

Facility Rentals:

The District make its facilities available to various community and civic organizations for a fee. In fiscal year 2021 total revenue was $229,246, in 2020 it was $293,164. The budget for the current year is $230,000 but due to the pandemic revenue will probably fall short of that number.

Interest Earnings:

The district invests excess funds in short-term investments to provide a return until the funds are needed. Interest rates have had significant fluctuations over the past several years. Revenue for 2019 was $607,866, 2020 was a significant decrease to $171,974, 2021 was down again to $35,269. Interest in the current year is expected to increase.

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 2020 the district received $3,919,865 in local grants, 2021 was $2,574,765. The budget for 2022 is $3,103,149.

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

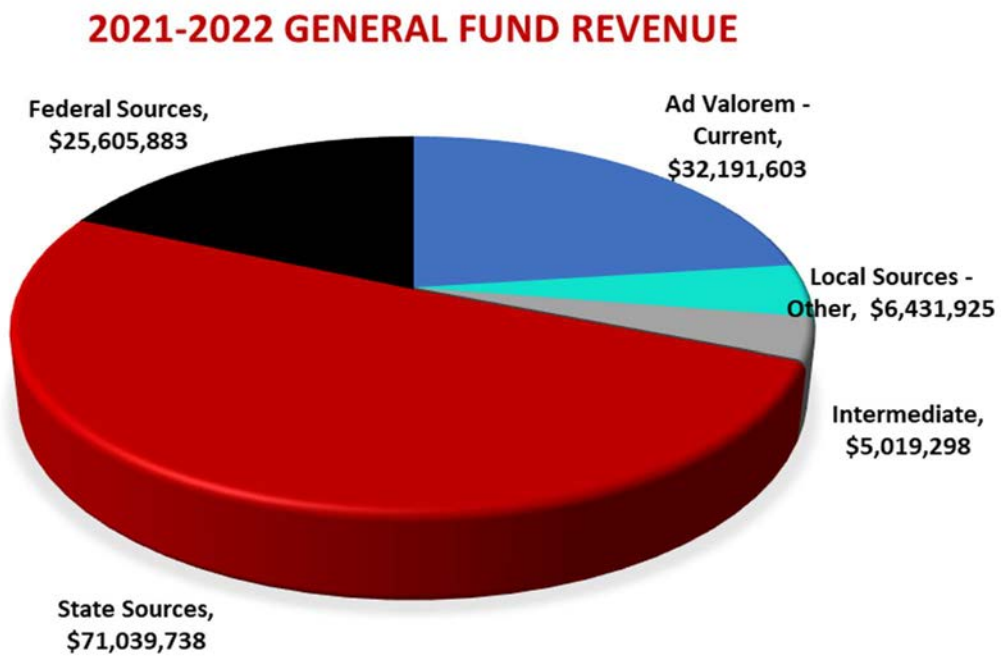
State aid is the District's largest single revenue source. The state aid allocation will be recalculated in January and will be adjusted to reflect the actual number of students served as of October, the previous year, as well as, any changes in prior fiscal year property valuations.

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).



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.

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

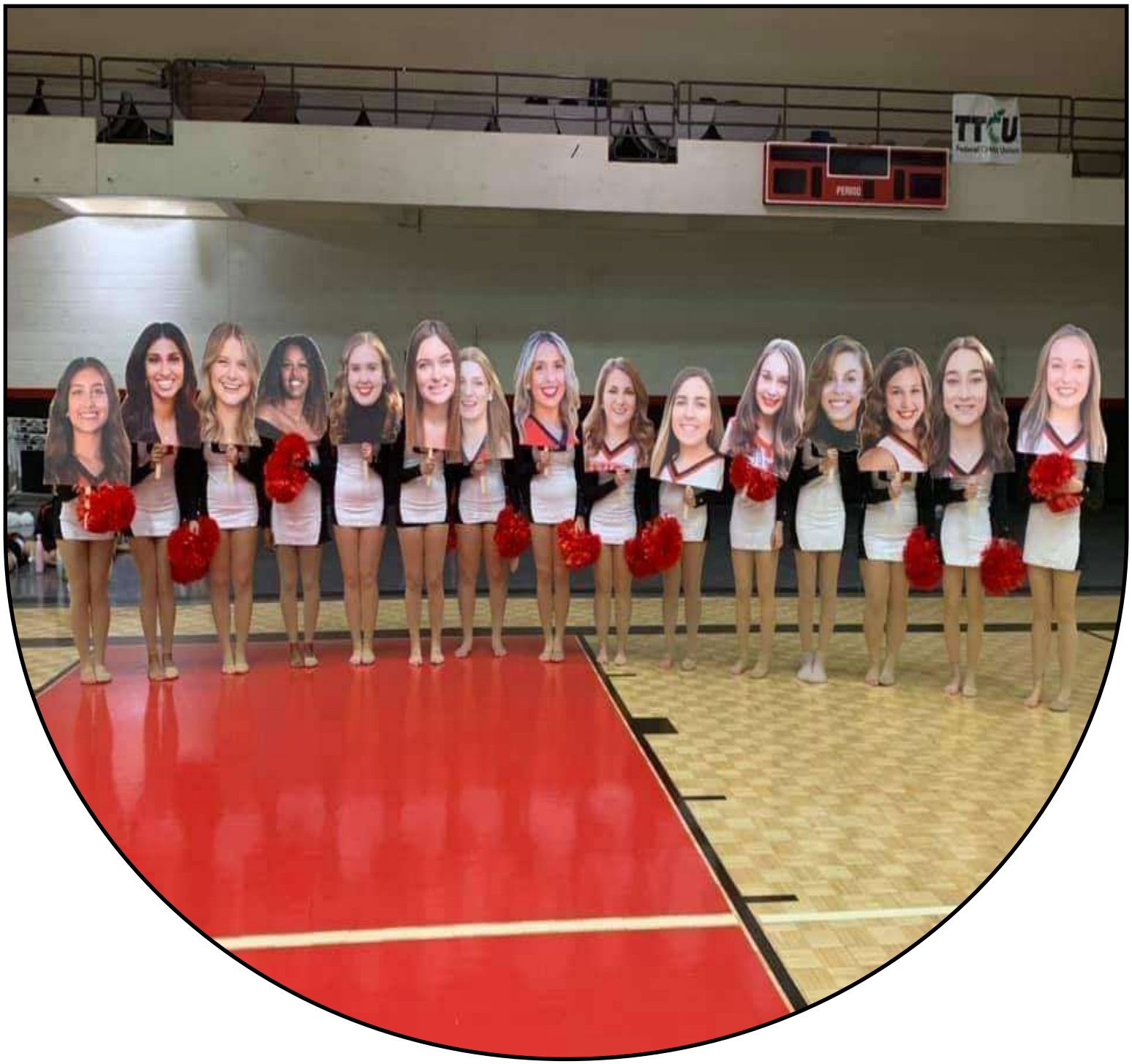
Activities, such as programs of civic activities and community welfare activities. i.e. Extended Day program, CAP three year old program.

Debt Service - Function 55100

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


Jakyrie Jenkins
2021
UNION
HIGH SCHOOL
HOMECOMING
KING


Calendar Math
Days in School
Pick-a-Problem
Estimation Jar
AFTER FALL
GAP
antisocial
adidas
TIGERS



FINANCIAL SECTION

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State aid is the District's largest single revenue source. The state aid allocation is recalculated in January 2022 and will be adjusted to reflect the actual number of students served as of October, the previous year, as well as, any changes in prior fiscal year property valuations. The state aid and state flexible benefit allowances have historically been the District's most stable sources of revenue, except for the years of 2001-2002 and 2002-2003, which resulted in a $3.4 million loss. State aid decreased in 2016-2017 from 2015-2016 by approximately $1.54 million, due to several State revenue failures. For 2016-2017, the flexible benefits allocation of $10,951,679.16 was fully funded by June of 2017. In 2009-2010, the State began to reduce state aid, but the decrease was supplemented with federal ARRA stabilization funds. The federal government provided this funding under the belief that states would utilize these funds to offset the reduction in state aid for two years (2009-2010 and 2010-2011), with state aid funding levels, beginning in 2011-2012, returning to 2008-2009 funding levels. However, the state of Oklahoma did not increase state aid back to the pre-federal ARRA stabilization funding levels of 2008-2009. The federal ARRA stabilization funds were not provided and the State did not increase funding to aid in recovering the loss. The 2011-2012 state aid payment amount of $37,521,745 was $900,835 less than the 2010-2011 combined state aid and federal ARRA stabilization payment of $38,422,580. From 2012-2015, the State had slowly increased the allocation paid to the District. In 2013-2014, the District received an allocation greater than the allocation received in 2008-2009 for the first time, but the District received fewer dollars per student compared with 2008-2009. In 2016-2017, the District received $38,776,485 in state aid, and an additional payment of $599,513 as a onetime payment of 2015-2016 returned Aid. The District's 2016-2017 state aid total was still $616,315 less than what was allocated and collected in 2008-2009. The amount per weighted average daily membership (WADM) was cut $40.40 throughout the year due to multiple State cuts.

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

MAJOR EXPENDITURE CATEGORIES

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

Looking at expenditures from the perspective of Function, Instruction comprises over 57% of expenditures, with a budget in the General Fund of $79,014,113. Operations and Maintenance comes in second at 8%, or $11,530,567. Student support is next at 7% with a total of $10,343,777. The smallest spending category is General Administration at $2,615,137 or 2%.

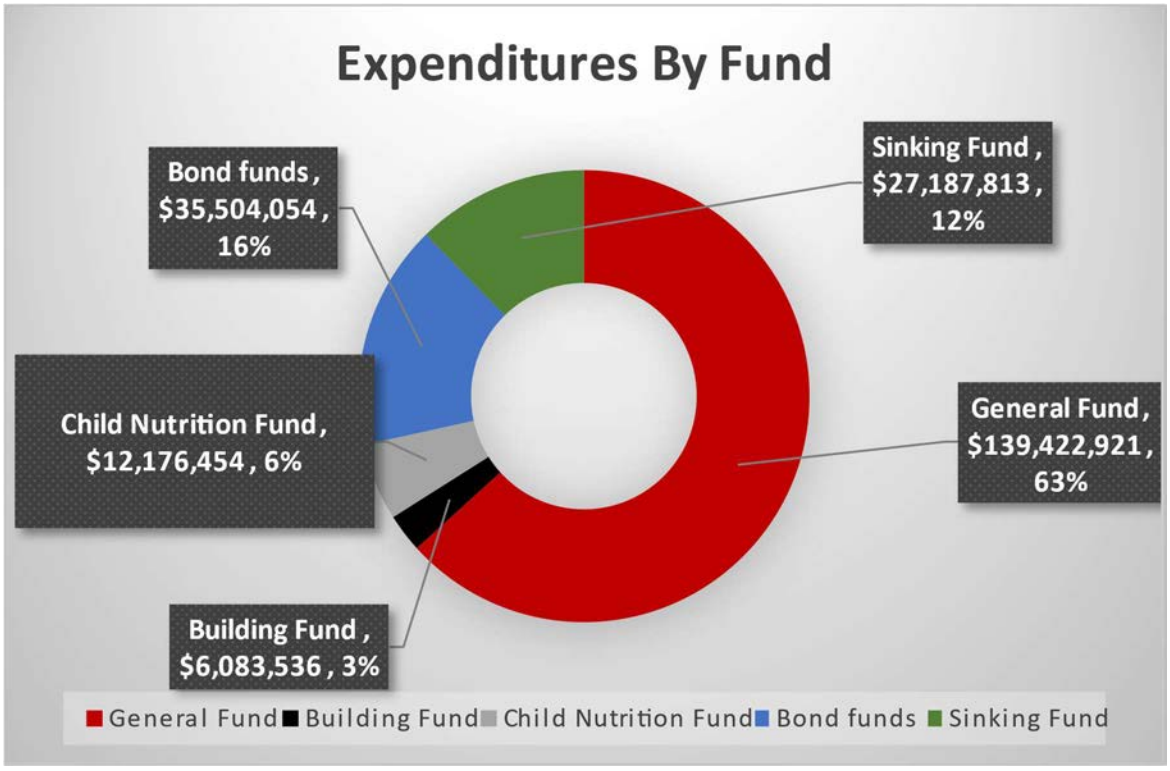


SUMMARY OF REVENUES AND EXPENDITURES – ALL FUND

Summary of Total Budget - All Funds

Revenue By Source	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Revenue									
Ad Valorem Tax	$ 59,609,322	$ 60,226,999	$ 62,983,915	$ 64,246,078	$ 63,518,414	$ 63,518,414	$ 63,993,874	$ 64,373,813	$ 64,757,551
Tuition and Fees	1,600,916	1,717,207	1,360,135	1,028,015	1,242,000	1,242,000	1,254,420	1,266,964	1,279,634
Investments	1,186,484	1,667,475	1,188,475	616,195	779,093	779,093	1,192,370	1,047,794	1,053,272
Rental, Disposals, and Commissions	703,099	614,495	487,636	356,071	341,000	341,000	395,415	399,369	403,363
Reimbursements	383,954	211,539	204,593	166,016	88,500	88,500	294,920	297,869	300,848
Donations	5,425,820	12,166,333	4,200,023	2,741,354	3,327,849	3,327,849	3,134,180	3,165,522	3,197,178
Athletic Programs	171,759	148,859	167,427	91,875	440,000	440,000	151,500	153,015	154,545
Other Local sources	605,429	1,012,298	704,251	1,281,057	1,082,743	1,082,743	1,215,500	923,659	931,435
Bond Sale	23,423,817	24,915,438	29,387,606	26,515,125	26,064,651	26,064,651	23,138,000	24,647,000	29,174,000
Meals	1,999,913	2,214,703	1,646,669	391,784	532,300	532,300	618,120	624,301	630,544
Intermediate Revenue									
County Four Mill Levy	3,447,346	3,521,781	3,698,889	3,872,896	3,872,897	3,872,897	3,911,626	3,950,742	3,990,250
County Mortgage Tax	539,819	606,922	697,475	947,724	947,724	947,724	957,201	966,773	976,441
Resale of Property	121,272	119,601	146,872	145,825	198,677	198,677	200,664	202,670	204,697
State Revenue									
State Dedicated Revenue	8,379,011	8,294,343	6,619,728	8,413,442	8,428,436	8,428,436	8,245,173	8,327,625	8,494,177
State Aid	50,321,283	59,419,745	63,089,063	59,057,777	60,465,292	60,465,292	59,255,986	59,848,546	61,045,517
Alternative Education	149,853	142,164	155,432	141,302	141,302	141,302	138,476	139,861	142,658
State Categorical	483,904	1,256,095	1,357,745	1,288,482	1,842,588	1,842,588	1,805,736	1,823,794	1,860,269
State Matching	73,393	68,357	80,358	79,825	79,825	79,825	10,100	10,201	10,303
Other State Sources of Revenue	7,944	81,283	44,054	51,058	59,258	59,258	58,073	58,654	59,827
State Vocational Programs	78,510	93,239	112,300	99,988	102,862	102,862	115,499	116,654	118,987
Federal Revenue									
Student Meals	6,396,576	6,642,426	6,379,189	16,719,833	11,109,865	11,109,865	11,258,470	11,371,055	11,484,765
Grants in Aid From Federal Gov	344,338	337,625	374,827	376,919	383,083	383,083	333,282	349,946	346,447
Improving Academic Achiev. Of Disad.	3,302,159	4,216,368	4,911,018	4,376,208	5,162,460	5,162,460	4,491,340	4,715,907	4,668,748
Individuals with Disabilities	2,781,081	3,130,595	2,927,062	2,618,931	3,617,015	3,617,015	3,146,803	3,304,143	3,271,102
Every Student Succeeds	80,125	144,049	124,466	340,545	602,446	602,446	524,128	550,334	544,831
Federal Grants Through Other Sources	62,567	69,081	82,486	752,079	1,220,754	1,220,754	12,617,827	13,248,718	13,116,231
Other Federal Sources Through State	1,442,329	1,340,524	990,271	986,921	14,413,269	14,413,269	1,071,926	1,125,522	1,114,267
Federal Vocational Education	441,594	610,494	1,132,236	2,764,817	206,856	206,856	91,812	96,403	95,439
Other	179,189	213,071	319,424	136,200	37,200	37,200	0	0	0
Total Revenues	**173,742,806**	**195,203,109**	**195,573,625**	**200,604,342**	**210,308,359**	**210,308,359**	**203,622,421**	**207,106,854**	**213,427,326**
Expenditures By Object									
Salaries	76,649,807	88,089,846	91,996,181	96,869,027	99,175,464	99,175,464	96,585,285	97,551,137	98,526,649
Benefits	29,314,357	31,680,081	33,130,983	32,975,255	34,087,591	34,087,591	32,945,721	33,275,178	33,607,930
Purchased Professional & Technical Service	24,672,955	25,722,305	26,861,283	33,539,087	38,031,570	38,031,570	25,703,570	26,730,606	31,757,912
Purchased Property services	2,141,281	4,296,238	7,338,563	1,959,363	1,905,181	1,905,181	1,563,445	1,579,079	1,594,870
Other Purchased Services	2,283,574	1,981,139	2,520,050	2,990,431	3,474,719	3,474,719	3,567,410	3,603,084	3,639,115
Supplies and Materials	9,438,213	10,216,711	9,421,271	13,266,558	15,206,438	15,206,438	15,011,401	15,161,515	15,313,130
Property Expenses	252,552	73,539	446,234	1,218,047	311,316	311,316	137,620	138,996	140,386
Other	26,208,930	27,831,829	28,532,092	27,930,533	28,182,499	28,182,499	30,013,685	23,078,181	16,954,357
Total Expenditures	**170,961,669**	**189,891,688**	**200,246,657**	**210,748,301**	**220,374,778**	**220,374,778**	**205,528,137**	**201,117,776**	**201,534,349**
Net	2,781,137	5,311,421	(4,673,032)	(10,143,959)	(10,066,419)	(10,066,419)	(1,905,716)	5,989,078	11,892,977
Beginning Fund Balance	82,977,426	85,758,563	91,069,984	86,396,952	76,252,993	76,252,993	76,252,993	74,347,277	80,336,355
Fund Balance	**$ 85,758,563**	**$ 91,069,984**	**$ 86,396,952**	**$ 76,252,993**	**$ 66,186,574**	**$ 66,186,574**	**$ 74,347,277**	**$ 80,336,355**	**$ 92,229,332**

Fund	Revenues	Expenditures
General Fund	$ 140,288,447	$ 139,422,921
Building Fund	$ 5,292,818	$ 6,083,536
Child Nutrition Fund	$ 11,993,425	$ 12,176,454
Bond Funds	$ 26,100,000	$ 35,504,054
Sinking Fund	$ 26,668,953	$ 27,187,813
Total FY 2021-22 - All Funds	**$ 210,343,643**	**$ 220,374,778**

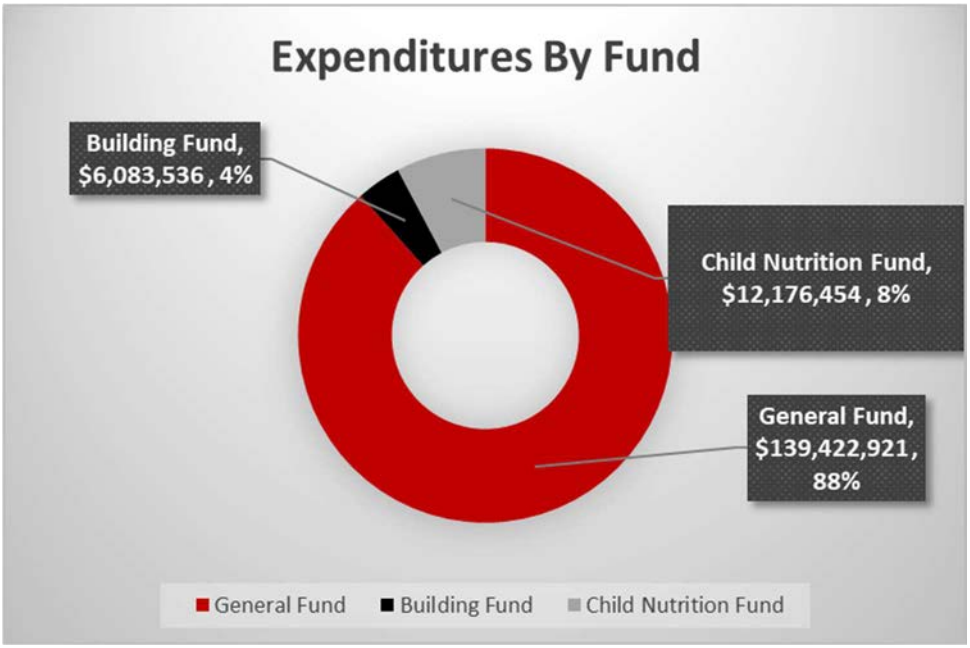


SUMMARY OF REVENUES AND EXPENDITURES – OPERATING FUNDS

Summary of Total Budget - All Funds

Revenue By Source	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Revenue									
Ad Valorem Tax	$ 33,696,416	$ 34,497,176	$ 35,875,844	$ 37,046,509	$ 37,617,697	$ 37,617,697	$ 37,993,874	$ 38,373,813	$ 38,757,551
Tuition and Fees	1,600,916	1,717,207	1,360,135	1,028,015	1,242,000	1,242,000	1,254,420	1,266,964	1,279,634
Investments	522,710	1,069,920	395,382	57,894	77,000	77,000	542,370	547,794	553,272
Rental, Disposals, and Commissions	703,099	614,495	487,636	356,071	391,500	391,500	395,415	399,369	403,363
Reimbursements	383,954	211,539	204,593	166,016	292,000	292,000	294,920	297,869	300,848
Donations	5,425,820	12,166,333	4,200,023	2,741,354	3,263,149	3,263,149	3,134,180	3,165,522	3,197,178
Athletic Programs	171,759	148,859	167,427	91,875	150,000	150,000	151,500	153,015	154,545
Other Local sources	605,429	1,012,298	704,251	1,281,057	990,400	990,400	3,532,576	3,567,902	3,603,581
Meals	1,999,913	2,214,703	1,646,669	391,784	622,000	622,000	618,120	624,301	630,544
Intermediate Revenue									
County Four Mill Levy	3,447,346	3,521,781	3,698,889	3,872,896	3,872,897	3,872,897	3,911,626	3,950,742	3,990,250
County Mortgage Tax	539,819	606,922	697,475	947,724	947,724	947,724	957,201	966,773	976,441
Resale of Property	121,272	119,601	146,872	145,825	198,677	198,677	200,664	202,670	204,697
State Revenue									
State Dedicated Revenue	8,379,011	8,294,343	6,619,728	8,413,442	8,413,442	8,413,442	8,245,173	8,327,625	8,494,177
State Aid	50,321,283	59,419,745	63,089,063	59,057,777	60,465,292	60,465,292	59,255,986	59,848,546	61,045,517
Alternative Education	149,853	142,164	155,432	141,302	141,302	141,302	138,476	139,861	142,658
State Categorical	483,904	1,256,095	1,357,745	1,288,482	1,842,588	1,842,588	1,805,736	1,823,794	1,860,269
State Matching	73,393	68,357	80,358	79,825	79,825	79,825	10,100	10,201	10,303
Other State Sources of Revenue	7,944	81,283	44,054	51,058	59,258	59,258	58,073	58,654	59,827
State Vocational Programs	78,510	93,239	112,300	99,988	117,856	117,856	115,499	116,654	118,987
Federal Revenue									
Student Meals	6,396,576	6,642,426	6,379,189	16,719,833	21,558,170	21,558,170	8,541,393	8,626,807	8,713,075
Grants in Aid From Federal Gov	344,338	337,625	374,827	376,919	383,083	383,083	333,282	349,946	346,447
Improving Academic Achiev. Of Disad.	3,302,159	4,216,368	4,911,018	4,376,208	5,162,460	5,162,460	4,491,340	4,715,907	4,668,748
Individuals with Disabilities	2,781,081	3,130,595	2,927,062	2,618,931	3,617,015	3,617,015	3,146,803	3,304,143	3,271,102
Every Student Succeeds	80,125	144,049	124,466	340,545	602,446	602,446	524,128	550,334	544,831
Federal Grants Through Other Sources	62,567	69,081	82,486	752,079	1,220,754	1,220,754	12,617,827	13,248,718	13,116,231
Other Federal Sources Through State	1,442,329	1,340,524	990,271	986,921	1,232,099	1,232,099	1,071,926	1,125,522	1,114,267
Federal Vocational Education	441,594	610,494	1,132,236	2,764,817	2,770,000	2,770,000	91,812	96,403	95,439
Other	179,189	213,071	319,424	136,200	244,056	244,056	0	0	0
Total Revenues	**123,742,309**	**143,960,293**	**138,284,855**	**146,331,347**	**157,574,690**	**157,574,690**	**153,434,420**	**155,859,849**	**157,653,782**
Expenditures By Object									
Salaries	76,649,807	88,089,846	91,996,181	96,869,027	99,175,464	99,175,464	96,585,285	97,551,137	98,526,649
Benefits	29,314,357	31,680,081	33,130,983	32,975,255	34,087,591	34,087,591	32,945,721	33,275,178	33,607,930
Purchased Professional & Technical Service	1,505,871	1,263,571	1,368,174	2,572,856	2,527,516	2,527,516	2,703,570	2,730,606	2,757,912
Purchased Property services	2,141,281	4,296,238	7,338,563	1,959,363	1,905,181	1,905,181	1,563,445	1,579,079	1,594,870
Other Purchased Services	2,283,574	1,981,139	2,520,050	2,990,431	3,474,719	3,474,719	3,567,410	3,603,084	3,639,115
Supplies and Materials	9,438,213	10,216,711	9,421,271	13,266,558	15,206,438	15,206,438	15,011,401	15,161,515	15,313,130
Property Expenses	252,552	73,539	446,234	1,218,047	311,316	311,316	137,620	138,996	140,386
Other	730,805	733,391	853,654	975,220	994,686	994,686	1,168,372	1,180,056	1,191,857
Total Expenditures	**122,316,460**	**138,334,516**	**147,075,110**	**152,826,757**	**157,682,911**	**157,682,911**	**153,682,824**	**155,219,651**	**156,771,849**
Net	1,425,849	5,625,777	(8,790,255)	(6,495,410)	(108,221)	(108,221)	(248,404)	640,198	881,933
Beginning Fund Balance	31,652,193	33,078,042	38,703,819	29,913,564	23,418,154	29,913,564	23,418,154	23,169,750	23,809,948
Fund Balance	**$ 33,078,042**	**$ 38,703,819**	**$ 29,913,564**	**$ 23,418,154**	**$ 23,309,933**	**$ 29,805,343**	**$ 23,169,750**	**$ 23,809,948**	**$ 24,691,881**

Fund	Revenues	Expenditures
General Fund	$ 140,288,447	$ 139,422,921
Building Fund	5,292,818	6,083,536
Child Nutrition Fund	11,993,425	12,176,454
Total FY 2021-22	**$ 157,574,690**	**$ 157,682,911**



REVENUE AND EXPENDITURE SUMMARY – ALL FUNDS

	General Fund Budget 2021-2022	Building Fund Budget 2021-2022	Child Nutrition Fund Budget 2021-2022	Sinking Fund Budget 2021-2022	Bond Funds Budget 2021-2022	Total All Funds Budget 2021-2022
Revenues						
Local Sources	$ 38,623,528	$5,292,818	$ 766,600	$26,668,953	$26,064,651	$ 97,416,550
Intermediate Sources	5,019,298	0	0	0	0	5,019,298
State Sources	71,039,738	0	79,825	0	0	71,119,563
Federal Sources	25,605,883	0	11,147,000	0	0	36,752,883
Total Revenues	**140,288,447**	**5,292,818**	**11,993,425**	**26,668,953**	**26,064,651**	**210,308,294**
Expenditures						
Instruction	79,014,113	0	0		35,504,054	114,518,167
Student Support	10,343,777	0	0			10,343,777
Instructional Support	6,188,567	0	0			6,188,567
General Administration	2,615,137	0	0			2,615,137
School Administration	9,094,612	0	0			9,094,612
Business/Technology	9,150,137	0	0			9,150,137
Operation & Maintenance	11,530,567	6,083,536	0			17,614,103
Student Transportation	5,115,174	0	0			5,115,174
Non-Instruction Services	6,173,798	0	12,176,454			18,350,252
Other Outlays	197,039	0	0	27,187,813		27,384,852
Facilities Acquisitions and Construction	0	0	0			0
Total Expenditures	**$139,422,921**	**$6,083,536**	**$ 12,176,454**	**$27,187,813**	**$35,504,054**	**$220,374,778**

GENERAL FUND REVENUE SCHEDULE

2021-2022 General Fund Revenue

Source Sub Source	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-20222	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Revenue									
Ad Valorem Tax	$ 29,484,364	$ 30,185,029	$ 31,391,363	$ 32,415,695	$ 32,886,879	$ 32,886,879	$ 33,215,748	$ 33,547,905	$ 33,883,384
Tuition and Fees	1,600,916	1,717,207	1,360,135	1,028,015	1,242,000	1,242,000	1,254,420	1,266,964	1,279,634
Interest	338,121	649,929	198,807	39,051	55,000	55,000	55,550	56,106	56,667
Rental, Disposals, and Comm	580,559	614,495	487,636	356,071	391,500	391,500	395,415	399,369	403,363
Reimbursements	383,954	211,539	204,593	166,016	292,000	292,000	294,920	297,869	300,848
Donations & Misc	3,155,674	3,946,920	3,919,865	2,574,765	3,103,149	3,103,149	3,134,180	3,165,522	3,197,178
Athletic Programs	171,735	148,859	167,427	91,875	150,000	150,000	151,500	153,015	154,545
Other	466,016	611,463	395,400	853,082	503,000	503,000	508,030	513,110	518,241
Total Local Revenue	36,181,339	38,085,441	38,125,226	37,524,570	38,623,528	38,623,528	39,009,763	39,399,861	39,793,860
Intermediate Revenue									
County Four Mill Levy	3,447,346	3,521,781	3,698,889	3,872,896	3,872,897	3,872,897	3,911,626	3,950,742	3,990,250
County Mortgage Tax	539,819	606,922	697,475	947,724	947,724	947,724	957,201	966,773	976,441
Resale of Property Fund	121,272	119,601	146,872	145,825	198,677	198,677	200,664	202,670	204,697
Total Intermediate Revenue	4,108,437	4,248,304	4,543,236	4,966,445	5,019,298	5,019,298	5,069,491	5,120,186	5,171,388
State Revenue									
State Dedicated revenue	8,379,011	8,294,343	6,619,728	8,413,442	8,413,442	8,413,442	8,245,173	8,327,625	8,494,177
State Aid	50,321,283	59,419,745	63,089,063	59,057,777	60,465,292	60,465,292	59,255,986	59,848,546	61,045,517
Alternative Education	149,853	142,164	155,432	141,302	141,302	141,302	138,476	139,861	142,658
State Categorical	483,904	1,256,095	1,357,745	1,288,482	1,842,588	1,842,588	1,805,736	1,823,794	1,860,269
Other State Sources Of Revenue	7,944	81,283	44,054	51,058	59,258	59,258	58,073	58,654	59,827
State Vocational Programs	78,510	93,239	112,300	99,988	117,856	117,856	115,499	116,654	118,987
Total State Revenue	59,420,505	69,286,869	71,378,322	69,052,049	71,039,738	71,039,738	69,618,943	70,315,133	71,721,435
Federal Revenue									
Grants in Aid From Federal Gov	344,338	337,625	374,827	376,919	383,083	383,083	333,282	349,946	346,447
Title I	3,302,159	4,216,368	4,911,018	4,376,208	5,162,460	5,162,460	4,491,340	4,715,907	4,668,748
Individuals with Disabilities	2,781,081	3,130,595	2,927,062	2,618,931	3,617,015	3,617,015	3,146,803	3,304,143	3,271,102
No Child Left Behind	80,125	144,049	124,466	340,545	602,446	602,446	524,128	550,334	544,831
Federal Grants Through Other	62,567	69,081	82,486	9,095,956	14,503,249	14,503,249	12,617,827	13,248,718	13,116,231
Other Federal Sources Through Stat	1,442,329	1,340,524	990,271	986,921	1,232,099	1,232,099	1,071,926	1,125,522	1,114,267
Federal Vocational Education	102,712	110,403	82,648	79,070	105,531	105,531	91,812	96,403	95,439
Total Federal Revenue	8,115,311	9,348,645	9,492,778	17,874,550	25,605,883	25,605,883	22,277,118	23,390,974	23,157,064
Total Revenue	$ 107,825,592	$ 120,969,259	$ 123,539,562	$ 129,417,614	$ 140,288,447	$ 140,288,447	$ 135,975,316	$ 138,226,154	$ 139,843,747

BUILDING FUND REVENUE SCHEDULE

2021-2022 Building Fund Revenue

Source Sub Source	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Revenue									
Ad Valorem Tax	$ 4,212,052	$ 4,312,147	$ 4,484,480	$ 4,630,814	$ 4,730,818	$ 4,730,818	$ 4,778,126	$ 4,825,907	$ 4,874,167
Interest	132,899	346,746	135,379	10,617	472,000	472,000	476,720	481,487	486,302
Rentals, Disposals and Commissior	122,540	0	0	0	0	0	0	0	0
Donations	2,000,000	7,975,000	0	0	0	0	0	0	0
Other Local Sources	258,212	540,140	652,360	483,187	90,000	90,000	90,900	91,809	92,727
Total Local Revenue	6,725,703	13,174,033	5,272,219	5,124,618	5,292,818	5,292,818	5,345,746	5,399,203	5,453,196
Total Revenue	$ 6,725,703	$ 13,174,033	$ 5,272,219	$ 5,124,618	$ 5,292,818	$ 5,292,818	$ 5,345,746	$ 5,399,203	$ 5,453,196



CHILD NUTRITION FUND REVENUE SCHEDULE

2021-2022 Child Nutrition Fund Revenue

Source Sub Source	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Revenue									
Interest	$ 51,690	$ 73,245	$ 61,195	$ 8,226	$ 10,000	$ 10,000	$ 10,100	$ 10,201	$ 10,303
Other Local Sources	173,897	161,302	128,018	132,733	2,904,600	2,904,600	2,933,646	2,962,982	2,992,612
Meals	1,999,913	2,214,703	1,646,669	391,784	612,000	612,000	618,120	624,301	630,544
Total Local Revenue	2,225,500	2,449,250	1,835,882	532,743	3,526,600	3,526,600	3,561,866	3,597,484	3,633,459
State Revenue									
State Matching	6,360,297	6,576,369	6,115,779	84,501	10,000	10,000	10,100	10,201	10,303
Total State Revenue	6,360,297	6,576,369	6,115,779	84,501	10,000	10,000	10,100	10,201	10,303
Federal Revenue									
Student Meals	605,218	791,381	1,521,412	11,171,871	11,147,000	11,147,000	11,258,470	11,371,055	11,484,765
Total Federal Revenue	605,218	791,381	1,521,412	11,171,871	11,147,000	11,147,000	11,258,470	11,371,055	11,484,765
Total Revenue	**$9,191,015**	**$9,816,999**	**$9,473,073**	**$11,789,115**	**$14,683,600**	**$14,683,600**	**$14,830,436**	**$14,978,740**	**$15,128,527**



GENERAL FUND SUMMARY

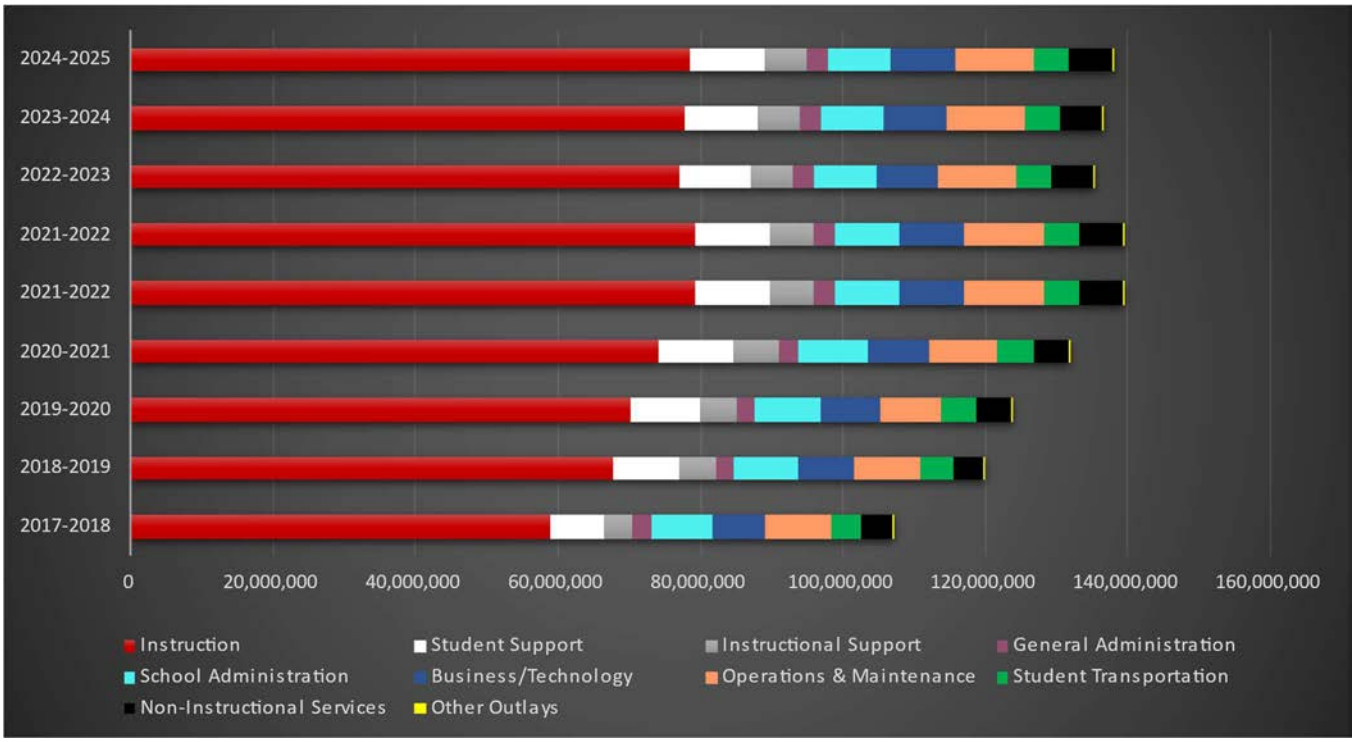
REVENUES	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Ad Valorem - Current	$ 29,484,364	$ 30,185,029	$ 31,391,363	$ 32,415,695	$ 32,886,879	$ 32,886,879	$ 33,215,748	$ 33,547,905	$ 33,883,384
Local Sources - Other	6,696,975	7,900,412	6,733,863	5,108,875	5,736,649	5,736,649	5,794,015	5,851,956	5,910,475
Intermediate	4,108,437	4,248,304	4,543,236	4,966,445	5,019,298	5,019,298	5,069,491	5,120,186	5,171,388
State Sources	59,420,505	69,286,869	71,378,322	69,052,049	71,039,738	71,039,738	69,618,943	70,315,133	71,721,435
Federal Sources	8,115,311	9,348,645	9,492,778	17,874,550	25,605,883	25,605,883	22,277,118	23,390,974	23,157,064
TOTAL REVENUES	107,825,592	120,969,259	123,539,562	129,417,614	140,288,447	140,288,447	135,975,316	138,226,154	139,843,747
EXPENDITURES									
Instruction	59,007,115	67,633,827	70,255,223	74,004,051	79,014,113	79,014,113	76,643,690	77,410,127	78,184,228
Student Support	7,373,738	9,317,736	9,749,731	10,733,346	10,343,777	10,343,777	10,033,464	10,133,798	10,235,136
Instructional Support	4,116,381	5,232,565	5,112,927	6,181,922	6,188,567	6,188,567	6,002,910	6,062,939	6,123,568
General Administration	2,655,005	2,442,970	2,568,552	2,682,929	2,615,137	2,615,137	2,536,683	2,562,050	2,587,670
School Administration	8,623,348	9,120,025	9,302,859	9,962,296	9,094,612	9,094,612	8,821,774	8,909,991	8,999,091
Business/Technology	7,347,032	7,883,100	8,158,132	8,538,965	9,150,137	9,150,137	8,875,633	8,964,389	9,054,033
Operations & Maintenance	9,170,551	9,216,510	8,693,970	9,604,834	11,530,567	11,530,567	11,184,650	11,296,496	11,409,461
Student Transportation	4,322,681	4,607,423	4,757,427	5,029,463	5,115,174	5,115,174	4,961,719	5,011,336	5,061,449
Non-Instructional Services	4,206,897	4,320,290	4,870,920	5,039,585	6,173,798	6,173,798	5,988,584	6,048,470	6,108,955
Other Outlays	74,421	104,635	234,380	54,427	197,039	197,039	191,128	193,039	194,969
TOTAL EXPENDITURES	106,897,169	119,879,080	123,704,121	131,831,817	139,422,921	139,422,921	135,240,233	136,592,636	137,958,562
EXCESS REV (EXP)	928,423	1,090,179	(164,559)	(2,414,203)	865,526	865,526	735,082	1,633,518	1,885,185
FUND BALANCE 07/1	14,892,437	15,820,859	16,911,038	16,746,479	14,332,276	14,332,276	15,197,802	15,932,884	17,566,402
FUND BALANCE 06/30	$ 15,820,861	$ 16,911,038	$ 16,746,479	$ 14,332,276	$ 15,197,802	$ 15,197,802	$ 15,932,884	$ 17,566,402	$ 19,451,587



GENERAL FUND SCHEDULE OF EXPENDITURES BY FUNCTION

General Fund By Function

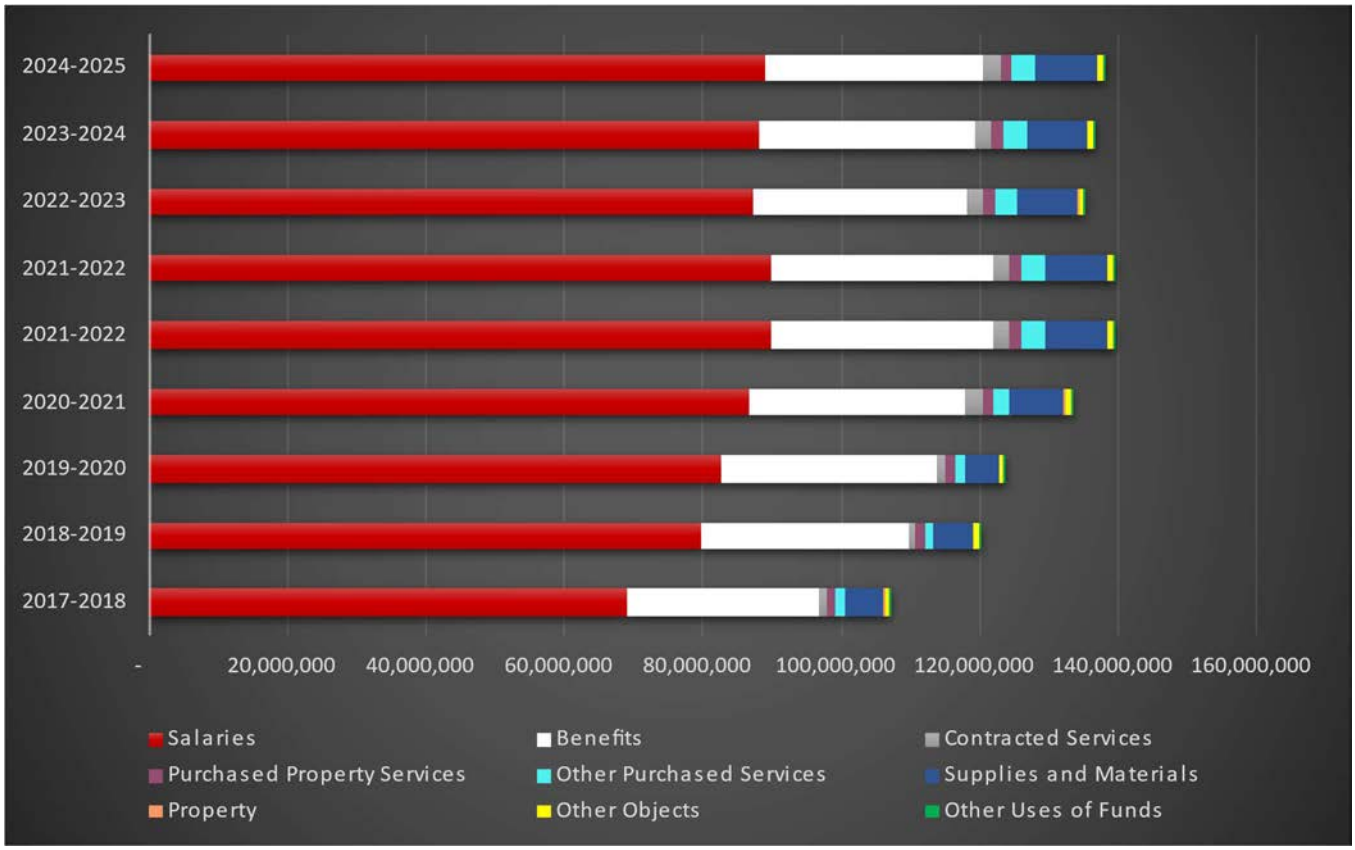
	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Instruction	$ 59,007,115	$ 67,633,827	$ 70,255,223	$ 74,004,051	$ 79,358,357	$ 79,358,357	$ 76,977,606	$ 77,747,383	$ 78,524,856
Student Support	7,373,738	9,317,736	9,749,731	10,733,346	10,517,955	10,517,955	10,202,416	10,304,441	10,407,485
Instructional Support	4,116,381	5,232,565	5,112,927	6,181,922	6,048,582	6,048,582	5,867,125	5,925,796	5,985,054
General Administration	2,655,005	2,442,970	2,568,552	2,682,929	3,029,706	3,029,706	2,938,815	2,968,203	2,997,885
School Administration	8,623,348	9,120,025	9,302,859	9,962,296	8,897,231	8,897,231	8,630,314	8,716,617	8,803,783
Business/Technology	7,347,032	7,883,100	8,158,132	8,538,965	9,051,657	9,051,657	8,780,107	8,867,908	8,956,587
Operations & Maintenance	9,170,551	9,216,510	8,693,970	9,604,834	11,242,169	11,242,169	10,904,904	11,013,953	11,124,093
Student Transportation	4,322,681	4,607,423	4,757,427	5,029,463	5,005,599	5,005,599	4,855,431	4,903,986	4,953,026
Non-Instructional Services	4,206,897	4,320,290	4,870,920	5,039,585	6,077,459	6,077,459	5,895,135	5,954,086	6,013,627
Other Outlays	74,421	104,635	234,380	54,427	194,206	194,206	188,380	190,264	192,166
Total Expenditure by Function	$ 106,897,169	$119,879,081	$123,704,121	$131,831,817	$139,422,921	$139,422,921	$ 135,240,233	$ 136,592,636	$ 137,958,562



GENERAL FUND SCHEDULE OF EXPENDITURES BY OBJECT

General Fund By Object

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Salaries	$ 69,106,246	$ 79,819,036	$ 82,749,488	$ 87,134,942	$ 90,000,533	$ 90,000,533	$ 87,300,517	$ 88,173,522	$ 89,055,257
Benefits	27,613,944	29,891,823	31,078,985	33,470,416	31,832,212	31,832,212	30,877,245	31,186,018	31,497,878
Contracted Services	1,112,110	1,036,173	1,263,286	1,488,478	2,529,792	2,529,792	2,453,898	2,478,437	2,503,221
Purchased Property Services	1,356,808	1,378,295	1,321,572	1,327,301	1,570,149	1,570,149	1,523,045	1,538,275	1,553,658
Other Purchased Services	1,226,175	1,106,786	1,517,696	1,605,329	3,426,726	3,426,726	3,323,924	3,357,163	3,390,735
Supplies and Materials	5,701,074	5,926,587	4,944,692	6,108,525	9,068,208	9,068,208	8,796,162	8,884,124	8,972,965
Property	56,288	18,265	-	-	6,516	6,516	6,320	6,383	6,447
Other Objects	650,102	622,397	618,862	644,231	796,409	796,409	772,517	780,242	788,044
Other Uses of Funds	74,421	97,718	209,539	52,595	192,377	192,377	186,606	188,472	190,356
Total Expenditure By Object	$ 106,897,169	$ 119,897,080	$ 123,704,121	$ 131,831,817	$ 139,422,921	$ 139,422,921	$ 135,240,233	$ 136,592,638	$ 137,958,561



GENERAL FUND BY CATEGORY

General Fund
Schedule of Expenditures

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Instruction									
Salaries	$41,016,862	$48,145,471	$50,241,292	$51,922,879	$ 56,227,384	$56,227,384	$54,540,563	$55,085,968	$55,636,828
Benefits	15,831,637	17,192,870	18,000,038	18,690,441	18,134,893	18,134,893	17,590,846	17,766,754	17,944,422
Contracted Services	165,349	206,420	169,181	483,633	1,225,315	1,225,315	1,188,555	1,200,441	1,212,445
Purchased Property Service	78,301	79,653	67,413	68,411	81,903	81,903	79,446	80,240	81,042
Other Purchased Services	106,115	84,034	416,214	607,477	644,651	644,651	625,311	631,564	637,880
Supplies and Materials	1,717,446	1,875,465	1,296,709	2,190,754	2,881,342	2,881,342	2,794,902	2,822,851	2,851,079
Property	0	0	0	0	0	0	0	0	0
Other objects	91,405	49,914	64,377	40,456	93,453	93,453	90,649	91,556	92,471
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	59,007,115	67,633,827	70,255,224	74,004,051	79,288,941	79,288,941	76,910,271	77,679,374	78,456,168
Student Support									
Salaries	5,231,604	6,850,957	7,210,885	7,825,054	7,666,754	7,666,754	7,436,752	7,511,119	7,586,230
Benefits	1,964,043	2,337,068	2,423,438	2,744,398	2,632,910	2,632,910	2,553,922	2,579,462	2,605,256
Contracted Services	76,877	30,428	49,998	83,173	58,038	58,038	56,297	56,860	57,429
Purchased Property Service	2,186	1,911	2,726	1,852	400	400	388	392	396
Other Purchased Services	26,375	10,370	12,373	6,650	19,595	19,595	19,007	19,197	19,389
Supplies and Materials	45,013	67,446	42,755	66,161	137,699	137,699	133,568	134,904	136,253
Property	0	0	0	0	0	0	0	0	0
Other objects	27,639	19,556	7,556	6,058	11,565	11,565	11,218	11,330	11,443
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	7,373,737	9,317,736	9,749,731	10,733,346	10,526,961	10,526,961	10,211,152	10,313,263	10,416,396
Instructional Support									
Salaries	2,889,352	3,691,461	3,484,458	4,247,239	3,898,495	3,898,495	3,781,541	3,819,356	3,857,549
Benefits	953,379	1,151,852	1,088,228	1,394,843	1,258,242	1,258,242	1,220,495	1,232,699	1,245,026
Contracted Services	40,640	186,183	338,139	248,301	113,823	113,823	110,408	111,512	112,627
Purchased Property Service	7,317	8,605	11,700	4,121	15,100	15,100	14,647	14,793	14,941
Other Purchased Services	46,121	40,318	31,289	5,758	495,649	495,649	480,780	485,588	490,444
Supplies and Materials	96,613	108,642	95,608	177,252	133,067	133,067	129,075	130,366	131,669
Property	0	0	0	0	6,516	6,516	6,320	6,383	6,447
Other objects	82,959	45,504	63,505	104,407	74,862	74,862	72,616	73,342	74,076
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	4,116,381	5,232,565	5,112,927	6,181,921	5,995,754	5,995,754	5,815,881	5,874,040	5,932,780
General Administration									
Salaries	1,403,039	1,471,112	1,480,885	1,593,106	1,587,547	1,587,547	1,539,921	1,555,320	1,570,873
Benefits	506,792	444,348	458,540	500,053	488,365	488,365	473,714	478,451	483,236
Contracted Services	314,844	205,939	268,781	178,740	408,034	408,034	395,793	399,751	403,748
Purchased Property Service	8,885	4,035	2,241	1,217	16,314	16,314	15,824	15,982	16,142
Other Purchased Services	344,132	270,463	312,482	346,383	495,440	495,440	480,577	485,383	490,236
Supplies and Materials	33,772	8,953	4,555	17,410	46,658	46,658	45,258	45,710	46,168
Property	0	0	0	0	0	0	0	0	0
Other objects	43,541	38,122	41,068	46,018	46,525	46,525	45,129	45,581	46,036
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	2,655,005	2,442,972	2,568,552	2,682,927	3,088,883	3,088,883	2,996,216	3,026,178	3,056,440
School Administration									
Salaries	6,211,743	6,562,254	6,764,830	7,212,171	6,509,987	6,509,987	6,314,687	6,377,834	6,441,612
Benefits	2,328,815	2,429,920	2,459,489	2,686,501	2,243,272	2,243,272	2,175,974	2,197,734	2,219,711
Contracted Services	0	2,733	720	0	5,000	5,000	4,850	4,899	4,947
Purchased Property Service	1,550	60,166	13,147	17,702	2,905	2,905	2,818	2,846	2,874
Other Purchased Services	20,813	24,853	21,229	14,092	55,402	55,402	53,740	54,277	54,820
Supplies and Materials	60,368	38,918	43,272	30,050	74,003	74,003	71,783	72,500	73,225
Property	0	0	0	0	0	0	0	0	0
Other objects	60	1,180	173	1,780	670	670	650	656	663
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	$ 8,623,349	$ 9,120,024	$ 9,302,860	$ 9,962,296	$ 8,891,239	$ 8,891,239	$ 8,624,501	$ 8,710,746	$ 8,797,853

GENERAL FUND BY CATEGORY

General Fund
Schedule of Expenditures

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Propsed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Business Services									
Salaries	$ 4,633,467	$ 4,929,420	$ 5,263,031	$ 5,520,036	$ 5,241,013	$ 5,241,013	$ 5,083,782	$ 5,134,620	$ 5,185,966
Benefits	1,676,114	1,749,211	1,866,103	2,057,999	1,857,109	$ 1,857,109	1,801,396	1,819,410	1,837,604
Contracted Services	266,649	255,827	197,307	238,217	279,186	$ 279,186	270,810	273,518	276,254
Purchased Property Service	27,453	40,153	26,810	26,019	50,960	$ 50,960	49,431	49,926	50,425
Other Purchased Services	189,463	266,851	250,710	133,360	816,977	$ 816,977	792,467	800,392	808,396
Supplies and Materials	167,042	193,632	162,826	148,769	275,030	$ 275,030	266,779	269,447	272,142
Property	0	0	0	0	0	$ -	0	0	0
Other objects	386,844	448,005	391,345	414,565	531,920	$ 531,920	515,962	521,122	526,333
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	7,347,032	7,883,099	8,158,132	8,538,965	9,052,195	9,052,195	8,780,629	8,868,435	8,957,119
Operations & Maintenance									
Salaries	2,923,447	3,011,776	2,744,251	3,126,372	2,959,846	2,959,846	2,871,051	2,899,761	2,928,759
Benefits	1,800,269	1,840,817	1,816,612	2,160,573	1,831,083	1,831,083	1,776,151	1,793,912	1,811,851
Contracted Services	23,634	27,800	28,152	33,503	29,426	29,426	28,543	28,829	29,117
Purchased Property Service	1,199,839	1,121,802	1,142,318	1,067,222	1,335,039	1,335,039	1,294,988	1,307,938	1,321,017
Other Purchased Services	213,022	195,072	249,085	266,362	383,688	383,688	372,177	375,899	379,658
Supplies and Materials	2,951,247	3,003,949	2,702,281	2,939,263	4,745,077	4,745,077	4,602,724	4,648,752	4,695,239
Property	56,288	12,500	0	0	0	0	0	0	0
Other objects	2,805	2,794	11,273	11,540	3,100	3,100	3,007	3,037	3,067
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	9,170,551	9,216,510	8,693,972	9,604,835	11,287,259	11,287,259	10,948,641	11,058,127	11,168,709
Student Transportation									
Salaries	2,486,488	2,707,193	2,834,806	2,912,521	2,833,407	2,833,407	2,748,405	2,775,889	2,803,648
Benefits	975,343	1,070,368	1,134,796	1,352,092	1,225,656	1,225,656	1,188,886	1,200,775	1,212,783
Contracted Services	6,718	4,191	5,198	3,533	2,500	2,500	2,425	2,449	2,474
Purchased Property Service	28,674	59,728	52,743	124,472	45,700	45,700	44,329	44,772	45,220
Other Purchased Services	271,584	204,206	216,147	223,536	272,790	272,790	264,606	267,252	269,925
Supplies and Materials	545,153	552,255	505,894	406,039	628,075	628,075	609,233	615,325	621,478
Property	0	0	0	0	0	0	0	0	0
Other objects	8,722	9,483	7,843	7,269	7,000	7,000	6,790	6,858	6,926
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	4,322,682	4,607,424	4,757,427	5,029,462	5,015,128	5,015,128	4,864,674	4,913,321	4,962,454
Non-Instructional Services									
Salaries	2,310,244	2,449,392	2,725,051	2,775,563	2,958,688	2,958,688	2,869,927	2,898,626	2,927,613
Benefits	1,577,552	1,657,369	1,831,742	1,883,515	2,225,057	2,225,057	2,158,305	2,179,888	2,201,687
Contracted Services	217,398	109,853	205,812	219,377	447,700	447,700	434,269	438,612	442,998
Purchased Property Service	2,604	2,125	2,475	16,287	21,829	21,829	21,174	21,386	21,600
Other Purchased Services	8,551	10,617	8,167	1,710	242,535	242,535	235,259	237,612	239,988
Supplies and Materials	84,420	77,327	90,792	130,996	159,236	159,236	154,459	156,003	157,563
Property	0	5,765	0	0	0	0	0	0	0
Other objects	6,128	7,841	6,882	12,137	27,315	27,315	26,496	26,761	27,028
Other Uses of Funds	0	0	0	0	0	0	0	0	0
	4,206,897	4,320,289	4,870,921	5,039,585	6,082,360	6,082,360	5,899,889	5,958,888	6,018,477
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	6,800	0	0	0	0	0	0	0
Purchased Property Service	0	117	0	0	0	0	0	0	0
Other Purchased Services	0	0	0	0	0	0	0	0	0
Supplies and Materials	0	0	0	1,832	1,829	1,829	1,774	1,792	1,810
Property	0	0	0	0	0	0	0	0	0
Other objects	0	0	24,841	0	0	0	0	0	0
Other Uses of Funds	74,421	97,718	209,539	52,595	192,377	192,377	186,606	188,472	190,356
	74,421	104,635	234,380	54,427	194,206	194,206	188,380	190,264	192,166
Total General Fund Budget	**106,897,170**	**119,879,081**	**123,704,126**	**131,831,815**	**139,422,921**	**139,422,921**	**135,240,233**	**136,592,636**	**137,958,562**
Fund Balance 06/30	**$15,820,861**	**$16,911,038**	**$16,746,479**	**$14,332,276**	**$ 15,197,802**	**$18,197,802**	**$15,932,884**	**$ 1,566,402**	**$19,451,587**

BUILDING FUND SUMMARY

REVENUES	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Ad Valorem	$ 4,212,052	$ 4,238,099	$ 4,412,484	$ 4,531,531	$ 4,631,535	$ 4,631,535	$ 4,677,850	$ 4,724,629	$ 4,771,875
Local Sources - Other	2,380,752	8,153,916	237,833	181,566	189,283	189,283	191,176	193,088	195,018
Interest - Interfund	132,899	782,018	621,903	411,521	472,000	472,000	476,720	481,487	486,302
TOTAL REVENUES	6,725,703	13,174,033	5,272,220	5,124,618	5,292,818	5,292,818	5,345,746	5,399,204	5,453,196
EXPENDITURES									
Operations & Maintenance	6,131,223	6,295,070	8,185,511	7,650,960	6,083,536	6,083,536	6,144,371	6,205,815	6,267,873
Facilities Acq & Construction	344,186	2,516,774	5,113,937	626,235	0	0	0	0	0
TOTAL EXPENDITURES	6,475,409	8,811,844	13,299,448	8,277,195	6,083,536	6,083,536	6,144,371	6,205,815	6,267,873
EXCESS REV (EXP)	250,294	4,362,189	(8,027,228)	(3,152,577)	(790,718)	(790,718)	(798,625)	(806,611)	(814,678)
FUND BALANCE 07/1	10,917,217	11,167,511	15,529,700	7,502,472	4,349,895	4,349,895	3,559,177	2,760,552	1,953,941
FUND BALANCE 06/30	**$ 11,167,511**	**$ 15,529,700**	**$ 7,502,472**	**$ 4,349,895**	**$ 3,559,177**	**$ 3,559,177**	**$ 2,760,552**	**$ 1,953,941**	**$ 1,139,263**



2021-2022 Building Fund Expenditure Schedule

Building Fund By Object

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Salaries	$ 3,860,103	$ 4,260,655	$ 4,962,255	$ 4,960,590	$ 4,881,110	$ 4,881,110	$ 4,929,921	$ 4,979,220	$ 5,029,013
Benefits	826,801	871,854	1,039,545	1,110,406	1,094,976	1,094,976	1,105,926	1,116,985	1,128,155
Supplies and Materials	1,788,504	3,679,335	6,936,531	2,202,847	107,450	107,450	108,525	109,610	110,706
Other Objects	0	0	361,117	3,351	0	0	0	0	0
Total Expenditure by Object	**$ 6,475,408**	**$ 8,811,844**	**$13,299,448**	**$ 8,277,195**	**$ 6,083,536**	**$ 6,083,536**	**$ 6,144,371**	**$ 6,205,815**	**$ 6,267,873**

Building Fund By Function

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Operations & Maintenance	$ 6,131,223	$ 6,295,070	$ 8,185,511	$ 7,650,960	$ 6,083,536	$ 6,083,536	$ 6,144,371	$ 6,205,815	$ 6,267,873
Facilities Acq & Construction	344,186	2,516,774	5,113,937	626,235	0	0	0	0	0
Total Expenditure by Function	**$ 6,475,408**	**$ 8,811,844**	**$13,299,448**	**$ 8,277,195**	**$ 6,083,536**	**$ 6,083,536**	**$ 6,144,371**	**$ 6,205,815**	**$ 6,267,873**

2021-2022 Building Fund Revenue Summary

Local Revenue		
Other Local Sources	5,292,818	
Local Revenue		**5,292,818**
Total Revenue		**$5,292,818**

CHILD NUTRITION SUMMARY

REVENUES	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	ACTUAL 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Local Sources	$ 2,279,451	$ 2,495,723	$ 1,866,418	$ 559,885	$ 766,600	$ 766,600	$ 774,266	$ 782,009	$ 789,829
State Sources	73,393	68,357	80,358	8,633	79,825	79,825	80,623	81,429	82,244
Federal Sources	6,838,170	7,252,920	7,526,297	11,220,597	11,147,000	11,147,000	11,258,470	11,371,055	11,484,765
TOTAL REVENUES	9,191,014	9,817,000	9,473,073	11,789,115	11,993,425	11,993,425	12,113,359	12,234,493	12,356,838
EXPENDITURES									
Food Preparation	3,592,407	3,917,720	4,327,688	4,348,466	4,139,446	4,139,446	4,180,840	4,222,649	4,264,875
Other Direct Services	1,027,217	964,897	1,014,951	940,246	2,011,414	2,011,414	2,031,528	2,051,843	2,072,362
Food Procurement/A La Carte	3,388,160	3,832,105	3,464,372	3,483,942	5,439,426	5,439,426	5,493,820	5,548,758	5,604,246
Other CN Programs	936,101	928,868	1,264,529	622,974	586,168	586,168	592,030	597,950	603,929
TOTAL EXPENDITURES	8,943,885	9,643,590	10,071,540	9,395,628	12,176,454	12,176,454	12,298,219	12,421,201	12,545,413
EXCESS REV (EXP)	247,130	173,409	(598,467)	2,393,487	(183,029)	(183,029)	(184,859)	(186,708)	(188,575)
FUND BALANCE 07/1	5,842,539	6,089,670	6,263,079	5,664,612	8,058,099	8,058,099	7,875,070	7,690,211	7,503,503
FUND BALANCE 06/30	$ 6,089,669	$ 6,263,079	$ 5,664,612	$ 8,058,099	$ 7,875,070	$ 7,875,070	$ 7,690,211	$ 7,503,503	$ 7,314,928



2021-2022 Child Nutrition Fund Revenue Summary

Local Revenue		
Interest	$ 10,000	
Other Local Sources	2,904,600	
Student Meals	612,000	
Local Revenue		3,526,600
State Revenue		
State Matching	10,000	
State Revenue		10,000
Federal Revenue		
Fresh Fruit and Vegetable	11,147,000	
Federal Revenue		11,147,000
Total Revenue		$14,683,600

Child Nutrition By Object

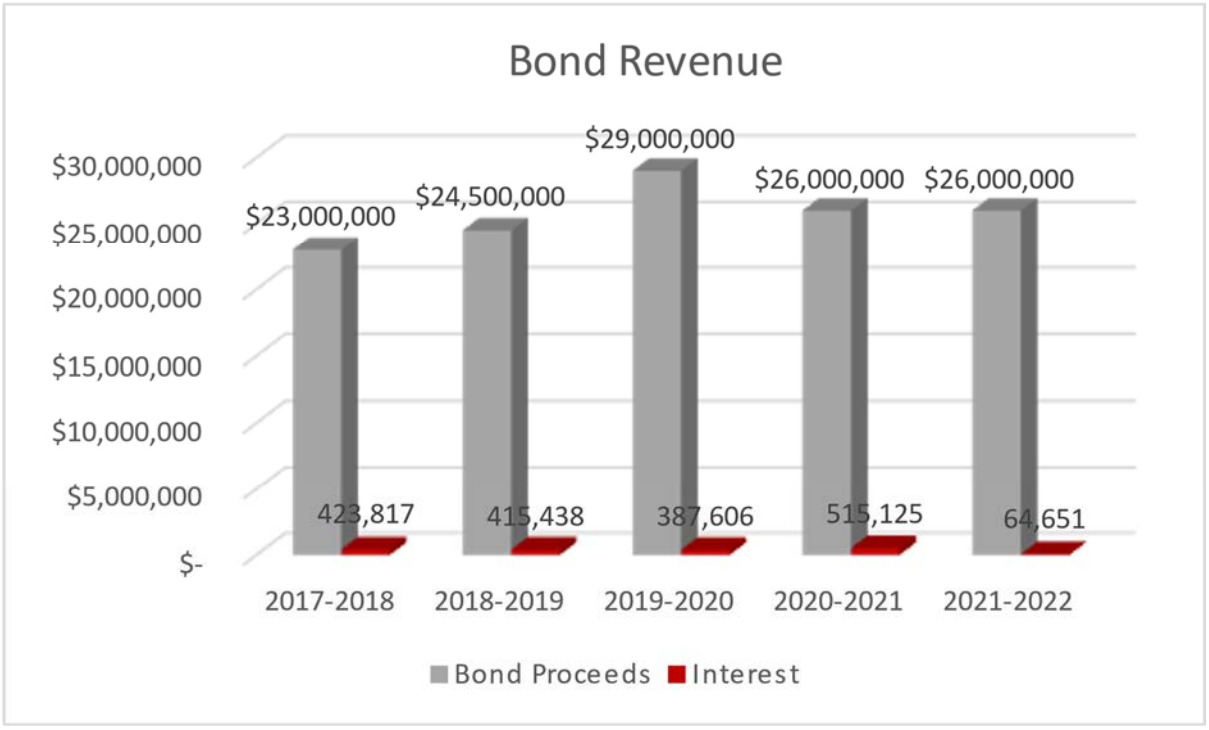
	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Salaries	$ 3,701,458	$ 4,028,154	$ 4,302,438	$ 4,318,606	$ 4,311,729	$ 4,311,729	$ 4,354,847	$ 4,398,395	$ 4,442,379
Benefits	855,612	916,404	994,452	1,039,941	953,019	953,019	962,550	972,175	981,897
Contracted Services	13,525	3,782	41,216	8,273	247,200	247,200	249,672	252,169	254,690
Purchased Property Services	654,977	527,739	951,583	258,342	40,000	40,000	40,400	40,804	41,212
Other Purchased Services	34,402	31,539	33,601	63,185	241,075	241,075	243,486	245,921	248,380
Supplies and Materials	3,527,467	4,111,765	3,680,924	3,671,389	6,046,252	6,046,252	6,106,715	6,167,782	6,229,460
Property	150,163	10,933	52,805	16,490	130,000	130,000	131,300	132,613	133,939
Other Objects	6,282	13,275	14,520	19,401	207,178	207,178	209,250	211,342	213,456
Total Expenditure by Object	$ 8,943,885	$ 9,643,590	$ 10,071,540	$ 9,395,628	$ 12,176,454	$ 12,176,454	$ 12,298,219	$ 12,421,201	$ 12,545,413

Child Nutrition By Function

	Actual 2017-2018	Actual 2018-2019	Actual 2019-2020	Actual 2020-2021	Proposed 2021-2022	Approved 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Food Preparations	$ 3,592,407	$ 3,917,720	$ 4,327,688	$ 4,348,466	$ 4,139,446	$ 4,139,446	$ 4,180,840	$ 4,222,649	$ 4,264,875
Other Direct Services	1,027,217	964,897	1,014,951	940,246	2,011,414	2,011,414	2,031,528	2,051,843	2,072,362
Food Procurement/A La Carte	3,388,160	3,832,105	3,464,372	3,483,942	5,439,426	5,439,426	5,493,820	5,548,758	5,604,246
Other CN Programs	936,101	928,868	1,264,529	622,974	586,168	586,168	592,030	597,950	603,929
Total Expenditure By Function	$ 8,943,885	$ 9,643,590	$ 10,071,540	$ 9,395,628	$ 12,176,454	$ 12,176,454	$ 12,298,219	$ 12,421,201	$ 12,545,413

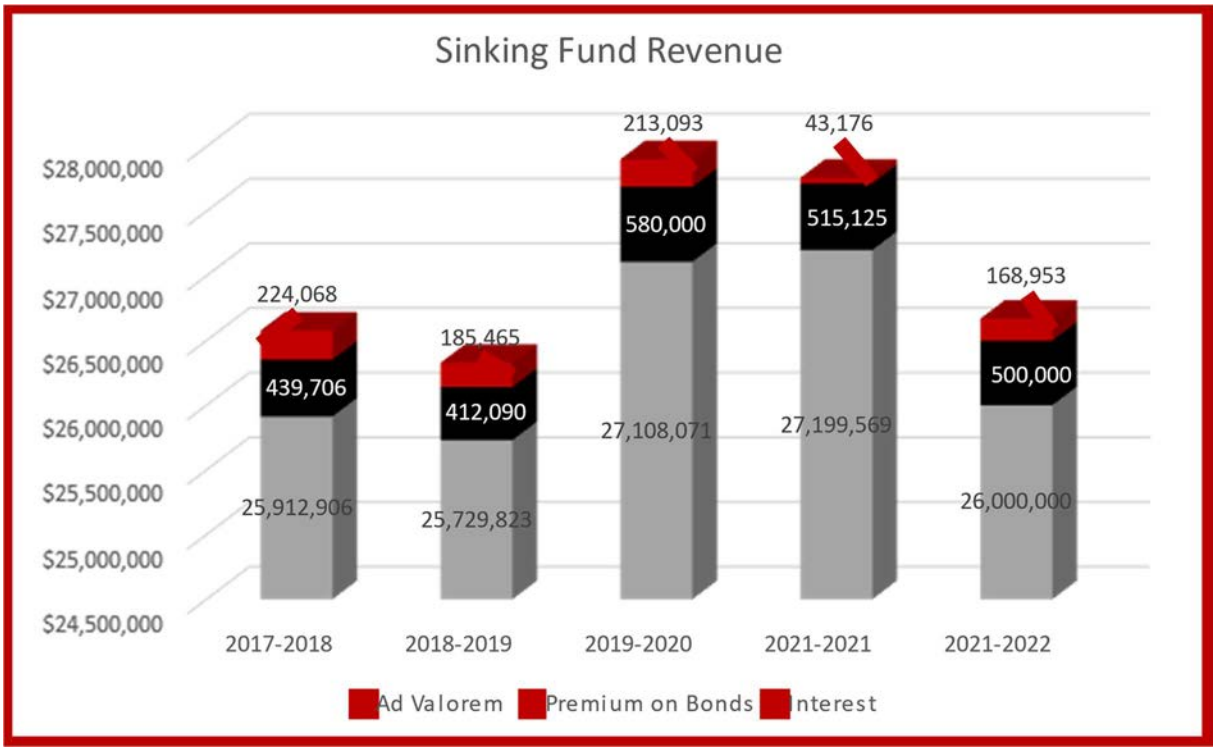
Bond Fund Revenue and Expenditures

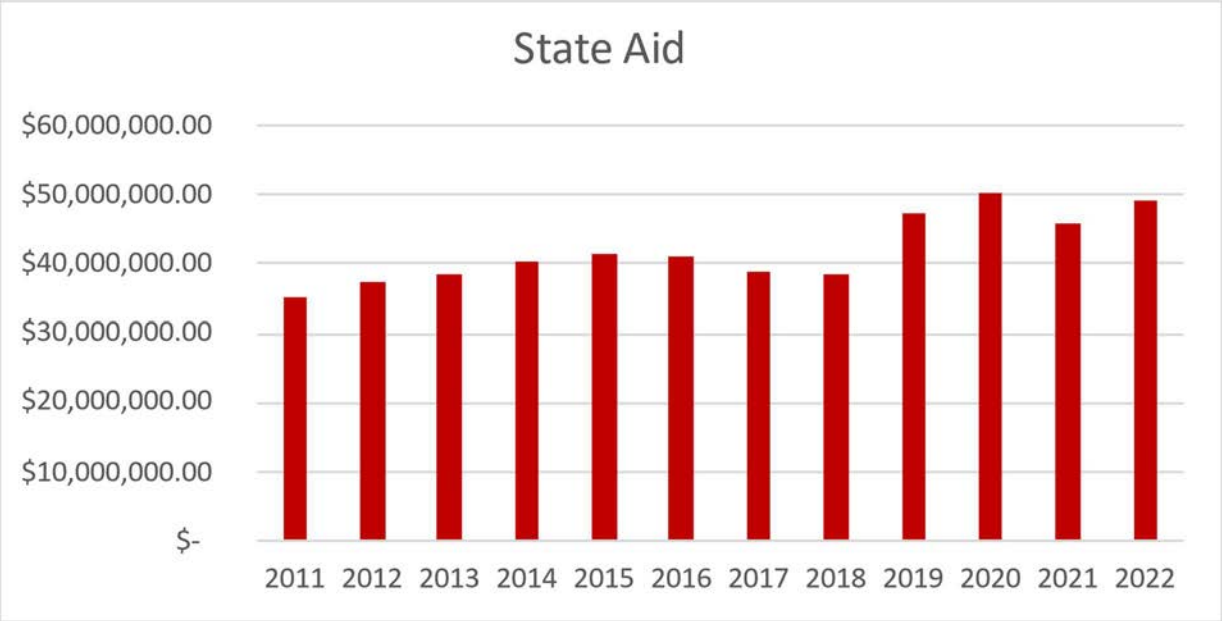
REVENUES	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	ACTUAL 2020-2021	Proposed 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Bond Proceeds	$ 23,000,000	$ 24,500,000	$ 29,000,000	$ 26,000,000	$26,000,000	$23,000,000	$24,500,000	$29,000,000
Interest	423,817	415,438	387,606	515,125	64,651	138,000	147,000	174,000
TOTAL REVENUES	**23,423,817**	**24,915,438**	**29,387,606**	**26,515,125**	**26,064,651**	**23,138,000**	**24,647,000**	**29,174,000**
EXPENDITURES								
Instruction	4,037,641	5,047,027	3,951,045	4,995,591	4,314,669	3,564,651	3,719,635	3,524,257
Student Support	53,903	145,557	17,371	62,812	54,250	15,672	16,353	44,312
Instructional Support	536,303	788,817	452,725	748,352	646,348	408,451	426,210	527,942
General Administration	31,759	99,258	19,505	2,276	1,966	17,597	18,363	1,606
School Administration	84,974	37,455	73,465	157,748	136,246	66,280	69,162	111,287
Business/Technology	1,469,555	1,487,820	1,599,406	897,303	774,997	1,442,991	1,505,730	633,023
Operations & Maintenance	768,185	1,586,639	1,227,268	785,582	678,504	1,107,247	1,155,388	554,207
Student Transportation	34,450	2,686,070	67,611	18,259	15,770	60,999	63,651	12,881
Appliances, Furniture, Fixtures	22,718	81,407	16,525	41,804	36,106	14,909	15,557	29,492
Buildings & Construction	16,001,970	12,101,404	17,623,123	23,129,255	28,735,293	15,899,663	16,590,952	23,471,221
Other	125,626	397,280	445,066	127,249	109,904	401,541	418,999	89,771
TOTAL EXPENDITURES	**23,167,084**	**24,458,734**	**25,493,109**	**30,966,231**	**35,504,054**	**23,000,000**	**24,000,000**	**29,000,000**
EXCESS REV (EXP)	256,733	456,704	3,894,497	(4,451,106)	(9,439,403)	138,000	647,000	174,000
FUND BALANCE 07/1	37,270,539	37,527,272	37,983,976	41,878,472	37,427,366	27,987,964	28,125,964	28,772,964
FUND BALANCE 06/30	**$ 37,527,272**	**$ 37,983,976**	**$ 41,878,472**	**$ 37,427,366**	**$ 27,987,964**	**$ 28,125,964**	**$ 28,772,964**	**$ 28,946,964**

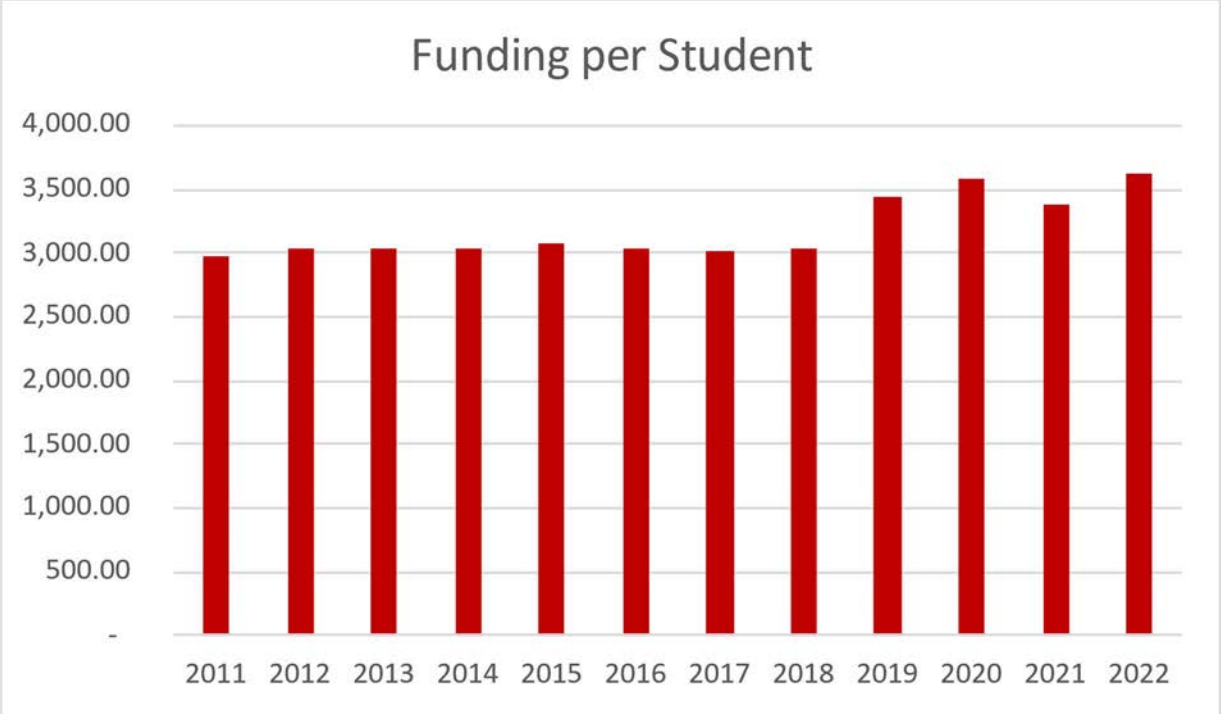


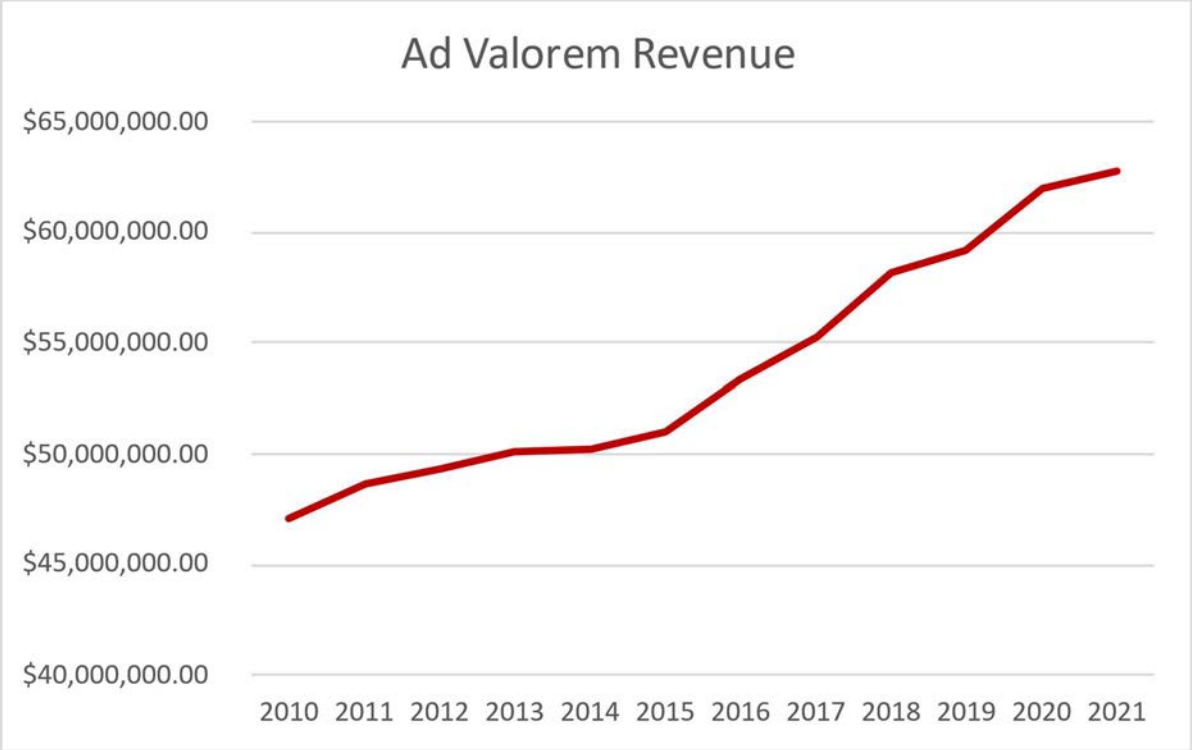
Sinking Fund Revenue and Expenditures

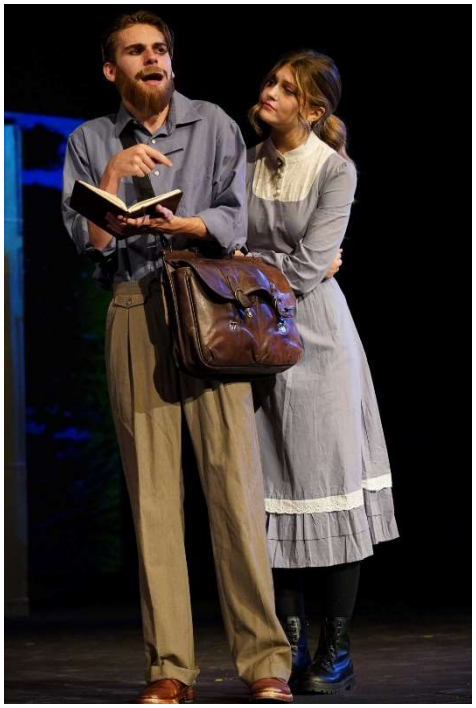
REVENUES	ACTUAL 2017-2018	ACTUAL 2018-2019	ACTUAL 2019-2020	ACTUAL 2020-2021	Proposed 2021-2022	Forecast 2022-2023	Forecast 2023-2024	Forecast 2024-2025
Ad Valorem	$ 25,912,906	$ 25,729,823	$ 27,108,071	$ 27,199,569	$26,000,000	$ 26,000,000	$ 26,000,000	$ 26,000,000
Premium on Bonds	439,706	412,090	580,000	515,125	500,000	400,000	400,000	400,000
Interest	224,068	185,465	213,093	43,176	168,953	250,000	200,000	200,000
TOTAL REVENUES	**26,576,680**	**26,327,378**	**27,901,164**	**27,757,869**	**26,668,953**	**26,650,000**	**26,600,000**	**26,600,000**
EXPENDITURES								
Principal	23,850,000	25,250,000	25,750,000	25,125,000	26,552,656	26,895,313	19,948,125	13,812,500
Interest	1,628,125	1,848,438	1,928,438	1,830,313	635,156	1,950,000	1,950,000	1,950,000
TOTAL EXPENDITURES	**25,478,125**	**27,098,438**	**27,678,438**	**26,955,313**	**27,187,813**	**28,845,313**	**21,898,125**	**15,762,500**
EXCESS REV (EXP)	1,098,555	(771,060)	222,727	802,557	(518,860)	(2,195,313)	4,701,875	10,837,500
FUND BALANCE 07/1	14,054,694	15,153,249	14,382,189	14,604,916	15,407,473	14,888,613	12,693,301	17,395,176
FUND BALANCE 06/30	**$ 15,153,249**	**$ 14,382,189**	**$ 14,604,916**	**$ 15,407,473**	**$14,888,613**	**$ 12,693,301**	**$ 17,395,176**	**$ 28,232,676**



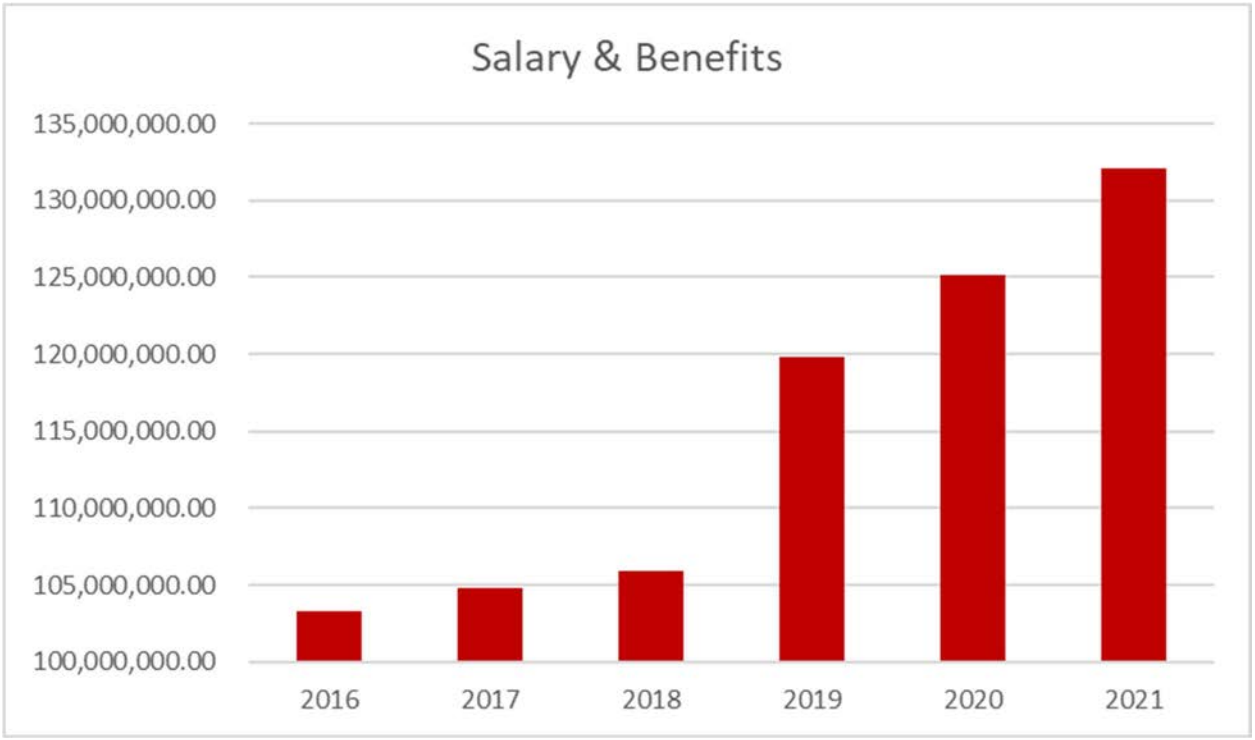

State Aid
$60,000,000.00
$50,000,000.00
$40,000,000.00
$30,000,000.00
$20,000,000.00
$10,000,000.00
$-
2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

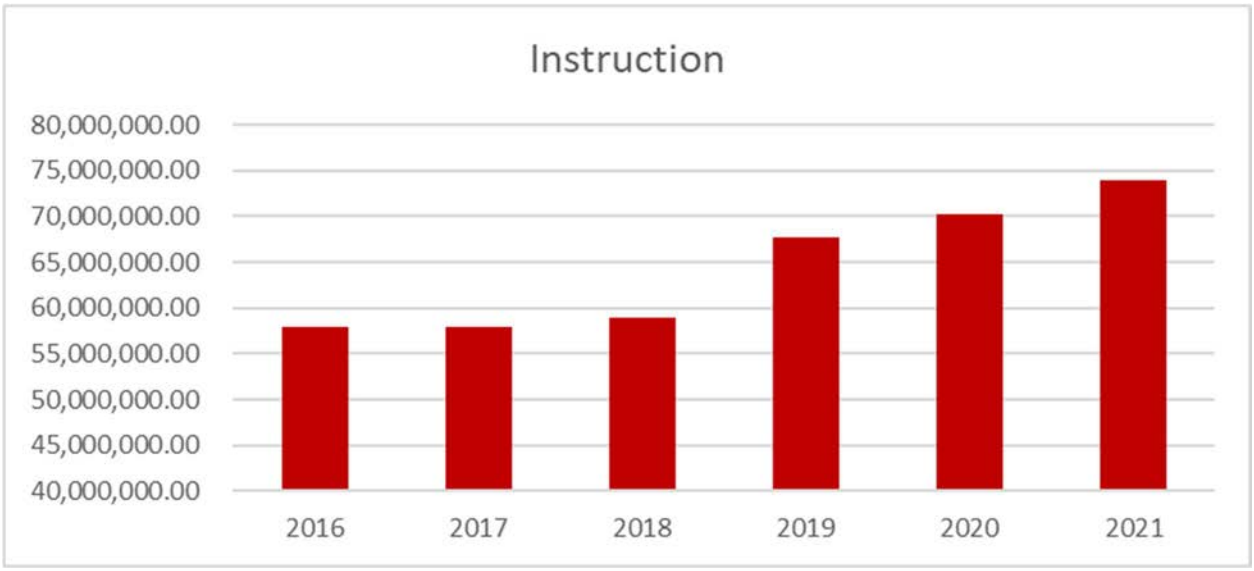

Funding per Student
4,000.00
3,500.00
3,000.00
2,500.00
2,000.00
1,500.00
1,000.00
500.00
-
2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022


Ad Valorem Revenue
$65,000,000.00
$60,000,000.00
$55,000,000.00
$50,000,000.00
$45,000,000.00
$40,000,000.00
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021









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 increased 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.

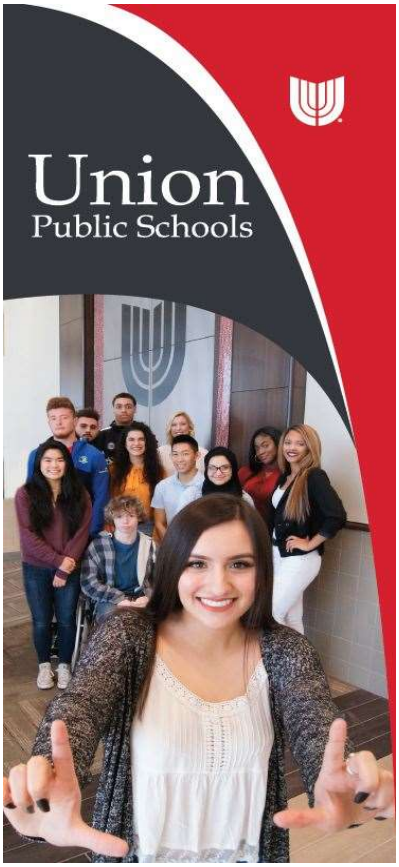
At the end of Fiscal year 2021, the district's governmental funds reported combined ending fund balances of $96,303,287, with $1,537,680 of this total amount constituting non-spendable fund balance reserved for inventories. In addition, $65,741,563 is restricted for specific purposes: $918,641in general fund, $4,482,965 in the building fund for uses mandated by the Oklahoma Constitution including building erection and maintenance, security, utilities, and fire/casualty premiums; $15,094,504 in the sinking fund for debt service, and $36,653,069 in the bond fund for capital project, $8,476,601 in the child nutrition fund for school lunches, $80,908 in the gift fund restricted for purposes designated by the donor, and $5,996 in other governmental funds for arbitrage. Assigned fund balance totals $5,039,034 for compensating balances, early retirement incentive, and insurance recovery. Unassigned fund balance totals $21,514,306 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 $21,514,306. 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 15.83 percent of total general fund expenditures and total fund balance represents 20.73 percent of total general fund expenditures. The fund balance of the District's general fund decreased by $659,731 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 2021 general fund revenue budgets were revised during the year based on adjustments to revenue collections. The fiscal year saw a $506,491 decrease in local revenue sources, a $175,390 increase in state aid and property tax collections, and $219,971 in Federal Sources .

The building fund is included as a Non-Major Governmental Fund. This program had a total fund balance of $4,482,965. The net decrease in fund balance during the current year in the building fund was $3,180,563. 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 $12,106,758, and expenses of $10,409,109 for the fiscal year 2021. 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

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 $129,417,617 with original budget estimates of $125,273,781 and final budget estimates of $129,492,040. 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 2020-21, 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 11.07 percent.



2022 BOND PROJECTS

THE YEAR AHEAD

Beyond completion of the new Fine Arts/Band Building, there are other exciting projects underway in 2022.

Roofing Projects

Due to supply chain issues, roofing projects at Union High School and Andersen were delayed. Portions of UHS and the second half of Andersen are expected this summer.

Greenhouse at Ochoa

The greenhouse project has been relocated to Ochoa Elementary (from Sanders Field). "Ochoa Elementary has an active gardening interest, plus we have land and a storage facility, so it made sense to relocate this project," said Bushyhead.

Playground Equipment

New playground equipment at Peters Elementary installed by 2022.

Indoor Golf Facility

Located in the former wrestling room, the practice facility will have three hitting bays, a golf simulator room and a 1,900 square foot putting green. All teams will use the indoor facility, especially during inclement weather. Expected completion: Fall 2022.



Union Innovation Lab

A Phase II buildout will include the addition of a construction classroom and wood shop to accommodate growing programs. Ultimately, there will be three teachers for Construction I – III courses, available to students in grades 9-12. A multi-use presentation room will host industry leaders and provide space for training and professional development. Phase II begins in May 2022 and should be completed this summer, in time for the start of school.

Gymnastics & Volleyball

The old gymnastics room at Union High School will be reconfigured for volleyball. New coach's and player's locker rooms, offices, a meeting room, updated restrooms, and storage will accompany two volleyball courts.



HVAC Projects

- **Jarman Elementary:** A new air conditioning system will be completed this summer, as well as lighting, an acoustical ceiling, and data and fire alarm systems.
- **Peters Elementary:** Renovations will take place in 2023-24.
- **Union High School:** "A study has been completed, and the scope of work is much greater than we originally thought," said Fred Isaacs, Director of Construction. "We will dehumidify the back of the high school, and there are six air handlers in the old section that need to be replaced, which will require the use of helicopters. Not kidding!"

Performing Arts Center

"Back of house" renovations, including modernizing the men's and women's dressing rooms, sinks, and showers, will begin in 2022 and continue with the next bond.

Building Automation System

Union will implement a new system to control energy more efficiently in buildings over the next couple of years. It will include automatic temperature setbacks at unoccupied times and controlled settings when occupied. The work will begin in 2022.

Believing in U



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



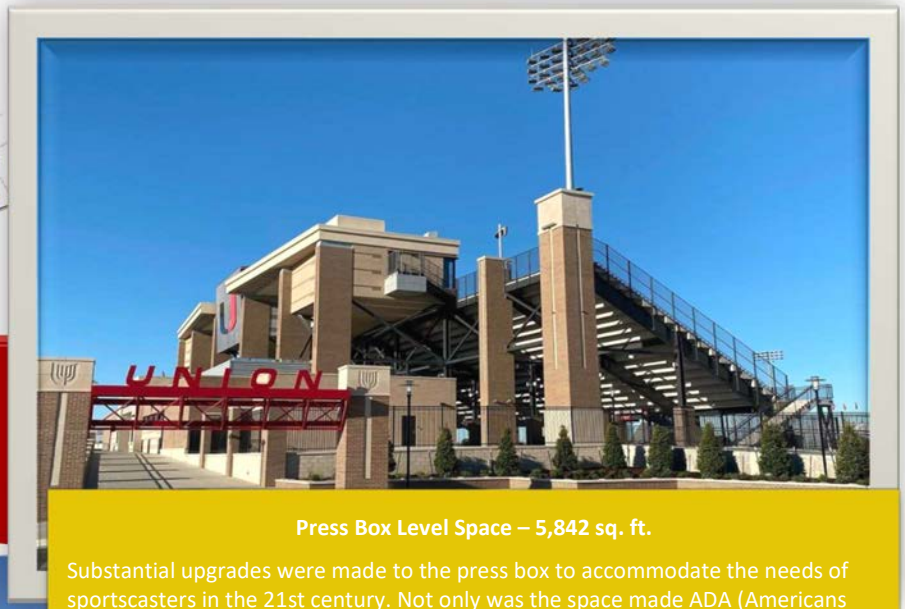
5-Year Series Bond (2018 – 2022) $128.6-Million Proposition at a Glance*

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



Concourse Level – 8,466 sq. ft.

- Two concession spaces
- Women's and men's restrooms
- Two family restrooms
- Two ticket booths

Press Box Level Space – 5,842 sq. ft.

Substantial upgrades were made to the press box to accommodate the needs of sportscasters in the 21st century. Not only was the space made ADA (Americans with Disabilities Act) compliant, but restrooms were added, and more abundant space provided for the news media, but also for visiting and home coaches. Associate Superintendent Charlie Bushyhead said, "The sight lines from inside the press box couldn't get any better. 'The sliding glass windows enable you to feel like you're in the game."



The reviews are in, and Union's Tuttle Stadium, in its new form, is an unqualified hit. All the blood, sweat and tears poured into reimagining the 45-year-old stadium for the 21st century have been met with thunderous approval. In fact, three Tulsa World sports reporters unanimously selected Union's "Big House" (nicknamed by Coach Kirk Fridrich) as their choice for No. 1 high school football stadium in the state.

"Our kids are worthy, and they're deserving of this," said Superintendent Kirt Hartzler. "I'm never going to apologize for building these great facilities for our kids." Associate Superintendent Charlie Bushyhead is very pleased with how it turned out. "The whole feel when you walk out of the concourse into the seating area, it's all first class. I don't feel like I've been in a nicer high school stadium."

He said the openness came out of tours of Arrowhead Stadium. "When we talked with architects, we mentioned that openness. You are enclosed under a roof but walk into a lit seating area. It really makes for a grand entrance and feels like you're in an arena."

With seating capacity at 9,748 seats, there are upper and lower decks on the home (west) side, as well as a press box with hospitality and meeting space. New athletic turf with redesigned end zones were added, as well as new goal posts. Even the east side has been refurbished for visiting spectators, and there are remarkable amenities for Union football and wrestling athletes.

The 580 days it took to complete Phase I of the stadium were not without challenges. "Because we were expanding the footprint of the west bleachers and adding the band building, the entire campus's utilities ran through that corner," said Bushyhead. "Trying to move those in preparation for construction – all while keeping the school running on an active school site with 3,400 students and vehicular traffic – was very difficult. But we made it, due to the extraordinary efforts of Dewberry and Crossland Construction."



MEASURABLE BOND GOALS COMPELTED



New wrestling /weight room

Located on the field level, beneath the stadium, these spaces are now an adequate size to support the number of athletes using those spaces.

At the time of the initial planning, there was no girl's wrestling team, but that has changed dramatically. Girl's wrestling is now Union's fastest-growing sport. Fortunately, architects and designers had the foresight to create a second locker room, so we can fully accommodate this change with a separate locker room and practice areas.

SPECS: Field Level Space – 33,981 sq. ft.

Wrestling Room

- Five 40' x 42' wrestling mats
- Girls' Team – office space and locker room
- Boys' Team – office space and locker room

Weight Room

- 60 yards x 10 yards artificial turf practice space
- 12,171 sq. ft. exercise space
- 26 weightlifting stations with a center sprint/run area
- 9th grade visitors locker room
- Training/nourishment room

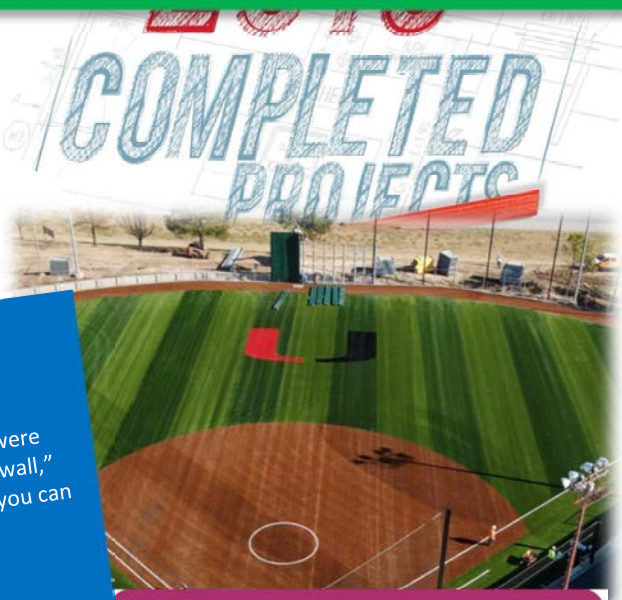
Esports Arena at Union Freshman Academy

In October, Union unveiled its new esports arena at the Freshman Academy, a redesign of the former orchestra room. "When we hosted our first tryouts for this season, the response was strong, with more than 150 students showing up," said Todd Borland, executive director of Information Technology. "We really needed a permanent space given the high level of interest." The esports team is a competitive event and is not an after-school club. Union launched the Oklahoma Esports League (OeSL) – the first high school-sponsored league of its kind in Oklahoma – in partnership with nine other school districts across the state a few years ago. Earlier this month, the Oklahoma Secondary School Activities Association (OSSAA) voted to make esports a championship activity. "The buildout by square footage was not very expensive," said Bushyhead. "We added a few walls, painted, and turned two closets into gaming areas. Most of the work was done internally by the IT and Construction teams. The cost of the technology was negligible, as we already had most of the machines." At an open house last fall, the esports athletes showed off the new facility to their parents and there was open game play for Smash, Madden, Rocket League and League of Legends.



Baseball Field

Work on the baseball field has been completed, with the installation of artificial turf, improved drainage and true dugouts, like the major leagues. "We decided while we were there to do it right, the Union way, adding a 'Champion' wall," said Bushyhead. "With the turf and improved drainage, you can play on it 30 minutes after the rain stops." New video scoreboards and lighting, as well as parking and paving renovations will be included in the next bond issue.



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

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 June 30, 2020	Additions	Deductions	Balance June 30, 2021	Due Within One Year
Governmental activities					
Bonds payable	$ 90,500,000	$ 26,000,000	$ (25,125,000)	$ 91,375,000	$ 25,625,000
Premium on debt	1,377,570	515,125	(440,269)	1,452,426	-
Compensated absences	5,148,107	1,114,991	(542,713)	5,720,385	3,124,016
Early retirement incentive	1,023,692	1,093,311	(613,070)	1,503,933	746,764
	$ 98,049,369	$ 28,723,427	$ (26,721,052)	$ 100,051,744	$ 29,495,780

A brief description of the outstanding general obligation bond issues at June 30, 2021 is set forth below:

	Amounts Outstanding
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.	$ 6,500,000
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.	11,500,000
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.	18,375,000
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.	29,000,000
Independent School District No. 9 of Tulsa County (Union), Oklahoma Building Bonds Series 2021, original issue $26,000,000, interest rate of 1.125% due in installments of $6,500,000 annually, final payment of $6,500,000 due April 1, 2026.	26,000,000
	$ 91,375,000

Maturities of long-term debt are as follows:

Year ending June 30,	Principal	Interest	Total
2022	$ 25,625,000	$ 1,562,813	$ 27,187,813
2023	25,625,000	1,115,625	26,740,625
2024	19,875,000	656,875	20,531,875
2025	13,750,000	291,250	14,041,250
2026	6,500,000	73,125	6,573,125
	$ 91,375,000	$ 3,699,688	$ 95,074,688



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 (a)	Plan Fiduciary Net Position (b)	Net OPEB Liability (a) - (b)
Balance for fiscal year ending 6/30/2019*	$ 6,251,250	$ -	$ 6,251,250
Changes for the year:			
Service cost	390,665	-	390,665
Interest	201,247	-	201,247
Changes of assumptions	353,645	-	353,645
Employer contributions	-	424,618	(424,618)
Benefit payments	(424,618)	(424,618)	-
Net changes	520,939	-	520,939
Balance for fiscal year ending 6/30/20*	$ 6,772,189	$ -	$ 6,772,189

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 7.70% for any employees' salaries covered by federal funds for the years ended June 30, 2021. The District's contributions to OTRS in 2020 were $8,546,998, 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 2021 totaling approximately $1,495,000.

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, 2021 the State paid approximately $639,000 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 and actual experience	$ 7,318,755	$ (2,546,258)
Changes of assumptions	18,437,092	(2,172,019)
Net difference between projected and actual earnings on pension plan investments	12,959,210	-
Changes in proportion and differences between District contributions and proportionate share of contributions	5,984,701	(1,212,409)
Total deferred amounts to be recognized in pension expense in future periods	44,699,758	(5,930,686)
District contributions subsequent to the measurement date	8,546,998	-
Total	$ 53,246,756	$ (5,930,686)




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7404
7405



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 on percentage point per year or increase in excess of the aforementioned assessment ranges for personal and real property. The percentage at which real or personal property is assessed within a county may be decreased with the limitations (assessment ranges) without approval of the voters of the county.

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

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

An exemption on certain household property taxes was approved by the voters of the state in the form of State Question 648 at an election held November 3, 1992. This exemption applies to "household goods of the heads of families and livestock employed in support of the family." State Question 648 actually authorized each county to hold an election approving the exemption. On September 14m 1993, Tulsa County voters became the first county in Oklahoma to approve the

household property exemption. The exemption was effective for tax year 1994. As a result, the School District's personal property valuation declined. In order to ensure a neutral effect on local government ad valorem tax revenues, State Question 648 provided for an adjustment in the mill levies assess by counties and schools, which prevented the School District from experiencing a decline in local revenues. Consequently, at that time the adjusted mill levies for Union's General Fund and Building Fund were set at 36.058 and 5.15 mills, respectively. In addition, the District's adjusted net debt limitation percentage was modified to 10.30% *10% adjustment factor of 1.03) of net assess property located in the District. The adjustment factor for the Union School District was determine by Tulsa County officials

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
2022	775,911,331	111,855,065	22,796,669	910,563,064	8,313,347,466	1.00%	10.95%	72.34
2022	791,429,557	112,973,616	23,024,635	927,427,808	8,396,480,941	1.00%	11.05%	72.34
2023 est	799,343,853	114,103,352	23,254,882	936,702,086	8,480,445,750	1.00%	11.05%	72.34
2024 est	807,337,291	115,244,385	23,487,430	946,069,107	8,565,250,208	1.00%	11.05%	72.34
2025 est	815,410,664	116,396,829	23,722,305	955,529,798	8,650,902,710	1.00%	11.05%	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
Last Ten Fiscal Years

Rates for Taxpayers in the City of Tulsa[a]

Fiscal Year	Direct Rates: Union School District General	Building	Sinking	Total Direct Rates	Overlapping Rates: Tulsa County	Tulsa Comm College	Tulsa VoTech	Tulsa City	Total Overlapping Rates	Total Direct & Overlapping Rates
2012	36.05	5.15	30.45	71.65	22.24	7.21	13.33	20.01	62.79	134.44
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	20.16	62.94	134.84
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	20.24	63.02	134.08
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	21.46	64.23	134.42
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	22.79	65.55	136.56
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	21.20	63.98	135.09
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	22.44	65.22	138.15
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	22.14	65.42	137.34
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	22.12	65.32	137.66
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	17.78	61.57	133.00

Rates for Taxpayers in the City of Broken Arrow[b]

Fiscal Year	Direct Rates: Union School District General	Building	Sinking	Total Direct Rates	Overlapping Rates: Tulsa County	Tulsa Comm College	Tulsa VoTech	Broken Arrow City	Total Overlapping Rates	Total Direct & Overlapping Rates
2012	36.05	5.15	30.45	71.65	22.24	7.21	13.33	17.13	59.91	131.56
2013	36.05	5.15	30.70	71.90	22.24	7.21	13.33	16.50	59.28	131.18
2014	36.05	5.15	29.86	71.06	22.24	7.21	13.33	17.32	60.10	131.16
2015	36.05	5.15	28.99	70.19	22.23	7.21	13.33	17.14	59.91	130.10
2016	36.05	5.15	29.81	71.01	22.22	7.21	13.33	17.10	59.86	130.87
2017	36.05	5.15	29.91	71.11	22.24	7.21	13.33	16.92	59.70	130.81
2018	36.05	5.15	31.73	72.93	22.24	7.21	13.33	16.84	59.62	132.55
2019	36.05	5.15	30.72	71.92	22.74	7.21	13.33	15.61	58.89	130.81
2020	36.05	5.15	31.14	72.34	22.66	7.21	13.33	15.66	58.86	131.20
2021	36.05	5.15	30.23	71.43	23.25	7.21	13.33	16.19	59.98	131.41

[a]Approximately 86% of the District lies within the City of Tulsa. The ten-year tax levy average for property owners in the City of Tulsa is 128.70 mills.

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

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

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	63,859,558.00	62,851,899.00	98.42%	1,394,179.00	64,246,078.00	100.61%	2,382,610	3.73%
2022 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%
2023 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%
2024 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%

[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 Deliquent Taxes to Total Levy" may exceed 100%.

Source: Tulsa County Treasurer

SAMPLE TAX BILL FOR CITY OF TULSA - 2022

Taxable Value	Gross 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**



UNION PUBLIC SCHOOLS

State Aid Calculation Sheet

FY22 Mid-Term

FOUNDATION AID

Foundation Weighted ADM	25,673.87		
Foundation Aid Factor	1,834.01		$ 47,086,134.32
Less Chargeables:			
Ad Valorem	911171589.2	$ 14,624,304.01	
Foundation Mils	0.01605		
County 4 Mil Levy (75%)	3,872,896.44	$ 2,904,672.33	
School Land Earnings		2,165,270.70	
Gross Production		4,462.80	
Motor Vehicle		6,206,222.32	
Rea Tax		-	
TOTAL CHARGEABLES			$ (25,904,932.16)
NET FOUNDATION AID (ZERO IF LESS THAN ZERO)			$ 21,181,202.16

TRANSPORTATION AID:

Regular Average Daily Haul	9,334.37		
Per Capita Amount	$ 33.00		
Transportation Factor	1.39		$ 428,167.55

SALARY INCENTIVE AID:

Incentive Aid Guarantee Factor	89.25		
Weighted ADM	25,673.87	$ 2,291,392.8975	
Adjusted District Valulation	911,171,589.18	$ 911,171.5892	
Incentive Mils	20		$ 27,604,426.17

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

$ 49,213,795.88

Calculated Per Student Factor	$ 3,619.01

Union Public Schools
Initial Allocation - Chargeable Calculations
FY22

		COUNTY 4 MIL	GROSS PRODUCTION	MOTOR VEHICLE	SCHOOL LAND
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
FY21	July	24,004.33	167.15	598,008.95	369,023.85
FY21	August	23,629.63	116.99	532,843.62	102,615.90
FY21	September	12,849.09	327.49	490,305.39	138,096.22
FY21	October	18,907.34	402.54	497,008.25	182,548.60
FY21	November	7,254.44	345.61	490,327.77	133,939.59
FY21	December	154,626.73	309.83	410,353.15	137,762.53
FY21	January	2,264,399.41	407.34	514,381.85	265,784.09
FY21	February	586,848.13	402.52	497,591.83	166,192.39
FY21	March	110,209.16	340.06	389,758.64	186,346.27
FY21	April	412,419.84	696.50	618,119.06	186,971.66
FY21	May	163,181.54	350.38	599,162.44	115,230.45
FY21	June	94,566.80	596.39	568,361.37	180,759.15

1Mos PY + 11Mos CY	$ 3,899,808.56	$ 4,462.80	$ 6,206,222.32	$ 2,165,270.70
SDE Chargeable Amount	$ 2,524,856.42	$ 4,462.80	$ 6,206,222.32	$ 1,983,849.53
Difference	75%	$ -	$ -	$ (181,421.17)

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[d]	987,201	49,475,553	50,117	475,681	5.0%
2017[e]	988,248	50,667,475	51,270	476,252	4.5%
2018	991,009	54,941,840	55,390	484,343	3.7%
2019	1,006,076	59,497,322	59,138	487,305	3.3%
2020	1,006,411	68,588,892	61,977	489,741	3.3%
2021	1,047,577	85,993,501	82,088	522,655	5.4%

[a]Tulsa MSA specific demographic data

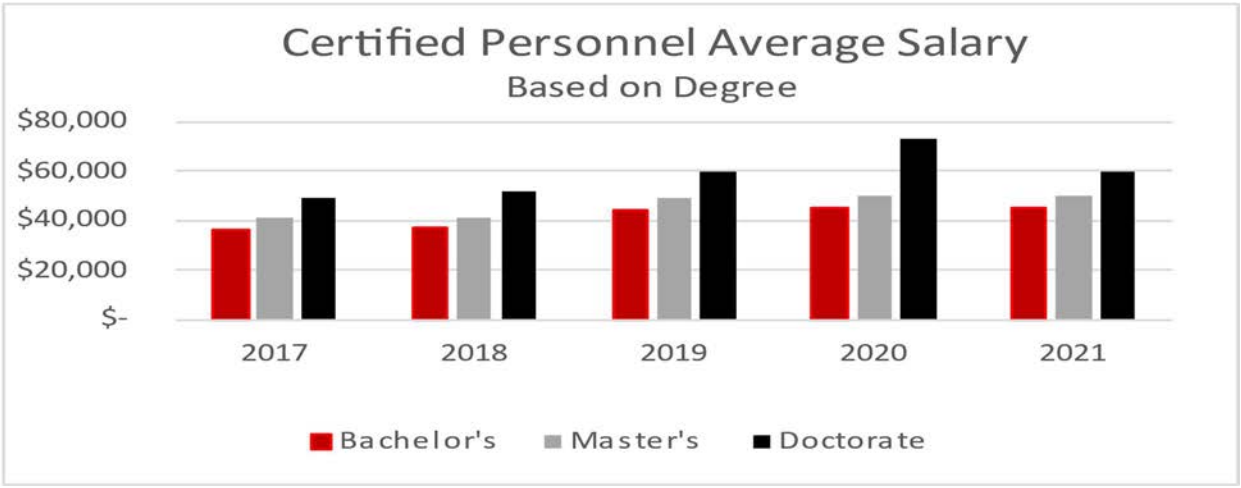
[b]Data obtained from the Tulsa Metro Chamber 2019 Economic Profile

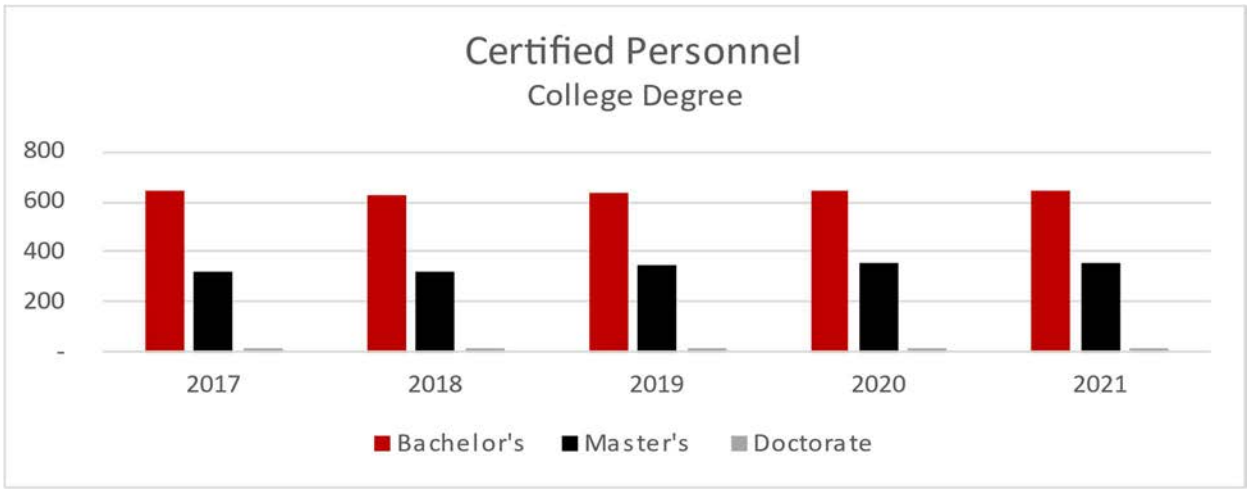
[c]Calculation based on the 2019 Tulsa Chamber of Commerce Economic Profile MSA population projection multiplied by 2019 projected per capita income

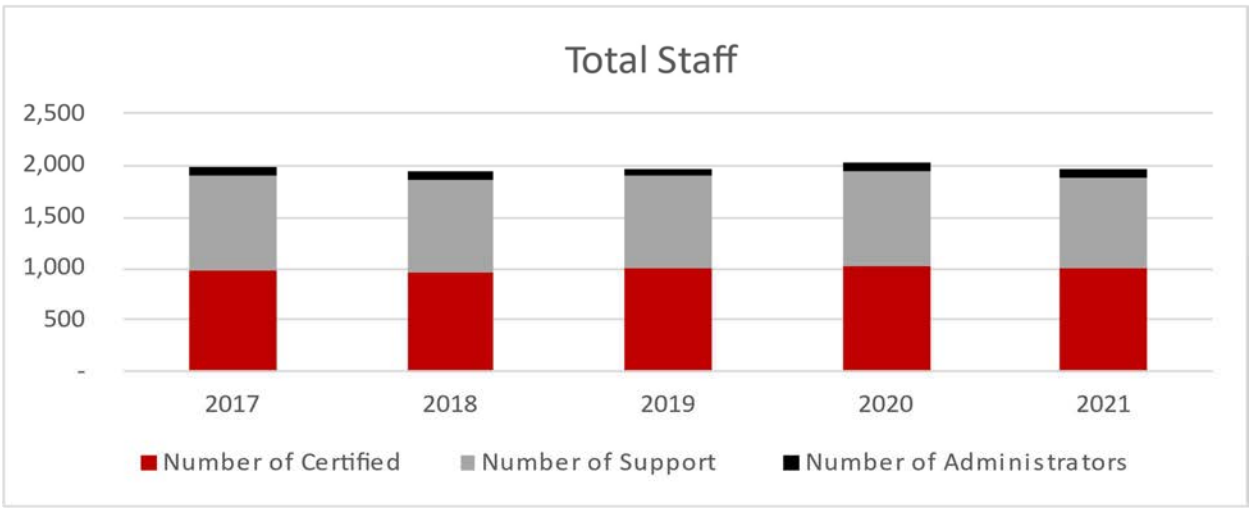
[d]Estimate based on data obtained from the Tulsa Metro Chamber

[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


Certified Personnel Average Salary
Based on Degree
$80,000
$60,000
$40,000
$20,000
$-
2017
2018
2019
2020
2021
Bachelor's
Master's
Doctorate


Certified Personnel
College Degree
800
600
400
200
-
2017
2018
2019
2020
2021
Bachelor's
Master's
Doctorate


Total Staff
2,500
2,000
1,500
1,000
500
-
2017
2018
2019
2020
2021
Number of Certified
Number of Support
Number of Administrators

Average Salary - Certified Staff

	2017	2018	2019	2020	2021
Bachelor's	$ 36,478	$ 36,822	$ 43,868	$ 45,132	$ 45,248
Master's	$ 40,856	$ 41,244	$ 48,987	$ 50,184	$ 49,856
Doctorate	$ 48,809	$ 51,525	$ 59,385	$ 72,570	$ 59,909

Staffing by Category

	2017	2018	2019	2020	2021
Number of Certified	980	968	996	1,017	1,008
Number of Support	920	903	908	930	882
Number of Administrators	78	78	72	78	81

Certified Personnel - College Degree

	2017	2018	2019	2020	2021
Bachelor	646	632	638	649	645
Master's	321	325	344	355	355
Doctorate	11	11	14	13	15





PRIOR YEAR ACTUAL SALARY BY FUNCTION			
TOTAL SALARY BY FUNCTION	2019	2020	2021
51000 - INSTRUCTION	$48,145,471	$50,241,292	$51,922,879
52112 - ATTENDANCE SERVICES	471,379	499,110	524,573
52113 - SOCIAL WORK SERVICES	369,368	354,562	360,732
52120 - GUIDANCE SERVICES	2,110,832	2,252,107	2,755,358
52132 - MEDICAL SERVICES	923,931	890,736	949,372
52135 - OCCUPATIONAL THERAPY	201,656	205,405	219,781
52140 - PSYCHOLOGICAL SERVICES	832,574	937,238	938,847
52152 - SPEECH PATHOLOGY SERVICES	892,363	968,571	944,973
52170 - PHYSICAL THERAPY	66,982	79,431	85,320
52194 - PARENTAL ADVISORY	463,819	473,476	569,944
52199 - OTH SUPPORT SERVICES STUDENT	518,054	550,249	476,153
52212 - INSTR CURR DEVELOPMENT SVC	1,817,817	1,745,125	1,733,199
52213 - INSTR STAFF TRAINING SVC	866,324	827,683	1,458,368
52220 - LIBRARY MEDIA SERVICES	753,439	656,157	810,216
52230 - INSTR RELATED TECHNOLOGY	125,598	130,298	138,633
52240 - ACADEMIC STU ASSESSMENT	128,283	125,195	106,824
52312 - BOARD MINUTES CLERK SERVICES	17,921	12,875	13,091
52313 - BOARD TREASURER SERVICES	121,341	126,053	134,084
52321 - OFFICE OF SUPERINTENDENT	531,555	627,281	660,700
52330 - STATE FED RELATIONS SERVICES	303,000	314,810	339,595
52340 - OTHER GENERAL AND ADMIN SVC	497,295	399,866	445,636
52410 - OFFICE OF PRINCIPAL SERVICES	5,922,024	6,103,460	6,526,143
52490 - OTHR SUP SVC SCHOOL ADM	640,230	661,370	686,028
52511 - BUSINESS OFFICE	269,267	280,671	294,598
52512 - BUDGETING SERVICES	242,367	246,262	265,611
52513 - RCVG FUNDS	107,178	147,184	156,379
52514 - PAYROLL SERVICES	347,379	423,153	404,835
52515 - FINANCIAL ACCOUNTING SERVICES	597,940	635,551	667,194
52517 - PROPERTY ACCOUNTING SERVICES	180,255	185,671	211,324
52519 - OTHER FISCAL SPT SERVICES	213,862	220,583	234,487
52520 - PURCH WRHSE DISTRB SERVICES	391,823	441,708	476,102
52530 - PRINTING PUBLSHN DISTRBNG	44,072	57,834	61,918
52544 - EVALUATION SERVICES	9,682	7,816	9,064
52560 - INFORMATION SERVICES	311,007	287,252	323,228
52571 - RECRUITMENT PLACEMENT	451,566	458,644	472,860
52572 - PERSONNEL SERVICES	272,557	286,900	298,615
52573 - INSERVICE TRAINING NONINSTRT	9,520	5,645	14,878
52575 - OTHER STAFF SERVICES	32,112	33,674	36,459
52580 - ADMIN TECHNOLOGY SERVICES	1,175,701	1,310,094	1,386,858
52582 - SYS APPLICTN DEV	255,134	216,387	187,627
52620 - OPERATION OF BLDG SERVICES	5,601,033	5,909,987	6,276,688
52630 - CARE UPKEEP OF GROUNDS SVC	428,980	461,645	456,524
52640 - CARE UPKEEP OF EQUIPMENT SVC	126,349	122,812	125,568
52660 - SECURITY SERVICES	1,103,399	1,200,186	1,217,559
52670 - SAFETY	12,670	11,874	10,624
52720 - VEHICLE OPERATION SVC STUDENT	2,074,519	2,181,145	2,237,036
52730 - MONITORING SERVICES STUDENT	324,463	351,927	368,790
52740 - VEHICLE MAINT SERVICES STUDENT	308,210	301,734	306,695
53120 - FOOD PREP DISPENSING SERVICES	3,205,446	3,547,130	3,544,565
53130 - FOOD SUPPLY DELIVERY SERVICES	157,705	181,307	184,837
53140 - OTHER DIR RLTD CN SERVICES	216,634	221,638	219,604
53150 - FOOD MILK PURCH REIMB STUD	195,392	142,151	150,461
53180 - NUT EDU AND STAFF DEVELOP	182,486	161,115	169,942
53190 - OTH CHILD NUT PROG OPERATIONS	98,016	86,582	87,800
53300 - COMMUNITY SVCS OPERATIONS	2,421,867	2,687,566	2,736,959
Grand Total	$88,089,846	$91,996,181	$96,396,138

2022 SALARY BUDGET BY FUNCTION

51000 - INSTRUCTION	$ 56,399,110	52517 - PROPERTY ACCOUNTING SERVICES	228,903
52112 - ATTENDANCE SERVICES	495,570	52519 - OTHER FISCAL SPT SERVICES	266,394
52113 - SOCIAL WORK SERVICES	467,404	52520 - PURCH WRHSE DISTRB SERVICES	394,210
52120 - GUIDANCE SERVICES	2,741,722	52530 - PRINTING PUBLSHN DISTRBNG	56,299
52132 - MEDICAL SERVICES	883,912	52544 - EVALUATION SERVICES	9,682
52135 - OCCUPATIONAL THERAPY	167,474	52560 - INFORMATION SERVICES	293,095
52140 - PSYCHOLOGICAL SERVICES	830,621	52571 - RECRUITMENT PLACEMENT	426,389
52152 - SPEECH PATHOLOGY SERVICES	892,771	52572 - PERSONNEL SERVICES	281,935
52170 - PHYSICAL THERAPY	69,546	52575 - OTHER STAFF SERVICES	32,367
52194 - PARENTAL ADVISORY	560,955	52580 - ADMIN TECHNOLOGY SERVICES	1,383,612
52199 - OTH SUPPORT SERVICES STUDENT	536,951	52582 - SYS APPLICTN DEV	228,629
52212 - INSTR CURR DEVELOPMENT SVC	1,637,615	52620 - OPERATION OF BLDG SERVICES	6,166,774
52213 - INSTR STAFF TRAINING SVC	1,362,913	52630 - CARE UPKEEP OF GROUNDS SVC	433,851
52220 - LIBRARY MEDIA SERVICES	691,797	52640 - CARE UPKEEP OF EQUIPMENT SVC	135,258
52230 - INSTR RELATED TECHNOLOGY	128,876	52660 - SECURITY SERVICES	1,066,229
52240 - ACADEMIC STU ASSESSMENT	118,998	52670 - SAFETY	15,254
52312 - BOARD MINUTES CLERK SERVICES	13,130	52720 - VEHICLE OPERATION SVC STUDENT	2,192,533
52313 - BOARD TREASURER SERVICES	119,864	52730 - MONITORING SERVICES STUDENT	353,648
52321 - OFFICE OF SUPERINTENDENT	760,249	52740 - VEHICLE MAINT SERVICES STUDENT	280,123
52330 - STATE FED RELATIONS SERVICES	270,177	53120 - FOOD PREP DISPENSING SERVICES	3,482,341
52340 - OTHER GENERAL AND ADMIN SVC	377,098	53130 - FOOD SUPPLY DELIVERY SERVICES	158,193
52410 - OFFICE OF PRINCIPAL SERVICES	5,917,508	53140 - OTHER DIR RLTD CN SERVICES	266,434
52490 - OTHR SUP SVC SCHOOL ADM	597,797	53150 - FOOD MILK PURCH REIMB STUD	139,192
52511 - BUSINESS OFFICE	249,249	53180 - NUT EDU AND STAFF DEVELOP	211,076
52512 - BUDGETING SERVICES	239,112	53190 - OTH CHILD NUT PROG OPERATIONS	101,158
52513 - RCVG FUNDS	165,831	53300 - COMMUNITY SVCS OPERATIONS	2,908,784
52514 - PAYROLL SERVICES	376,329		
52515 - FINANCIAL ACCOUNTING SERVICES	590,518		

Grand Total = $99,175,464

PRESENT ENROLLMENT

Enrollment as of October 1, 2021	
SCHOOL	**# OF STUDENTS**
Andersen Elementary	400
Boevers Elementary	420
Cedar Ridge Elementary	417
Clark Elementary	455
Darnaby Elementary	566
Grove Elementary	549
Jarman Elementary	607
Jefferson Elementary	543
McAuliffe Elementary	499
Moore Elementary	511
Ochoa Elementary	957
Peters Elementary	401
Rosa Parks Elementary	602
6/7th Grade Center	2,241
8th Grade Center	1,223
Union Freshman Academy	1,280
Union High School	3,340
DISTRICT TOTAL NUMBER OF STUDENTS:	**15,011**



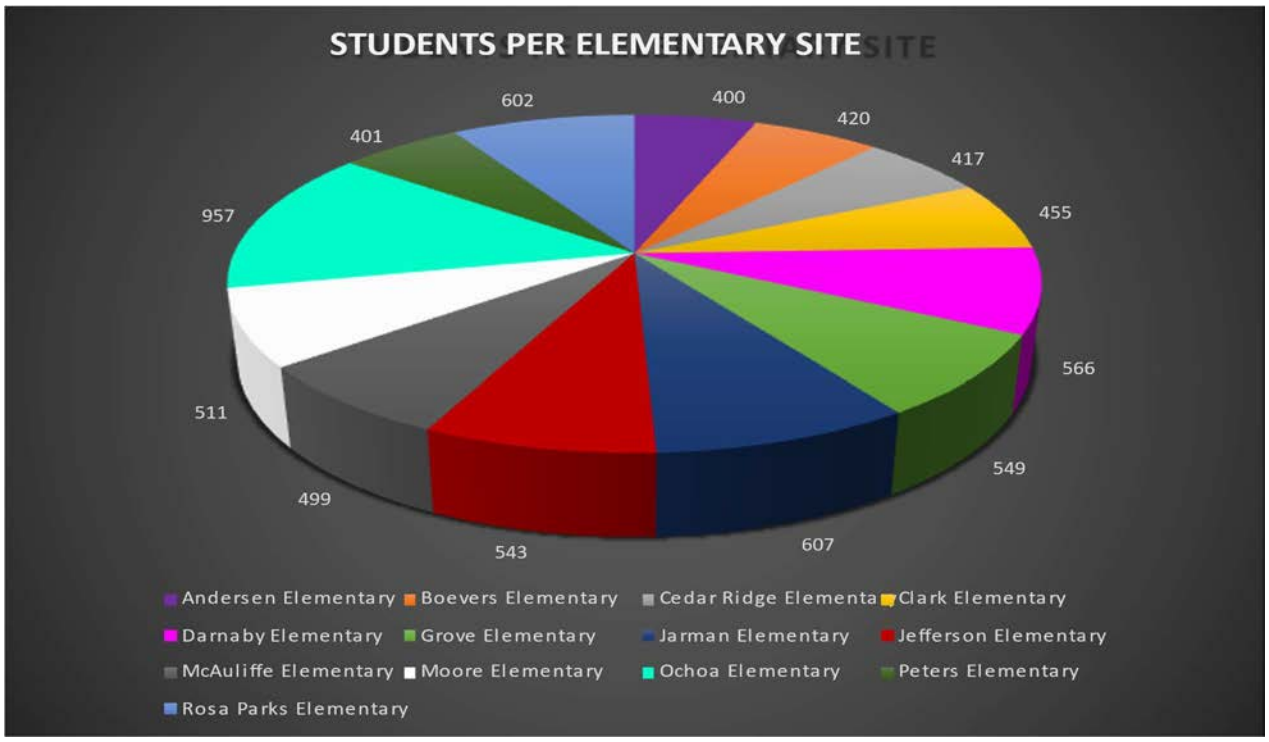
STUDENT ENROLLMENT HISTORY BY SCHOOL SITE

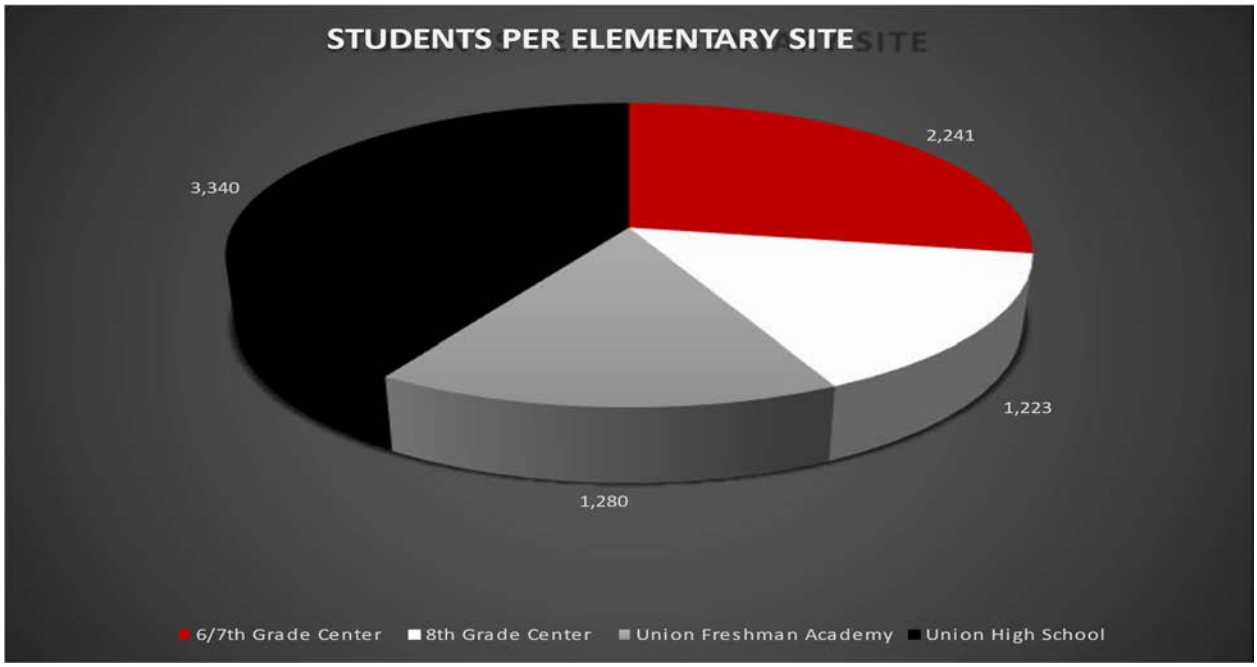
Student Enrollment History By School Site										
SCHOOL SITE	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Andersen Elementary	463	477	466	463	429	441	459	489	410	400
Boevers Elementary	555	558	592	580	575	612	609	468	418	420
Cedar Ridge Elementary	548	518	504	500	482	479	506	470	447	417
Clark Elementary	623	638	609	659	672	696	674	449	448	455
Darnaby Elementary	667	647	622	610	640	651	643	595	531	566
Grove Elementary	602	611	625	636	581	543	552	567	540	549
Jarman Elementary	582	601	600	591	630	583	551	621	621	607
Jefferson Elementary	526	576	558	554	568	545	579	583	526	543
McAuliffe Elementary	666	705	593	621	655	661	607	570	566	499
Moore Elementary	488	482	588	597	568	553	511	512	482	511
Ochoa Elementary	525	553	600	620	612	546	560	1014	962	957
Peters Elementary	512	500	528	496	455	463	441	420	348	401
Rosa Parks Elementary	669	709	771	794	833	864	844	730	660	602
ELEMENTARY SUBTOTAL	7426	7575	7656	7721	7700	7637	7536	7488	6959	6927
6/7th Grade Center	2266	2272	2226	2322	2306	2298	2369	2449	2332	2,241
8th Grade Center	1168	1126	1205	1173	1174	1197	1140	1218	1168	1,223
Union Freshman Academy	1201	1217	1236	1301	1238	1267	1264	1217	1196	1,280
Union High School	3238	3336	3500	3489	3542	3448	3464	3444	3304	3,340
SECONDARY SUBTOTAL	7873	7951	8167	8285	8260	8210	8237	8328	8000	8084
DISTRICT TOTAL NUMBER OF ST	15,299	15,526	15,823	16,006	15,960	15,847	15,773	15,816	14,959	15,011








STUDENTS PER ELEMENTARY SITE
400
420
417
455
566
549
607
543
499
511
957
401
602
Andersen Elementary
Boevers Elementary
Cedar Ridge Elementa
Clark Elementary
Darnaby Elementary
Grove Elementary
Jarman Elementary
Jefferson Elementary
McAuliffe Elementary
Moore Elementary
Ochoa Elementary
Peters Elementary
Rosa Parks Elementary


STUDENTS PER ELEMENTARY SITE
2,241
1,223
1,280
3,340
6/7th Grade Center
8th Grade Center
Union Freshman Academy
Union High School

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

ENROLLMENT FORECASTS			
SCHOOL	**22-23**	**23-24**	**24-25**
Andersen Elementary	440	446	456
Boevers Elementary	505	536	569
Cedar Ridge Elementary	464	477	487
Clark Elementary	544	588	630
DarnabyElementary	597	612	628
Grove Elementary	550	557	576
Jarman Elementary	597	601	595
Jefferson Elementary	555	560	566
McAuliffe Elementary	581	612	623
Moore Elementary	514	525	548
Ochoa Elementary (Briarglen)	808	739	670
Peters Elementary	415	425	455
Rosa Parks Elementary	740	786	813
SUBTOTAL	7,309	7,464	7,616
Union 6th/7th Grade Center	2,338	2,351	2,349
Union 8th Grade Center	1,189	1,179	1,180
Union Freshman Academy	1,245	1,236	1,257
Union High School	3,400	3,440	3,477
SUBTOTAL	8,172	8,207	8,264
DISTRICT TOTALS	15,481	15,671	15,880

BOND PRINCIPAL AND INTEREST INDEBTEDNESS

As of June 30, 2021

AGENT	DUE DATE	ISSUE DATE	PRINCIPAL	INTEREST	TOTAL	ACCRUED INTEREST
		2021-2022 FY				
BOK	10/01/21	04/01/17		65,000.00	65,000.00	32,500.00
BOK	10/01/21	04/01/18		147,343.75	147,343.75	73,671.88
BOK	10/01/21	04/01/19		214,375.00	214,375.00	107,187.50
BOK	10/01/21	04/01/20		208,437.50	208,437.50	104,218.75
BOK	04/01/22	04/01/21		292,500.00	292,500.00	73,125.00
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	1,562,812.50	27,187,812.50	
		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	10/01/22	04/01/21		146,250.00	146,250.00	
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	
BOK	04/01/23	04/01/21	6,500,000.00	146,250.00	6,646,250.00	
			25,625,000.00	1,115,625.00	26,740,625.00	
		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	10/01/23	04/01/21		109,687.50	109,687.50	
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	
BOK	04/01/24	04/01/21	6,500,000.00	109,687.50	6,609,687.50	
			19,875,000.00	656,875.00	20,531,875.00	
		2024-2025 FY				
BOK	10/01/24	04/01/20		72,500.00	72,500.00	
BOK	10/01/24	04/01/21		73,125.00	73,125.00	
BOK	04/01/25	04/01/20	7,250,000.00	72,500.00	7,322,500.00	
BOK	04/01/25	04/01/21	6,500,000.00	73,125.00	6,573,125.00	
			13,750,000.00	291,250.00	14,041,250.00	
		2025-2026 FY				
BOK	10/01/25	04/01/21		36,562.50	36,562.50	
BOK	04/01/26	04/01/21	6,500,000.00	36,562.50	6,536,562.50	
			6,500,000.00	73,125.00	6,573,125.00	
GRAND TOTAL			**91,375,000.00**	**3,699,687.50**	**95,074,687.50**	

DROPOUT RATES

School Site	Enrollment				Dropouts				Percentage			
	2017-18	2018-19	2019-20	2020-21	2017-18	2018-19	2019-20	2020-21	2017-18	2018-19	2019-20	2020-21
7th Grade	1143	1188	1202	1224	3	4	8	3	0.26%	0.34%	0.67%	0.25%
8th Grade	1197	1140	1218	1168	3	5	11	7	0.25%	0.44%	0.90%	0.60%
9th Grade	1267	1264	1217	1196	11	7	29	18	0.87%	0.55%	2.38%	1.51%
10th Grade	1183	1216	1300	1213	28	23	48	52	2.37%	1.89%	3.69%	4.29%
11th Grade	1208	1114	1125	1133	23	13	47	48	1.90%	1.17%	4.18%	4.24%
12th Grade	1057	1134	1019	958	14	5	5	44	1.32%	0.44%	0.49%	4.59%



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	14,889	10,701	71.87%	884,247	1,814,249
2022	14,889	10,701	71.87%	884,247	1,814,249

[a] *Final audited average daily membership (ADM) obtained from the Oklahoma State Department of Education*
[b] *Obtained from District records*



KNOW YOUR FARMER, KNOW YOUR FOOD

It might surprise some, but even though Oklahoma is in the heart of Midwest, some kids in the city of Tulsa don't know a great deal about how their food arrives on their dinner plate. Union's Child Nutrition Department hopes to open children's eyes and help them know their food. "When the popular program featuring Chef Jamie Oliver and his mission of improving school food came out a few years ago, I remember him telling his audience that students did not even know what a potato was, and were shocked to find out that french fries were made from them," said Lisa Griffin, director of Child Nutrition. "Part of his mission was to help students know where their food comes from and what the food is. I was equally shocked with I heard that even some students at Union did not know about some common foods and their origins, such as a student who did not know that to eat a banana, it needed to be peeled first!" This realization was the roots of a new program called "Know Your Farmer, Know Your Food," which she hopes will be a monthly promotion that features a different fruit and vegetable each month on the menus. "Union Child Nutrition is very passionate about using as much local produce and foods as possible in the meals served to students," Griffin said. "There are many advantages to why we would do this."



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

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%.

Scores represent the percent of students scoring At or Above Proficient

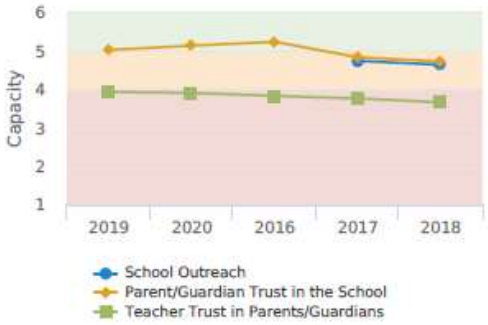
Data includes ALL FAY (Full Academic Year) students in Regular Ed, Special Ed, and ELL.

	Sites	READING/ELA												MATH												SCIENCE			
		3rd Grade				4th Grade				5th Grade				3rd Grade				4th Grade				5th Grade				5th Grade			
		2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021
Elementary	Andersen	53	38	47	32	57	54	36	37	54	55	63	21	62	62	42	37	60	58	36	46	70	51	48	21	70	67	56	18
	Boevers	13	20	16	7	11	14	10	13	21	11	24	13	29	28	38	9	27	27	16	25	44	40	37	25	28	23	20	21
	Cedar Ridge	69	53	61	34	46	49	63	16	67	50	57	46	73	60	63	49	66	62	57	24	72	59	45	41	60	54	41	47
	Clark	16	20	20	11	32	21	26	23	20	27	14	8	23	40	41	16	61	20	43	32	23	18	5	8	34	24	12	14
	Darnaby	52	34	62	22	60	55	52	33	60	49	51	55	67	50	60	37	55	57	67	53	64	48	48	40	61	44	52	52
	Grove	20	12	29	14	28	24	28	10	35	33	25	19	18	26	32	13	33	22	32	18	32	29	22	19	29	28	21	16
	Jarman	35	30	37	14	26	32	34	21	35	22	36	22	35	36	41	13	33	38	45	21	25	22	35	17	38	28	32	27
	Jefferson	24	28	53	14	24	19	13	11	31	21	22	29	46	41	64	21	19	17	18	14	25	13	15	9	40	26	23	23
	McAuliffe	20	15	16	7	18	11	12	6	19	10	16	14	21	27	11	7	26	7	20	15	17	12	9	7	21	14	28	17
	Moore	56	27	51	27	43	63	35	25	49	40	52	29	67	55	59	19	53	65	51	26	58	59	55	25	54	53	57	27
	Ochoa/Briarglen	22	13	12	4	9	19	14	10	10	14	15	6	12	12	10	9	10	16	14	10	5	15	19	6	20	24	20	8
	Peters	40	38	52	33	44	38	33	28	44	47	58	25	46	48	52	26	41	47	42	30	65	53	64	17	60	60	56	25
	Rosa Parks	14	14	15	7	8	11	13	17	14	11	9	14	28	31	18	7	5	12	19	17	11	6	10	11	12	19	13	20
	District Composite	31	25	33	15	30	30	27	19	33	29	32	22	38	38	37	18	35	33	35	24	36	31	29	18	38	34	31	23
	State Composite	39	33	39	25	37	36	30	22	40	36	35	28	44	41	43	29	40	36	38	28	35	30	31	22	43	41	38	32

	Sites	READING/ELA				MATH				SCIENCE			
		2017	2018	2019	2021	2017	2018	2019	2021	2017	2018	2019	2021
Secondary	6th Grade District	34	28	28	21	33	21	23	21	N/A			
	6th Grade State	40	38	36	26	35	28	30	21				
	7th Grade District	29	26	25	14	27	32	25	16				
	7th Grade State	34	27	29	19	34	34	33	20				
	8th Grade District	32	30	27	16	32	25	32	18	44	41	42	27
	8th Grade State	35	33	31	24	23	20	23	14	41	39	40	33
	11th Grade District			34	31			27	22			28	20
	11th Grade State			33	30			24	20			24	24

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

Peronnel Resources Turnover

	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Certified Staff							
Total Employed	1011	995	982	968	958	1005	1009
Total Terminated	45	157	125	182	158	118	95
Turnover Rate	4.45%	15.78%	12.73%	18.80%	16.49%	11.74%	9.42%
Support Staff							
Total Employed	889	911	910	855	842	910	885
Total Terminated	67	126	149	194	190	183	52
Turnover Rate	7.54%	13.83%	16.37%	22.69%	22.57%	20.11%	5.88%
Administrative Staff							
Total Employed	80	77	81	78	78	81	81
Total Terminated	3	1	7	7	3	2	3
Turnover Rate	3.75%	1.30%	8.64%	8.97%	3.85%	2.47%	3.70%

2020-2021 Reason for Personnel Changes

Term Reasons	Certified Staff	Admin Staff	Support Staff	Total By Reason Code	Percent per Reason
00-No Reason	9	0	38	47	18.08%
00-Temp Contract Ends	20	0	8	28	10.77%
01-Retiring (ERI included)	25	3	15	43	16.54%
02-Another School In-State	11	0	1	12	4.62%
03-Work out-of-state	6	0	4	10	3.85%
04-Other Employment	16	0	23	39	15.00%
05-Health Reasons	0	0	3	3	1.15%
06-Marriage	0	0	0	0	0.00%
07-Personal Reasons	16	0	25	41	15.77%
08-Deceased	0	0	4	4	1.54%
09-Leave of Absence	0	0	0	0	0.00%
10-Maternity/Childbirth/Homemaking	6	0	4	10	3.85%
11-Moving due to spouse's employment	8	0	4	12	4.62%
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	11	11	4.23%
Total	**117**	**3**	**140**	**260**	**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.

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

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