Lancaster Independent School District

Needs Assessment: Executive Summary

Completion Date: July 17, 2023
INTRODUCTION

A complaint submitted to The Texas Education Agency on November 11, 2020, alleged that the Lancaster ISD Board of Trustees (the “Board”) approved the former superintendent’s $2.1 million separation agreement just 11 days after the Board approved the former superintendent’s contract extension. TEA received nine subsequent complaints from LISD parents and taxpayers related to the $2.1 million buyout of the former superintendent’s contract. The Agency also received a complaint on July 24, 2019, involving a second allegation of a possible conflict of interest arising out of the Board president’s concurrent role as president of the Lancaster Education Foundation Board (the “LEF Board”).

On November 8, 2022, the LISD Board President was sent a final report of TEA’s findings related to the investigation into those allegations. The Agency concluded appointment of a Conservator was necessary to work with the district as related to the violations cited above to “ensure compliance, prevent further issues that led to non-compliance, and assist the Board in working together as a team in the best interest of LISD students.”

As a result of the Conservator placement, district administrators, campus administrators, members of the Board of Trustees and the Conservator participated in a needs assessment process to evaluate areas of focus for the district and Conservator during assignment. This executive summary is intended to outline the needs assessment process and general findings of the District and Conservator. The executive summary is not intended to be an exhaustive, detailed study of LISD but rather a starting point for the Conservator and District to develop a corrective action plan for the district to complete over the next two school years. Additional analyses could be needed as determined by the Conservator.

NEEDS ASSESSMENT PROCESS

The Conservator facilitated the Texas Education Agency’s needs assessment evaluation process for Conservator placements. This process included reviewing District documents and Board of Trustee policy, interviewing district administrators, campus administrators, and members of the Board of Trustees.

The Conservator reviewed the following System Areas within the school system:

- Governance
- Fiscal Management
- Teaching & Learning
- Talent Management
• Operations
• Culture

The LISD Board, Superintendent, and Lancaster ISD staff are commended for the speed with which they responded to requests for documents and willingness to do in-person meetings for the preparation of the Needs Assessment Executive Summary. All parties were responsive, forthcoming, and candid in their interactions with the Conservator.

From late February 2023 to late May 2023, the Conservator compiled and reviewed documents submitted by LISD staff, conducted in-person interviews, and viewed online videos and documentation to construct an understanding of LISD’s governance, education delivery processes, general operations, and culture. Overall, LISD appears to be a relatively healthy school district, but, as with all organizations, there are opportunities for growth, particularly as it relates to school district governance which was the primary reason for placement of a Conservator.

FINDINGS

Governance

The Lancaster ISD Special Investigation INF 2021-11-052 and IR 2021-11-002 and the Lancaster ISD responses to Special Investigation INF 2021-11-052 and IR 2021-11-002 describe the entry conditions and rationale for placement of a Conservator. The investigative report concluded appointment of a Conservator was necessary to work with LISD to (1) ensure compliance, (2) prevent further issues that led to non-compliance, and (3) assist the Board in working together as a team in the best interest of LISD students.

Shortly after entry into the district, the Conservator conducted interviews with Board of Trustee members and observed live and recorded Board meetings. Much as the investigative report noted, the interviews and observations revealed fracture and distrust among trustees toward the Board President, Superintendent, and other Trustees. The fracture often results in five/two votes or with one Trustee regularly abstaining from votes. Two Trustees show animosity toward the Board President and Superintendent and, from time to time, exchange heated comments or email messages with them. Communication between Trustees and the administrative staff is sometimes tinged with hostility and deprecatory language. Board meetings and committee meetings often run long because of protracted questioning of presenters or the Superintendent. Board meetings have averaged four and half hours long with several lasting past midnight. In addition, the Superintendent receives numerous non-agenda related requests from Trustees for information requiring considerable time for staff to answer.
Since the Conservator’s placement between late February 2023 and late May 2023, ongoing interactions between and among Board members have required intervention as described below.

In October 2022, the Board voted to censure one of the Trustees leading to additional acrimony and dissension among them. Since that time, the censured Trustee has requested a public hearing to contest the censure. Because the Board Attorney has ruled the hearing must be in closed session, to date, a hearing on the censure has not been scheduled.

The Conservator observed two Trustees who consistently sent emails that were copied to all Trustees. Consequently, the Conservator advised all Trustees individually in writing that such communication is a violation of the Texas Open Meetings Act (TOMA), and they were advised to stop sending emails in that manner. To date, Trustees have complied with the Conservator’s instructions.

In April 2023, the Conservator instructed the Board President to remove a report on Board Operating Procedures from the April Board agenda because the Board committee that had been working on revising the procedures had grown contentious, were unable to work together amicably, and had not produced a final draft of Board Operating Procedures for Trustees to review. The Board President complied and removed the item from the agenda.

A Trustee gave the Conservator a copy of a MOU between the Superintendent’s husband and LISD and alleged the MOU was a conflict of interest. The Conservator investigated the allegation and determined it to be without merit. Despite the findings, the Trustee continues to voice concerns that the MOU is a conflict of interest.

Because there is not a seamless system for Trustees to respond to invitations to various District events, activities, trainings, or conferences, miscommunication often occurs, which results in the Board Liaison exchanging several emails with Trustees to clarify their desires to attend/not attend. The Conservator has observed tension and disagreement with one Trustee concerning whether the Trustee has responded to invitations, and sometimes the Superintendent has been brought into the exchanges.

The Conservator has observed ongoing tension and disagreement concerning Trustee travel budgets. One Trustee has exhausted the allotment each Trustee is given for travel to Board training and/or conferences. Although all Trustees had been advised earlier in 2023 of their travel budget balances and whether they were in danger of exhausting their funds, the Trustee insisted the funds were not depleted and demanded an accounting of travel expenses. The documentation of the Trustee’s travel expenses was provided showing that the Trustee had exceeded the travel allotment by just over $1,000.

A Trustee has attempted to remove or photograph documents used during closed Board meetings. The Trustee has been advised by the Board Attorney that removing or photographing closed session documents is a violation of TOMA.
A Trustee contended that, since October 2022, numerous requests had been made to the Board President to hold a special meeting. On June 2, 2023, the Conservator wrote the Trustee who had requested the special meeting that the Board President was amenable to holding the meeting and the Trustee should 1) provide the Conservator and Board President with documentation of a written request from another Trustee for a special meeting as required by local policy; 2) work with the Board Liaison to secure a date for the meeting; 3) prepare the agenda items requested in the format used for LISD agendas then, as per policy timelines, submit these items six days before the special meeting; and, 4) ask that the meeting notice be posted 72 hours before the meeting date. Since the time of that communication, the Trustee has submitted agenda items, and they were included on the June 22, 2023, regular Board meeting.

One Trustee has sent several requests to the Board President to view the certified agenda of closed sessions. Initially, the Board President denied the request; however, upon reviewing law and policy and consulting with the Board Attorney, it was found that the Trustee has the right to view the documents. The Board Attorney has advised that a District is free to develop its own protocol for viewing closed session documents. Consequently, the Board President, Superintendent, Board Attorney, and Conservator met to develop an operating procedure for reviewing closed session documents that will be presented to the Board for review and adoption. Until that operating procedure is adopted, the Board Attorney created a Superintendent Regulation that can be used to govern the process for viewing closed session documents.

Based on information about LISD Governance reviewed to date, and despite these challenges, the current Board officers are managing Board affairs according to policy and are supportive of the mission to educate LISD students.

**Strengths**

- LISD Trustees exhibit an interest in educating the children of LISD.
- Trustees willingly represent the communities they serve.
- Most Trustees attend and participate in Board meetings.
- Trustees met 2022-23 School Board Member training requirements.

**Growth Areas**

- The Board should seek ways to operate efficient governance procedures in accordance with TEC 11 and all other policies and laws applicable to Texas school boards.
- The Board should devote more time to reviewing student performance and outcomes.
- Board members should demonstrate an understanding of the difference between board work and superintendent work by respecting the superintendent’s responsibility to manage the school district and direct employees in district and campus matters.
• The Board should implement and adhere to best practices for amicable and efficient communication among themselves, Superintendent, Staff and Community.

**Fiscal Management**

Based on information about LISD Fiscal Management reviewed to date, the District shows a commitment to fiscal responsibility, honesty, and transparency. Within a two-year period, the Superintendent and CFO moved quickly to introduce or reinforce appropriate fiscal management practices such as financial security measures, controls, and checks and balances to ensure financial integrity.

**Strengths**

- The District received 90/100 points on 2021-2022 FIRST rating attaining the Superior Achievement level.
- The department implements financial integrity checks and balances such as segregation of duties, auditor reviews of the financial systems, dual controls at the bank, and little to no cash handling at campuses.
- The department maintains strong communication with the Board of Trustees and Superintendent concerning financial matters.

**Growth Areas**

- The Superintendent should install a permanent replacement for the CFO who recently resigned.
- The District should move to a cashless system at all campuses and for all District sponsored events.
- The budget and talent management leadership should confer regularly to ensure new positions are not added to the budget after it is adopted.

**Teaching and Learning**

Based on information about LISD Teaching and Learning reviewed to date, this department has strong leadership with a clear vision for supporting campus-level staff to improve student achievement and outcomes. District and campus improvement plans are in place, and reviewed regularly. The overall district accountability rating is “B” including 38 academic distinctions with 100% of campuses meeting or exceeding standards and a District Distinction in Post-Secondary Readiness.
**Strengths**

- Lancaster ISD was the first K-12 STEM district in the state of Texas, and its revised STEAM curriculum is a selling point attracting families to the district and distinguishing it from nearby districts.
- The curriculum includes Advanced Placement, dual credit, and STEM Early College High School courses giving students opportunities to earn college credit and/or an associates degree.
- The District offers a wide range of Career and Technical Education (CTE) programs with over 800 industry-based certifications.
- The department organizes an array of community engagement events and industry partnerships.

**Growth Areas**

- The District must address and resolve all special education complaints.
- The Superintendent should ensure highly qualified leadership of the special education department.

**Talent Management**

Based on information about LISD Talent Management (Human Resources) reviewed to date, the department has adopted a strong service model that goes beyond usual HR duties. In addition to conducting traditional administrative tasks such as running payroll, salary schedules, and administering benefits, department staff also work one-on-one with employees needing help or guidance. The department has systems for providing (1) professional learning to all levels of employees; (2) reward programs; (3) employee recruitment and retention methods; and (4) a technology driven application process.

**Strengths**

- Lancaster ISD has the highest starting teacher salary of $59,050, outpacing the “Best Southwest” school districts.
- The District maintains an accurate, fair, and rigorous performance appraisal system.
- Staff moved quickly to rebuild the LISD job description database after a ransomware attack in 2021.

**Growth Areas**

- Leadership should continue to seek complaint and grievance resolutions at the lowest level and within Board policy to avoid escalating to Level 3 grievance status.
Operations

Based on information about LISD Operations reviewed to date, this department strives to respond quickly and proactively to needs and requests for maintenance and operations (M&O). Within a year of joining the District, this department’s leadership was named the District’s Outstanding Department and its leader the District’s Outstanding Employee.

Strengths

- Using before and after photographs, leadership shares with Trustees monthly about progress toward resolving M&O issues.
- The department has a technology solution for tracking and prioritizing work orders and is researching an even more efficient system to replace the current one.
- Department staff appear to thrive on being problem solvers who anticipate their customers’ needs.

Growth Areas

- The outstanding Child Nutrition audit must be resolved quickly.
- LISD should consider ways to improve salary and benefits for veteran technicians to overcome the challenge of hiring and retaining qualified staff.

Culture

Based on information about LISD Culture reviewed to date, the District experienced an uptick in reputation after re-branding as a STEM District in 2012 creating a sense of community and pride. The athletics and fine arts programs are respected and praised both within and outside LISD and the community supports the programs by attending events and activities. The principals the Conservator interviewed indicated they felt supported and valued and are provided enough autonomy to do their jobs. The Superintendent has provided avenues for feedback from students, staff, and community and the feedback is used to make decisions on behalf of students and ongoing process improvements.

Strengths

- The Communications Department has created a robust suite of communication tools such as a Board Newsletter, website, social media, podcast, and feedback forums.
- Principals feel empowered to operate as needed at their campuses.
- Constituents value the intimate, family-like culture of the District.
- LISD enjoys a 99.2% graduation rate.
Growth Areas

- LISD must continue working to re-establish community trust to overcome the misconduct of the previous Board and administration.
- There is a need to expand strategies for enculturating newly hired staff to the “Lancaster ISD way”.
- All campuses will benefit from establishing active parent groups such as PTAs, PTOs, or any other type of parent involvement groups appropriate for the Lancaster ISD community.

FOCUS AREAS for IMPROVEMENT

Overall, Lancaster ISD has the potential to be an exemplary District with a high-performing Board of Trustees. The Superintendent and her leadership team are strong and appropriately focused on student growth and achievement. Although there are some unresolved programmatic audits and complaints, these are being addressed.

The Conservator concurs with the findings of the TEA Special Investigation INF 2021-11-052 and IR 2021-11-002 that indicated the Lancaster ISD Board of Trustees is fractured. Much of the discord emanates from the behaviors of Trustees, so the focus of the Conservator’s work will be directed toward improving Board work and relationships. Consequently, to elevate governance and become a high-performing entity, the Board and administration must work to re-build relationships and develop collegiality in a way that focuses on the following:

**Focus Area 1:** Streamlined, timely school board meetings centering on student achievement and outcomes.

**Focus Area 2:** Board of Trustee adherence to the Texas Education Code and related law and policy requirements for school board governance.

**Focus Area 3:** Improved communication systems and decorum between and among Trustees, Superintendent, Staff, and Community.

**Focus Area 4:** Evidence of a clear delineation and understanding of Board work and Superintendent work.

**Focus Area 5:** Timely resolution of programmatic audits and complaints.
CONCLUSION

This executive summary outlines areas of strength and growth in Lancaster ISD. It is not intended to be an exhaustive, detailed study, but rather a mechanism for surfacing specific focus areas for subsequent inclusion into a Progress Report for the District to complete over the next two school years. If additional analyses are needed, the Conservator will reach out to the Superintendent and Board President.

The overarching goal is for the Board of Trustees, Superintendent, Staff, and LISD stakeholders to work together in a cooperative and productive manner to overcome the issues identified in this assessment. Given the passion of the LISD Trustees, along with the dedication, talent, and skills of the administrative staff, the LISD Board of Trustees has the potential of becoming a high performing Board working to accomplish its mission of going “Forward Together” to ensure the academic success of each LISD student.

Any questions regarding findings of the needs assessment may be addressed to Dr. Carol François, via email at conservatorlisd23@gmail.com.

Sincerely,

Dr. Carol François, TEA Conservator, Lancaster ISD