Edina Public Schools
DEFINING EXCELLENCE

School Board Work Session
Monday, November 16, 2020; 5:00 PM
Hybrid Meeting

I. Determination of Quorum and Call to Order

II. Reports / Discussion

A. PEER Review Initial Results (5:00-5:30 PM)
Description: As part of the 2020-25 Strategic Plan, district administration will be conducting action work around STRATEGY C Foster Positive Learning Environments and Whole Student Support.
Presenter(s): Steve Buettner, Director of District Media and Technology Services

B. Budget Update for FY2021-22 (5:30-6:30 PM)
Description: This report will give the School Board information on FY19-20 Unaudited financial results and a high level first draft of what the FY21-22 budget may look like given various budget assumptions.
Presenter(s): John Toop, Director of Business Services

III. Leadership Updates

Board Meeting Date: 11/16/2020 Work Session

TITLE: Preliminary Results from COSN PEER Review

TYPE: Discussion

PRESENTER(S): Steve Buettner, Director of Media and Technology Services

BACKGROUND: As part of the 2020-25 Strategic Plan, district administration will be conducting action work around STRATEGY C Foster Positive Learning Environments and Whole Student Support.

RECOMMENDATION: Discuss the preliminary results from the COSN PEER review.

PRIMARY ISSUE(S) TO CONSIDER:

Edina Schools administration has begun working on the Action Steps for the following strategic outcomes:

C.6 - Review and develop a technology plan for students and staff.

- Partner with DMTS to inventory technology currently in use by students and staff.
- Identify the benefits and drawbacks of each category of technology utilized.
- Make recommendations around continued use of each category of technology used.

The district has completed a peer review and this presentation by the reviewers will share the preliminary results.

ATTACHMENTS:

1. Presentation
2. Final Draft Report

Peer Review Services for Edina School District

November 16, 2020

CoSN Peer Review Team

Adela Dickey, CETL
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Washington, DC

CoSN Peer Review Process

- Peer Review Process
- Document Review
- Stakeholder Survey
- Stakeholder Interviews
  - Candid Conversation
  - Dominant Themes
  - Focus on Process
- Commendations and Recommendations
- Recommended Resources

Leadership and Vision

Commendations

Best Practice: *The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use.*

School district stakeholders are united behind technology leadership.	Edina has a qualified technology leader at the cabinet level.

Leadership and Vision

Recommendations

Best Practice: *The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use.*

School district leaders support innovation and risk taking by encouraging teaching innovation.	Develop a plan to remove barriers to innovation and risk taking in remote learning.

Leadership and Vision

Recommendations

Best Practice: *The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use.*

Continue to build toward full alignment between DMTS and Teaching and Learning.	DMTS should take a more centralized role in the approval of all software and applications.

PEER REVIEW
ENVISION. DEVELOP. SUCCEED.

Strategic Planning

Commendations

Best Practice: *School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.*

The school district just completed a five year strategic plan for 2020-2025. There are technology elements embedded in the strategic plan.	The District is developing higher level dashboards to track key performance indicators that measure many different aspects of performance.

Strategic Planning

Recommendations

Best Practice: *School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.*

Review what remote learning means to different teachers.	Create a separate technology plan.

Strategic Planning

Recommendations

Best Practice: *School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.*

Review the district strategic plan as a guide to define and communicate the role of technology in instruction, both as a method for delivering instruction and as a tool to improve student learning.

Ethics and Policies

Commendations

Best Practice: *The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.*

Edina school district has responded to digital equity needs that some disadvantaged families have with home access to the internet.	The school district is bridging the digital equity gap by adding Spanish and Somali language capabilities to key public interfaces.

Ethics and Policies

Commendations

Best Practice: *The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.*

The school district recognizes the need to maintain up-to-date policies.	Ensure that the Digital Citizenship Program can be consistently presented across schools.

Ethics and Policies

Recommendations

Best Practice: *The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.*

The school district should continue to improve their cybersecurity and student data privacy practices.

Instructional Focus and Professional Development
Commendations

Best Practice: *School system leader's budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.*

Edina has a renewed focus on implementing effective and contemporary approaches to instruction and professional development.	Edina encourages innovative practice with an annual innovation day allowing for the sharing of original ideas with others.

Instructional Focus and Professional Development
Recommendations

Best Practice: *School system leader's budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.*

Review consistency in the organization of the Learning Management Systems to improve the user experience.	Build the capacity of building leaders to model and mentor professional staff with research based effective approaches to the integration of instructional technology and personalized learning in the classroom.

Instructional Focus and Professional Development

Recommendations

Best Practice: *School system leader's budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.*

Review documented expectations for the level of content/rigor for elementary students and determine appropriate minimum standards for remote learning instruction time.

Team Building and Staffing

Commendations

Best Practice: *School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program.*

Tech Paras have embraced new roles supporting help desk inquiries from students and parents in remote locations while showing a willingness to adapt and change as needed to support the technology deployment.

Team Building and Staffing

Recommendations

Best Practice: *School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program.*

Major implementations should be led by individuals trained in project management and the district should adopt a common project mgt. methodology.	Continue to encourage managers to work with entry level DMTS staff members to develop their skills and certifications.

Team Building and Staffing

Recommendations

Best Practice: *School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program.*

Share the business case for centralized technology services with stakeholders with a new service level agreement and clear service expectations that are superior to the building-based model.

Stakeholder Focus
Commendations

Best Practice: *The school system builds trusting relationships with all stakeholders.*

Inclusion of staff from all levels of the district in the Peer Review process symbolizes the administration's commitment to continuous improvement.	The school district uses stakeholder groups to review district technology ideas.

Stakeholder Focus
Recommendations

Best Practice: *The school system builds trusting relationships with all stakeholders.*

The school district should review its technology documentation to ensure that it is easily accessible (centralized) and consistent in how it addresses different processes.

Infrastructure

Commendations

Best Practice: *The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.*

Internet connectivity is sufficiently meeting the needs of the district and well positioned to meet future needs with flexible bandwidth access of up to 10GB.	DMTS has a swap out model for Chromebooks with 10% of total devices serving as spares so that students do not have down time.

Infrastructure

Recommendations

Best Practice: *The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.*

Continue to monitor the success of the BYOD program and the related return on investment as the distribution between school issued devices and BYOD devices shifts.	DMTS should lead district technology initiatives through careful collaboration across departments.

Infrastructure

Recommendations

Best Practice: *The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.*

Proactively evaluate the benefits of newer technologies in support of remote learning versus the bandwidth and hardware requirements as a part of the planning process.

Information and Data Management

Commendations

Best Practice: *The school system manages the data programs that are needed for operations and instruction.*

The school district has implemented seamless and efficient data sharing between most applications.

Information and Data Management

Recommendations

Best Practice: *The school system manages the data programs that are needed for operations and instruction.*

Evaluate the use of transparent dashboards to measure and report performance against associated key performance indicators. Assign accountability for integrating district wide dashboards to the Technology department.	Create a long term plan for data management to ensure all data is appropriately stored securely, preferably in the student information system.

Communications Management

Commendations

Best Practice: *The school system manages the platforms and messages used to communicate transparently with internal and external stakeholders, effectively using both emerging and mature technologies as appropriate.*

The Communications Department is working to be more effective and compliant with ADA requirements.

Communications Management

Recommendations

Best Practice: *The school system manages the platforms and messages used to communicate transparently with internal and external stakeholders, effectively using both emerging and mature technologies as appropriate.*

There is commercial software available to identify broken links on a frequent basis. We encourage continued use of this feature on a frequent basis with the transition to a new website.	Standardize the parent user experience.

Business Management

Commendations

Best Practice: *The school system manages budget, financial operations, disaster recovery, and business continuity effectively.*

The school district backs up all data onsite and offsite thus protecting data integrity and providing a reasonable defense against cybersecurity threats.	The school district provides reasonable funding for technology management and network security initiatives.

Business Management
Commendations

Best Practice: *The school system manages budget, financial operations, disaster recovery, and business continuity effectively.*

The school district has developed a sustainable model for supporting Chromebook repair costs.

Business Management
Recommendations

Best Practice: *The school system manages budget, financial operations, disaster recovery, and business continuity effectively.*

Establish a goal of moving to a single inventory repository with standardized data reporting.	Evaluate the migration plan of digital content to prepare for a potential impact on technology budgets and hardware capabilities.

Q&A?

PEER REVIEW
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Peer Review Services for the

Edina Public Schools

November 4, 2020

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About CoSN

CoSN is the premier educational technology leader for K-12 schools in the United States and is quickly becoming recognized as an international resource for K-12 ed tech information. For 28 years, the Consortium for School Networking (CoSN) has provided leaders with the management, community building, and advocacy tools they need to succeed. Today, CoSN represents over 13 million students in U.S. school districts and continues to grow as a powerful and influential voice in K-12 education.

CoSN empowers educational leaders to leverage technology to create and grow engaging learning environments. We envision a world where the unique potential of individual learners is fully realized and where education is transformed and improved through visionary, strategic technology leadership.

CoSN assembled a four person team to interview Edina Public Schools Stakeholders. Reviewers were selected based on their experience in leading and managing technology functions and their familiarity with the CoSN Digital Leap Framework for School System Technology Success and its representation of industry best practice. The Team included a facilitator, two reviewers and a reviewer/editor. Team bios are provided in Appendix 1.

Project Goals

The Department of Media and Technology Services (DMTS) from Edina Public Schools engaged CoSN to perform a peer review of technology processes deployed by the school district for purposes of documenting current technology practices and aligning these practices to best practices.

Peer Review Process

The review team collected a number of documents related to district operations, technology and planning. A list of documents requested is provided in Appendix 2. These documents and web resources were evaluated prior to stakeholder interviews to provide the review team a better understanding of district planning,

processes, and operations. The team interviewed technology staff, principals, district administrators, and other key technology stakeholders. Interviews were designed to investigate processes and not people. While a peer review may comment on the role of a functional unit within the school district, the review is not intended to be used to evaluate individual performance.

- Candid discussion was encouraged, and participants were assured that all attribution in this report would be presented anonymously.
- Recommendations presented by the team represent common themes reported across departments and supported by evidence. Statements made by one individual do not represent a verified theme while statements made by three or more individuals are more likely to represent a theme that is shared in this report.
- Themes are linked to the CoSN Digital Leap Matrix so as to provide an alignment to known best practice.
- A survey of all stakeholders identified as a part of the process was conducted in advance of the visit to assess the general understanding of technology processes within the school district. This survey data is included at the top of each of each of the ten Matrix categories. In general, there was very little disagreement between stakeholders in these survey results.
- This report presents 43 commendations and recommendations, and it is intended to be a starting point for additional planning. It is our suggestion that cross functional collaborative teams be established to review and create an action plan to address areas that may benefit from improvement.

CoSN Peer Reviewers interviewed stakeholders at Edina Public Schools on October 19-20, 2020. As a part of this process 66 District stakeholders were interviewed in departmental groups as noted in Appendix 3 (this includes the Parent Leadership Team with 19 parents). In this report commendations and recommendations are supported by evidence which is either an observation or a direct unattributed quote. Recommended actions represent the opinion of the Peer Reviewers as ways to address the observations. CoSN and other resources are identified to in each section in support of recommended actions.

The CoSN Peer Review is unique in its use of the talents of sitting K-12 ed-tech leaders. These experienced individuals are immersed in the unique challenges managing K-12 education technology on a daily basis. CoSN uses its own matrix developed by a group of national ed tech leaders as the basis for evaluating digital capabilities.

Recognizing the unique challenges of K-12 education, CoSN developed the *Digital Leap Success Matrix* in 2015 to support their efforts in the 21st century. This Matrix outlines the practices needed to be a successful digital school system and the CoSN Peer Review process uses this Matrix to determine how a school system aligns to best practices identified by peers who have successfully converted to a digital environment. The Matrix is a public document and shared in Appendix 4.

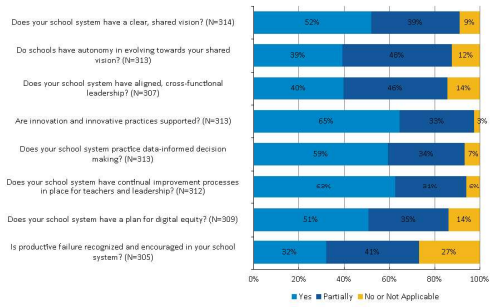
- ***Leadership and Vision*** The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use.
- ***Strategic Planning*** School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.
- ***Ethics and Policies*** The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.
- ***Instructional Focus and Professional Development*** School system leaders budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.
- ***Team Building and Staffing*** School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program.
- ***Stakeholder Focus*** The school system builds trusting relationships with all stakeholders.
- ***Infrastructure*** The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.

- ***Information and Data Management*** The school system manages the data programs that are needed for operations and instruction.
- ***Communications Management*** The school system manages the platforms and messages used to communicate transparently with internal and external stakeholders, effectively using both emerging and mature technologies as appropriate.
- ***Business Management*** The school system manages budget, financial operations, disaster recovery, and business continuity effectively.

In general, the Edina Public Schools compared favorably with other school districts using the CoSN Peer Review Service. Many school district technology operations continue to struggle with funding, staffing, bandwidth and interoperability issues. We did not see large scale problems in any of these areas, thus allowing the school district to focus their efforts beyond the basic elements as described in our report.

Leadership and Vision

Best Practice: *The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use.*



Commendations

School district stakeholders are united behind technology leadership and have expressed enthusiasm about how the school district has managed a very quick conversion to remote learning in the Spring of 2020 coupled with hybrid classroom work in the Fall.

Supporting Observations:

- "Leadership of DMTS (Dept. of Media and Technology Services) was outstanding and continues to be outstanding. The staff has worked tirelessly to ensure students were able to do what was expected."
- Teaching and Learning added a new coordinator to align remote learning as a result of Pandemic needs.
- The department is very responsive to student needs.
- "DMTS is amazing at problem solving and handling tickets."
- "High marks to <DMTS> on the pivot to distant learning"

The school district should ensure a qualified technology leader continues to be represented at the cabinet level to provide strategic vision and lead all technology initiatives.

Supporting Observations:

- The current technology leader in Edina Public Schools oversees both technology administration and the instructional technology teams.
- This is a best practice as identified in COSN Digital Leap Matrix. In a regional peer group of school districts which includes Minnesota, Iowa and Wisconsin, 55% of district technology leaders are in the Executive Cabinet and 48% report to the Superintendent. In this same peer group, 81% of these leaders supervise both technology and instructional technology staff (Source: 2019 CoSN IT Leadership Survey).

Recommendations

School District leaders support innovation and risk taking by encouraging teaching innovation and the senior leadership team expressed their support for the concept. Productive failure, which is sometimes an outcome of experimentation is tolerated by the leadership. Several stakeholders shared that the community is less forgiving of failure.

> We recommend that school leadership develop a plan to remove barriers to innovation and risk taking in remote learning which already is a highly focused topic in the current pandemic. This may include an education program and public discussion designed to present the potential benefits around innovation to determine an appropriate path forward.

Supporting Observations:

- "Innovation is a hallmark of our district, though it does need to be thoroughly vetted so we don't take undue risk." <School Administrator>
- "The District allows you to fail, but the parents don't."
- The survey distributed to stakeholders in advance of the review indicated that Director level and above respondents were confident that productive failure was at least fully or partially supported (100%) while all survey respondents were less certain (73%).
- District faculty and staff all have access to "Innovation Days" which features an effort to showcase some of the newer ideas teachers are introducing into their instructional methodologies.
- "Our ability to leverage technology is going to be one of the benefits of COVID."
- The school district is leveraging collaboration across schools to bring those teachers new to remote learning up to speed by creating mixed experience cohorts to raise the full understanding of the entire group. Schools are working on consistency of instruction, but it is very hard. They report that they have had great turnout in these sessions.

Continue to build toward full alignment between DMTS and Teaching and Learning. This is critical for the ongoing success of remote learning.

Supporting Observations:

- The Teaching and Learning groups met monthly prior to March 2020 and now they are meeting more frequently to align technology and instruction planning.
- "It feels like tech is driving the bus and instruction is following."
- "How do we better engage students using technology? Technology is the tool but learning is our focus."
- The pandemic has forced school districts to move toward remote learning hybrid teaching models faster than may have originally been planned. Students, teachers and parents all commented on a need for more student interaction and engagement in the remote learning environment. Some of the ideas shared by this group are provided in Appendix 5.

DMTS has created a list of approved applications for faculty to use. Applications that are not on this list require parental notification for each individual user if the app collects student data. While not encouraged, schools are not prohibited from purchasing software and bypassing existing evaluation processes.

> DMTS should take a more centralized role in the approval of all software and applications used to ensure that purchases are compatible with existing equipment, meet student data privacy standards, do not pose a cybersecurity threat to the organization and to assess the financial and human resources required to provide both interoperability linkages with other systems and tech support.

Supporting Observation:

- "We like to think we're all the same, but all six elementary schools are completely different."

- DMTS does not have absolute authority over their list of unapproved Applications, thus they are not in a position to standardize how different schools approach instruction.
- "Edina Apps," was a list created by DMTS with applications vetted and approved by the department and applications not approved by the department. If a faculty member chose to use an unapproved application, they would be asked to seek written permission from parents of each student using the application.

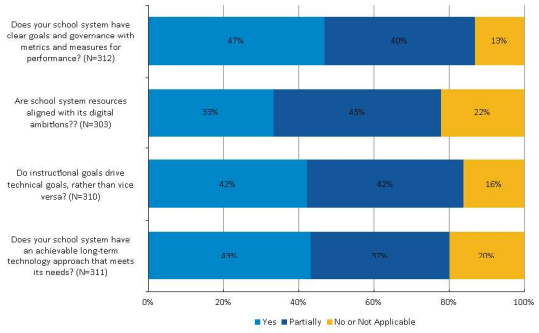
Recommended Resources:

Superintendents can make or break any or all educational technology initiatives. They are responsible for ensuring that their school districts embrace transformative digital learning. CoSN collaborates with superintendents to assess their challenges and increase their capacities to lead technology efforts. The Empowered Superintendents Toolkit is done in partnership with AASA.

> Rate your senior leadership team to determine your readiness to implement effective edtech learning environments in your school system. (Attached)
>
> District Leadership Team Assessment (Attached)
>
> CTO Self-Assessment (Attached)
>
> Superintendent Self-Assessment (Attached)

Strategic Planning

Best Practice: *School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.*



Commendations

The school district just completed a five year strategic plan for 2020-2025. There are technology elements embedded in the strategic plan.

Supporting Observations:

- The CoSN Digital Leap Matrix identifies this best practice as follows:
- Possess a high-level view across the organization and work with teams to identify steps needed to transform the educational and operational technology vision into a strategic plan in alignment with the organization's mission, vision and goals.
- The district has taken a flexible stance with the plan with the recognition that there may be future adjustments based on current environmental variables.

The District is developing higher level dashboards through the LearnersEdge program to begin the process of tracking key performance indicators that measure many different aspects of performance.

Supporting Observations:

- The student profile is at least partially available now.
- There are additional plans to create teacher-level dashboards and then school and district perspectives. This learner-centric focus is commendable.

Recommendations

Review what remote learning means to different teachers:

Review and promote standards for how long students are engaged online that balances learning needs with screen time.

How are students actively engaged online and offline and how are the most successful forms of engagement institutionalized?

Supporting Observations:

- "We tapped into the collaborative culture of our organization to drive a remote curriculum. This is still a challenge for K-3. How do you have that contact with a student in the classroom that doesn't know how to read?"
- "I definitely feel for the teachers right now as some of them are clearly struggling with remote learning." <Student>
- "There is no opportunity to build a personal relationship with my teacher when it is all remote. The amount of content we are learning is pretty much the same. You do have the opportunity to learn the same remotely." <Student>
- "There is no uniformity in use of Schoology, so even though we have standards, they are waived far too frequently. Why do we have standards then?"
- "Schools are working on consistency of instruction, but it is very hard."
- "What has worked the best are breakout rooms that allow students to interact in smaller groups. What doesn't work well is when the teacher points their computer at the board trying to unite both in person and remote students in a presentation." <Student>
- "We have become more responsive to the needs of teacher professional development in this new environment." Professional development for teachers is available every Wednesday.

Review the district strategic plan as a guide to define and communicate the role of technology in instruction, both as a method for delivering instruction and as a tool to improve student learning.

Update the technology-focused strategic plan to guide upcoming decisions for purchasing, support, and staffing. As stated in the district strategic plan, "Complete a comprehensive review of technology used by students and staff."

While an appropriate role of technology may be assumed where it is not specifically mentioned, stakeholders would benefit from guidance on the district's vision of technology's role in instruction.

Supporting Observations

- Strategy C of the strategic plan, to "Foster Positive Learning Environment and Whole Student Support" includes goals for healthy lifestyles with technology. The district's endorsement of digital citizenship advances this goal well. Strategy A, to "Advance Academic Excellence, Growth and Readiness" addresses goals for a comprehensive curriculum and educational experiences without mentioning the role of technology.
- Strategy C of the plan, #6, calls for the comprehensive review of current technology. The district will benefit from this analysis, as the list of presently supported hardware and approved applications is lengthy. The current tendency for schools to purchase additional items that are not always fully supported by DMTS adds to the breadth of technology in use.
- The technology plan currently published on the Edina website was last revised in 2014.

Create a separate technology plan that leverages technology to meet or exceed district goals with the 2020-2025 strategic plan timeframe using Key Performance Indicators appropriate to each phase of the deployment.

Identify successes in remote learning implemented during the COVID era that should be carried forward into future years.

Define success metrics for each initiative and create dashboards that track these metrics.

Define the intended trajectory for BYOD versus district issued devices over time if it is expected to be modified over time.

Supporting Observation:

- The school district was in a position of adopting first full remote learning and then hybrid learning very quickly in response to the COVID-19 pandemic. Overnight DMTS responsibilities increased geometrically when they went from supporting 9 to 1100 buildings. Teachers are adapting to different ways to engage with students. There are successful practices from this period that should be identified and integrated into teacher professional development plans for future years.

Recommended Resources:

A structure for digital learning visioning, planning, and implementation focused on Personalized Student Learning.

The Future Ready Framework

Intel has assembled a collection of remote learning tips for educators.

Educator's Guide to E-Learning

To help school leaders keep pace with current research and educational practices, the K-12 Blueprint offers toolkits to help support technology initiatives.

K-12 Blueprint

This document articulates a vision of equity, active use, and collaborative leadership to make everywhere, all-the-time learning possible.

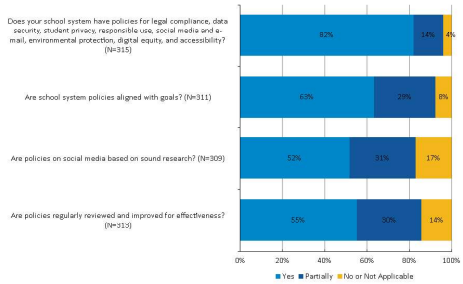
National Education Technology Plan

This guide provides practical, actionable information intended to help district leaders (superintendents, principals, and teacher leaders) navigate the many decisions required to deliver cutting-edge connectivity to students.

Future Ready Schools Building Technology Infrastructure for Learning

Ethics and Policies

Best Practice: *The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.*



Commendations

Remote learning has highlighted an existing digital equity gap for many school districts and the Edina school district has responded to a need that some disadvantaged families have with home access to the internet. The district has established a partnership with a cable provider and secured 100 hotspots for families that do not have easy access to the internet.

Supporting observations:

The response to COVID was outstanding but it does highlight that maybe we weren't doing enough prior to COVID to meet Digital Equity needs."

- Ninety-five percent of school districts surveyed on a nationwide basis agree that closing the digital access gap is one of their higher technology priorities according to the 2019 CoSN IT Leadership Survey.
- Stakeholders indicated a commitment to ensuring that every student has access to the internet. A staff member shared a story of sharing two hotspots to a larger lower income family that was having difficulty with bandwidth constraints.
- The district is responsive when they locate a family with home connectivity issues. Four years ago the district began working with cultural liaisons to proactively contact families that were suspected of having limited or no access to the internet from home.

The school district is bridging the digital equity gap by adding Spanish and Somali language capabilities to key public interfaces.

Supporting Observations

- The school district has three coordinators that focus on underserved populations representing the needs of these populations in all areas of the district management.
- The Student Information System has Spanish language capabilities which make it easier for families to enroll in the school district. Somali translation support is under development.
- The school district uses a language service to ensure that other communications needs are addressed as needed.
- The single sign-on access portal should also reflect similar multilingual capabilities where possible. "I work with multilingual parents or parents

who need translation and interpretation and I know they find it very hard to access or use the portal."

The school district recognizes the need to maintain up-to-date policies and is working to ensure that most technology policies are in place. The following policies were reviewed. There are no modifications suggested.

Supporting Observations:

Social Media.
- Public Relations and School Communications
- Electronic Acceptable Use Policy Appendix III, IV, V

Acceptable use.
- Electronic Acceptable Use Policy

Student data privacy.
- Protection and Privacy of Student Records
- Log on as agreement
- Tool Checklist for teachers

Email communications.
- Electronic Acceptable Use Policy

Records retention.
- Records Retention

Password policies.
- User guidelines

Network security including ransomware.
- Incident Response

- Response to phishing email

Student device policies.
- Electronic Acceptable Use Policy

Inventory, Equipment and Applications.
- SLA for personal devices
- Device guidelines
- Tool Checklist for teachers

The school district routinely implements a curriculum for digital citizenship education with a defined curriculum and dedicated instructional time focused to prepare students for engaging in a digital space. Ensure that the program can be consistently presented across schools.

Supporting Observations:

- Digital citizenship is identified as a priority in the strategic plan and is blended into the learning curriculum.
- "We do a great job with Digital Citizenship and we have an opportunity to include other members of the family in a "boot camp" program. Two years ago, based on feedback, we shifted the program to include additional family members."
- The Program is only as good as the individual presenting the program. Not all media personnel are able to present this information in an effective and consistent manner.

Recommendations

The school district should continue to improve their cybersecurity and student data privacy practices.

The school district follows NIST standards and the CCPA framework to manage student data privacy and successfully completed a cybersecurity audit of workstations in Fall 2019.

The school district may benefit from participating in the (TLE) Trusted Learning Environment Seal which is a student privacy framework developed by CoSN with support from both the Bill and Melinda Gates and Michael and Susan Dell Foundations. The TLE offers a structured and rigorous approach to privacy policy development. Achieving the seal has been described by participating school districts as a significant achievement (additional information is shared in the resource section).

Supporting Observations:

- In a regional peer group of school districts which includes Minnesota, Iowa and Wisconsin, 58% of district technology leaders report using a proactive strategy and 6% report using a reactive strategy toward cybersecurity (Source: 2019 CoSN Infrastructure Survey).
- The school district currently educates school personnel on proper security procedures with phishing email drills. One staff member noted that it seems like there is a big phishing problem from outside the district.
- DMTS stakeholders were not aware of any serious cybersecurity events over the last two years.
- DMTS staff are working on written contingency action plans detailing a district response to different types of attacks.
- The District uses deep threat protection to identify phishing attempts.

Recommended Resources:

Student access to robust digital tools is key to their success as 21st-century citizens. Yet many students from economically disadvantaged families have limited access to these tools both at school and at home. CoSN has created a toolkit to assist Districts in addressing this issue.

Digital Equity Toolkit (Attached)

Educators and policymakers are increasingly realizing the potential in using student data to make informed decisions. But even with all that potential, balancing technology advances with the need to protect student privacy and data is a major challenge.

Protecting Privacy Toolkit (Attached)

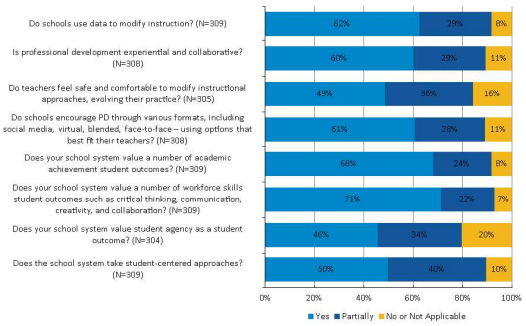
Trusted Learning Environment (TLE Seal)

Technology leaders and policymakers need to protect their networks and information security, analyze their current status, and validate what they are doing well.

Cybersecurity Toolkit (Attached)

Instructional Focus and Professional Development

Best Practice: *School system leaders budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.*



Commendations

The current leadership has clearly identified a renewed focus on implementing effective and contemporary approaches to instruction and professional development.

Supporting Observations:

- The current hybrid schedule includes significant opportunities for teacher collaboration and professional development every Wednesday.
- Teachers report tremendous value in having this dedicated time to build their peer relationships across the different schools.
- "Learning new things in Wednesday sessions that we have always been talking about. She loves it."

The school encourages innovative practice with an annual innovation day allowing for the sharing of original ideas with others.

Many comments in the reviewer interviews were focused on a consistency of student engagement in remote learning. This should be an effort that is collectively defined and reinforced collaboratively by faculty groups across schools.

How do you enrich this experience and take this to the next level with sharing between schools?

Supporting Observations:

- Principals believed that DMTS should continue to lead this effort and work with teachers to be more innovative.
- Several schools have created their own times for encouraging teachers to work with colleagues on technology and integration topics. There is a desire for this type of peer instruction coordinated at the district level.

- "Our ability to leverage technology is going to be one of the benefits of Covid."

Recommendations

Review consistency and implementation of the Learning Management Systems to improve the user experience.

Review the layout consistency in the Learning Management Systems to help students/parents navigate the software more efficiently and develop a common template for users.

Work with building leadership to support their teachers on the consistent use of these standards.

Encourage teachers to be consistent with calendar use, explaining to students what is needed when and where it can be found.

Supporting Observations:

- Parent bootcamps for their use of Schoology and other technologies were offered pre-pandemic, and now several online resources are available to assist users in managing the learning management system.
- There is a lack of consistency in the use/layout of Schoology as this student observed,"Some teachers' remote lessons are very basic - click through a slide show without a lot of work/content. Others assume you have lots of time and they provide a lot of work."
- Teachers are doing a good job of trying to keep the kids organized. One mom appreciates Schoology's ability to keep her better informed of what is going on in her son's school day. It requires effort by both to navigate through Schoology. She worries about students without that parent help.
- School District staff is aware of a certain level of student frustration in adapting to both the learning management system and an extended

duration remote learning. Some users have given up in trying to find material in Schoology as it is too difficult to navigate. DMTS created additional documentation to aid these users in response.
- "I would love to see the district/administration require a standard for all teachers to post even a daily calendar prior to class beginning. I know for my two at the high school, there are classes that the teacher doesn't post ABA or assignments until after the class is over. That becomes horribly stressful to work that ABA in before the due time when your student doesn't have a student prep before the end of the day."
- "There is no standard at the high school level for teachers to organize their schedules. Each teacher is exploring how to communicate their schedules. Standardization would be appreciated."
- "The success of the portal is dependent on individual teacher participation."
- School leadership has set Expectations on use of calendars in the Learning Management System, but the review team heard feedback that there was not consistency in execution.

The school district should build the capacity of building leaders to model and mentor professional staff with research based effective approaches to the integration of instructional technology and personalized learning in the classroom.

COVID forced a rapid transition to full remote learning and then various hybrid remote and in person learning combinations. Consult with Districts that have successfully implemented a full 1:1 strategy to ensure an ongoing improvement process. Examples of School Districts that have been successful in efforts with contact information is available in the resource section.

There are teachers within the school district who are successfully engaging students through remote learning.

Develop a plan to communicate the value of personalized learning.

Ensure students, teachers and parents fully understand this initiative.

Supporting observations:

- Education Technology leaders (67%) say that the greatest challenge they face in implementing digital learning or expanding technology use is motivating teachers to change their traditional instructional practices to use technology more meaningfully with students (CoSN Mobile Learning Insights).
- The School District is focused on and would like to focus more on personalized learning. We did not sense that staff fully understand this effort.

Review documented expectations for the level of content/rigor for elementary students and determine appropriate minimum standards for remote learning instruction time.

Multiple stakeholders reported that there is a minimal investment in remote learning time at this level.

There were reports of students requiring parental support to complete their lessons which leads to an even larger learning deficit for those children without proactive parental support.

Supporting Observations:

- There were multiple reports of a day's work being done within an hour. The parents felt they were left to design additional educational activities for their child to fill the morning or rest of the day.
- Parents with multiple siblings in different grade levels observed the differences in online time between their children.
- Students are craving more time to interact with their classmates.

Recommended Resources:

This infographic illustrates a digital transformation.

Digital Transformation Infographic

Mobile learning implementations run the gamut of using devices to support existing pedagogies, replacing paper and pencil with keyboard and stylus, to inventing new pedagogies, in particular those that are socially based. The Mobile Learning Overview lists some current uses of mobile devices for teaching and learning.

Ask most schools and districts why they are launching a new technology Initiative and their answer is likely to be about what they are doing rather than why they are doing it.

Technology Implementation in School Systems: Starting with the Why

Learn from pioneering districts how they have dealt with their thorniest problems in mobile learning implementation.

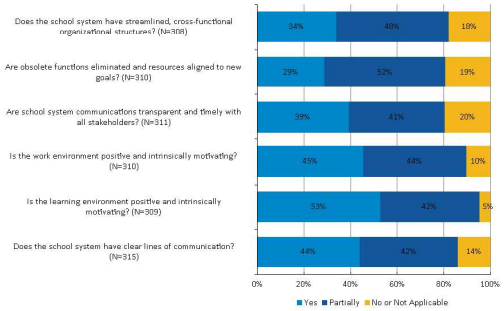
Advice from Districts: Mobile Learning Insights

The Remake Learning Playbook is an ambitious project to open source the project code for learning innovation ecosystems.

Remake Learning Playbook

Team Building and Staffing

Best Practice: *School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program.*



Commendations

Tech Paras have embraced new roles supporting help desk inquiries from students and parents in remote locations while showing a willingness to adapt and change as needed to support the technology deployment.

Monitor Technician staffing against functional areas for alignment to projected needs.

Supporting Observations:

- In a regional sample which included school districts in Minnesota, Iowa and Wisconsin, an average of 11 techs are used to support 10,000 on average. Edina Public Schools deploys 10 FTE technicians and external services to support 11,959 devices while outsourcing most repairs. The school district supports an additional 5,420 BYOD devices on a more limited basis without providing break fix services. (Appendix 6).
- The school district has redeployed tech paras from direct assignment to a building to assist in addressing four times as many helpdesk tickets from the prior year at this time. Currently these teams are successfully supporting both school buildings and connectivity and devices in student's homes.
- Formally the school district does not support the Mac OS (They do support IPADS), but they are providing assistance for basic needs with these machines in the moment.

Recommendations

Major implementations should be led by individuals trained in project management and the district should adopt a common project management methodology. The LearnersEdge deployment seems to lack ownership and a coordinated implementation plan. While it may be a relatively new initiative, it does not yet have universal support from all stakeholders and will require additional effort to "sell" the value of this program.

Staff skilled in project management from within DMTS should manage integration with other systems.

DMTS should identify how the data is collected and managed. For example, should LearnersEdge serve as the primary repository for data or should

student data be transferred from Infinite Campus to support data managed by LearnersEdge?

Supporting Observations:

- The LearnersEdge platform is expected to track strategic plan goals when completed. It will begin by tracking student metrics with learning profiles presented in a dashboard format and currently available to students and parents. There are additional plans to add governance and principal dashboards to consolidate data needed by these groups.
- Senior staff were enthusiastic around the potential benefits of this system while other district staff were not aware of the objectives of LearnersEdge and did not understand the value.
- The School District is using LearnersEdge in a way that it was not originally designed. The program developers do not fully understand the tables in Infinite Campus, and this is the root of a problem with Assessment data that is fed into LearnersEdge and does not translate well to Infinite Campus resulting in data reports that are incorrect without extensive manual manipulation.
- The system is unwieldy because there is a lack of discipline around its development and deployment.
- "There is not clarity around who is making decisions and how this information is uploaded. Reporting <linked back through Infinite Campus> is not accurate. Not sure why <the two systems> are not working together."

Continue to encourage managers to work with entry level DMTS staff members to develop their skills and certifications.

Current practice is for DMTS team members to each have personal development plans that are monitored to ensure that staff are seeking the

training required to stay current in their profession. This is especially important in a quickly changing technology field.

Supporting Observations:

- Out of three lower level technology staff we spoke with, only one was fully engaged in the department's pledge to support certification and continuing education. A second employee had heard of this support and the third was not aware of this support. Technology related certifications are listed in Appendix 8.
- Incorporate best practices in the evaluation process. CoSN's evaluation tools are free resources available to evaluate the full technology leadership team.
- Encourage qualified team leaders to earn the CETL designation. Only the Director of Technology and Media Services has attained the CETL designation. This is a widely accepted certification for IT leaders in K-12 education, with a network of more than 500 CETLs domestically and abroad. CoSN offers free assessment tools for the evaluation of technology staff and the Chief Technology Officer.

The school district has redeployed tech paras from direct assignment to a building to assist in addressing four times as many helpdesk tickets from the prior year at this time. Currently these teams are successfully supporting both school buildings and connectivity and devices in student's homes.

School-based staff have noticed this change and view the current model as less convenient than having tech paras assigned to a building.

If DMTS believes that managing tech paras on a need basis is more effective than assigning this staff to buildings, then this business case

should be carefully shared with the stakeholders with a new service level agreement and clear service expectations that are superior to the building-based model. Fully enforcing the ticketing policy will continue to build a data case for a needs based system.

Supporting Observations:

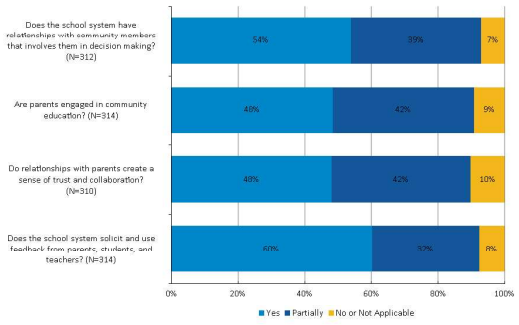
- "Would like to see tech paras in each building as well as more training wikis."
- With the tech paras no longer stationed at the school, staff requests often go to the media person who then feels obligated to work on the issue even if it would more appropriately be done by the tech para. A clearer understanding of the service level agreement may help staff and media personnel to know when the tech para will be available for assistance.

Recommended Resources:

Rate your senior leadership team to determine your readiness to implement effective edtech learning environments in your school system (Attached).

Stakeholder Focus

Best Practice: *The school system builds trusting relationships with all stakeholders.*



Commendations

The school has demonstrated their commitment to all stakeholders by providing the opportunity for a representative selection of stakeholders to be a part of the Peer Review process. Inclusion of staff from all levels of the district symbolizes the administration's commitment to continuous improvement.

Supporting Observation:

- Sixty Six Stakeholders were represented in twenty-three Focus Groups over the dates of October 19-20, 2020. Groups included not only district administrators, but also teachers, principals, high school students, school board members and parent advisory team members.

The school district uses stakeholder groups to review district technology ideas. This provides both continuous feedback from the community on existing and planned processes while also permitting district staff to communicate future plans to these community stakeholders.

Supporting Observations:

- Monthly parent leadership meetings are a positive part of a communication culture. The technology director is included on these calls at least once a year with greater frequency as the need arises.
- The Technology Advisory Committee includes district staff, students, building leaders and parents. The group meets on a quarterly basis and serves as a sounding board for technology planning.
- The Director of Technology updates the School Board twice per year and subcommittees of the Board as required.
- The school district distributed surveys to parents and students to collect their input into the strategic planning process.

Recommendations

The school district should review its technology documentation to ensure that it is easily accessible (centralized) and consistent in how it addresses different processes. Currently the district is using Technical wikis to document its processes.

Supporting Observations:

- The review team noticed Audio Visual procedures that appeared to not be included in the hierarchy of the main technical wiki.
- DMTS Website documents include an out-of-date tech plan from 2011-2014.

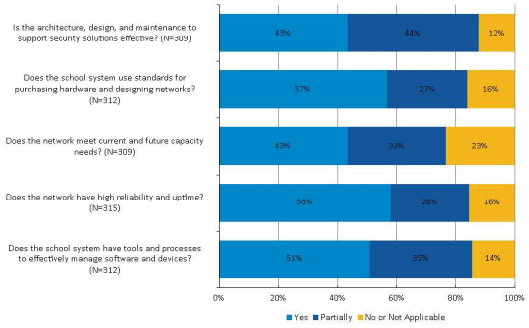
Recommended Resources:

The Smart Education Networks by Design (SEND) Initiative provides Districts with resources to help them navigate the shift from old networks to modern, resilient, flexible networks that support the increasing demands of teaching and learning.

Send Checklist for the K-12 CTO (Attached)

Infrastructure

Best Practice: *The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.*



Commendations

Internet connectivity is sufficiently meeting the needs of the district and well positioned to meet future needs with flexible bandwidth access of up to 10GB.

Supporting Observations:

- The school district has Fiber connections of 10Gbps that will adequately support the district's future WAN needs and internet access of 3 Gbps with the ability to dynamically increase access to 10 Gbps as needed. Fifty-two percent of respondents within a regional peer group of school districts in Minnesota, Iowa and Wisconsin have at least a 10Gbps fiber connection between buildings (Source: CoSN 2019 Infrastructure Survey).
- The FCC has a stated interest in ensuring affordable access to high-speed broadband sufficient to support digital learning in schools and robust connectivity for all libraries. Connectivity speeds of 1 GB per 1,000 students per school is a national long term goal set by the Federal Communications Commission for students. For example, a school with 8,500 students and a mature 1:1 implementation would aspire to having access to 8.5 Gbps of connectivity. Forty-two percent of respondents within a regional peer group of school districts in Minnesota, Iowa and Wisconsin aspire to maintaining access that is at least this high (Source: CoSN 2019 Infrastructure Survey).

The school district has developed a swap out model for Chromebooks with 10% of total devices serving as spares so that students do not have down time. While this process has been modified to comply with COVID-19 best practices, it is a reasonable set aside to account for breakage and repair needs.

Supporting Observations:

- The Peer Reviewers have adopted this standard within their districts.
- Application updates are distributed to students on a timely basis to ensure that devices continue to function as efficiently & safely as possible.

Recommendations

Bring Your Own Device (BYOD) was selected based on its superior return on investment to the district. This strategy appears to be working for the district. Continue to monitor the success of the program and the related return on investment as the distribution between school issued devices and BYOD devices shifts.

Supporting Observations:

- In a peer group of Minnesota, Wisconsin and Iowa, 74% of the school districts responding to the 2019-2020 CoSN IT Leadership survey indicated that their district aspired to providing devices to all students whereas only 9% aspired to having a combination BYOD/district issued device program.
- A partnership with Best Buy is a key element of the program. Parents may purchase a device at a discount and the district subsidizes the device at the rate of $150 per device. Over a three year period the calculated savings to the school district is $401,425 over the anticipated cost of a school issued device program.
- The BYOD program is helping our students to take ownership of their learning as well as preparing them for college and personal responsibility.
- Using a BYOD model does require a technical staff that is able to address problems that may differ between devices, thus the tech support knowledge required to support devices from multiple manufacturers and with operating systems is more complex.

The Technology Department should lead district technology initiatives through careful collaboration across departments and functional areas in support of the adoption and implementation of technology in all aspects of school business with an exceptional focus on those initiatives that improve teaching and learning.

They should be cognizant of the communications channels down the hierarchy as some stakeholders felt their opinions were not represented in key decisions.

Supporting Observations:

- This stakeholder is seeking more collaboration with decisions made around remote learning. "Sometimes we are on the outside with regard to technology decisions."
- "It feels like tech is driving the bus and instruction is following."

Proactively evaluate the benefits of newer technologies in support of remote learning versus the bandwidth and hardware requirements as a part of the planning process.

Supporting Observations:

- Principals decided to use building money to purchase cameras to support live streaming when DMTS staff chose not to support the technology based on a valid concern about the privacy risks of video originating from a teacher's home.
- "I haven't thought about future technology needs and defer to DMTS leaders."

Recommended Resources:

CoSN continues its commitment to sharing high-quality trend reports that support the use of emerging technology in K-12 education to transform learning. In this initiative, a global advisory board of K-12 leaders, practitioners, and changemakers engages in discourse about the major themes driving, hindering, and enabling teaching and learning innovation at schools.

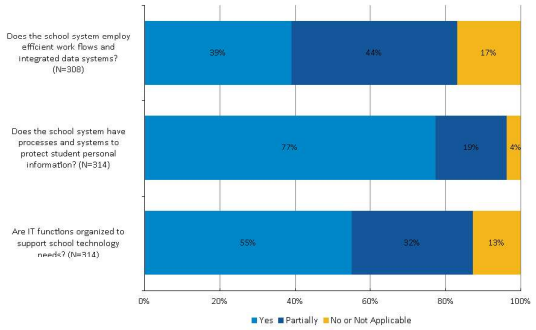
Driving K12 Innovation Toolkit (2020) (Attached)

Technology leaders and policymakers need to protect their networks and information security, analyze their current status, and validate what they are doing well.

IT Tools

Information and Data Management

Best Practice: *The school system manages the data programs that are needed for operations and instruction.*



Commendations

The school district has implemented seamless and efficient data sharing between most applications.

Supporting Observation:

- In general, the school district is able to facilitate the accurate and efficient transfer of data between major enterprise systems.

Recommendations

Evaluate the use of transparent dashboards to measure and report performance against associated key performance indicators. Assign accountability for integrating district wide dashboards to the Technology department.

DMTS should take the lead on the integration of all systems

Best practice is to have the Student Information System as the central repository.

Supporting Observations:

- The preferred platform for centralizing achievement dashboard, LearnersEdge, requires technology leadership in its integration with other key systems such as the Student Information System.
- The enrollment department reported that the transfer of data between the two systems had a high number of errors.
- Key Performance Indicators (KPIs) used to measure District performance in all areas of business management, including
- Technology, and associated calculations are available from the Council of Great City Schools are provided in Appendix 9.

Supporting Observations:

- The preferred platform for centralizing achievement dashboard, LearnersEdge, requires technology leadership in its integration with other key systems such as the Student Information System.

- The enrollment department reported that the transfer of data between the two systems had a high number of errors.
- Best practice is to have the Student Information System as the central repository.

Create a long term plan for data management to ensure all data is appropriately stored securely, preferably in the student information system, with an eye toward what will be needed for internal reporting purposes as well as for future state and Ed-Fi reporting.

Supporting Observations:

- The student information system is typically at the center of any student data efforts. In this case the SIS is not in the center. This could lead to integration challenges in the future.
- Information from special education systems are not transferring well to the student information system.
- Edfi data was reported as not transferring well from the student information system.
- The current configuration with LearnersEdge is not aligned to this design as information does not transfer well back to the student information system.

Recommended Resources:

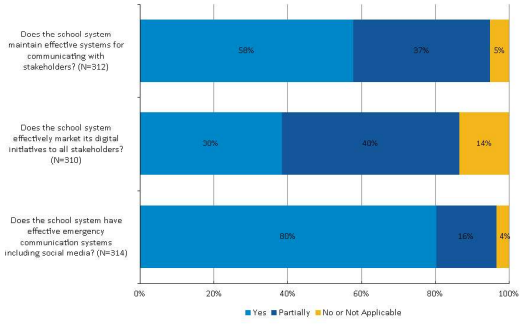
K–12 education institutions are increasingly looking to digital content and related e-learning technologies to meet evolving education needs and goals. Technology-based products, services, and resources are making positive impacts on education and are improving efficiency and outcomes in teaching, learning, and classroom and school management. And yet, as educators grow more

sophisticated in their use of technology, there are gaps in the integration and interfaces among disparate applications.

Interoperability Standards, Cost Calculator and Case Studies

Communications Management

Best Practice: *The school system manages the platforms and messages used to communicate transparently with internal and external stakeholders, effectively using both emerging and mature technologies as appropriate.*



Commendations

The Communications Department is working to be more effective and compliant with ADA requirements.

Ensure that the technology team continues to be involved in this process to ensure that proper student data privacy, cybersecurity and integration protocols are followed in the new implementation.

The RFP for a new website should retain the goal of attaining at least Level A-508 compliance and maybe more depending on the cost of doing this.

Supporting Observation:

- The communications department is working with DMTS to distribute and RFP for a new website that will meet useability requirements.

Recommendations

There is commercial software available to identify broken links on a frequent basis. We encourage continued use of this feature on a frequent basis with the transition to a new website.

Supporting Observation:

- The review team identified several broken links on the current website in a limited sampling of functionality on the home page, the tech para resource page and the help desk pages.

Continue to improve and standardize the parent user experience.

Supporting Observations:

- Parents expressed some frustration with having to access independent platforms for different information. For example, once they enter the parent portal they have to choose to either enter the Learning Management

System or the Student Information System depending on what they are seeking.
- "I cannot access the parent portal from my device. I need to be able to see <my child's> information."
- "I login to Schoology and Infinite Campus and can never figure out what is where."
- "The success of the portal is dependent on individual teacher participation."
- "Multilingual parents or parents need translation and interpretation and I know they find it very hard to access or use the portal."

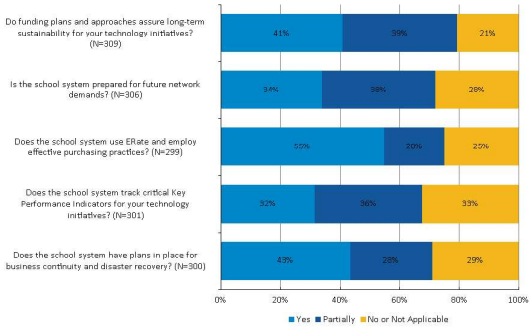
Recommended Resources:

Accessibility is essential for leveraging technology and providing educational opportunities for all students. Digital 508 compliance is a standard that ensures wider access to digital information provided to the public.

Digital Toolkit for 508 Compliance (Attached)

Business Management

Best Practice: *The school system manages budget, financial operations, disaster recovery, and business continuity effectively.*



Commendations

The school district backs up all data onsite and offsite thus protecting data integrity and providing a reasonable defense against cybersecurity threats.

Supporting Observations:

- Backups of enterprise systems are performed daily. As most applications are in the cloud, a disaster would not be as impactful as it might be in a full enterprise environment.
- Backup data is stored in two different offsite buildings.

The school district provides reasonable funding for technology management and network security initiatives.

Supporting Observations:

- The school district has a technology budget of $6.2m in 2019 which is 4% of the 2018-2019 total expenditure budget of $156m. A peer group of Minnesota, Wisconsin and Iowa school systems that participated in the 2019 CoSN Infrastructure Survey had an average technology budget of representing 2.0% of the school district expenditure budget.
- The school district spends $90k securing their network on an annual basis. This exceeds the average investment made by districts in the peer group of Minnesota, Iowa and Wisconsin which spend an average of 8% of their total budget on security. Based on a total infrastructure and non-instructional software budget of $1.08m, 8% would be $86k (Appendix 10).

The school district has developed a sustainable model for supporting Chromebook repair costs.

Supporting Observation:

- The district charges a flat fee of $30 for broken devices and when a device is lost or purposefully destroyed the district charges for the replacement cost. We have reviewed the basis for these calculations and concluded that

this is a sustainable model based on current breakage rates. If experience rates change then the model should be re-evaluated.
- Repair rates over the last 4 years are divided by the number of devices requiring repair over the same period of time. The resulting unit cost must be equal or less than $30 per unit for this to be a sustainable model.

Recommendations

The school district is able to print an up-to-date inventory of devices from a database (not a spreadsheet). While spreadsheets and databases are used to collect this information, one database is able to aggregate this data into a single report. Establish a goal of moving to a single inventory repository with standardized data reporting.

Supporting Observation:

- A modern asset tracking system assists with insurance reporting, budget planning, and equipment recycling. Use of a single database would simplify this process for all user/stakeholders.

Evaluate the migration plan of digital content to prepare for a potential impact on technology budgets and hardware capabilities.

Supporting observations:

- The school district is planning for digital textbooks as a part of the 2021 tech levy.
- While not identified as a pressing priority, there is a future digitization effort that would improve the effectiveness in facilities management. They suggested an effort to digitize blueprints that would allow engineers with easier access to these blueprints.

Recommended Resources:

Understanding the complete cost of your computing programs is a key step you must take before you can implement your strategic plan to provide better service for less. Total Cost of Ownership (TCO) is a methodology that allows you to measure and understand the costs of acquiring and maintaining all of your networks, computers, devices, and staff. A TCO assessment helps to set levels for annual budgets, determine the effects of proposed changes in IT staffing or restructuring of operations to migrate to cloud services, or similar.

Total Cost of Ownership Tools

Smart IT Technology Planning & Investment

Appendix 1 - Peer Review Team

Adela Dickey, CETL, Reviewer, Fort Wayne, IN

Adela Dickey is Director of Technology at Northwest Allen County Schools in Fort Wayne, Indiana in her 34th year with the school district. She began her career at NACS as a first-year high school math and computer science teacher when the district served about 3600 students in five schools. As technology needs grew along with the district itself, NACS named her as their first technology director. NACS now serves over 7800 students in ten schools, with another school opening in late 2020.

Adela leads a Technology Department of 18 to serve students and staff for all instructional and operational technology needs. Each NACS student in pre-kindergarten through grade 12 has a district-owned Chromebook or laptop assigned for use at school and at home. With the one-to-one devices and strong learning management systems already in place, teachers and students were able to quickly pivot to synchronous remote learning throughout the Spring, 2020, pandemic closing.

Adela earned her Certified Education Technology Leader (CETL) with the certification's inaugural class in 2012. She is active in CoSN, Consortium for School Networking, and their state chapter, Indiana CTO Council. She served on the council's board for five years, including two years as chair, and continues to work with their CTO2B program, a mentorship program for future education technology leaders. She has served as chair of HECC, Hoosier Educational Computer Coordinators, a state educational technology group, and on the board for UNITE, a student information system users group. She continues to lead with a regional study council group for technology staff and instructional coaches, and a state PowerSchool user's group, regularly presents at conferences for each of the groups.

Louis McDonald, CETL, Reviewer, Warrenton, VA

Louis McDonald is the Director of Technology for Fauquier County Public Schools. In his nine years of service with the 11,000 student division, he has been responsible for the migration to a new student information system, design and implementation for the GSuite roll-out, and oversight for the 1:1 Chromebook implementation in secondary.

Louis McDonald has over 35 years of experience in information systems management, software engineering, strategic planning and project management. Prior to joining the division, Mr. McDonald was the CTO/CIO at Virginia's Center for Innovative Technology (CIT). His areas of focus included workforce development; identifying trends, strengths and gaps in information security and emerging technologies; and working with universities and community colleges to ensure leadership and interaction with Virginia's information technology industry. Prior to joining CIT, Mr. McDonald worked at The Aerospace Corporation, where he served as a consultant to the federal government. He also has worked for SRA International, Inc. and Hughes Aircraft.

Mr. McDonald is CETL certified and holds a Bachelor of Computer Science from California State Polytechnic University, a Master of Computer Science from the University of Southern California, and a Master of Information Systems from George Washington University.

Jeri Ramos, CETL, Reviewer/Editor, Marion, IA

Jeri Ramos is the Executive Director of Technology Services at Linn-Mar Community School District since 2012. Her professional history spans several years and many positions from technical writer, corporate training, network specialist to Infrastructure Director. She has worked for a variety of corporate and education corporations including AMD, Intel, PG&E and CRST. Jeri has been a technology instructor for community colleges in California and Iowa. As a Cisco Certified Academy Instructor she served in multiple school districts, community based programs and community colleges. She has a Bachelor's Degree in

Business Management & Ethics and a Master's Degree in Information Technology. Jeri resides in Marion, Iowa with her husband and 2 children.

Robert Duke, CAE, Facilitator, Washington, DC

Robert Duke is Chief Operating Officer for CoSN (the Consortium for School Networking). In this capacity, he is responsible for membership services, certification, conferences and administration. Robert has worked in the non-profit community for more than 30 years serving in various roles for professional membership associations and trade associations primarily in the technology and educational sectors. Robert has previously served as Chair of the Networking and Nominating Committee for the ASAE Finance and Business Operations Council. He holds a Masters of Business Administration degree from the College of William and Mary and a Bachelor's Degree in Political Science from Hampden-Sydney College.

Appendix 2 - Documents Requested

1. Staffing
    a. School District Organizational Chart.
    b. Organization chart demonstrating all roles in the technology area. including all designated hardware mgt., software mgt., and digital coaches.
    c. Job descriptions for technology (administrative and instructional) staff.

2. Planning
    a. A current school district strategic plan with information relating to current technology goals.
    b. Instructional Technology Plan.
    c. Technology Master Plan.
    d. Technology Budgets.
    e. Historical feedback from students, parents and teachers regarding the 1:1 environment.
    f. Summary of top ten ticketing system requests over the last 12 month period.
    g. Current Key Performance Indicators currently in use by District to measure technology services.

3. Policies
    a. Social media.
    a. Acceptable use.
    b. Student data privacy.
    c. Email communications.
    d. Records retention.
    e. Password policies.
    f. Network security including ransomware.
    g. Student device policies.
    h. Inventory, Equipment and Applications.

4. Please Identify Enterprise Systems Used by the District
    a. Network Diagrams.
    b. WiFi & Broadband Support.
    c. Backup.

d. Student Information System.
e. Financial Management.
f. Parent billing portal.
g. Applications mgt.
h. Content Management System.
i. Transportation Scheduling.
j. Food Service Management.
k. Human Resources.
l. Identity Management.
m. Other Major Systems.
n. Identify outsourced IT services.

Appendix 3 - Stakeholders Interviewed

First Name	Last Name	Title
PLT	24 Participants	Parent Leadership Team
Tim	Anderson	Principal
Kristy	Ardinger	Teacher, Elementary
Jon	Baird	Communications Technical Operations Analyst
Andy	Beaton	Principal
Sean	Beaverson	Personal and Digital Learning Specialist, Elementary
Karen	Bergman	Principal
Tim	Berndt	Principal
Peter	Blackwell	Repair Tech
Gary	Bridges	Information Systems Specialist
Steve	Buettner	Director of Media and Technology Services
Jennifer	Christ	Student Information Systems, Enrollment
Bruce	Coles	Workstation and Desktop Support Specialist
Jody	De Ste. Hubert	Director of Teaching and Learning
Adam	Duffy	Systems Support, Online Testing
Tammy	Forby	Tech Operations Analyst-Repair Services
Greg	Guswiler	Coordinator, Information Systems
Eric	Hamilton	Director of Buildings and Grounds
Zach	Horn	AV Specialist
Abdikadir	Ibrahim	Somali Cultural Liaison
Curt	Johanson	Buildings and Grounds Manager
Thomas	Johnston	Network Manager
Marylin	Kuppe	Web based Systems Design Support Specialist
Mark	Lawerence	Technical Advisory Team Member
Nathanial	Lindley	Technology Supervisor
Mary	Manderfeld	Director of Equity and Enrollment
Albert	McGee	Equity & Inclusion Specialist
Diane	Morris	Student Information Systems, Enrollment
Tim	O'Neill	Technical Advisory Team Member
Max	Opitz	HS Student

Shandra	Prowell	Teacher, Music
Deb	Richards	Gifted Education Coordinator
Liz	Rosenthal	Repair Tech
Jack	Salaski	Instructional Technology Specialist
John	Schultz	Superintendent
Janie	Shaw	School Board Member
Randal	Smasal	Assistant Superintendent, Academic Services
Melissa	Stiegler	Technical Advisory Team Member
Ayomide	Last Name WH	HS Student
Ellie	Last Name WH	HS Student
Mason	Last Name WH	HS Student
Tully	Last Name WH	HS Student
Sara	Swenson	Media Specialist
John	Toop	Technical Advisory Team Member
Nicole	Tuescher	Director of Human Resources and Admin Svcs.
Mike	Walker	Personal and Digital Learning Specialist, Secondary
Leny	Wallen-Friedman	School Board Member
Krista	Winkel	Media Specialist
Mary	Woitte	Director of Communications

Appendix 4 - Digital Leap Matrix

The ***Digital Leap Success Matrix*** consists of three primary implementation categories for operational readiness in a digital environment. These categories of essential areas outline the practices needed to be a successful digital school system representing technology best practices in U.S. school systems..

A survey was distributed to technology stakeholders by the Director of Technology to assess general opinion on how School District practices align to the CoSN Digital Leap Matrix. One hundred and thirty stakeholders responded to the survey. Peer Reviewers were able to focus their questions on those areas where there appeared to be a clear lack of agreement.

At the top of each framework session, the results of the survey are displayed. Details on elements within the survey are explained below the survey results.

Leadership and Vision

Best Practice: The executive team works together to develop a shared vision with all stakeholders for effective and strategic technology use. The vision describes how technology infused teaching and learning will support students in gaining the skills and knowledge they will need for success in college and the modern workplace. Student outcomes drive the educational vision, which describes how technology will be used to support school system goals.

1A. Shared Vision – School system leaders have created a shared vision for creating and sustaining a digital environment that is aligned with the school system strategic plan and goals.

Evidence:
- There is an approved digital vision for the school system.
- Stakeholders (administrators, teachers, students, parents, community members, etc.) were involved in the development, can articulate the vision in their own words and describe how their work supports the vision.
- The vision encapsulates what students will need to know and be able to do on graduation, and describes their path for reaching that milestone.

1B. Executive Leadership – A cross-functional executive leadership team meets periodically to monitor and communicate progress.
Evidence:
- There is evidence that this team meets regularly to monitor progress, prioritize resources, and actively communicate progress on the digital plan to stakeholders.

1C. Distributed Leadership – Decision-making is distributed to the school system staff that is closest to the day-to-day operations, information, and impact of specific decisions.

Evidence:
- School system staff report that decisions are made by those closest to the day-to-day operations and that they have the appropriate guidance and knowledge.
- Leaders report that they coordinate and work together toward common goals.

1D. Innovation and Experimentation – The school system supports action research, experimentation, and innovative practice.

Evidence:
- There is a process for initiating, collaboratively sharing, and reflecting on the results of promising innovative practices.
- Productive failure is recognized as progress and is encouraged.
- Innovative efforts are focused on addressing school system needs.
- Evidence of success of initiatives is collected to determine the value of the initiative and assess the opportunity to scale across the organization.

1E. Flexibility and Adaptability – The school system has an appropriate and quick response to changes in internal or external conditions.

Evidence:
- Leaders implement and are able to articulate a collaborative approach for addressing unexpected circumstances.
- The school system demonstrates organizational resilience and capacity to change.
- The school system collects metrics on system performance and has a process to evaluate the need for change.

1F. Data-Informed Decision Making – The school system uses evidence, data, and research in making educational and operational decisions.

Evidence:
- Leaders can articulate and provide examples of how data and research are used to guide school system decision making.
- Leaders can provide examples of key decisions that have been based on data.

1G. Continual Improvement – The school system is continually improving its processes and outcomes.
Evidence:
- There is a process to evaluate that projects are delivered on-time, within budget, and

there are agreed upon performance standards.

1H. Equity – The school system ensures that all students have equitable access to, and use of, technology inside of school facilities and supports equitable access outside of school facilities.

Evidence:
- All students have equitable access to digital tools and content through a connected device at school, home, and elsewhere.
- All school facilities meet established minimum digital infrastructure standards.
- The digital plan supports equitable access to digital resources out of school access for all students.

Strategic Planning

Best Practice: School system leaders utilize their high-level view of the school system to identify the steps needed to transform the digital vision into a long-range plan, complete with specific goals, governance, objectives, and action plans.

2A. Clear Goals – The school system has clear and aligned goals.

Evidence:
- The school system has approved goals and action steps articulated as part of its current strategic plan.
- Administrators and educators can clearly articulate the system goals in their own words.
- Established goals align with the school system vision and are regularly reviewed.

2B. Measures and Metrics – The school system regularly measures progress against goals.

Evidence:
- The school system has established qualitative and quantitative measures to regularly assess progress against goals and to measure the effectiveness of technology for teaching and learning.

2C. Governance – The school system has an effective governance process.

Evidence:
- The school system has and adheres to a governance process for managing its digital learning implementation.
- The school system maintains evidence that projects and initiatives are aligned and prioritized to the established goals.

2D. Resource Alignment – Resources are aligned to build capacity according to defined school

system priorities.

Evidence:
- Budgets, staffing, and other resources are allocated to meet school system goals.
- Resource allocation includes planned sunset of initiatives that no longer align to the strategic plan.

2E. Instructional Goals Precede Technology Goals – School system use of technology follows the goals and vision for teaching and learning.

Evidence:
- Technology projects and processes are clearly aligned to articulated instructional goals.
- Education technology solutions are selected, configured, and implemented with teaching and learning as a primary consideration.

2F. Technology Planning – The school system plans for technology implementation, funding, and evaluation.

Evidence:
- There is a current, board-approved technology plan.
- Planning reflects the input of all stakeholders, provides for instructional and operational technology needs, and has identified funding and reporting procedures.
- The plan includes strategies to consider project life-cycles.

Ethics and Policies

Best Practice: The school system leadership team models responsible decision-making and manages the creation, implementation, and enforcement of policies related to the social, legal, and ethical issues linked to technology use throughout the school system.

3A. Legal Compliance – The school system understands and adheres to applicable local, state, and federal laws.

Evidence:
- School system leadership can demonstrate knowledge of applicable local, state, and federal laws and can identify the processes used to ensure compliance.
- The school system conducts a periodic review of processes and provides proper public notice and communication to ensure local, state, and federal law adherence.

3B. Responsible Use – The school system maintains policies for responsible and ethical use of technology and reviews them regularly.
Evidence:

- There are written policies that guide students and staff in the responsible use of technology and policies are updated when needed.
- Education regarding these policies is provided annually for all students and staff.

3C. Social Media and Email Communication – The school system maintains policies for the use of social media and email.

Evidence:
- There are written policies that guide students and staff in the appropriate use of social media and email communication.
- Policies are updated when needed.
- Education regarding the implementation of these policies is provided for all students and staff.

3D. Data Storage and Retention – The school system maintains policies for the storage and retention of data.

Evidence:
- There are written policies for how data is stored, how long it is held, and under what circumstances it is retained; these policies are fully followed.

3E. Disaster Recovery and Business Continuity – The school system maintains policies for disaster recovery and business continuity.

Evidence:
- There are written policies regarding disaster recovery and these policies are fully followed.

3F. Data Security – The school system maintains policies for ensuring information and data security

Evidence:
- There are written policies and procedures for ensuring data security and these policies are fully followed.
- These policies are compliant with local, state, and federal law and conform to industry practice.

3G. Student Data Privacy – The school system maintains policies for assuring appropriate student data privacy and such policies comply with local, state and federal laws.

Evidence:
- There are written policies for ensuring student data privacy and these policies are fully followed.

- Policies reflect both legal requirements and aspirational practice.
- Education regarding the implementation of these policies is provided for all students and staff.

3H. Environmental Conservation – The school system maintains environmentally friendly policies for the purchasing, disposing, and responsible use of technology.

Evidence:
- There are written policies for purchasing and disposing of technology and these policies adhere to best-practice for energy saving and environmental protection.

3I. Accessibility – The school system maintains policies ensuring accessibility for all students, staff, and stakeholders.

Evidence:
- There are written policies regarding how all stakeholders are afforded equal access to technology and the Internet.
- Professional development is provided for all staff regarding universal design and the implementation of these policies.

3J. Policy Effectiveness – The school system reviews and improves policies relating to technology on a regular basis.

Evidence:
- There is a policy review process to monitor effectiveness and update as necessary, all existing policies.
- There is a policy review process to consider, adopt, vet, and approve new policies.
- These reviews take place at the highest appropriate levels in the organization.

Instructional Focus and Professional Development

Best Practice: School system leaders budget, plan, and coordinate ongoing, purposeful professional development using technologies for all staff.

4A. Adaptation of Innovative Practices – The school system encourages staff to bring in best practices from the field and adapt them to their own circumstances.

Evidence:
- Educators can identify the resources, case studies, or research that have inspired classroom practices and can articulate how those practices are being adapted for their classes.

4B. Student Ownership – school system encourages use of technology to support student ownership of their learning.

Evidence:
- Administrators and educators leverage technology and digital resources to make teaching and learning more student-centric or personalized.

4C. Balanced Outcomes – The school system values and uses multiple metrics of student success, including content area mastery, as well as 21st century skills.

Evidence:
- Balanced priority is given to cognitive skills, content knowledge, 21st century skills (e.g. creativity, communication, collaboration, critical thinking), and non-cognitive skills.

4D. Data-Informed Instruction – Teachers use formative and summative assessment data to customize their instruction.

Evidence:
- Assessments are integrated into instructional content and practice.
- Educators meet on a regular basis to discuss student assessment data as a way to revise and personalize instruction.

4E. Data-Informed Learning – The school system uses technology to help meet the learning needs of all students.

Evidence:
- Learning is customized to each student's level, pace, interests, and needs.
- There are multiple ways for students to demonstrate content mastery and options reflect student voice and choice.

4F. Professional Development – Professional Development is experiential, ongoing and job-embedded.

Evidence:
- Teachers gain familiarity with technology tools and content through student-centered practice, rather than lecture, whenever possible.
- Stakeholders are given training in the use of data reporting and administrative systems and education technology tools.
- Educators have access to peer coaching.

4G. Collaborative Professional Development – Professional development is collaborative, with

teachers advancing their practice together.
Evidence:

- Teachers have opportunities to participate in sharing and reflecting on their practice with other educators.
- Teachers teach other teachers the successful tools and approaches they have discovered in their own practice.
- Delivery of professional development reflects a job-embedded, personalized learning environment (online modules, collaboration spaces, etc.).

4H. Continual Improvement – The school system is continually improving its processes and educational practices.

Evidence:

- There are processes in place for frequently reflecting on, evaluating, and improving current instructional practices.
- The school system can provide examples of such improvements.

Team Building and Staffing

Best Practice: School system leaders create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the school system's technology program. The school system aligns resources to functional requirements. The school system hires motivated, self-directed staff.

5A. Organizational Structure – The school system has an effective, functional, streamlined organizational structure.

Evidence:

- There are documented lines of authority, clear organizational charts, documented spans of control, and streamlined operations.

5B. Cross-functional Structures – school system operations are cross-functional not siloed.

Evidence:

- School system and project organizational charts show teams that include representatives from appropriate stakeholder functions.
- Leaders across functions come together to plan and implement change.

5C. Motivating Environment – The school system fosters an environment that supports intrinsic motivation for all staff.

Evidence:

- The work environment supports autonomy, mastery, and purpose.

5D. Functional Alignment – Functions are clearly aligned to the school system goals.

Evidence:

- School system organizational charts show functions that are aligned with evolving goals and the vision for a digital environment.
- School system deals effectively with redundancies or obsolete functions.

5E. Human Resources – The school system allocates the human resources required to support all functions.

Evidence:

- School system organizational charts show resources adequate to support the evolving needs.
- There is adequate staff to support functions.

5F. Communication Transparency – The school system communicates, in a timely and clear fashion, information that impacts stakeholders.

Evidence:

- The school system implements a communication plan that ensures all stakeholders have information in a timely manner.

5G. Job Descriptions – The school system has job descriptions and evaluations for all staff.

Evidence:

- Every position has an up-to-date job description.
- Evaluation instruments and processes align with job descriptions.

5H. Professional Growth – The school system supports and implements professional growth plans for each staff member.

Evidence:

- Every staff member has a documented plan for multi-year, relevant professional growth.
- The school system allocates appropriate funds to support professional growth.

Stakeholder Focus

Best Practice: The school system builds trusting relationships with all stakeholders. School Best

Best Practice - system leadership understands the key factors that lead to stakeholder satisfaction and implements practices to gather feedback from students and other stakeholders.

6A. Community Partnerships – The school system develops relationships and reaches out to community stakeholders.
Evidence:

- The school system demonstrates good relationships with organizations that provide grants and donations.
- The school system engages in outreach to community organizations.
- The school system works with the community to provide robust Internet access digital equity for students in the community.
- The school system engages in community education on such topics as digital citizenship and student data privacy.
- The school system develops trusting relationships with parents and the community at large.

6B. Feedback – The school system seeks feedback from internal and external stakeholders to use in improving stakeholder satisfaction.

Evidence:

- The school system provides documented evidence of survey results, meeting notes, or other means of gathering feedback from parents, students, teachers, and the community.
- Feedback is evaluated and acted upon in order and acted on to increase stakeholder satisfaction.

Infrastructure

Best Practice: The school system maintains a robust infrastructure that aligns to industry standards and is adequate to meet the needs of stakeholders.

7A. Security – The school system has effective architecture, design, and maintenance to support current and emerging security concerns, including virus/malware protection, intrusion detection, patch management, and application controls.

Evidence:

- The school system regularly conducts a technology security audit (including passwords and role-based permissions to data) and promptly addresses concerns.

- The school system reviews and modifies network security policies and access to reflect current needs of a digital school system.
- The school system addresses the security of digital communication and remote access.
- The school system has established general controls in areas of access, systems development and maintenance, documentation, operations, and security.

7B. Network Standards – The school system uses industry-accepted standards for hardware and networks.

Evidence:

- The school system has established and enforces a set of published hardware standards including Internal Network, Devices, LAN, Primary Network, WAN, Security Cameras, Phones/VOIP, and wireless.

7C. Connectivity – The school system network supports current capacity needs and can be expanded to meet future needs.

Evidence:

- The school system has established annual goals to meet or exceed bandwidth capacity as identified by the FCC for LAN, WAN, and Internet.
- Network coverage and density are adequate to meet user needs as evidenced by specific data such as heat maps and bandwidth utilization.
- The school system has an effective process to address issues when wireless coverage issues are reported.
- The school system has realistic projections for future Internet usage/capacity needs.

7D. Software and Device Management – The school system has the tools and processes to effectively manage school system software and devices.

Evidence:

- The school system is utilizing tools and systems that allow for effective management of devices and software.
- The school system selects and employs tools that allow for the evolving use and management of mobile devices.
- Standards and processes are in place for replacement of computing devices based on the needs of the evolving business functions and learning environments.

7E. Business Continuity – The school system has implemented processes in support of business continuity of critical systems.

Evidence:

- The school system has evidence of regular testing of business continuity and recovery procedures.

Information and Data Management

Best Practice: The school system manages the data systems that are needed for operations and instruction. There are general controls in the areas of access, system development and maintenance, documentation, operations and physical security. To the extent possible, systems are integrated and interoperable and provide each user with a simple interface to the functionality he/she needs. The school system maintains appropriate controls and safeguards for both student and staff personal information.

8A. Comprehensive Education Architecture – The school system provides data systems configured to provide the information the school system needs while also meeting the needs of all end users in systems such as:

- SIS
- Finance
- HR
- Health
- Special Ed
- Parent Notification Systems
- Data Warehouse
- Content Management
- Assessment
- Security and camera systems
- SSO / Identity Management
- Learning Management Systems

8B. Data Systems Access – The school system has appropriate and well-designed data systems readily available to stakeholders.

Evidence:

- The school system tracks and reports on system access and reliability in order to meet stakeholder expectation and service level agreements.
- The school system minimizes the number of obstacles to system access through reducing the number of unique username and password sign-ons.

8C. Data Integration – The school system has a data architecture plan that integrates systems and data that support a streamlined workflow

Evidence:

- Disparate data systems are connected in a way that automates and efficiently transfers data.

8D. Work Flow – The school system has created and implemented workflow efficiencies

throughout the organization.

Evidence:
- The technology department can demonstrate that it has reduced redundancy in systems and data entry through workflows that automate data routing and approval processes and that allow for efficient information sharing.
- Users are satisfied that systems meet their business and learning needs.

8E. Privacy Protection and Security – The school system maintains processes and systems to protect student and staff personal information.

Evidence:
- The school system limits and delimits the collection, sharing, and storage of data to those data necessary to perform the school system's functions.
- There is evidence that the school system is in full compliance with federal, state, and local laws.
- The school system has a plan in place to communicate their privacy efforts to stakeholders.
- The school system is adhering to student data privacy standards and best practices.
- The school system protects access to systems and data, granting access only to authorized individuals.

8F. Effective Data Reporting – The school system provides accurate, appropriate, and timely reporting of data.

Evidence:
- The school system has processes to assure clean data and accurate information.
- The school system provides reports and data to key stakeholders in a timely manner.

8G. Standardized Assessment – The school system provides a technology environment that meets the needs of standardized assessments.

Evidence:
- The school system meets infrastructure and device standards for its state and local testing needs.
- Bandwidth is sized to manage the online testing requirements while not impacting other instruction or school system functions.

8H. Data System Performance – The school system is constantly improving the effectiveness and efficiency of enterprise IT systems.

Evidence:
- A process exists for reporting, tracking, and resolving problems and technical issues specific to improving individual system performance, efficiency, and effectiveness.
- IT leadership meets regularly with stakeholders and implements processes to gather feedback and consider stakeholder requests.

Communications Management

Best Practice: The school system manages the platforms and messages used to communicate transparently with internal and external stakeholders, effectively using both emerging and mature technologies as appropriate.

9A. Communications Systems – The school system maintains effective communications systems to communicate with stakeholders.

Evidence:
- The school system effectively uses a variety of digital technologies to improve and enhance communication.

9B: Marketing – The school system effectively markets its digital vision to all stakeholders.

Evidence:
- The initiative has a compelling name, a brand, and rationale that is understood by parents and shared with the press and community.

9C: Mobile Communications – The school system provides access to communication tools via mobile devices.

Evidence:
- The school system ensures that communications are responsive across all devices.

Business Management

Best Practice: The school system manages budget, financial operations, disaster recovery, and business continuity effectively. The school system determines the return on investment for all technology implementations. School system leaders foster good relationships with vendors, potential funders, and other key groups.

10A. Sustainability – The school system has funding plans and approaches that assure the

long-term sustainability of school system technology resources.

Evidence:
- The school system has a comprehensive budget plan with appropriate and adequate sources of funding for device and system refresh, network expansion, digital instructional resources, and staff.
- The school system provides evidence that cost analysis models (total cost of ownership, value of investment, purchasing or leasing devices/network services, outsourcing for expertise not on staff) are frequently used and updated.

10B. Roadmapping – The school system is prepared for future device and network demands.

Evidence:
- The school system maintains a multi-year 'roadmap' technology plan that starts with the end-user in mind (teachers, administrators, students, support staff, etc).
- This plan has realistic assumptions about the growth in demands based on end-user needs (e.g. internet bandwidth and wide area network bandwidth (if appropriate), network architecture, capacity, reliability, industry standard, flexibility for growth).
- The plan includes appropriate devices based on identified purpose.
- Appropriate databases, repositories, and functional data systems are included in the plan.
- The implementation plan (roadmap) has identified budgets that support that growth.
- The school system publishes progress on project implementation and service level agreements to stakeholders.

10C. Funding – The school system secures appropriate annual funding to meet the needs of the school system technology plan and staffing.

Evidence:
- The school system maintains an approved budget that shows sources of funding and expenditures for infrastructure, storage and backup, devices, tools, digital content, internet access, and professional development.
- The school system has a long term funding model to appropriately staff IT services and the eLearning team to achieve its technology plan.
- The school system fosters good relationships with the community and potential partners in support of a strong technology base.
- The school system has aligned capital, categorical and operational funding sources to adequately address planned expenditures.

10D. Resources – The school system allocates resources to align with program goals and priorities.

Evidence:
- The school system has a system in place to include the CIO/CTO/Technology coordinator as part of the administrative (cabinet level) conversations around priorities and expenditures.
- This collective work and decision making have resulted in a comprehensive funding model that directly supports the technology plan (roadmap).

10E. Federal Funds – The school system makes effective use of eRate, Title, and other funding programs.

Evidence:
- The school system conducts an annual application for maximum, timely, and appropriate federal funding (e.g. eRate, Title I, Title II, etc).
- The school system stringently follows relevant rules and regulations to procure hardware and services with the most flexibility to carry out the school system infrastructure growth plan.
- The school system follows USAC and other applicable rules and regulations to archive records of transactions, and to track purchased assets.

10F. Purchasing – The school system employs effective purchasing practices.

Evidence:
- The school system follows federal, state, and local regulations in expending dollars to implement the technology plan.
- Best practices should be in place to secure competitive pricing.
- Technology leadership demonstrates successful partnerships with vendors to meet the school system's needs.

10G. Disaster Recovery – The school system has effective disaster recovery processes in place.

Evidence:
- The school system has a documented, comprehensive disaster recovery plan that is routinely practiced and updated.

10H. Business Continuity – The school system has effective business continuity processes in place.

Evidence:
- The school system has implemented a documented business continuity plan that is updated annually and practiced/tested by the appropriate departments or department

partnerships.

10l. Key Performance Indicators – The school system maintains and acts on Key Performance Indicators (KPI's).

Evidence:

- The school system has and acts on key performance indicators to evaluate their success in reaching key project and cost objectives.
- These indicators are publicly available. In technology, these indicators include support metrics (e.g. support, network service, database service).
- The indicators are adequate, useful, updated often, and based on stakeholder feedback.

Appendix 5 - Lessons from Students, Teacher and Parent Focus Groups

In the current environment, all school districts have been forced to adopt a more significant focus on remote learning. Our Peer Review team was able to evaluate comments from these stakeholders that may be useful considerations for a multi-year technology plan. This is especially true if many of the tactics used during this period are operationalized over the longer term. We have summarized comments made within these focus groups below.

Devices

- "A Chromebook is not sufficient for all students."
- "We have had a significantly better experience with a Mac as opposed to Chromebooks." This does create an equity issue, but this parent recognizes the economic reality of Chromebook purchases.
- Sometimes there are battery issues with Zoom meetings all day
- There are spare devices available for use when a student does not have a device available to them.

Remote Learning/Student Engagement

- Schoology works well, but Seesaw is more of a challenge and requires a higher level of parent involvement.
- Time spent on remote learning may vary substantially between grade levels as this parent noted that their high school student has 6-7 Google Meets per day, their middle school student is 'busy' and their while their elementary student has about 1.5 hrs of work per day.
- Students crave interaction, "There is no opportunity to build a personal relationship with my teacher when it is all remote. The amount of content we are learning is pretty much the same. You do have the opportunity to learn the same on a remote basis."

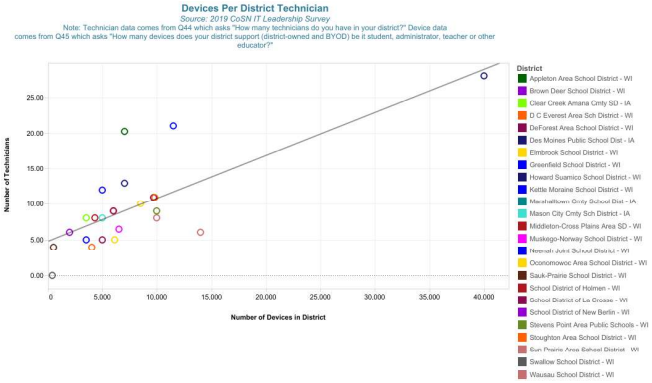
- "A two-dimensional world is not sufficient for our students. Students need the in-person opportunities."
- Directing theater has been a real gift in an all- virtual setting. Students are craving this interaction and time together.
- When at home, one parent's student is on Google Meet for the whole day, "It doesn't seem to be appropriate to be on this long. The number of reminders that Schoology sends out results in a distraction to the student. We are asking too much."
- In High School classes, one parent, "sees more group work in breakout rooms to conduct their work." A student backed up this observation as a positive learning format, "What has worked the best are breakout rooms that allow students to interact in smaller groups. What doesn't work well is when the teacher points their computer at the board trying to unite both in person and remote students in a presentation."
- "The virtual parent conferences were very helpful and very streamlined." Helpful to be home with the student having a one-on-one with the teacher, no lines, very efficient. Would like to see that continued post-COVID.
- Students know what type of remote learning is ineffective, "I have teachers who just click through a slideshow which means I don't have much to do. I have other teachers who assume you can get through more work and push us more on a remote basis."
- This student found some remote learning to be an even greater challenge, "We did a biology lab over Zoom. They would present information and we would record it into a Google Doc. This was the most interactive experience I have had. It was hard."
- One student relayed their problems of internet speed and explained that this hindered her ability to complete assignments. Recorded sessions are helpful in these situations.
- One teacher noted that the dropoff rate with remote learning meetings is very high.
- Teachers expressed appreciation for some techniques that should continue beyond the Pandemic, specifically in flipped lessons for math. Teachers would like to continue using Seesaw, Flipgrid and Schoology.

- "If we are out for a day , then Schoology and Seesaw will allow us to set up lessons for that day." <a teacher>
-

Useability

- There are many broken links in the Schology application that sometimes hinders easy navigation, "I login to Schoology and Infinite Campus and can never figure out what is where."
- Edina tries as much as they can to make Schoology effective, but they feel teachers can do more to make it easier on the students. Small examples such as links in different places each week. I definitely feel for the teachers right now as some of them are clearly struggling with remote learning."
- "It can be hard to navigate to materials in Schoology, and some students without parent support could easily be lost."
- One parent noted that the LMS controls are not aligned with what the teachers are asking of students. They were unable to print assignments given browser lock down features.
- One parent requested a one page calendar function in the parent portal that would consolidate everything they should pay attention to as parents.
- One parent noted that the parent portability information should have full functionality in the Somali language if it is to be useful to those parents that are not fluent in English.
- "There is no standard at the high school on how teachers organize their schedules. Each teacher is exploring how to communicate their schedules. Standardization would be appreciated."

Appendix 6- Technician Staffing



In a regional sample which included school districts in Minnesota, Iowa and Wisconsin, an average of 11 techs are used to support 10,000 on average. Edina Public Schools deploys 10 FTE technicians and external services to support 11,959 devices while outsourcing most repairs. The school district supports an additional 5,420 BYOD devices on a more limited basis without providing break fix services.

Minnesota data is limited and for this reason the regional peer group includes WI and IA
Data Provided by Forecast 5, 5 Sight.
Source - 2019 IT Leadership Survey

Appendix 7- Technology Staffing Models

Function	Edina Public Schools (MN) 8.8k Students	Fauquier Schools (VA) 11K Students	Northwest Allen County Schools (IN) 7.8k students	Lin- Mar Community School District (IA) 7.8k students
Tech Leader in cabinet – IT and Instructional Technology	1	1	1	1
Supervisor of Technology	1	1	1	0
Tech Paras/Tech Support	10	9	10	2
Network/Sys Admin	2	2	2	1
Identity and Info Email Mgr./Communications	2	1	0	1
Admin	1	0	0	.5
Web Developer	1	0	0	0
Lifecycle/ Analyst/Proj Mgrs	1	1	1	0

Workstation/Application Specs	2	2	2	1
Data Mgt/State Reporting	3	0	0	0
*Help Desk	1	0	0	1
IT Admin	**25**	**17**	**18**	**7.5**
Media Specialists/Clerks	**13.5**	**18**	**8**	**12**
Dir/Coord. Instruct Tech	1	1	0	1
Digital Learning Spec/ Coaches	3	1	2	8
Instructional Tech Support	**4**	**2**	**2**	**9**
Total	**42.5**	**37**	**28**	**28.5**

* Additional Help desk support is provided by Tech Paras

Appendix 8- Technology Staff Certifications

Technology staff are in the position of managing change and given the frequency of change in the technology field, certification training will ensure they are up to date with industry best practices. Certification training may also expose staff to a network of peers which may provide needed support in future problem solving.

Technology Position Most Likely to Benefit	**Recommended Certifications**
Tech Leader in Cabinet/Strategy	CETL, ITIL, Forecast5, Cognos
Director of Technology	CETL, ITIL, Forecast5, Cognos
IT Technicians/ Break Fix Support	CompTIA A+, Google IT Support Professional
Network & Systems Administration	CCNA, CISSP, CompTIA Network + and Security +
Data Integration	MCSA, MCSE, SQL, BI, AWS, Forecast5, Cognos
Project Management	PMP, PMI
DB Analysts	SQL, PMI, MCSA, Forecast5, Cognos, CDD
Business Analysts	PMI-PBA, Forecast5, Cognos, CDD
Application Specifications	MCSE, AWS, Cognos, CDD
Cablers/Phone Support	CompTIA A+ and Network +, VoIP (depends on vendor selection)
Help Desk	HDI, Forecast5, Cognos
Director of Instructional Technology	CETL, Google Certified Innovator, Microsoft Innovative Educator
PLNs	Apple Educator, Google IT Support Professional, Google Certified Trainer, Microsoft Innovative Educator Discussion Groups

Coaches	Apple Educator, Google Educator Level 1 & 2, G Suite Certification, Microsoft Innovative Educator (MIE) and MIE Trainer
Instruct. Tech Support	Apple Educator, Google Educator Level 1 & 2, G Suite Certification, Microsoft Innovative Educator Trainer,

Glossary

Apple Educator and IT Support - The Apple Educator community and training resources along with their Everyone Can Create and Everyone Can Code curriculums can help build credibility and instructional use, while helping technical teams manage, support and deploy resources. <More>

AWS - Amazon Web Services Certifications help learners build credibility and confidence by validating their cloud expertise. <More>

CCNA - Certified Cisco Network Administrator. <More>

CETL - Certified Education Technology Leader is managed by CoSN with an emphasis on leadership and management over technology skills. <More>

CISSP - Cybersecurity and IT Security Professionals <More>

Cognos - Cognos is used in the district for information management. <More>

ITIL - The Information Technology Infrastructure Library is a framework of best practices for the delivery of IT services. <More>

CompTIA -The Computing Technology Industry Association (CompTIA) has developed training and certification exams for computing support, networking, security, open-source, cloud and mobility. <More>

Forecast 5 - Forecast5 offers operating and benchmarking data sources. <More>

Google IT Support Professional - This five-course certificate, developed by Google, includes a curriculum designed to prepare individuals for an entry-level role in IT support. <More>

Google Educator Certification Levels 1&2, G Suite - This training ensures that teachers and coaches understand how to best support the Google G Suite. <More>

HDI - The Help Desk Institute trains and certifies individuals to manage desktop support and IT help desk tasks efficiently. <More>

MCSA & MCSE & MCSA - Microsoft supports IT professionals with a range of career step technical certifications. <More>

Microsoft Innovative Educator program and communities including Office 365, Minecraft EDU, Microsoft Showcase Schools and more - This training ensures that teachers, coaches and school leaders understand how to best utilize and support Microsoft Office 365 tools and other programs such as Minecraft EDU, and Skype in the Classroom. <More>

PMP - The Project Management Institute offers training and certification in project management and business analysis principles. <More>

Certified Education Technology Leader (CETL®)

"CETL certifications came at a critical time in Utah, as our state legislators continue to wrestle with how to best fund the infrastructure needs for one-to-one as a state. CETLs have added support and credibility to the excellent group of technologists in districts around the state and the CETL framework has enhanced our conversations about best practices when implementing one-to-one. CETL certification has been affirming and empowering for all who have participated in seeking this distinction. With this credential in hand, technology directors, CTOs, and CIOs around the state have reasserted their place at the table in discussing the role of technology in education."
—David Long, CETL, Superintendent, Beaver County School District, Utah

For K-12 education technology leaders, earning the CETL® certification will demonstrate to your staff, superintendent, and other stakeholders that you have mastered the knowledge and skills needed to define the vision for and successfully build 21st century learning environments in your school district.

View our Directory of Certified Education Technology Leaders to see who you can talk to about this certification.

The CETL is the first-ever aspirational certification for education technology leaders. It is based on a body of knowledge defining the skill areas critical to today's education technology leaders: leadership and vision; understanding the educational environment; and managing technology and support resources. Specifically, the CETL is a rigorous, two-part exam that identifies those who have mastered the framework skills and knowledge needed to bring 21st century skills to schools. The exam is a true measure of today's education technology field. The CETL program is also professional development to enhance the knowledge of learning technologies.

To date, more than 500 education technology leaders, from large and small school systems nationwide, have passed this rigorous program and earned their certification, with more in the pipeline. More than half of CETL-certified educational technology leaders hold district, cabinet-level positions. For the past couple of years, CoSN has worked closely with superintendents and district technology leaders to help them understand the value and importance of the

CETL. Superintendents who have encouraged CETL certification have reported that:

- Stakeholders see that they are committed to the highest standards in administration.
- They hire and promote only the most skilled and knowledgeable education technologists.
- Their districts keep current on latest trends and best practices in education technology.
- Asking for CETL demonstrates commitment to their employees' professional growth.
- The technology team skills are well matched to the job requirements of their positions.

Additionally, CoSN has been actively promoting the value of the CETL to State departments of education and education service agencies through the State Partnership Program. CETL Partnerships allow states to provide scholarships to their educational technology leaders for preparing for and taking the CETL exam. In exchange, these states show their commitment to 21st century learning in their districts and are recognized for this forward-thinking commitment. CoSN also partners with educational service agencies to offer professional development and CETL certification exam fees at reduced rates. In sum, the CETL provides independent validation of the competencies necessary for success as an education technology leader, empowering employers to make informed decisions between candidates with diverse backgrounds.

Resources:

Why the CETL Certification matters, Superintendent perspective.
Value of the CETL to Superintendents

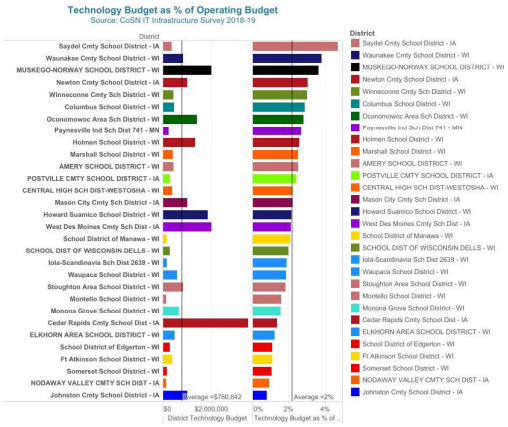
Appendix 9 - Key Performance Indicators

Key Performance Indicators directed at the K-12 community are available through the Council of Great City Schools. These KPIs have been carefully vetted by CTOs in the K12 community and are commonly used in many Districts to measure and compare performance of network services and devices year over year. The technology metrics deployed include the following:

Devices - Average Age of Computers
Devices - Computers per Employee
Devices per Student
Devices - Advanced Presentation Devices per Teacher
IT Spending Percent of District Budget
IT Capital Investments Ratio to Operational Spending
IT Spending per Student
Network - Bandwidth per 1,000 Students (Mbps)
Network - Days Usage Exceeds 75% of Capacity
Network - WAN Availability
Support - Break/Fix Staffing Cost per Ticket
Support - Help Desk Call Abandonment Rate
Support - Help Desk Staffing Cost per Ticket
Systems Cost - Business Systems Cost per Employee
Systems Cost - Instructional Systems Cost per Student

Formulas for the key performance indicators are available here.

Appendix 10 - Technology Budget as a Percentage of the Operating Budget



Edina Public Schools has a technology budget of $6.2m in 2019 which is 4% of the 2018-2019 total expenditure budget of $156m. A peer group of Minnesota, Wisconsin and Iowa school systems that participated in the 2019 CoSN Infrastructure Survey had an average technology budget of representing 2.0% of the school district expenditure budget.

Minnesota data is limited and for this reason the regional peer group includes WI and IA
Data Provided by Forecast 5, 5 Sight.
Source - 2019 IT Infrastructure Survey

Board Meeting Date: 11/16/2020 Work Session

TITLE: Budget Update for FY2021-22

TYPE: Report

PRESENTER(S): John Toop, Director of Business Services

BACKGROUND: This report will give the School Board information on FY19-20 Unaudited financial results and a high level first draft of what the FY21-22 budget may look like given various budget assumptions.

RECOMMENDATION: Informational Only

PRIMARY ISSUE(S) TO CONSIDER: The School Board should consider whether or not they agree with or want to change various assumptions in the model to develop the FY21-22 budget. This will enable the Supt. and Director of Business Services to begin development of the budget with agreed upon parameters.

ATTACHMENTS:

1. Presentation (next page)

Edina Public Schools #273

- FY19-20 Unaudited Financial Results
  - FY21 and 22 Budget Update

Edina Public Schools #273

- FY19-20 GF Unassigned Fund Balance was projected at: $6,157,761
  - FY19-20 Actual GF Unassigned Fund Balance is: $6,499,816 (6%)
- September 14, 2020 approved transfers for FY19-20 = $2,113,696
  - FY19-20 Inflated GF Unassigned Fund Balance is: $8,613,511 (7.96%)

Edina Public Schools #273

FY20-21 Budgeted Enrollment = 8,389

FY20-21 Actual Enrollment = 8,238

Unfavorable Variance of 151 students x $6,567 = ($991,617) (CY State Aid Adj)

151 x $2,499 = ($377,349) (Future Local Levy Adj)

FY21-22 has an enrollment projection currently at 8,312 (74 student increase)

Edina Public Schools #273

Major points in the Budget Report for FY20-21:

- FY20-21 Budget HAS NOT been revised in totality, but DOES reflect enrollment decrease and CARES Act expenses in excess of revenues
- Also reflects other minor adjustments on an estimated basis for revenues and expenses before deeper dive revision is completed
- FY20-21 GF Unassigned Fund Balance now estimated to decline by $712,817 from $8,613,511 to $7,900,694 (Original Budget approval in June 2020 was an increase of $626,938)
- Unemployment costs have increased significantly and will impact results for FY20-21 by over $500K (Local Levy to recapture these costs subsequently)

Edina Public Schools #273

Major assumptions in the Budget Report for FY21-22:

- Enrollment increase of 74 students
- General Education Aid per student budgeted at 0% increase
- Other local miscellaneous revenues and fees budgeted on a conservative basis reflecting closer to FY18-19 actuals
- Salary and Fringe Benefit increases at historic or actual settlement levels including replacement savings for retirees
- Other cost increases at 1% for Purchased Services, 3% for Utilities and 1% for Supplies

Edina Public Schools #273

Potential results using major assumptions in the Budget Report for FY21-22:

- GF Unassigned Fund Balance to decrease by estimated $2,126,363 from $7,900,694 to $5,774,331 (5.1%)
- Reductions necessary to restore 6% fund balance per School Board policy = $1,037,483
- Recommended reduction target amount = $1,500,000
- Target amount higher due to potential additional costs for FY20-21

Edina Public Schools #273

Potential tools to lessen reductions for FY21-22:

- Utilize additional Operating Capital transfer (One-Time)
- Utilize Committed for 1% Cash Flow fund balance (One-Time)
- One-Time use of Committed for 1% Cash Flow account requires School Board motion to decommit
- One-time uses to lessen budget reductions in a given year DOES NOT reduce the structural imbalance for the subsequent year

Edina Public Schools #273

Addendum update for FY20-21 and FY21-22:

- Special Ed Aid now updated for FY20-21 due to completion of UFARS data submission for FY19-20 (uses PY costs + Growth Factor and Hold Harmless)
- Also impacts FY21-22 Spec Ed Aid estimate
- Special Ed aid is volatile until all reporting is Final
- Tier I Child Care costs increasing for remainder of year?

Edina Public School District No 273

Five Year General Fund Budget Projection

Excludes Capital Reserves

Date Prepared: 11/11/2020 Version I -A

Definitions	Actual 2019-20	Adopted 2020-21	Revised 2020-21	% Chg	Projected 2021-22	% Chg	Projected 2022-23	% Chg	Projected 2023-24	% Chg	Projected 2024-25	% Chg
SOURCES OF REVENUE:												
Basic Revenue Allowance	$58,691,914	$60,733,266	$59,682,039	1.7%	$60,117,210	0.7%	$60,494,681	0.6%	$60,641,650	0.2%	$61,071,001	0.7%
Special Education Aid	13,161,779	13,324,370	13,834,413	5.1%	14,180,273	2.5%	14,534,780	2.5%	14,898,149	2.5%	15,270,603	2.5%
Other Aids and Levies	9,338,435	9,252,957	9,190,121	-1.6%	9,580,332	4.2%	9,745,188	1.7%	9,877,108	1.4%	9,898,716	0.2%
Miscellaneous Revenue	4,319,068	3,269,168	2,675,418	-38.1%	2,675,418	0.0%	2,675,418	0.0%	2,675,418	0.0%	2,675,418	0.0%
Federal Funding	1,813,876	1,903,693	1,903,693	5.0%	1,903,693	0%	1,903,693	0.0%	1,903,693	0.0%	1,903,693	0.0%
Voter/Board App'd Oper. Ref.	17,144,461	16,673,830	16,673,166	-2.7%	16,413,351	-1.6%	16,774,579	2.2%	17,256,630	2.9%	17,840,603	3.4%
Local Optional Revenue	3,864,662	6,642,289	6,642,289	71.9%	6,533,582	-1.6%	6,692,200	2.4%	6,708,403	0.2%	6,755,738	0.7%
Budget Transfers (through FY 2017)	-	-	(1,137,245.00)	#DIV/0!	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Capital-Not included in Oper. Bud.	-	-	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Total Revenue	$108,334,196	$111,799,574	$109,463,895	1.0%	$111,403,859	1.8%	$112,820,539	1.3%	$113,961,052	1.0%	$115,415,772	1.3%
USES OF REVENUE:												
Salaries & Wages	$71,625,260	$72,368,635	$72,368,635	1.0%	$74,420,240	2.8%	$76,195,982	2.4%	$77,674,649	1.9%	$78,833,902	1.5%
Benefits	24,892,463	24,964,218	25,078,390	0.7%	25,859,965	3.1%	26,735,505	3.4%	27,568,849	3.1%	28,314,657	2.7%
Purchased Serv.	8,171,466	9,982,213	9,253,291	13.2%	9,391,009	1.5%	9,531,459	1.5%	9,674,710	1.5%	9,820,832	1.5%
Supplies	2,905,925	3,157,514	3,157,514	8.7%	3,189,089	1.0%	3,220,980	1.0%	3,253,190	1.0%	3,285,722	1.0%
Other Expenses/Transfers	649,306	669,919	669,919	3.2%	669,919	0.0%	669,919	0.0%	676,618	1.0%	683,384	1.0%
Transportation in Basic Budget	0	0	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Capital-Not included in Oper. Bud.	-	-	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Total Uses of Revenue	$108,244,420	$111,142,499	$110,527,749	2.1%	$113,530,222	2.7%	$116,353,845	2.5%	$118,848,017	2.1%	$120,938,497	1.8%
REVENUE OVER (UNDER)	$89,776	$657,075	($1,063,854)		($2,126,363)		($3,533,307)		($4,886,965)		($5,522,725)	
FUND BALANCE:												
Beginning	$13,475,979	$13,565,755	$13,565,755		$12,501,901		$10,375,538		$6,842,231		$1,955,266	
Ending	$13,565,755	$14,222,830	12,501,901		10,375,538		6,842,231		1,955,266		(3,567,459)	
RECON. OF ENDING FUND BALANCE:												
Nonspendable	$0	$0	$0		$0		$0		$0		$0	
Restricted	$130,894	$302,700	$302,700		$302,700		$302,700		$302,700		$302,700	
Assigned	$4,821,350	$4,298,507	$4,298,507		$4,298,507		$4,298,507		$4,298,507		$4,298,507	
Total Nonspendable-Asgn Fd Bal	$4,952,244	$4,601,207	$4,601,207		$4,601,207		$4,601,207		$4,601,207		$4,601,207	
Subsequent Year Deficit Not Res'd	$0	$0	$0		$0		$0		$0		$0	
Total Reserved Fund Balance	$4,952,244	$4,601,207	$4,601,207		$4,601,207		$4,601,207		$4,601,207		$4,601,207	
Unassigned Fund Balance	$8,613,511	$9,621,623	$7,900,694		$5,774,331		$2,241,024		($2,645,941)		($8,168,666)	
Total Fund Balance as % of Exp.	12.5%	12.8%	11.3%		9.1%		5.9%		1.6%		-2.9%	
Unassigned as a % of Exp.	8.0%	8.7%	7.1%		5.1%		1.9%		-2.2%		-6.8%	
Minimum Unassigned Fund Balance *	$6,494,665	$6,631,665	$6,631,665		$6,811,813		$6,981,231		$7,130,881		$7,256,310	
Variance - Over (Under)	$2,118,846	$2,989,958	$1,269,029		($1,037,483)		($4,740,207)		($9,776,822)		($15,424,976)	

* Excludes Operating Capital Expenditures

INDEPENDENT SCHOOL DISTRICT #273
COMBINED STATEMENT OF BUDGETED AND ACTUAL REVENUES, EXPENDITURES, AND PROJECTED AND ACTUAL CHANGES IN FUND BALANCE
Fiscal Year Ending June 30, 2020

	Audited Balance June 30, 2019	Original Revenues	Revised Revenues	Actual Revenues	Original Expenditures	Revised Expenditures	Actual Expenditures	Original Required Transfers	Revised Required Transfers	Actual Required Transfers	Orginal Projected Balance June 30, 2020	Revised Projected Balance June 30, 2020	Actual Balance June 30, 2020
GENERAL FUND (01)													
Nonspendable - General	31,133	-	-	-	-	-	31,133	-	-	-	128,765	31,133	-
Nonspendable - Capital	-	-	-		-	-		-	-		-	-	-
Subtotal Nonspendable	**31,133**	**-**	**-**	**-**		**-**	**31,133**	**-**	**-**	**-**	**128,765**	**31,133**	**-**
Restricted for Student Activities	25,049	-	-	2,953	-	-	3,431	-	-	1,960	-	-	26,531
Restricted for Staff Development	58,820	1,186,375	1,181,924	1,193,524	1,229,916	1,247,933	1,138,648	-	-	(113,696)	(47,942)	(7,189)	0
Restricted for Capital - Carryover	2,366,645		-			2,366,645	2,002,445	-	-		-	-	364,200
Restricted for Capital	388,831	2,266,474	3,258,049	3,134,711	2,205,864	3,411,284	559,405	-	-	(2,000,000)	497,604	235,596	964,138
Restricted for Learning & Development	-	1,895,622	1,884,244	1,879,962	1,892,265	1,899,794	1,879,962	1,879,962	15,550	-	3,357	-	0
Restricted for Success Center ALC	-	149,738	148,235	131,259	237,643	367,153	463,865	87,905	218,918	332,607	-	-	-
Restricted for High School ALP	-	330,642	358,296	307,497	376,656	375,462	367,620	46,014	17,166	60,123	-	-	-
Restricted for Gifted Education	-	132,780	132,345	126,430	1,040,048	1,050,201	1,137,206	907,268	917,856	1,010,776	-	-	-
Restricted for Basic Skills-ML	-	269,398	291,718	311,797	1,278,218	1,285,197	1,303,263	1,008,820	993,479	991,466	-	-	-
Restricted for Basic Skills-Compensatory	-	249,405	255,147	241,113	245,877	247,018	241,113	-	(8,129)	-	3,528	-	(0)
Restricted for Achievement & Integration	-	1,145,800	1,142,326	1,142,079	1,121,504	1,142,326	1,037,715	1,142,079	-		-	-	104,363
Restricted for Safe Schools	(189,562)	465,312	759,231	759,232	611,544	824,077	797,567	146,232	64,846	227,898	-	-	-
Restricted for Basic Skills-Compensatory Ext Time	-			14,033			14,033			-			-
Restricted for Long Term Facilities Maintenance	-	6,857,801	6,857,801	6,857,801	5,613,311	5,669,048	6,677,291	(1,244,490)	(1,188,753)	(180,510)	-	-	-
Restricted for Medical Assistance				115,553			140,558			25,005			-
Subtotal Restricted	**2,649,783**	**14,949,347**	**15,762,785**	**16,217,944**	**15,852,846**	**19,143,522**	**17,764,124**	**3,973,790**	**794,848**	**355,629**	**456,547**	**228,407**	**1,459,232**
Committed 1% of Unassigned Fund Balance	1,037,614	-	-		-	-		12,670	42,652	30,795	1,029,886	1,080,266	1,068,409
Subtotal Committed	**1,037,614**	**-**	**-**			**-**		**12,670**	**42,652**	**30,795**	**1,029,886**	**1,080,266**	**1,068,409**
Assigned for Separation/Retirement Benefits	3,385,135	-	-		-	-		-	(187,729)	(115,462)	2,756,526	3,197,406	3,269,673
Assigned for Q Comp	149,673	2,375,570	2,218,576	2,216,974	2,318,231	2,409,341	2,322,727	-	41,092		215,028	-	43,920
Assigned for Donations Carryover	-	-	-	648,398	-	538,715	209,050	-	538,715		-	-	439,348
Subtotal Assigned	**3,534,808.20**	**2,375,570**	**2,725,107**	**2,865,373**	**2,318,231**	**3,690,671**	**2,531,778**	**-**	**628,162**	**(115,462)**	**2,971,554**	**3,197,406**	**3,752,941**
Unassigned - Unemployment	(71,946)			89,626			303,169				(92,422)	(71,946)	(285,490)
Unassigned - Lease Levy	-										(721,178)	-	-
Unassigned - Career and Technical	-	106,364		111,842	471,312		405,557	364,948		293,715	-		-
Unassigned - General	7,026,123	98,894,422	99,779,280	99,069,295	95,967,392	97,731,718	96,631,740	(2,573,857)	(2,654,416)	(564,677)	7,230,333	6,229,707	8,899,001
Subtotal Unassigned	**6,954,177**	**98,894,422**	**99,779,280**	**99,270,763**	**96,438,704**	**97,731,718**	**97,340,467**	**(2,573,857)**	**(2,654,416)**	**(270,962)**	**6,416,733**	**6,157,761**	**8,613,511**
Total General	**14,207,514**	**116,325,703**	**118,267,172**	**118,354,080**	**114,609,781**	**120,565,910**	**117,667,501**	**(1,244,490)**	**(1,188,753)**	**(180,510)**	**11,003,485**	**10,694,973**	**14,894,093**
			108,151,322	107,713,170		109,118,935	108,247,851						14,894,093
							108,247,851						
				102,024,294			99,466,687						
FOOD SERVICE FUND (02)													
Nonspendable	-	480	-		-	-		-	-		480	-	-
Restricted	1,100,255	2,945,804	2,945,752	2,475,919	3,256,453	3,205,401	2,649,049	-	-		484,128	840,606	927,125
Total Food Service	**1,100,255**	**2,946,284**	**2,945,752**	**2,475,919**	**3,256,453**	**3,205,401**	**2,649,049**	**-**	**-**	**-**	**484,608**	**840,606**	**927,125**
COMMUNITY SERVICE FUND (04)													
Nonspendable Community Ed - General	-	-	-	-	-	-	-	-	-	-	-	-	
Restricted for Community Ed - General	660,226	6,433,895	7,072,510	6,391,105	6,385,416	6,952,198	6,787,071	-	-	100,000	430,753	778,555	364,259
Restricted for ECFE	80,107	1,166,959	825,850	614,099	931,599	806,240	633,026	-	-	-	622,630	99,717	61,180
Restricted for School Readiness	181,219	189,078	216,128	252,853	119,866	246,130	258,629	-	-	(100,000)	227,528	151,217	75,443
Restricted for Other Community Ed	10,653	274,979	212,481	195,826	265,725	239,413	179,306	-	-	-	9,822	(14,294)	27,173
Total Community Service	**932,204**	**8,064,911**	**8,326,969**	**7,453,883**	**7,702,606**	**8,243,981**	**7,858,032**	**-**	**-**	**-**	**1,290,733**	**1,015,195**	**528,055**
Total Operating Funds	**16,239,973**	**127,336,898**	**129,539,893**	**128,283,882**	**125,568,840**	**132,015,292**	**128,174,582**	**(1,244,490)**	**(1,188,753)**	**(180,510)**	**12,778,826**	**12,550,774**	**16,349,274**
BUILDING FUND (06)													
Nonspendable - LTFM Levy	-	-	-		-	-		-	-		12,739	-	-
Restricted for Capital/Technology Levy	1,278,344	5,914,554	5,914,554	5,991,425	5,845,567	6,489,145	6,853,237	-	-		833,510	703,752	416,531
Restricted for $124.9M Building Bond	798,649	-	-	11,733	1,008,223	798,649	810,382				-	(0)	-
Restricted for Long Term Facilities Maintenance	23,000,223	100,000	2,232,331	1,024,566	12,016,970	12,016,970	11,528,855	1,244,490	1,188,753	180,510	14,065,710	14,404,337	12,676,444
Total Building	**25,077,215**	**6,014,554**	**8,146,885**	**7,027,724**	**18,870,760**	**19,304,764**	**19,192,474**	**1,244,490**	**1,188,753**	**180,510**	**14,911,959**	**15,108,088**	**13,092,975**
DEBT SERVICE FUND (07)													
Restricted for Bond Refunding	-	-	21,951,538	21,951,538	-	21,951,538	21,951,538	-	-		-	-	-
Restricted Fund Balance	2,596,972	15,984,979	15,984,979	16,109,011	15,050,625	15,095,477	15,679,022	-	-		2,988,627	3,486,474	3,026,960
Total Debt Service	**2,596,972**	**15,984,979**	**37,936,517**	**38,060,549**	**15,050,625**	**37,047,015**	**37,630,560**	**-**	**-**		**2,988,627**	**3,486,474**	**3,026,960**
INTERNAL SERVICE FUND - Dental (20)													
Unassigned Fund Balance	489,605	870,000	870,000	855,860	870,000	870,000	744,260	-	-		484,367	489,605	601,205
Total Internal Service	**489,605**	**870,000**	**870,000**	855,860	**870,000**	**870,000**	**744,260**	**-**	**-**		**484,367**	**489,605**	**601,205**
TOTAL ALL FUNDS	**44,403,765**	**150,206,431**	**176,493,295**	**174,228,015**	**160,360,225**	**189,237,071**	**185,741,876**	**-**	**0**	**(0)**	**31,163,779**	**31,634,941**	**33,070,415**

Board Meeting Date: 9/14/2020

TITLE: Budgeting 2020-2021 School Year

TYPE: Information

PRESENTER(S): John W. Schultz, Superintendent and John Toop, Director of Business Services

BACKGROUND: This report provides the financing of the additional staffing, services and capital for the 2020-2021 school year.

RECOMMENDATION: It is recommended that the School Board transfer $116,000 of Staff Development to Unassigned fund balance and make an Operating Capital transfer to cover the current projected deficit of $1,137,245 for this year. Further, the School Board should consider an additional amount of $862,755 to give District administration additional flexibility to respond to other unforeseen expenses. The total suggested Operating Capital transfer would then be $2,000,000.

PRIMARY ISSUE(S) TO CONSIDER: Financing the 2020-2021 School Year

ATTACHMENTS:

1. Report (next page)

Financing the 2020-2021 School Year

Revenue

For the 2020-2021 school year the State of Minnesota is distributing federal dollars to schools. There are two sources of money for FY20-21 that are additional to our regular allocation.

The first is $2,115,000, a federal amount that will be closely monitored and must be spent by 12-31-2020. Additionally, there are also milestone expense percentage thresholds that the district must meet by a certain time, or dollars will be reallocated to other districts.

The second amount is also Federal money from the Governor for $440,098 that must be spent by 12-31-2022. For these funds, an equitable allocation must be set aside for non-public schools, leaving about $400,000 for ISD #273 to spend.

We will spend $400,000 from the federal between now and 12-31-2020 in staffing expense and match that with the Governor's Federal money of $400,000 for staffing for the second half of the year. This leaves approximately $1,716,730 remaining to spend from the federal dollars.

Expenses

One-Time costs have been identified which total an estimated $1,782,862. These include items like plexiglass, sanitizer, cleaning solutions, technology capital, and items like bell covers for instruments.

We have also identified one-time costs like technology capital (Chromebooks) curriculum, and professional development from the general fund that will be coded to the CARES funding. These are items that can be expended between now and December 31. We will charge some current year ongoing expenses to the technology levy. This is represented by the remaining amount, $1,036,000 to the General fund.

Est. One-Time Costs	
Technology	$1,279,169
PPE Supplies	$213,674
T & L/ Research Eval and Assess (REA)	$100,000
Other Student Support Services costs	$100,000
Comm Ed All Day Pre-K, Ext Learning, ECFE Pre-Sch	$90,019 (Spring 2020)
Total Est. One-Time Costs	**$1,782,862**

Est. Ongoing Costs	
Tier 1 Child Care (Wed)	$260,000
Tier 1 Child Care (M Tu Th F)	$560,000
Para educators (K, 1/grade level/school ~31)	$1,395,000
Para educators (Remote Teaching @ Secondary ~15)	$675,000
Edina Virtual Academy Teachers (2.0 FTE)	$200,000

Mental Health (2.3 FTE Counselor/Social Worker)	$185,000
Transportation for Tier 1	$100,000
Custodial Overtime (Cleaning)	$252,000
Total Ongoing Costs	**$3,627,000**
Total Est. One-Time and Ongoing for FY20-21	**$5,409,862**

These one-time and ongoing costs are currently covered incompletely by the following funding sources:

Federal thru 12-30-20	$2,115,617
Federal (thru Governor)	$400,000
Tech Levy	$1,036,000
Supt/Asst. Supt Contingency	$100,000
Staff Development (MDE Authorized Transfer)*	$116,000*
Curriculum Development (Accelerate expense)	$45,000
Community Education (Fund Balance)	$260,000
Travel (Districtwide savings)	$200,000
Total	**$4,272,617**

**Using this revenue will require Board motion before the 19-20 audit is completed.*

This leaves a $1,137,245 deficit with the Federal dollars and other adjustments provided.

Recommendation

It is recommended that in addition to the Staff Development transfer referenced above, the School Board make an Operating Capital transfer to cover the projected deficit for this year. Further, the School Board should consider an additional amount of $862,755 to give District administration additional flexibility to respond to other unforeseen expenses. The total Operating Capital suggested transfer would then be $2,000,000.

District administration will continue to monitor and see what other expenses will emerge as the school year is underway. There remains unknowns like the number of Tier 1 Parents' children who will attend child care and use transportation. We also will have more information about enrollment, which will inform us more about revenue. Once we have a better idea of enrollment and the services being provided to students this year, we can determine a more accurate budget deficit. We will continue to look for efficiencies and ways to finance this deficit. It may be necessary to discuss the use of other fund balances.

Dept	Item	Cost	Approved	one time /vs ongoing	CARES 154	GEER 153	ESSER 151	ESSER 152	Total
	Allocation received				2,115,617.00	$94,013.00	$135,905.00	$210,180.00	2,555,715.00
	Edina				2,115,617.00	$85,686.20	$123,868.40	$191,558.10	2,516,729.70
	OLG				0	$6,661.44	$9,629.28	$14,897.52	$31,188.24
	Avail Academy				0	$1,665.36	$2,407.32	$3,724.38	$7,797.06
					2,115,617.00	$94,013.00	$135,905.00	$210,180.00	$2,555,715.00
							One-Time	Ongoing	
Community Ed	Extended Learning	5,985	spring 2020	One-Time			5,985	-	
Community Ed	All Day PreK	25,375	spring 2020	One-Time			25,375	-	
Community Ed	ECFE/Preschool	58,659	spring 2020	One-Time			58,659	-	
DMTS	Hotspots	5,000		One-Time			5,000	-	
DMTS	PearDeck	7,500		One-Time			7,500	-	
DMTS	EdPuzzle	11,160		One-Time			11,160	-	
DMTS	Secondary Classroom Audio enhancement pilot QTY 15	15,735	ordered	One-Time			15,735	-	
DMTS	WeVideo	17,774		One-Time			17,774	-	
DMTS	Google Enterprise CAL	20,000	purchased	One-Time			20,000	-	
DMTS	Additional Yoga laptops(20)	20,000		One-Time			20,000	-	
DMTS	Syncronous video conferencing 1 per building	30,000	ordered	One-Time			30,000	-	
DMTS	Elementary Chromebook repair	30,000		One-Time			30,000	-	
DMTS	Syncronous video conferencing QTY 360 IPEVO	36,000	ordered	One-Time			36,000	-	
DMTS	Additional Laptops (Replacements)	50,000		One-Time			50,000	-	
DMTS	Additional Laptops (NEW) (Replace in Tech Levy w Tech Para S/F)	130,000		One-Time			130,000	-	
DMTS	Interactive Panel refresh (replace in Tech Levy w Tech Para S/F)	300,000		One-Time			300,000	-	
DMTS	Chromebook refresh (replace in Tech Levy w Tech Para S/F)	606,000		One-Time			606,000	-	
PPE/Social Distancing	Waste barrels for lunch program	758		One-Time			758	-	
PPE/Social Distancing	17 barcode scanners	3,400	purchased	One-Time			3,400	-	
PPE/Social Distancing	Foaming Sanitizer	552	Purchased	One-Time			552	-	
PPE/Social Distancing	Spray Bottles	722	Purchased	One-Time			722	-	
PPE/Social Distancing	COVID Safety Signage	1,401	Purchased	One-Time			1,401	-	
PPE/Social Distancing	Lanyards	2,500	ordered	One-Time			2,500	-	
PPE/Social Distancing	Disinfectant sprayers(QTY 6)	3,600	Purchased	One-Time			3,600	-	
PPE/Social Distancing	Bleacher 6' spacing barrier/signage	3,900	ordered	One-Time			3,900	-	
PPE/Social Distancing	Band instrument bell covers - for rehearsing	4,300		One-Time			4,300	-	
PPE/Social Distancing	Child face masks (980)	4,900		One-Time			4,900	-	
PPE/Social Distancing	Adult face masks (1,500)	9,000	Purchased	One-Time			9,000	-	
PPE/Social Distancing	Face Masks	13,500	Approved	One-Time			13,500	-	
PPE/Social Distancing	Nurses offices HEPA Filtration	16,616	Received	One-Time			16,616	-	
PPE/Social Distancing	Floor Decals	18,500	ordered	One-Time			18,500	-	
PPE/Social Distancing	Barriers	24,000	ordered	One-Time			24,000	-	
PPE/Social Distancing	Hand Sanitizer, Secondary Schools	25,000	Ordered	One-Time			25,000	-	
PPE/Social Distancing	Air Purifiers	33,000	Purchased	One-Time			33,000	-	
PPE/Social Distancing	Plastic Shields	48,025	Purchased	One-Time			48,025	-	
Student Support Ser.	Sonday Training and Materials	15,000		One-Time			15,000	-	
Student Support Ser.	Ipads for HillRAP	20,000		One-Time			20,000	-	
Student Support Ser.	HillRAP Training	30,000		One-Time			30,000	-	
Student Support Ser.	SEL Needs Assessment and Progress Monitoring	35,000		One-Time			35,000	-	
T & L/REA	ML Learners: Licenses for Imagine Learning (per Ulli)	10,000		One-Time			10,000	-	
T & L/REA	ML / EL Family Needs Assessment	15,000		One-Time			15,000	-	
T & L/REA	Cross District Lesson Creation and Collaboration	30,000		One-Time			30,000	-	
T & L/REA	LP COVID Feedback |SEL Assessment	45,000		One-Time			45,000	-	
Transportation	Transportation costs for Tier 1 Child care	100,000		Ongoing			-	100,000	
B and G	Custodial overtime	252,000	Starts 8/24/20	Ongoing			-	252,000	
ECC	Childcare costs for the year (1:15)	260,000	Approved (Wed)	Ongoing			-	260,000	
ECC	Childcare costs for the year (1:15)	560,000	**TBD**	Ongoing			-	560,000	
Staffing	Additional 2 FTE's for elem eva	200,000		Ongoing			-	200,000	
Staffing	Elem Paras-1 for each K, 1/ gr level (31 but to be reduced with sped paras TBD)	1,395,000		Ongoing			-	1,395,000	
Staffing	Paras for Remote Secondary Teachers (15)	675,000		Ongoing			-	675,000	
Student Support Ser.	2.3 Mental Health Practitioners	185,000	approved on 8/3	Ongoing			-	185,000	
Totals		**5,409,862**					**1,782,862**	**3,627,000**	
Grand Total								**5,409,862**	