



Plano ISD Future Planning Task Force
February 15, 2022
Sockwell Professional Learning Center

Task Force Attendees

Abbie Alter, Leigh Althaus, Eric Atchley, Caitlin Bailey-Garafola, Nathan Barbera, Deni Bleggi, Robyn Burkhead, Glenn Callison, Penny Chapman, Rick Cinclair, Michael Cook, Jennifer Denton, Andre Devillier, Cassie Doss, Suzanne Drotman, Jill Engelking, Lisa Fox, Chris Glasscock, Cody Graham, Benton Hall, Sharon Hirsch, Will Hodges, Marshall Jackson (chair), Mona Kafeel, Bob Kehr, Liz Lansing, Tarrah Lantz, Bryan Linares, Grady Locknane, Adrienne Mageors, Kelle Marsailles, Dr. Raj Menon, Octavio (Tavo) Oropeza, Dan Prendergast, Billy Raley, Mary Reeves, Julie Richard, Coty Rodriguez-Anderson, Dina Rowe, Kale Sears, Monica Shortino, Paola Sotomayor, Joanna Spiars, Ryan Steele, Kelley Thomas, Julie Thrift, Bill Tiede, Semida Voicu, Mike Waid, Jessica Bartnick, John Boog-Scott, Lauriston Crockett, Ryan Dry, Holly Nguyen, Tom Salamat, Sheetal Shant, Reyha Shenoy, Dollie Thomas, Kim Torten Rabinowitz, Dr. Sophie Zou

Staff Attendees

Sara Bonser (superintendent), Dr. Theresa Williams (deputy superintendent), Dr. Selenda Anderson, Dr. Beth Brockman, Karen Buechman, Gloriane Fernandez, Matt Frey, Susan Hayes, Johnny Hill, Ashley Hipp, Karen Kalhoefer, Jeremy Kondrat, Kathy Kuddes, Dr. Saul Laredo, Lariza Liner, Gloria Martinez, Sherra McGaha, Bill McLaughlin, Shannon Patterson, Tony Pearson, Juan Ramos, Lesley Range-Stanton, Courtney Reeves, Bart Rosebure, Mark Skinner, Jeff Smith, Jill Stoker, Patrick Tanner, Kathy Waskow, Dr. Dash Weerasinghe

Opening and Welcome: Sara Bonser, Superintendent

The inaugural meeting of the Plano ISD Future Planning Task Force was held on February 15, 2022, at the Plano ISD Sockwell Center. The meeting was called to order at 6:30 p.m. and participants were present both in person or virtually. Superintendent Bonser welcomed the Task Force members and conveyed appreciation for their time and effort that would be spent planning for the future in Plano ISD. Superintendent Bonser also shared the Board's consensus to move forward with the creation of the Task Force at its November 16, 2021 Work Session as well as the priorities of the Board in relation to the planning to be conducted by the Task Force. Superintendent Bonser introduced Marshall Jackson, Chairperson of the Task Force and Rick Cinclair, Co-chair as well as facilitators Dr. Ken Helvey and Sheri Sides who will assist in the Task Force process.

Charge to the Task Force: Marshall Jackson, Chairman

Chairman Marshall Jackson welcomed the committee and read the charge to the Task Force to build a common understanding of the Task Force objectives and responsibilities. Marshall stated to the Task Force that any thoughts, questions, etc., throughout the process by Task



Force members regarding the district could be directed to him and would be passed along to administration. In addition, participants were given a link to use to request additional information from administration about topics for discussion or questions that arise throughout the process. Marshall also challenged the group to ask the questions that needed to be asked of administration to ensure that all perspectives are heard and considered.

Introductions and Protocols: Sheri Sides & Dr. Ken Helvey, Facilitators

Following the Charge to the Task Force, Facilitator Sheri Sides led an introductory activity and Dr. Ken Helvey reviewed committee protocols and procedures. An overview of norms was provided and a brief technology update was given to demonstrate the tools available to the Task Force to access meeting materials electronically. Dr. Helvey introduced Dr. Williams to give a District Overview.

District Overview: Dr. Theresa Williams, Deputy Superintendent

Dr. Williams presented a District Overview, including the number of staff and students in Plano ISD, programs available in the district, student engagement in activities and an overview of the district’s strategic plan.

Demographic Update: Rocky Gardiner, Zonda Education/Templeton Demographics

Mr. Gardiner presented the third quarter 2021 demographic report which encompassed information about the economic conditions for DFW and Plano ISD, housing market, vacant development lots, future lots, overall housing data, family and multifamily growth, enrollment history and a ten-year forecast.

Mr. Gardiner noted the COVID-19 bounceback in enrollment and stated that the data shows that once families come to Plano ISD and enroll, they stay enrolled in PISD schools. The birth rates in Collin County/Plano ISD are lower and therefore, the graduating classes exiting are larger than the entering kindergarten classes.

His presentation indicated that as the district matures, the enrollment will stabilize when the graduating class size and kindergarten class size are about the same, and estimates that to be approximately 3,500 students in each of those grade levels.

In addition, Mr. Gardiner reviewed the ten-year forecast by campus to show where schools are at or near capacity, or where there is available space for increased enrollment.

The current enrollment of the district at the October snapshot date (the official reporting date for school districts to TEA) is 49,405.

District Financial Overview: Johnny Hill, Chief Financial Officer

CFO Johnny Hill provided a financial overview of the district. The presentation showed that



Plano ISD encompasses 100 square miles, 72.5% of that within the City of Plano and has a taxable value of \$60.9 billion. The district serves students from 10 municipalities including Plano, Murphy, Richardson, Allen, Frisco, Carrollton, Dallas, Wylie, Parker, Lucas and Garland. The district consists of 73 campus sites, 14 support facilities, and 6 stadiums/athletic fields.

Mr. Hill provided a comparison of tax rates in the area to Plano ISD on both the Maintenance and Operations (M&O) and Interest and Sinking (I&S) tax rates, demonstrating Plano as the second lowest tax rate at \$1.321. This rate is composed of a \$1.0518 M&O rate plus a \$0.269 I&S rate. This rate for the 2021-22 school year nets total tax revenues of \$622 million, 34% of which is sent back to the state in recapture at a cost of \$213 million for this school year. Next year's recapture bill is estimated to be \$218 million demonstrating that while HB3 created a temporary relief, the district is now paying more in recapture than any other year in the history of recapture. Plano ISD is the second highest recapture district in the State of Texas.

At the same time that enrollment is trending down, and recapture is rising, the district has taken steps to downsize staffing and showed the decline in staff relative to enrollment over a period of time from 2016-present. The current number of staff is 6,537, down from a 2019 staffing high of 7,015. Mr. Hill also indicated that the district spends 85.8% of M&O funds on payroll costs and that for all expenditures, 66.9% of the budget is spent on instruction-related costs—one of the highest rates in the state.

Mr. Hill went on to explain the current debt policy (CCA LOCAL) adopted by the Plano ISD Board, which puts Plano ISD in a strong financial position on the I&S side. The debt management philosophy contains provisions that allow Plano ISD to be one of only four districts in the State of Texas to have the highest bond ratings from both Standard & Poor's and Moody's. Mr. Hill explained several components that are important to note:

- PISD finances its debt not to exceed 20 years and not 40 years as allowed by law
- PISD finances debt only over the life of the asset and not at the legally allowed 125% of asset life
- PISD minimizes debt through interest and financing cost management
- PISD structures debt to minimize the impact on taxpayers

Mr. Hill previewed the amount of current debt issued at \$625 million. A payment made on the date of the meeting brought the cumulative debt of PISD down to \$492 million. A slide was shared that demonstrated that Plano ISD has the least amount of debt per student in the region and state at \$16,249/student.

Through sound debt management strategies, the district has refinanced or refunded debt which has saved the district \$106,057,718 in debt service over the past five years. A possible debt parameter scenario was shared with the committee that demonstrated, for example, with an I&S tax rate of \$0.237 (down from .0269) over a 10-year period, debt capacity of \$973.4 million.



A question was raised about what the debt capacity would be remaining at \$.0269 rate. Administration indicated they would follow up with the answer as part of requests for information from the Task Force.

A question was asked about eliminating recapture as a way to keep tax rates down for the district. Mr. Hill explained that HB3 reduced the number of recapture districts down to 160 so while we are constantly advocating to eliminate or reduce recapture the number of voices that share our concern has diminished. The districts paying recapture are paying more than ever before and we will continue to advocate but even keeping M&O recapture dollars would not cover the cost of maintaining long-term capital needs of the district.

Links to debt management policy and regulation: PISD Board Policy [CCA \(LOCAL\)](#) and [CCA \(REGULATION\)](#)

2016 Bond Overview: Johnny Hill, Chief Financial Officer

Johnny Hill gave a summary overview of the work completed in the 2016 Bond–Promised Made/Promises Kept. The 2016 Bond passed a \$481 million bond referendum with a voter approval rating of 78.4%.

The bond referendum completed work included:

- Major renovations: Shepton HS and Robinson MS
- Refurbishments: Jasper HS, Williams HS (Phase 1 substantially complete), Bowman MS, Barksdale ES, Gulledege ES, Rose Hagggar ES, Haun ES, Skaggs ES
- Kitchen upgrades: Vines HS, Wilson MS, Bowman MS, Rice MS, Renner MS, Schimelpfenig MS, Barksdale ES, Gulledege ES, Rose Hagggar ES, Miller ES, Haun ES, Skaggs ES, Thomas ES, Saigling ES, Shepard ES, Andrews ES, Hickey ES
- Fine Arts Center land acquisition and building (substantially complete Summer 2022)
- Art classrooms: Jasper HS and Vines HS
- Theater and stages: Plano East SH, Shepton HS, Jasper HS, McMillen HS, Williams HS
- Dance flooring: Plano SH, Plano West SH, Plano East SH, Vines HS, Jasper HS, Shepton HS, McMillen HS, Clark HS
- Fine Arts additions: Armstrong MS, Renner MS, Frankford MS, Rice MS
- Technology replacements: desktop/laptops, classroom devices, mobile devices, special education, digital cameras, scanners, headphones
- New technology: ES classroom devices, secondary classroom devices, PreK-12 teacher devices, K-12 art and CTE courses, wireless presentation and collaboration technology
- Expanded classroom & program capacity: Elementary classroom expansion for growth at Barksdale ES and Gulledege ES, Employee Childcare Center #3, Special Education Adult Transition Center land acquisition and facility
- Safety and security: Security camera systems, alarm and access control systems, emergency communication equipment, security upgrades at senior high schools and safety upgrades at Clark Stadium



- Transportation: replacement of 90 buses
- Athletics turf additions: Williams stadium, practice fields at Plano East SH, Plano West SH, and Plano SH, Clark sub-varsity fields
- Athletics Turf Replacement: Clark Stadium, Indoor Activity Centers at Plano East SH, Plano SH and Plano West SH
- Athletic scoreboard replacement at Clark and Kimbrough Stadiums
- Athletic locker room addition at Clark East Field
- Athletic locker room renovations at Plano East SH
- Athletic bleacher enhancement/expansion: Plano SH baseball and softball fields

Of the \$481 million debt approved by taxpayers, \$431,125,000 was issued and \$49,875,000 remains unissued. The unissued debt was due to the lack of enrollment growth meaning the district did not need to acquire an additional elementary site, did not build an elementary school nor open a 4th early childhood school. Current school campus capacity can accommodate enrollment in PreK-5th grade so debt was not issued.

A question arose about using the remaining debt for other needs since it had already been approved. Mr. Hill explained that the Board committed that prioritizing transparency to the community, they would use the dollars in accordance with the proposed bond program that was approved by voters.

Timeline and Adjournment: Dr. Ken Helvey and Sheri Sides, Facilitators

Dr. Helvey and Ms. Sides closed the meeting by asking Task Force participants to write down any questions or requests for information from administration. These questions will be answered and provided back to the Task Force prior to the next meeting to be held on March 3, 2022. Participants were also asked to review the Board Priorities and Parameters prior to the March 3 meeting date.

The meeting was adjourned at 8:38 p.m.