

**INDEPENDENT SCHOOL
DISTRICT #624**



**WORK-STUDY
AGENDA**

May 23, 2011

To: Members of the School Board
From: Dr. Michael J. Lovett, Superintendent of Schools
Date: May 9, 2011

A work-study session of the White Bear Lake Area School Board will be held on Monday, May 21, 2011, at 5:30 p.m. in Room 201 at the District Center, 4855 Bloom Avenue, White Bear Lake, MN.

WORK-STUDY AGENDA

A. PROCEDURAL ITEMS

1. Call To Order
2. Roll Call

B. DISCUSSION ITEMS

1. Update on School Board/Superintendent Objectives 5:30 – 6:30 p.m.
 - a) Goal 3 - Ongoing Financial Stewardship on Investments and Budget Management, including review of proposed budget for 2011-12 which will be on June School Board agenda.
 - b) Goal 4b - Develop strategies which would permit the district and community to be prepared for a referendum levy campaign should one be scheduled for the fall of 2011, including review of proposed item for June School Board agenda.
2. Review of Recommendations from Strategic Planning Process, as proposed for June School Board meeting. 6:30 – 7:15 p.m.
3. Other School Board/Superintendent Objectives 7:15 – 8:00 p.m.
 - a) Goal 1e – Prepare a comprehensive program review of District gifted and talented programs (preK-12).
 - b) Goal 6e – Design and implement a program review of White Bear Lake Area Schools preschool programming, including early childhood and family education, special education, and preschool programs.
 - c) Goal 1b – Review teacher and administrative appraisal protocols, and use student progress and achievement as one measure of evaluating performance. (This will be submitted as written updates, with discussion as time permits)
 - d) Goal 6f – Prepare a program review of the district's food service program, including reviewing the most current research and findings for child nutrition, auditing our current practices and menus, and make recommendations for improvement. (This will be submitted as written updates, with discussion as time permits)

C. ADJOURNMENT

8:00 p.m.

AGENDA ITEM: **Update on School Board/Superintendent Objectives**
MEETING DATE: **May 23, 2011**
SUGGESTED DISPOSITION: **Discussion Item**
CONTACT PERSON(S): **Dr. Michael Lovett, Superintendent**
Pete Willcoxon, Sr., Executive Director of Business Services

Background:

a. Goal 3 - Ongoing Financial Stewardship on Investments and Budget Management.

Pete Willcoxon, Sr. will provide information on the preliminary financial forecast. Materials are attached.

b. Goal 4b - Develop strategies which would permit the district and community to be prepared for a referendum levy campaign should one be scheduled for the fall of 2011.

At this evening's meeting we will review the specific proposed resolution and background information which we would anticipate having on for action at the June School Board meeting. Materials are attached.

**White Bear Lake Area School District #624
School Board/Superintendent Goals
2010-2011**

1. Develop Measures of Student Success and Plan for Accountability and Reporting

Goals:

- a. Establish clear district and site goals for student growth using Measures of Academic Progress (MAP), MCA II and other measures in which demonstrate student progress and proficiency.
- b. Review teacher and administrative appraisal protocols, and use student progress and achievement as one measure of evaluating performance.
- c. Implement the new organization of the teaching and learning office with the purpose of strengthening the links and accountability among preK-12 curriculum, assessment, and student achievement and progress.
- d. Develop protocols and organizational capacity to measure and publicly report progress and achievement in curricular areas in addition to those currently tested by MCAII (math, reading and science).
- e. Prepare a comprehensive program review of District gifted and talented programs (preK-12).

Rationale: Student success is at the heart of the School District's mission and public accountability is essential. In addition, it is the proper role of the School Board to help establish those measures of success which reflect the priorities of the White Bear Lake Area Schools.

During the 2009-10 school year, the School District achieved MCA-II test results which showed a five percentage point gain in math, a ten percentage point gain in science, with reading showing only modest gain.

NWEA MAP (Measures of Academic Progress) results showed that in grades 1-10, math improvement grew by an average of 1 year, eight months and reading grew by an average of 1 year, four months.

Other measures of student success are still being evaluated.

This year's goals are more specific than those identified in 2009-10, and represent an effort to further build a school culture that supports student success.

Each goal addresses a component of the system, especially embedding accountability, and encouraging us to look closely at setting high standards for all students, and continuing to look for opportunities that assure all students will be challenged and grow significantly each year.

Evaluation: Strategies to implement this goal will be designed to be consistent with the District AYP plan, but will go beyond the AYP plan, identifying additional measures of success. During the year, each building principal and the leaders of District-wide programs will report to the Superintendent and School Board on goals, strategies, and progress. The results of site and District student achievement will be reported by August 30, 2011. The comprehensive program review of District gifted and talented program will be a separate study.

The administration will develop a timeline and detailed plan to address each of the five goals above.

Status Update: At the October work-study session, the administration proposed a model for a Gifted and Talented program review, and began implementation immediately thereafter to begin to fulfill goal 1e. On January 24, the administration provided an update on the Gifted and Talented program review.

At the School Board meeting of November 8, the administration provided a recommendation that the School Board authorize the superintendent to complete and submit the District's AYP plan due November 11. This plan was developed consistent with goal 1a.

At the work-study session of November 22 the administration provided updates to the School Board on goals 1a and 1c. A more comprehensive update on goal 1a was presented at the February work-study session, with an hour set aside at the March work-study session for principals to meet with School Board Liaisons. The Strategic Plan addresses strategies to extend this objective.

Goal 1b - Review teacher and administrative appraisal protocols, and use student progress and achievement as one measure of evaluating performance.

Teachers

Prior to the start of the school year, a formal process for teacher evaluation was written. This document provided clarification for teachers and administrators about the timelines and procedures for both probationary and tenured teachers. In August, all administrators were updated on the process and provided a new form to use for teacher evaluation. This process and documentation system ensured a new level of consistency in teacher evaluation. During the school year all administrators received three- three hour training sessions on teacher evaluation. During these sessions, administrators had the opportunity to review the rubrics for quality teaching, have dialogue about

evidence in the classroom and observe videos of teaching to start working towards inter-rater reliability. Between the training sessions administrators did additional observations and were encouraged to bring back questions or reflections. Several administrators commented that this was the most impactful training on teacher observation they have received.

Christina Picha and David Law have also been working with the University of Minnesota and the State Department of Education on a new evaluation process. This potentially could parallel some recommendations from the state on teacher evaluation.

This month teachers will have the opportunity to provide feedback on the teacher evaluation process using an online survey. This information will be the baseline for further improvements to the teacher observation process. Over the next few months, a team of teachers and administrators will be working on improving the process through the use of new tools that encourage more timely feedback through technology, more frequent informal classroom observations, and hopefully a method for incorporating student data into the evaluation process. We are still waiting for some clarification from the Legislature on this topic. Depending on this information, we may be required to make changes to our process as well.

Administrators

During the first few months of school, administrators were introduced to a new observation process based on national standards for school leadership. This rubric based tool is comparable to the teacher evaluation we currently use. Based on national standards, this evaluation guide focuses on a leader's ability to provide a clear vision and put the plan into action through communication to the larger school community. Each administrator met with David Law and Christina Picha to review the tool and identify areas for focus. Mid-year, administrators had a check in on the process and set some goals for and end of the year follow up. This month administrators will be provided evidence of their progress in several goal areas.

We are also in the developmental stage of a school community survey that will provide information on each of the areas covered in the evaluation tool. We plan to have this survey used at the end of each school year as part of our evaluation process.

We are also reviewing and administrative evaluation tool created by the Minnesota Association of School Administrators to determine how it might replace or complement our current process.

Goal 1e - The Gifted & Talented Review Committee last met on Monday, April 25, 2011. We completed our book study of *Best Practices in Gifted Education*, reviewed characteristics of gifted learners and began to analyze the parent and teacher survey results using a data analysis protocol that Ann Malwitz developed.

The next meeting is scheduled for May 23rd. At that meeting we will complete our analysis of the parent and teacher surveys by identifying areas of strength and areas needing improvement in our gifted and talented program. We will also develop questions to be used for parent and teacher focus groups. Parents and teachers had many positive things to say about our current program, but also offered many helpful suggestions for improvement. Our guest presenter will be Sue Feigal-Hitch, Gifted and Talented Teacher for Eden Prairie Public Schools. She will share information about effective programming for gifted learners.

Our next steps include the following:

- Provide update on review process for principals;
- Provide professional development for principals on *Gifted and Talented 101*;
- Complete student surveys and conduct focus groups;
- Conduct site visits (Stillwater, Bloomington, Minnetonka, Spring Lake Park) – May – September, 2011;
- Speakers (best practice programming, equity, clustering, etc.) – May and June, 2011;
- Identify program improvements for 2011-12 (marketing and communications);
- Work on integrating more technology into program for 2011-12;
- Solidify program coordination for 2011-12;
- Attend Gifted & Talented Symposium sponsored by MDE (June 12-16, 2011).

Our plan is to have formal program improvement recommendations ready in the fall of 2011 so that we have enough time for the necessary program planning and professional development to implement any significant program changes in the fall of 2012-13. During the 2011-12 school year we will make program improvements related to principal professional development, marketing and communications, technology integration, ongoing teacher training related to differentiation and customizing services to better adapt to the varied needs of students.

2. Complete Phase 2 of Planning for Long Range Facility Needs

Goal: The long range facility use study is designed to develop a solution to address the needs of the District during the next five to ten years. Due to the magnitude of this project, it is being phased over a two-year period.

Building on Phase 1 of facility planning done during the 2009-10 school year, for 2010-11 we will develop a comprehensive long range facility plan encompassing all district programs, consistent with the strategic plan.

Initiatives to be explored during this phase will include:

- Exploring the need for changes in the number of District buildings; continued exploration of boundary issues and their impact on school populations; and potential changes to preK-12 grade configuration, following a more complete review of educational programming;
- Models to further develop innovative and competitive programs;
- Efficiencies in the utilization of space and facilities to aid in maintaining financial stability;
- Partnerships with other public and private entities for instructional, co-curricular, and recreational facilities; and
- Developing a transition plan which would assure a smooth transition from the current organizational model to the recommended model taking into account facility and programmatic needs.

Rationale: The White Bear Lake Area Schools are faced with demographic changes, including a shift of school-age population from the southern to the northern portion of the District, and after a decade of declining enrollment we have a relatively high ratio of building space per student compared to other school districts.

The broad nature of this study and the related timelines necessary for full implementation require a very thoughtful and methodical process, resulting in our plan for a phased study.

Evaluation: The District will develop methods and strategies of delivery that will maximize the resources that go into instructional programs, and emphasize efficiency in the number and operation of school sites.

Status Update: At the School Board work-study session of November 22, the administration provided a status report on work completed thus far including analysis of demographics, space and facility utilization, and status report on partnerships and leased space. In addition, on November 9 the District presented the opportunity for community members and school members to participate in strategic planning action teams.

Phase II initiatives are included in the strategic planning process related to Goal #5. The District will continue to discuss our planning timelines with all potential partners. We want to increase the likelihood that we can make our educational space decisions in a way and on a schedule that will enable other public or private non-profits to buy or lease space we will not need. Strategic Planning Action Team #3 is addressing this goal; the recommendations from the Strategic Planning process addresses next steps in this objective. Specific recommendations for 2011-12 are listed in the Strategic Plan, to be reviewed on May 23.

3. **Ongoing Financial Stewardship on Investments and Budget Management**

Goal: Considering the budgetary challenges resulting from uncertainty of state funding, continue to identify greater efficiencies in operations to help maintain financial stability and to continue improvements in program quality and student success.

Rationale: Over the past decade, the District has established an excellent record of financial management, as evidenced by ten consecutive years of recognition for excellence in financial reporting by both ASBO and GFOA, and also achieving an AA Bond Rating in 2008.

However, considering the financial challenges presented by the slowly recovering economy, the state's continuing budget crisis and the district's need to renew its operating levy in 2011, it is important for the District to develop strategies to meet these challenges to help maintain financial stability.

Evaluation: The District's ongoing financial stewardship on investments and budget management will be reviewed annually as part of the financial audit. The audit report was presented to the Finance Committee in the fall and to the School Board and public at the regular school board meeting in December.

Status Update: At the October School Board meeting, the School Board accepted two awards for excellence in financial reporting from both the Association of School Business Officials (ASBO) and the Government Finance Officers Association (GFOA).

At the October and November work-study sessions, the administration has provided background information related to the option and advisability of a renewal levy referendum for 2011.

Administration presented its initial financial forecast for 2012-2016 to the School Board at its November 22, 2010 work-study session. Administration developed enrollment projections during the month of October and incorporated the latest state financial projections into the forecast assumptions.

Development of the 2011-2012 budget began shortly after January 1, 2011 with the target date for presentation at the School Board work-study session on May 22, 2011. The final budget for the 2011-2012 school year is scheduled for adoption at the regular school board meeting of June 13, 2011.

Administration will continue to work with the School Board throughout the winter and spring to update its financial forecast using the most current data available from the governor, the state legislature and federal sources.

The 2010 financial audit was presented to the Finance Advisory Committee in draft form on November 16, and presented to the School Board at the School Board meeting of December 13, 2010.

The District's Finance Committee continues to meet on a quarterly basis with our OPEB investment advisors, most recently on February 22, 2011. The committee continues to analyze the data and recommendations of the advisors and make prudent investment decisions. The committee reviewed scenarios showing how the latest financial forecast impacts the cash flow needs of the trust, and will evaluate the district's cash flow needs for the coming year. The Finance Advisory Committee met on May 18. The budget for 2011-12 was reviewed on April 25 at the work-study session. The recommended budget for 2011-12 will be reviewed at the School Board work-study session of May 23.

4. **Communications and Marketing Plan for the District**

Goals:

- a. Implement the Communications and Marketing plan presented to the School Board in July, 2010.
- b. Develop strategies which would permit the district and community to be prepared for a referendum levy campaign should one be scheduled for the fall of 2011.

Rationale: The implementation of successful outreach initiatives is especially important in the current environment, as area school districts compete for students. A net gain in open enrollment numbers would provide the District with financial benefits.

It is important for the District to understand perspectives of White Bear Lake area community members in order to remain a trusted steward of resources. Responsible stewardship is an important component in continued community support.

A long-range vision and plan about District communications will ensure resources are appropriately utilized. Additionally, it is beneficial to have such a plan to allow for prioritization of communications and marketing projects and activities.

Evaluation: The communications and marketing plan will serve as a base against which current and future communications and marketing projects and ideas will be analyzed. The plan will be evaluated periodically to ensure it continues to be in alignment with the District's objectives.

One key evaluation piece will be whether or not a levy referendum passes, should it be scheduled, in the fall of 2011.

Status Update: An update was made at the January 24, 2011 School Board Work-Study Meet, highlighting:

- a. Related to Goal 4a, recent projects have included oversight of:
 - PreK-12 Registration materials (complementary guides for Early Childhood, Elementary, Middle School and High School)
 - District-wide "Welcome to White Bear" events
 - District website redesign (including District and individual school websites)
 - A Realtor Workshop scheduled for February 10.
- b. The Administration provided an update of Goal 4b at the January 24 Work-Study meeting.

At the February and March work-study sessions, a comprehensive presentation was made pertaining to levy planning. During April a community survey was completed, with a review of the results taking place April 25.

A committee with representation from administration, School Board and the White Bear community has met periodically. Committee members will recruit other participants for the support committee. Administration will support the goal with an informational campaign.

5. **Strategic Planning**

Goal: By October, 2010, initiate a strategic planning process which will address programs, facilities, and finances with initial recommendations ready for implementation for the 2011-12 school year.

Rationale: The School District is currently in a stable financial situation, but faces:

- Continuing ramifications of the state and federal economic downturn and uncertain prospects for the next State biennial;
- Changing demographics, including the expansion in the northern portion of the School District;
- Improving student achievement, especially in 2009-10, as measured by local, state, and national tests but further opportunities to improve;
- Several key public-private partnerships, with opportunities for growth and refinement, and;
- A competitive market in which families have the opportunity to choose schools for their children.

Given these and other factors, comprehensive strategic planning will allow the District to establish priorities and align District resources with these priorities.

Evaluation: The administration will lead a strategic planning process during the 2010-11 school year, which will dovetail with the 2010-11 School Board/Superintendent goals, and will provide recommendations for the 2011-12 school year.

Status Update: The administration reviewed a detailed process and timeline for strategic planning at the August 23, 2010 School Board work-study session.

During September and October the administration provided presentations to school staff and community members regarding the strategic planning process. On October 26 and 27, a strategic planning team of thirty individuals met for a total of twenty hours to review and affirm the District's core values, and draft a mission statement, objectives, parameters, and six strategies. At the strategic planning kick-off event at South Campus on November 9, the administration presented this work to the community and through press releases, communications and information on the website invited interested citizens and employees to be involved in the action teams which meet through the end of February. A detailed timeline for the strategic planning process was publicly presented. Presentations are continuing to parent groups and community organizations.

At the School Board work-study session on January 24, the administration provided an update on the progress of the six action teams. The District website features regular updates on action team meetings and the next stages of the process. At the March work-study session, the administration proposed a communication plan and timeline for the strategic plan. On April 25, an hour was set aside at the work-study session to discuss the plan and next steps. Recommendations for 2011-12 will be discussed at the May 23 School Board work-study session.

6. **Operational Improvements/New Strategic Areas**

Goals:

- a. Extend new protocols for recruitment, selection and support of employees to all employee groups.
- b. Develop a comprehensive performance appraisal and evaluation system for all employee groups; tie ongoing professional development to appraisal.
- c. Implement Phase I of the Technology Audit completed during January 2010.

- d. Implement the Student Activities Audit completed in December 2009.
- e. Design and implement a program review of White Bear Lake Area Schools preschool programming, including early childhood and family education, special education, and preschool programs.
- f. Prepare a program review of the district's food service program, including reviewing the most current research and findings for child nutrition, auditing our current practices and menus, and make recommendations for improvement.
- g. Design and implement a comprehensive program for recognizing students, staff, and community.

Rationale: These represent priority areas for 2010-11.

Evaluation: In each case above, the activity will be made operational and a report made to the School Board.

Status Update:

- a. On January 24, administration provided an update on this goal; final report is anticipated at the May work-study session.

New protocols were reviewed by front-line supervisors and will be implemented this summer. We have moved to Applitrack for all postings, including summer, continue to revise interview guides and put on administration portal and we moved from bi-monthly meetings to quarterly. We have also implemented online clerical testing so we have a validated test for Word, Excel, customer service, and grammar. We will continue to train on diversity hiring. Our hope is to move to a non-certified applicant testing similar to the teacher style profile builder.

- b. Work in progress, with a final report anticipated by the summer. (See details under Goal 1b.)
- c. On January 24, the District's new Instructional Technology Coordinator provided an update on progress and plans on two components of our audit follow-through: support for teachers and students to improve utilization of technology; and improving our web-based communications. Implementation of the six month plan continues.
- d. At the November 22, 2010 work-study session the administration provided an update on the student activities audit, completed and presented to the School Board in December of 2009.

The administration continues to monitor and clean up budget codes and process as needed.

- e. At the September work-study session the administration proposed a model for program review of White Bear Lake Area Public Schools preschool programming, and that program review is underway with completion anticipated by Spring, 2011. A progress report was made at the work-study session on March 28, 2011. A detailed presentation will be made on May 23.
- f. At the November 22, 2010 work-study session the administration provided an update on initiatives already taken to improve our food service offerings, and additional steps planned. These include utilization of a \$5,000 grant, approved by the School Board at the meeting of November 8, to be used in supporting this objective in partnership with Washington County.

Our food service manager for over 22 years will be retiring this June. In her last year of employment with the district, she has made some very significant improvements and created new and exciting opportunities for our elementary students to experience in the food nutrition world.

For several years we have had diverse and healthy choices at our secondary schools. This year we introduced weekly salad bars and fruits and vegetables of the month that have excited our elementary students while reductions in both the sodium and fat content of our foods have made choices healthier.

All the while we have maintained a self-sufficient program, including purchasing needed equipment, which has not required general fund support during her tenure of overseeing this needed program.

Over the next several weeks we will be reviewing possible options concerning the structure in which our program shall be moving. Mr. Willcoxon, Sr. has talked with members of our food services team and they have prepared a list of the qualifications they would like to see in the new structure. He is talking with neighboring districts who have developed successful partnerships for overall management of this program, as well as looking at food service management firms.

The landscape for a successful food service program continues to evolve and remain challenging. We will continue to update the Board on our progress.

White Bear Lake Area Public Schools
Office of the Executive Director of Business Services
4855 Bloom Avenue
White Bear Lake, Minnesota 55110
(651) 407-7515

Goal 3

To: Superintendent Lovett
School Board Members

From: Pete Willcoxon Sr.
Executive Director of Business Services

Subj: May 23, 2011 Work Study Session

Date: May 18, 2011

On Monday evening, we will be reviewing the proposed budget for 2011-2012.

The documents that we will review include the budget summary, the financial forecast for the general fund, enrollment projection which feeds into the forecast, the recommended capital expenditure fund that was developed by the capital committee, and our bonded indebtedness structure.

There are actually three components within the general fund. The general fund is contained within the financial forecast model, the grants & federal programs component, and the capital expenditure fund.

The forecast model summary shows the primary assumptions that were used to develop the forecast included in the enrollment, staffing, revenue and expenditure areas. The summary data from the enrollment projection model that we developed last fall is included.

Grants & federal programs, which are structured to match revenues and expenditures, are down for the 2011-2012 budget year, primarily due to the end of the ARRA funds. These funds have been available over the past two years.

The capital expenditure fund is recommended to use some fund balance for next year as we try to address some needs within our buildings and programs.

Some of the funding will be used to supplement our alternative facilities program projects at South Campus (auditorium) and Birch Lake Elementary (secure entrance). Our pep band is in need of some replacement instruments and with the beginning of first grade at Hugo, we need to provide funds for a mobile computer lab, additional media center books, and some gym equipment.

Our classroom technology improvements continue with the allocation of \$130,000 set aside to support this. We have developed an application process that will be evaluated by our teaching and learning team and will require a specific commitment for training and sharing of ideas with other staff members.

Our food service fund is in need of its biennial increase in meal prices. A \$.10 per meal increase is built into the 2011-2012 budget and we will have this as an agenda item at our June meeting, seeking your approval.

Our community services fund continues to use fund balance to support its program offerings. The shortfall lies within the K+ kindergarten program where the class sizes that we want to support to continue to make the program attractive do not generate sufficient revenue. At some point in the near future we will need to make some adjustments to this by creating some general fund support.

Our debt service fund revenues are established by the bond and interest amounts that we have structured at the time that we sell bonds. Included with this packet of information is a bar chart that shows our current liability. Bonds that are sold in the future can readily be scheduled for principal repayment at the end of our current schedule. This should allow for minimal impact on current property taxes when there is that need for us to sell bonds.

White Bear Lake Area School District #624 **2011-2012 Adopted Budget**

FUND	Fund Balance 6/30/2010	2010-2011 Adopted		2011-2012 Adopted	
		Revenues	Expenditures	Revenues	Expenditures
					Fund Balance 6/30/2012
General:					
general sub-fund	\$14,034,169	\$74,609,864	\$77,285,407	\$74,100,000	\$78,800,000
grants & federal programs	\$0	\$5,285,636	\$5,285,636	\$4,000,000	\$4,000,000
general (reserved)	\$3,471,285	\$0	\$0	\$0	\$0
capital (reserved)	\$3,120,086	\$4,349,500	\$4,598,957	\$3,600,000	\$5,000,000
Total General Fund	\$20,625,540	\$84,245,000	\$87,170,000	\$81,700,000	\$87,800,000
Food Service	\$469,201	\$3,929,000	\$4,029,000	\$4,200,000	\$4,200,000
Community Service	\$729,739	\$4,532,000	\$4,635,000	\$4,700,000	\$4,900,000
Debt Service	\$1,713,666	\$10,736,000	\$10,745,000	\$11,200,000	\$11,100,000
All Funds Total:	n/a	\$103,442,000	\$106,579,000	\$101,800,000	\$108,000,000
					n/a

White Bear Lake Independent School District #624

Financial Forecast 2011-12 through 2015-16

Enrollment Assumptions							
TOTAL GRADES K-12							
2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	Total Change
8,059	8,036	7,986	7,980	7,915	7,908	7,879	
<i>Enrollment Changes by current grade configurations:</i>							
Kindergarten	44	21	(4)	(18)	(19)	7	-12
Grades 1-5	10	19	51	9	(47)	26	60
Grades 6-8	(38)	20	(11)	37	40	(93)	-7
Grades 9-12	(40)	(110)	(44)	(94)	19	31	-198
Total Change	(23)	(50)	(7)	(65)	(7)	(29)	-157

Major Staffing Assumptions:						
<i>Forecast assumes maintaining current class size averages.</i>						
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
At Current Ratios	389.6	389.0	389.3	387.1	386.4	385.6
Kindergarten	23.5	24.4	24.2	23.5	22.7	23.0
Grades 1-5	131.4	132.2	134.5	134.9	132.8	134.0
Grades 6-8	80.2	78.6	77.7	79.8	82.8	82.1
Grades 9-12	100.9	98.8	97.5	93.5	93.2	91.4
Staffing Changes		-0.6	0.3	-2.2	-0.7	-0.8

Major Revenue Assumptions:	
1	General Education Formula Changes 0% for each of next four years.
2	Each change in the general education formula of \$100 will impact this assumption by almost \$1 M.
3	The 30% hold back (\$15 M) is carried forward to the 2013-2015 biennial budget.
4	Special Education Revenue currently pro-rated at 77%.
5	Referendum authority expires in November, 2011.

Major Expenditure Assumptions:	
1	For the 2011-2012 school year, first graders will stay at Hugo Elementary.
2	For the 2011-2012 school year, all operating schools will continue with current grade configurations.
3	New salary increases are consistent with projected general education formula changes.
4	Budget Efficiencies Implemented for 2010-2011 (\$750,000) and for 2011-2012 (\$196,000).
5	Cash flow borrowing will be needed early in 2012.

Fund Balance Assumptions:	
1	The District's target fund balance allows for approx. five weeks worth of cash flow needs.
2	OPEB reimbursement will begin June, 2011 and be at full reimbursement by 2012-2013.

The year end fund balances that result from the assumptions above are:				
	Revenue	Expenditures	Fund Balance	Target Fund Balance
2009-10	\$75,794,525	(\$75,090,702)	\$ 14,034,169	\$8,533,034
2010-11	\$75,262,516	(\$78,279,948)	\$ 10,938,527	\$8,895,449
2011-12	\$74,041,607	(\$78,741,964) *	\$ 6,238,170	\$8,947,950
* 2012-13	\$80,276,875	(\$81,060,518)	\$ 7,192,591	\$9,211,422
2013-14	\$59,285,640	(\$83,414,712)	\$ (16,936,482)	need referendum renewal !!!

Factors to keep in mind	
1	Referendum authority renewal would be approximately \$14 million.
2	State Biennial Budget has not yet been passed.
3	

"The Enrollment Projection System of SchoolFinances.Com"

ENPRO

Version XVI

5/18/2011

WHITE BEAR LAKE

624



ADMINISTRATION

Pete Willcoxon Sr

SYSTEMS

SchoolFinances.com

Projection Options Used in this Report

End-of-Year Avg. Daily Membership

Avg. Zip for Kindergarten Projections

Wt Ratio 4 Yrs

**Enrollment History Through
Enrollment Projections**

Ann Thomas

Ann@schoolFinances.com

952-435-0955

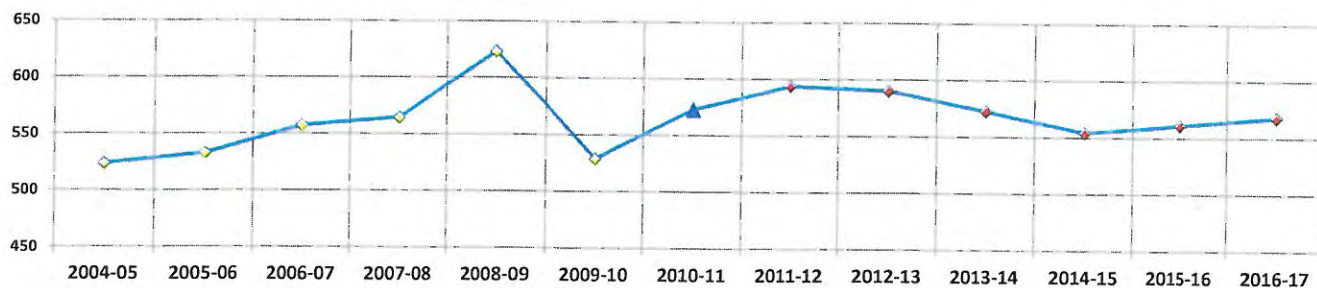
Jim Sheehan

Jim@SchoolFinances.Com

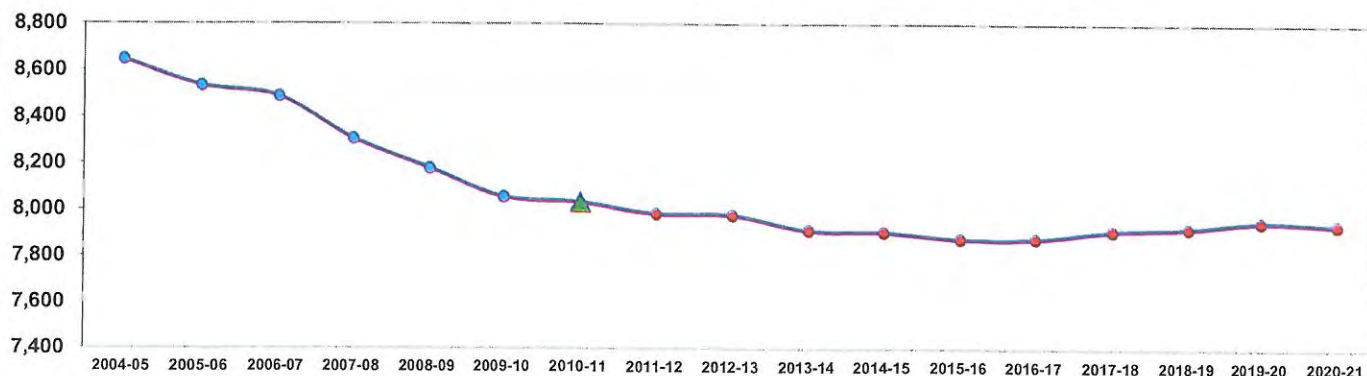
952-435-0990

	Change	K-12 Enrollment
2004-05	-1.64%	8,650
2005-06	-1.30%	8,538
2006-07	-0.56%	8,490
2007-08	-2.13%	8,309
2008-09	-1.52%	8,183
2009-10	-1.51%	8,059
2010-11	-0.29%	8,036
2011-12	-0.62%	7,986
2012-13	-0.08%	7,980
2013-14	-0.81%	7,915
2014-15	-0.09%	7,908
2015-16	-0.37%	7,879
2016-17	0.01%	7,880

Kindergarten Enrollment Anticipated in Projection



Enrollment History and Enrollment Projections



DATA Worksheet for ENPRO XVI**Version XVI**

This system is designed to project enrollment using either Fall Data, End-of-Year ADM, or District Data. Some Training is needed to use this system effectively.

Enter the enrollment history years and the projection years

WHITE BEAR LAKE

624

**ENROLLMENT DATA FROM ENHIST FOR PROJECTIONS**
 ADMINISTRATION Pete Willcox Sr
 SYSTEMS SchoolFinances.com

2	"1" Oct 1st MDE Data, "2" EOY ADM, "3" DistDATA Worksheet												End-of-Year Avg. Daily Membership			
END OF YEAR A.D.M.																
	Pre K	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12	PreK-12
1999-00	65.66	595.74	667.79	648.26	670.16	696.42	712.99	712.21	735.47	762.89	807.02	778.20	743.49	800.81	9330.7	9396.3
2000-01	65.79	610.18	662.53	683.98	657.39	670.30	704.59	712.67	716.22	731.18	781.20	810.22	771.04	775.75	8287.3	9353.0
2001-02	59.60	591.38	671.31	658.32	688.20	660.70	661.99	723.19	710.11	711.49	758.39	786.19	787.50	858.63	9267.4	9327.0
2002-03	56.89	570.50	601.94	662.42	650.39	691.49	656.61	667.61	732.90	714.93	696.38	748.65	767.81	854.83	9018.6	9075.4
2003-04	71.44	557.55	598.48	601.20	657.58	642.13	684.32	651.12	686.20	736.27	726.81	683.57	712.05	837.77	8775.1	8846.5
2004-05	65.66	523.51	600.80	598.20	607.46	647.33	642.55	681.83	658.20	693.72	750.17	754.33	675.74	818.27	8650.2	8715.9
2005-06	71.58	532.85	571.63	598.91	601.75	615.48	654.50	637.26	689.53	668.39	709.94	751.52	741.50	786.68	8538.0	8606.8
2006-07	65.28	557.23	578.97	593.50	613.47	612.48	613.08	673.23	644.03	693.30	687.04	708.25	736.40	799.34	8490.3	8555.6
2007-08	70.76	564.39	597.49	585.42	597.13	618.07	603.53	588.42	674.13	634.74	685.08	651.40	703.05	808.28	8309.1	8379.9
2008-09	82.95	623.22	603.93	602.81	587.91	580.76	605.63	594.10	593.91	659.37	650.12	681.50	667.95	741.34	8182.6	8265.5
2009-10	94.08	528.75	652.36	616.88	596.89	602.61	558.44	598.11	614.08	605.02	681.14	637.76	688.18	699.73	8059.4	8153.4
2010-11	75.16	572.97	560.44	667.19	631.35	591.86	586.21	590.11	596.79	628.45	604.30	670.57	641.56	726.28	8038.1	8111.2

If any adjustments are to be made to the enrollment HISTORY or enrollment PROJECTIONS, MAKE THE ENTRIES ON THE Enroll ADJ Worksheet. This worksheet may be hidden since it is seldom used.

ENTER PROJECTED KINDERGARTEN DATA FOR PROJECTION YEARS (Estimate Fall Enrollment or EOY-ADM as Used Above) The cells are initialized by using the data from the last year. You make revised entries right over this data.

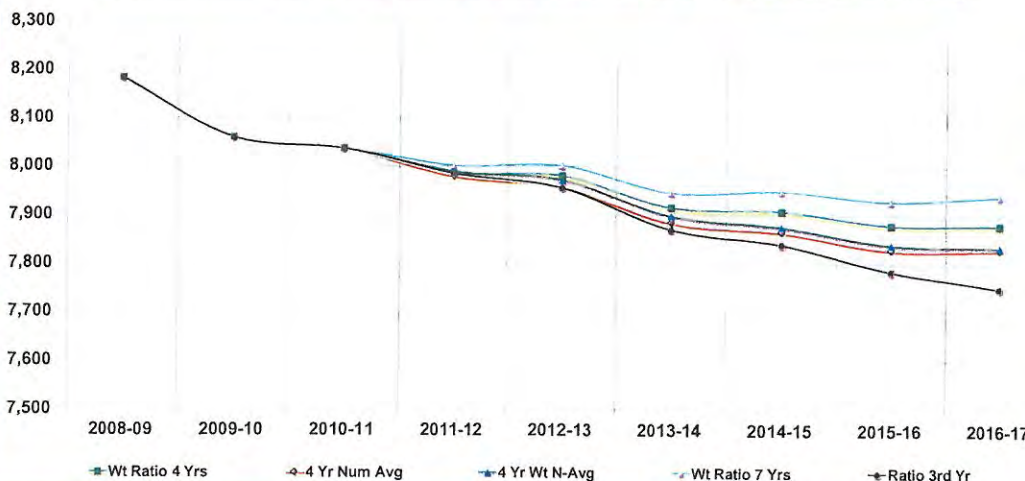
Projection Years	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	Projections are made for 5 years on the Report. Total projections for 10 years on each method selected are presented below. Projections by grade for ten years for the SELECTED method are on the Ten-Year Worksheet
Comment	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	
(5)	Read Comment Above. (1) Holds K constant, (2) Uses a 5 year linear progression, (3) Uses a ratio with County births in last 4 Years. (4), (5), and (6) Use the Lowest, Average, and Highest ratio of births in Prominent Zip Codes in last 4 years.										
Kindergarten	594.0	590.2	572.7	554.0	560.9	567.9	567.6	567.3	567.0	566.7	Note: These Kindergarten Entries MUST include Handicapped Kindergarten The HK and PK are based on the ratio of HK/K and PK/K in the most recent year...and this ratio is multiplied times the projected K in future years.
Handicapped K	32.21	32.01	31.05	30.04	30.42	30.79	30.78	30.76	30.75	30.73	
Pre-Kindergarten	105.69	105.02	101.90	98.58	99.80	101.05	101.00	100.95	100.89	100.84	

PROJECTIONS REVIEW AREA FOR USER ANALYSIS AND DETERMINATION

WHITE BEAR LAKE 624 The area below presents the results of the cohort and numerical projections. The user should examine these results to make a determination of the most appropriate projection method for the district. Certainly you can review several selections before making a determination.

Enrollment Graph of Projections Selected for Viewing

You are encouraged to select (5) methods for graphing and then to select the single option that you believe to be the best projection. This selection is used for PROJECTIONS



AVG	Prior Yr. Fit	Absolute Value Variance
1	Wt Ratio 7 Yrs	3.97
1	1 Yr Num Avg	49.82
Projection Method Read Comment		SELECTIONS
		GRAPH Selected
(1)	Ratio Prior Yr.	
(2)	Wt Ratio 2 Yrs	
(3)	Wt Ratio 3 Yrs	
(4)	Wt Ratio 4 Yrs	1 (1)
(5)	Wt Ratio 5 Yrs	
(6)	Wt Ratio 6 Yrs	
(7)	Wt Ratio 7 Yrs	4
(8)	MERGED	
(9)	RatAVG 2 Yr.	
(10)	RatAVG 3 Yr.	5
(11)	RatAVG 4 Yr.	
(12)	RatAVG 5 Yr.	
(13)	RatAVG 6 Yr.	
(14)	RatAVG 7 Yr.	
(15)	4 Yr Num Avg	2
(16)	4 Yr Wt N-Avg	3
(17)	1 Yr Num Avg	
(18)	Spec. Compute	

Wt Ratio 4 Yrs
Simulate various methods in the yellow cells above before selecting the best method

Projection Method & #												2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	The Cells at the left present the 10 year projections for each of the (5) areas selected above	
Wt Ratio 4 Yrs												4	8182.6	8059.4	8036.1	7986.5	7980.0	7915.4	7908.5	7879.1	7880.0	7914.2	7926.6	7954.2		7943.2
4 Yr Num Avg												15	8182.6	8059.4	8036.1	7980.0	7957.5	7885.4	7866.4	7830.2	7830.7	7850.8	7875.1	7898.3		7882.4
4 Yr Wt N-Avg												16	8182.6	8059.4	8036.1	7989.0	7971.4	7897.9	7875.6	7838.9	7834.9	7864.8	7874.7	7899.4		7883.4
Wt Ratio 7 Yrs												7	8182.6	8059.4	8036.1	8000.2	8000.3	7945.4	7948.6	7928.1	7939.5	7985.4	8007.9	8041.3		8034.0
Ratio 3rd Yr												10	8182.6	8059.4	8036.1	7985.1	7955.2	7870.0	7839.8	7784.5	7750.5	7768.7	7762.8	7776.7		7747.4
Annual Difference between High and Low of Methods Selected														20.2	45.1	75.5	108.8	143.7	189.0	216.7	245.1	264.6	286.7	SchoolFinances.Com		

Capital Expenditure Fund Budget

2010-2011

2011-2012

Projected Revenue:

Fund Balance
Operating Capital
Referendum

\$ 2,000,000

\$ 930,000

\$ 600,000

\$ 2,000,000

\$ 875,700

Expenditures:

Total

Total

Technology:

Districtwide Computer Support Staff	\$ 612,990	\$ 612,990		\$ 631,380	\$ 631,380	
Building Computer Support Staff	\$ 114,150	\$ 114,150		\$ 117,575	\$ 117,575	
Other Costs	\$ 30,000	\$ 30,000		\$ 30,000	\$ 30,000	
Current Software Licenses/Communications	\$ 401,000	\$ 49,000	\$ 352,000	\$ 436,300	\$ -	\$ 436,300
Districtwide Technology Replacement Program	\$ 565,860	\$ 166,860	\$ 399,000	\$ 360,000	\$ -	\$ 360,000

Building/Site Needs:

Leasing (Copiers)	\$ 360,000	\$ 360,000		\$ 360,000	\$ 360,000	
Maintenance Staff Salaries	\$ 114,000	\$ 114,000		\$ 114,000	\$ 114,000	
Delivery Vehicle	\$ -	\$ -		\$ -	\$ -	
Transportation Vehicle	\$ 40,000	\$ 40,000		\$ 40,000	\$ 40,000	
Desk Replacement & Filing Cabinets	\$ -	\$ -		\$ -	\$ -	
Building Furniture Orders (50% contribution)	\$ 40,000	\$ 40,000		\$ 40,000	\$ 40,000	
Property Assessments	\$ 65,000	\$ 65,000		\$ 65,000	\$ 65,000	
Grounds	\$ 30,000	\$ 30,000		\$ 30,000	\$ 30,000	
Field Issues - Districtwide	\$ -	\$ -		\$ -	\$ -	
Custodial Equipment	\$ 40,000	\$ 40,000		\$ 40,000	\$ 40,000	
Buildings & Grounds	\$ 40,000	\$ 40,000		\$ 40,000	\$ 40,000	
Community Services	\$ 10,000	\$ 10,000		\$ 10,000	\$ 10,000	
	\$ -	\$ -		\$ -	\$ -	
One time fund balance items	\$ -	\$ -		\$ 654,236	\$ 654,236	
(see below)	\$ -	\$ -		\$ -	\$ -	
	\$ -	\$ -		\$ -	\$ -	
	\$ -	\$ -		\$ -	\$ -	

Instructional Program Needs:

Curricular Adoption	\$ 40,000	\$ 40,000	\$ -	\$ 40,000	\$ 40,000	\$ -
Textbook Additions/Replacements	\$ 50,000		\$ 50,000	\$ 50,000	\$ 50,000	\$ -
New Course Adoptions	\$ -	\$ -		\$ -	\$ -	\$ -
Technology Items related to new curriculum	\$ -			\$ -		
Technology Improvements	\$ 120,000	\$ 65,000	\$ 55,000	\$ 115,000	\$ 90,000	\$ 25,000
Secondary Musical Instrument Replacement	\$ 24,000	\$ -	\$ 24,000	\$ 24,000	\$ -	\$ 24,000
Elementary Musical Instruments (Birch)	\$ -	\$ -		\$ 8,000	\$ 8,000	
K-12 Piano/Keyboard Replacement	\$ 7,000	\$ 7,000		\$ 7,000	\$ 2,600	\$ 4,400
Media Replacement Schedule	\$ 50,000		\$ 50,000	\$ 50,000	\$ 24,000	\$ 26,000
Phy Ed	\$ 10,000	\$ 10,000		\$ 10,000	\$ 10,000	
Athletics	\$ 20,000	\$ 20,000		\$ 20,000	\$ 20,000	
Allied Arts	\$ 13,000	\$ 13,000		\$ 13,000	\$ 13,000	
Special Education (assistive tech)	\$ 5,000	\$ 5,000		\$ 10,000	\$ 10,000	
Special Education Facility Needs	\$ 20,000	\$ 20,000		\$ 20,000	\$ 20,000	
Building Allocations	\$ 108,000	\$ 108,000		\$ 108,000	\$ 108,000	

Grand Total: \$ 2,930,000 \$ 2,000,000 \$ 930,000

\$ 3,443,491 \$ 2,567,791 \$ 875,700

Difference: \$0 \$0 \$32,209 \$0

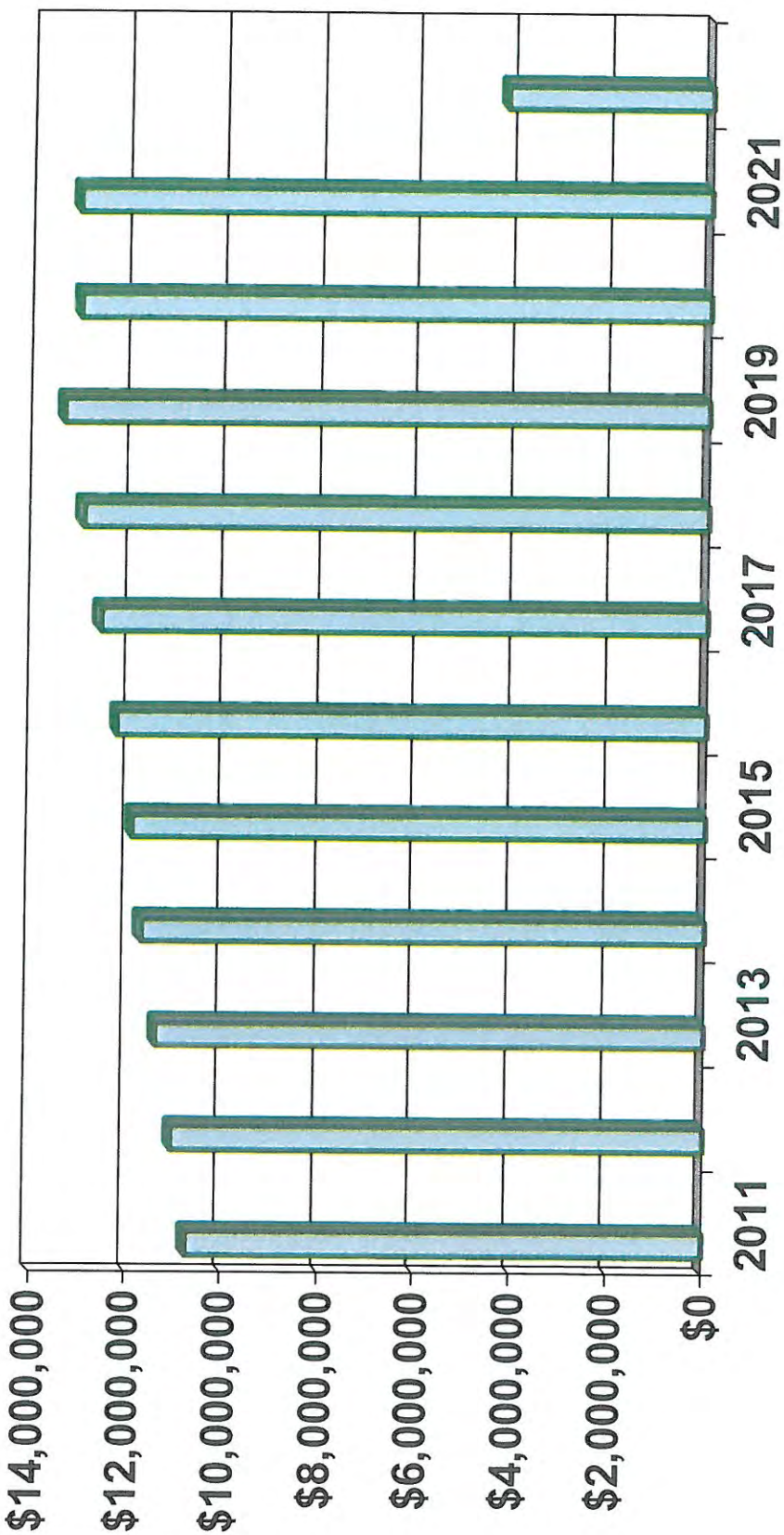
Technology Replacement Cycle	Year One	Year Two	Year Three	Year Four
Sunrise Park	151			
Oneka	152			
Matoska	76			
Hugo (building + kindergarten)	25			
Willow Lane	63			
ALC		52		
Birch Lake		76		
Lakeaires		79		
Lincoln			77	
Normandy Park		40		
Hugo (Lab + Grade One)		63		
Otter Lake		90		
Central			159	
Vadnais Heights			79	
District Center			73	
T-Plus & Aware			20	
South				236
North.				232
Totals	467	400	408	468
Cost for Traditional Setup @\$900	\$420,300	\$360,000	\$367,200	\$421,200

Issues for discussion:

Birch Lake entrance modifications	\$ 110,000
Mobile Lab for Hugo	\$ 20,000
Physical Education equipment @ Hugo	\$ 2,000
Security gates for media centers (per gate)	\$ 7,736
Hugo Media Center	\$ 20,000
Pep Band	\$ 30,000
Art Kiln @ South	\$ 6,000
Physical Education equipment @ South	\$ 5,000
North Campus cameras	\$ 15,000
Phase II -- South Auditorium project	\$ 210,000
Normandy Park storage & SmartBoards	\$ 10,000
SmartBoard Initiative	\$ 130,000
Heart rate monitors for PE program	\$ 4,000
Innovative Technology	\$ 30,000
Computer room A/C @ Sunrise	\$ 26,500
Computer room A/C @ Central	\$ 28,000
Total	\$ 654,236

Technology		Instructional Technology	
Skyward	\$ 87,000	Viewpoint	\$ -
Novell Network	\$ 26,000	NWEA	\$ 77,000
Windows Licen	?	Study Island	\$ 17,000
Barrier	\$ 6,000	Discovery Ed	\$ 22,000
Deep 9	\$ 4,700	Gizmo's	\$ 9,000
Kaspersky	\$ 23,000	Cognitive Tutor	\$ 9,000
Icebox	\$ -	Casper	\$ 500
Honeywell	\$ 29,000	Schoology	\$ 3,000
VMWARE	\$ 11,500		
Docuware	\$ -	Student Plans	\$ 14,500
ActivNet	\$ 30,000	Destiny	\$ 12,000
Vtrans	\$ -	Sample Tech.	\$ 4,000
Google Apps	\$ 12,000	Tumblebooks	\$ 2,600
PCS	\$ -		
SQL Licenses	\$ 3,000	Read 180	\$ 30,000
Geotrust	\$ 3,500		
Total	\$ 235,700	Total	\$ 200,600

Annual Bonded Indebtedness



Financial Planning for 2011-2012

Updated 5/19/11

2011-2012 Categories for analysis	2011-2012 Potential Changes in Revenue	2011-2012 Potential Increases in Expenditures	Changes for 2011-2012	Strategic Planning	2011-2012 Projected Budget Reductions
1. General Fund	1. Expect continuation of current funding level. 2. Continued state Hold back of 30% of revenue earned. 3. Potential change in funding for all day kindergarten. (Governor's proposal) 4. Potential increase in rental and lease revenue at Birch \$23,000 5. Improve efficiency in funding model for after school support (Targeted Services) \$30,000	1. Increase in support for elementary art classes \$19,000 2. Administrative adjustments at Birch and Hugo \$32,000	1. Work to increase efficiency in staffing while maintaining class size. 2. Following audit of job descriptions, improve efficiency and support and training for all positions. 3. Increase use of technology for work efficiency and effectiveness. 4. Monitor reductions in energy use as result of participation in SEE program.	Create Innovation Fund as placeholder for strategic plan recommendations \$100,000.	1. 2.2 clerical reduction (\$77,000) 2. Reduction in budgeted expenditures for tuition and home based instruction as a result of the AWARE program. (\$50,000) 3. 3.0 Reduction in paraprofessional staff allocations (2 special education and 1 regular education) (\$85,000) 4. 1.0 Instructional Tutor in Special Education (\$35,000) 5. 1.0 reduction in elementary learning skills and intervention staffing. (\$65,000) (\$312,000) decrease in expenditures
SUBTOTAL	\$53,000 increase in revenue	\$51,000 increase in expenditures	Potential decrease in expenditures	\$100,000 increase in expenditures	
2. Capital Fund					

2011-2012 Categories for analysis	2011-2012 Potential Changes in Revenue	2011-2012 Potential Increases in Expenditures	Changes for 2011-2012	Strategic Planning	2011-2012 Projected Budget Reductions
3. Technology Levy					
4. Alt. Facilities					
5. EMID	Creation of innovation fund consistent with EMID strategic plan.	Potential source of revenue for district priorities consistent with EMID strategic plan.	The administration will prepare a budget for 2011-12 based on current law.	EMID innovation funds are a potential source of support for district goals consistent with EMID plan.	Our operating assumptions for 2011-12 are that we can continue with staffing allocations under current law.
6. OPEB	Consistent with finance advisory committee and board direction				
7. SRFC (Suburban Ramsey Family Collaborative)	1. Reduction of .75 FTE in community cultural liaison funding. 2. Currently we have 3.25 FTE, with 2.0 FTE funded by EMID, and 1.25 FTE from SRFC funds. 3. Reduction of .25 FTE in ATOD (chemical health) funding.		We are currently reviewing options for 2011-12.		
8. Federal	1. Elimination of stimulus funding for	1. Shifting of some benefit costs back to	1. Some costs will be shifted back to the general		

2011-2012 Categories for analysis	2011-2012 Potential Changes in Revenue	2011-2012 Potential Increases in Expenditures	Changes for 2011-2012	Strategic Planning	2011-2012 Projected Budget Reductions
8. Federal (cont.)	Special Education benefits in 2009-10 and 2010-11. (\$500,000). 2. Elimination of federal jobs bill. (\$1,200,000).	the general fund; amount to be determined. 2. Some staffing positions revert to state funding; amount to be determined.	fund, consistent with practice before 2009-10. 2. May need to be more conservative in adding additional sections once staffing targets are reached.		
9. University of Minnesota Funds	1. University of Minnesota TERI program (\$40,000) for teacher new teacher development and ongoing teacher support.	1. Allocation of \$40,000 TERI funding towards related initiatives.	We will develop a multi-year plan for FY 11, 12, and 13, reflecting revenue from the University of Minnesota of \$20,000 per year.		
10. ADSIS	Alternative delivery of Specialized Instructional Services. The application is under review by MDE for 2011-2012 school year. The formula for special education is used to fund general education staff to provide interventions and specific materials for identified students with a focus on Oneka	The ADSIS funding formula supports a portion of general education licensed teacher and non-licensed staff (paras) in both Oneka and Lincoln. This is the third year we have applied. Due the fact that both of our mid-year and end-year results for the past two years have			

2011-2012 Categories for analysis	2011-2012 Potential Changes in Revenue	2011-2012 Potential Increases in Expenditures	Changes for 2011-2012	Strategic Planning	2011-2012 Projected Budget Reductions
	and Lincoln for 2011. This funding has been used to support what is generally known as RtI (Response to Intervention).	shown student gains, it is anticipated that our application will be accepted for the 2011-12 school year. If ADSIS were not renewed we would either have to cut 2.7 FTE teaching staff and 3 paraprofessional staff or transfer to general fund.			
11. Third Party Billing	Third Party Billing generates between \$140,000-\$180,000 per year. All funds are tied to therapeutic services provided to students on IEP's.	T.P.B. funds must be used to directly benefit students in Special Education. For example T-Plus expansion and remodel, technology, curriculum, conferences, large motor equipment, and more. For 2011-2012 \$48,000 of these funds will be used to support the ECSE admin changes.			
12. Community Education Fund	Anticipated increase in revenue related to	Placeholder for staffing increase			1. Reduction of summer clerical hourly help.

2011-2012 Categories for analysis	2011-2012 Potential Changes in Revenue	2011-2012 Potential Increases in Expenditures	Changes for 2011-2012	Strategic Planning	2011-2012 Projected Budget Reductions
	more comprehensive reporting of children age 0-4. \$90,000	(leadership & clerical) to provide better coordination, and support for ECFE program. \$50,000			(\$4,000) 2. Reduction of hourly help during the year. (\$10,000)
13. Community Services Senior Programs	1. Loss of Federal Title III Funding for Meals on Wheels. Decrease in revenue of approximately \$60,000 2. Increase fundraising from the local and metro Meals on Wheels \$15,000 . 3. Increase minimum meal price for Meals on Wheels \$5,000 . 4. Establish fee system for Outreach services \$5,000 . 5. Increased support from Ramsey County \$20,000				1. Reduction in Outreach staff; not replacing retiring Outreach staff (\$15,000)
SUBTOTAL for 12 and 13	\$75,000 increase in revenue.	\$50,000 increase in expenditures.			(\$29,000) decrease in expenditures

New Levy Ahead - Inflation

SPECIAL ELECTION BALLOT**INDEPENDENT SCHOOL DISTRICT NO. 624
(WHITE BEAR LAKE AREA SCHOOLS)****NOVEMBER 8, 2011**

INSTRUCTIONS TO VOTERS**To vote, completely fill in the oval(s) next to your choice(s) like this:** 

**To vote for a question, fill in the oval next to the word "YES" for that question.
To vote against a question, fill in the oval next to the word "NO" for that question.**

**SCHOOL DISTRICT BALLOT QUESTION 1
RENEWAL OF EXPIRING
REFERENDUM REVENUE AUTHORIZATION**

The school board of Independent School District No. 624 (White Bear Lake Area Schools) has proposed to renew the school district's existing referendum revenue authorization of \$ ___*___ per pupil which is scheduled to expire after taxes payable in 2012. The proposed referendum revenue authorization would increase each year by the rate of inflation and be applicable for ___ years, beginning with taxes payable in 2013, unless otherwise revoked or reduced as provided by law.

☐

YES

Shall the increase in the revenue proposed by the board of Independent School District No. 624 be approved?

☐

NO

**BY VOTING "YES" ON THIS BALLOT QUESTION,
YOU ARE VOTING TO EXTEND AN EXISTING PROPERTY
TAX REFERENDUM THAT IS SCHEDULED TO EXPIRE.**

* The maximum amount that would be included would be the MDE approved number, including inflation, that the Department shows as the District's authority for pay 2012. It would be the pay 2011 authority as increased by inflation. That number is usually available in June.

AGENDA ITEM: Review of Recommendations from Strategic
Planning Process

MEETING DATE: April 11, 2011

SUGGESTED DISPOSITION: Discussion Item

CONTACT PERSON(S): Dr. Michael Lovett, Superintendent

Background:

Dr. Lovett and members of the Cabinet will review the recommendations of the strategic planning team. At the June 13 School Board meeting the administration will ask the School Board to consider action on these recommendations.



White Bear Lake Area Public Schools

Independent School District 624

Michael J. Lovett, Ph. D.
Superintendent of Schools

4855 Bloom Avenue
White Bear Lake, MN 55110-2731
(651) 407-7563 • Fax (651) 407-7566

May 12, 2011

Dear Colleagues, Students and Families, and Community Members:

This week on our website we are posting summary information on the strategic action plans under consideration by the White Bear Lake Area Schools School Board.

For those of you who have participated actively in the Strategic Planning process or even followed the process online, much of this will already be familiar. But those new to this information may need some additional background.

Below you will find key information about initiatives being considered by the School Board.

1. Core Values, Mission, Objectives, Parameters, and Strategies

This document, a product of the October strategic planning session, was presented to the public in a Strategic Planning “Kick-off” event on November 9, 2010. This document has been highlighted at meetings throughout the year, including sessions with school staff and PTO and PTAs, and through staff and community electronic newsletters.

Our 30 member planning team is broadly representative of the school community, with 15 staff members and 15 community members. The planning team affirmed the school and community core values, initially developed through a community participation process a decade ago.

The team also developed a new mission, which was broadly reviewed by staff and community and will replace the mission approved by the School Board in 1994.

The objectives, parameters, and strategies provide specific structure for the aspirations described in the mission to be carried out. For each of the six strategies, an action team was charged with the responsibility of researching and developing specific action steps, which will allow us to operationalize the strategies.

These committees were each co-chaired by a community leader and a school leader, and were open to any member of the public. The committees met from November through February, and submitted their recommendations to the strategic planning team, which evaluated the action plans during a two-day meeting in March.

The specific recommendations you will read in the following document represent the work of the action teams, with some minor clarifications and stipulations made by the planning team that were intended to improve clarity and coordinate or reconcile selected recommendations that came from different action teams.

The final document includes:

1. The recommended core values, mission, objectives, parameters, and strategies.
2. Under each strategy is a list of specific results. Of the total of 51 specific results, the Planning Team has recommended 22 as highest priority to be implemented during the 2011-12 school year. The other specific results would be set for future years beginning with 2012-13, subject to an annual review by the planning team.

In addition to the 51 specific result statements, each has a supporting list of action steps (generally in the range of 5-10 specific actions to be taken), and a cost benefit analysis. The action steps and cost-benefit analysis are not included online, but copies can be viewed in the superintendent's office.

Immediately in March when the recommendations were received, the administration began additional analysis and examined costs and potential benefits, giving special attention to those actions that would save the District resources or be implemented on a cost-neutral basis. Thus, as our work continues, this portion of the plan continues to be updated and revised.

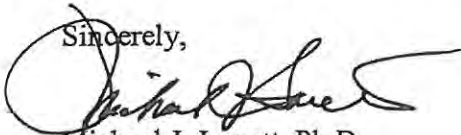
Next Steps

During April and May, the administration and School Board have been carefully reviewing and analyzing the recommendations. At the School Board work-study session on April 25, the School Board discussed the specific recommendations now provided online.

The School Board will further review and consider the recommendations at their work-study session of May 23. Action on this document is scheduled for the regular School Board meeting of June 13.

Should you have any questions or comments, please contact me at 651-407-7563 or superintendent@wbl.whitebear.k12.mn.us or members of our School Board at SchoolBoard@wbl.whitebear.k12.mn.us.

Sincerely,



Michael J. Lovett, Ph.D.
Superintendent

Core Values

- Compassion
 - We will understand the circumstances and viewpoints of others.
 - We will develop the capacity to forgive others and ourselves.
 - We will celebrate the contributions of others.
 - We will promote a peaceful, caring and safe community.
- Integrity
 - We will stand up for what we believe.
 - We will be honest with ourselves and others.
 - We will demonstrate fairness in our judgments and actions.
 - We will fulfill commitments and promises.
- Respect
 - We will believe in the inherent dignity of all people.
 - We will celebrate individuality.
 - We will value and appreciate diversity.
 - We will honor self and others through words and actions.
- Responsibility
 - We will take ownership of our behavior as individuals.
 - We will have the courage to think and act independently.
 - We will demonstrate problem solving and decision-making skills.
 - We will be reliable and trustworthy.
- Service
 - We will find positive ways to contribute to the broader community.
 - We will share time and talents with others.
 - We will take an active role in service opportunities in the school and community.
 - We will celebrate involvement in service.

Mission

The mission of the White Bear Lake Area School District, a leader in innovative education and community partnerships, is to ensure our students:

- develop a love for learning,
 - excel academically,
 - are inspired to realize their dreams, and
 - become engaged citizens with a global understanding
- by challenging each student within a dynamic, respectful and inclusive environment that nurtures the unique talents and abilities of every student.

Objectives

- All students love to learn.
- All students excel academically.
- All students feel valued.
- All students are interculturally competent.
- All students are involved in the community.
- All students understand and respect differences.
- All students are confident and prepared to pursue their goals and dreams.

Parameters

- We will always treat our students, staff, families and community members with fairness, impartiality, dignity and respect.
- We are committed to the success of every student
- We expect excellence from every staff member

Strategies

1. We will develop a comprehensive understanding of our students' needs and interests to ensure students are challenged and excelling academically.
2. We will create and implement a plan for global experiences and relationships to further understand world connections.
3. We will ensure our facilities support our district's mission and objectives.
4. We will create a district-wide culture that inspires innovation, a passion for learning, and confidence to pursue dreams.
5. We will build a network of partnerships to provide personal and educational growth and service opportunities for students.
6. We will foster connections with and among students and staff members to ensure all feel valued, supported and understood; and we will establish an environment that cultivates understanding and respect for differences among people.

Strategic Planning Committee Members:

Sima Bazooband - Student
 Jordan Beckers - Student
 Don Bosch - Principal
 Kim Chapman - School Board
 Shane Cody - Teacher
 Tiffany Dittrich - Teacher
 Mike Ericson - Local government representative
 Mike Fish - Parent
 Gail Gendler - Community
 Dave Guenther - Cabinet
 Graciela Hammeken - Cultural Liaison
 Dona Kass - Teacher
 Deb Kelly - Food Service
 George Kimball - School Board
 David Law - Cabinet
 Michael Lovett - Superintendent
 John Ottaviani - Parent
 Rolf Parsons - Community
 Julie Perreira - Parent
 Chris Picha - Cabinet
 David Potts - Parent
 Becky Sass - Parent
 Citty Scherman - Health Assistant
 Cathy Solomon - Parent
 Sara Svir - Principal
 Ursula Thomas - Clerical
 Cha Vang - Teacher
 Marisa Vette - Cabinet
 Keith Warner - Community
 Brianna Wittek - Student

Strategic Planning Process Timeline:

Spring 2010 – Oct. 2010	Preparation
Oct. 26 & 27, 2010	Initial Planning Session
Nov. 2010 – Feb. 2011	Active involvement of school and community
March 8 & 9, 2011	Second Planning Session
March – May 2011	Review Recommendations with School Board
June 2011	Recommend to School Board action steps for 2011-12
Summer of 2011	Begin Implementation

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy I: We will develop a comprehensive understanding of our students' needs and interests to ensure students are challenged and excelling academically.

PRIORITIES RECOMMENDED FOR 2011-2012:

- I. 1. All students will achieve grade level in reading, writing and math by grade 4 and maintain grade level proficiency throughout their tenure in White Bear Lake Schools.
- I. 2. All students will have an ongoing plan for post-secondary readiness that will be monitored from grades 6 through 12 and all students will have the academic skills to be successful in a post-secondary institution.

RECOMMENDED FOR 2012-2013 AND BEYOND

- I. 3. Authentic Intellectual Work (AIW) principles will be implemented at all grade levels. (STIPULATION - Communication with parents and community with the ability to report back to show evidence that AIW is working.)
- I. 4. The District will build upon the International Baccalaureate (IB) offering already in place at Matoska by implementing the IB Middle Years Program, career-related program, and Diploma program at District schools. (STIPULATION - IB should not be limited from moving beyond this for other schools if there is interest)
- I. 5. Students will have the opportunity to access multiple electives each year while meeting graduation standards.

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy II: We will create and implement a plan for global experiences and relationships to further understand world connections.

PRIORITIES RECOMMENDED FOR 2011-2012:

- II. 1. All students will expand their global perspective through the study of world language and culture at the elementary schools. (STIPULATION - within each school, one or more options will be available to study world language and culture)
- II. 2. Secondary students will develop global understanding and competitiveness through expanded world language opportunities at the secondary level.

RECOMMENDED FOR 2012-2013 AND BEYOND

- II. 3. Teachers and staff will have the knowledge and skills to promote global languages and culture among students.
- II. 4. All students will expand their global perspective by participating in annual service learning opportunities at the classroom or building level. (STIPULATION - opportunities are voluntary and not required)
- II. 5. Elementary students have an opportunity to develop global understanding and competitiveness through expanded International Baccalaureate programming.
- II. 6. Middle school level students will develop global understanding and competitiveness through expanded and developed International Baccalaureate programming.
- II. 7. All students will have opportunities to have cross-cultural experiences in and out of the classroom.
- II. 8. All students will expand their global perspective through the study of world cultures and history of peoples within our diverse student body and community (Cross reference to Strategy IV - Plan 7).

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy III: We will ensure our facilities support our district's mission and objectives.

PRIORITIES RECOMMENDED FOR 2011-2012:

- III. 4. The District will ensure that square footage to accommodate student population and program activities are equitable for all buildings.
- III. 7. Each District facility will have appropriate acoustical levels for the site.
- III. 9. District facilities will be designed to allow for informational technology to be accessible by all ISD 624 employees, learners and families.

RECOMMENDED FOR 2012-2013 AND BEYOND

- III. 1. The District will ensure that inside and outside large group spaces are comparable to conference schools.
- III. 2. At an additional three elementary schools, the District will provide a gym with a performing arts area separate from the cafeteria.
- III. 3. The District will ensure that storage spaces are equitable for all district facilities.
- III. 5. Each district facility will have a standardized operations and a maintenance procedures manual consistent with best practices.
- III. 6. Each district facility will have an HVAC system that provides optimum air quality throughout the district.
- III. 8. The District will ensure that all schools provide secure entrances.
- III.10. The District will ensure that elementary class sizes are balanced across the district.
- III.11. Secondary facilities will be evaluated and recommendations will be made that improve programs and reduce transitions, including a cost benefit analysis of a single campus high school.

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy IV: We will create a district-wide culture that inspires innovation, a passion for learning, and confidence to pursue dreams.

PRIORITIES RECOMMENDED FOR 2011-2012:

- IV. 1. The WBLAS will identify strengths and weaknesses in the areas of innovation, confidence to pursue dreams, and passion for learning.
- IV. 3. Faculty will have the skills to implement collaboration, critical thinking, creativity, and communication skills within their lesson plans.
- IV. 5. Self-awareness and emotional intelligence curriculum will be incorporated within the curriculum review cycle.
- IV.10. A process will be established to facilitate the collection and implementation of innovative ideas.
- IV.12. The District will enhance communication, interaction, and collaboration through the use of a web site.
- IV.13. The District will establish a learning management system to support the development and management of online coursework to allow web-based learning for staff and students.
- IV.14. A policy will be developed and presented for board approval that leverages students' access to mobile technology and use of that technology in the classroom.

RECOMMENDED FOR 2012-2013 AND BEYOND

- IV. 2. An evaluation protocol will be implemented assessing a teacher's use of available technology to facilitate collaboration, engagement, and interaction with students.
- IV. 4. STEM integration, 21st century skills and creativity will be incorporated within the curriculum review cycle for areas undergoing current and future review.
- IV. 6. Peer assisted learning activities will be utilized in every classroom.
- IV. 7. Teachers will have the skills to assist students as they implement individual development plans within the classroom. (STIPULATION - teachers will have the cultural competence necessary to effectively help students with their individual plans)
- IV. 8. Teachers will have an implementation plan to incorporate current best teaching and learning practices.
- IV. 9. Students will have an "individual development/graduation plan" in place that reflects their passions, interests, and strengths.
- IV.11. Every classroom will have equitable access to a core set of effective, innovative, and well supported technology.
- IV.15. Instructional technology will be available for use by students beyond the traditional school day/year.

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy V: We will build a network of partnerships to provide personal and educational growth and service opportunities for students.

PRIORITIES RECOMMENDED FOR 2011-2012:

- V. 1. The District will implement a process that will provide a consistent method to initiate and maintain community partnerships.**
- V. 2. A comprehensive needs assessment will be developed and administered at every WBL school in order to provide direction to future partnerships.**
- V. 3. The District will create a process which aligns a partner with a compelling need or promising vision.**
- V. 5. The District will communicate information related to partnerships using a variety of resources.**

RECOMMENDED FOR 2012-2013 AND BEYOND

- V. 4. The District will evaluate each partnership with a periodic review of the objectives and effectiveness of all parties involved.**

**WHITE BEAR LAKE AREA SCHOOLS
STRATEGIC ACTION PLAN PRIORITIES
Recommended by the Strategic Planning Team**

Updated 5/12/11

Strategy VI: We will foster connections with and among students and staff members to ensure all feel valued, supported and understood; and we will establish an environment that cultivates understanding and respect for differences among people.

PRIORITIES RECOMMENDED FOR 2011-2012:

- VI. 1. The District will adopt a comprehensive bullying prevention, intervention, and support program for students and staff that promotes a safe, civil, and inclusive climate and is implemented in each building, program, and service.**
- VI. 2. The District will increase the number of faculty and staff from culturally diverse communities to more closely reflect the diversity of the student population.**
- VI. 5. The District will provide programming that will continue to create an environment of understanding similarities and differences among students, staff, administration, community members, and parents.**
- VI. 6. The District will review and assess the current plan related to cultural competency.**

RECOMMENDED FOR 2012-2013 AND BEYOND

- VI. 3. During curriculum review cycles in all areas, the District will identify best practices that promote and enhance multi-cultural understanding.**
- VI. 4. Programs will be adopted and implemented and resources allocated for students and families to promote a positive transition between buildings and programs.**

Budgetary Ramifications of Specific Results for 2011-12

Recommendation	Budget Ramification
I. 1. All students will achieve grade level in reading, writing and math by grade 4 and maintain grade level proficiency throughout their tenure in White Bear Lake Schools.	(NOTE: This section is currently in development.)
I. 2. All students will have an ongoing plan for post-secondary readiness that will be monitored from grades 6 through 12 and all students will have the academic skills to be successful in a post-secondary institution.	
II. 1. All students will expand their global perspective through the study of world language and culture at the elementary schools. (STIPULATION - within each school, one or more options will be available to study world language and culture)	
II. 2. Secondary students will develop global understanding and competitiveness through expanded world language opportunities at the secondary level.	
III. 4. The District will ensure that square footage to accommodate student population and program activities are equitable for all buildings.	
III. 7. Each District facility will have appropriate acoustical levels for the site.	
III. 9. District facilities will be designed to allow for informational technology to be accessible by all ISD 624 employees, learners and families.	
IV. 1. The WBLAS will identify strengths and weaknesses in the areas of innovation, confidence to pursue dreams, and passion for learning.	
IV. 3. Faculty will have the skills to implement collaboration, critical thinking, creativity,	

and communication skills within their lesson plans.	
IV. 5. Self-awareness and emotional intelligence curriculum will be incorporated within the curriculum review cycle.	
IV.10. A process will be established to facilitate the collection and implementation of innovative ideas.	
IV.12. The District will enhance communication, interaction, and collaboration through the use of a web site.	
IV.13. The District will establish a learning management system to support the development and management of online coursework to allow web-based learning for staff and students.	
IV.14. A policy will be developed and presented for board approval that leverages students' access to mobile technology and use of that technology in the classroom.	
V. 1. The District will implement a process that will provide a consistent method to initiate and maintain community partnerships.	
V. 2. A comprehensive needs assessment will be developed and administered at every WBL school in order to provide direction to future partnerships.	
V. 3. The District will create a process which aligns a partner with a compelling need or promising vision.	
V. 5. The District will communicate information related to partnerships using a variety of resources.	
VI. 1. The District will adopt a comprehensive bullying prevention, intervention, and support program for students and staff that promotes a safe, civil, and inclusive climate and is implemented in each building, program, and service.	

VI. 2. The District will increase the number of faculty and staff from culturally diverse communities to more closely reflect the diversity of the student population.	
VI. 5. The District will provide programming that will continue to create an environment of understanding similarities and differences among students, staff, administration, community members, and parents.	
VI. 6. The District will review and assess the current plan related to cultural competency.	

AGENDA ITEM: Other School Board/Superintendent Objectives
MEETING DATE: May 23, 2011
SUGGESTED DISPOSITION: Discussion Item
CONTACT PERSON(S): Michael J. Lovett, Superintendent

Background:

- a) Goal 1e – Prepare a comprehensive program review of District gifted and talented programs (preK-12). *(See update on School Board/Superintendent Goals)*
- b) Goal 6e – Design and implement a program review of White Bear Lake Area Schools preschool programming, including early childhood and family education, special education, and preschool programs. *(See update on School Board/Superintendent Goals)*
- c) Goal 1b – Review teacher and administrative appraisal protocols, and use student progress and achievement as one measure of evaluating performance. *(See update on School Board/Superintendent Goals)*
- d) Goal 6f – Prepare a program review of the district’s food service program, including reviewing the most current research and findings for child nutrition, auditing our current practices and menus, and make recommendations for improvement. *(See update on School Board/Superintendent Goals)*

2010-11 Early Childhood Program Review Executive Summary

1. **Background**

In the fall of 2010 the School Board/Superintendent Goals included a review of the Early Childhood Program. This document serves as the executive summary of this review.

Just as there are many educational choices for families of school age children, there are also many choices for families with young children.

As we know from our communication and marketing plan presented to the School Board in July of 2010, it is essential to attract families with young children into our programs. We know when families participate in our high quality programs they are more likely to attend our schools beyond early childhood. We need to be competitive in this market. We need to make sure the programs we offer are priced fairly, meet the needs of families and are perceived as the highest quality available.

2. **Overview**

The main components of this program review included the following:

1. Conducting staff and parent focus groups
Three staff focus groups were conducted in November of 2010. One parent focus group was conducted in November of 2010. One focus group with kindergarten teachers was conducted in April of 2011.
2. Gathering and comparison of information from local private providers and from surrounding school district programs
3. Analysis of the data and consideration of ramifications of findings

From this information several issues were acted upon immediately. Those include: an update of the existing website; creation of a new registration catalog; classes for the 2011-12 school year were lengthened by fifteen minutes; the calendar was adjusted to add two weeks of class to the program; and early childhood staff have attended the kindergarten staff meetings on a regular basis this school year.

3. **Findings**

Parent Focus Groups:

1. Parents view staff as caring, qualified and dedicated.
2. Marketing our programs is important.
3. Transportation is a barrier for some families.
4. Lengthened class times and calendar alignment important.
5. Fees may be barrier for some families, but qualified, trained staff a must.

Early Childhood Staff Focus Groups:

1. Market program options, locations, and services.
2. Update website and marketing materials.
3. A forum for communication with program and district staff is important.
4. Transportation for some families may prevent attendance.
5. Students benefit from early intervention and developmental curriculum.
6. Programs options and sites have expanded, with the addition of Head Start, Play and Learn Pre-School and, Tamarack partnership; however, leadership model and support model have stayed the same.
7. Being part of an elementary building viewed very positively by Hugo staff.
8. Continue emphasis on program efficiencies, design, and communication.

Kindergarten Focus Group:

1. Knowledge gap exists between kindergarten staff and early childhood programs.
2. Staff are eager for more knowledge and opportunity to visit programs.
3. Interested in increased communication and how to make transitions very positive.
4. Curriculum alignment is critical.

Comparison with Surrounding Districts and Private Programs:

1. White Bear Lake Area Schools Early Childhood offers comparable and competitive programs.
2. Both public and private programs struggle with transportation.
3. Public school leadership model in surrounding districts generally separates the early childhood and special education functions.
4. Several surrounding districts have sites in elementary buildings.
5. New birth-2 year old state criteria have increased number serviced in that age group significantly, increasing number of staff required for home visits.
6. White Bear Lake Area Schools' fee is slightly higher than surrounding districts.
7. White Bear Lake hires only early childhood licensed teachers which contributes to our higher costs.

4. Conclusions:

1. Our leadership model is not adequate for the size and scope of our program.
2. Higher fees reflect higher salary and benefit costs for our district. We need to pay close attention to the marketplace and be creative in how we hold costs down and structure classes.
3. Through our research, we determined that transportation presents a challenge in all districts.
4. We need to work internally on staff perception regarding our programs. Increased discussion and staff development will be helpful to promote positive messages regarding our district's early childhood programs.
5. As space allows, our administrative team needs to explore opportunities for site expansion in the district. A location in the south east (e.g., Vadnais) area could be considered for future day or evening classes.

5. Recommendations:

1. We recommend that the leadership model for early childhood programs be strengthened. Currently, the leadership model for all early childhood programming includes a 1.0 position divided into .4 for early childhood family education programming and .6 for early childhood special education programming.
 - a. We recommend that the Early Childhood Family Education supervisor position be increased from .4 FTE to 1.0 FTE. The supervisory responsibilities would include early childhood family education, Play and Learn Preschool, school readiness, pre-school screening and the liaison with Head Start.
 - b. We recommend that the Early Childhood Special Education supervisor position be increased from .6 FTE to 1.0 FTE with .2 of the FTE dedicated to the Early Childhood Special Education kindergarten programming, communication, supervision, and transition.
2. We recommend that the clerical staff be restructured to support year round programming. Both birth-2 services and extended school year for Early Childhood run during summer months. Currently, we have a 1.0 FTE, ten-month position with an additional 100+ hours submitted on timesheet during the summer months. We recommend that our current position be increased to a 1.0 FTE, twelve-month position. Another consideration is to create a .5 position with a specific schedule to be determined to ensure that the office at Normandy would be staffed throughout the summer months.
3. Continue to focus on the marketing of all Early Childhood programs and partnerships using updated materials, updated website, and the expertise of the communications director.

6. Other Considerations:

1. Consider options for expanding transportation for families. We are working on cost neutral, creative ways to provide some families with transportation, i.e. pair with elementary or with ECSE.
2. Explore need for before and after class childcare. We will monitor how the YMCA program is received to see what needs still exist in the community.
3. Analyze impact of fee differences between public and private programs.
4. Consider Saturday program options in the future. Surrounding districts have not offered Saturday options.
5. Work with kindergarten staff to ensure that curriculum is aligned using MDE guidelines and best practice for support.
6. Consider site expansion to elementary buildings.