

WAYZATA PUBLIC SCHOOLS

Independent School District 284
Wayzata, Minnesota

BOARD OF EDUCATION

Regular Meeting - May 18, 2009 - 4:00 PM
District Administration Building
210 County Rd. 101, N, Plymouth, MN

AGENDA

- | | | |
|----|--|----|
| 1. | CALL TO ORDER - Board Chair Moroz | 3 |
| 2. | ADMINISTRATIVE | |
| | A. Referendum Discussion - C. Anderson, J. Westrum, B. Noyed | |
| 3. | CURRICULUM AND INSTRUCTION | |
| | A. East Middle School Site Plan - P. Paetzel | 4 |
| | B. Curriculum Review - 2008-2009 and Forecast - 2009-2010 - J. Sigford | 33 |
| 4. | FINANCIAL | |
| | A. Budget Revisions - 2008-2009 - J. Westrum | |
| | B. Preliminary Budget - 2009-2010 - J. Westrum | 41 |
| 5. | HUMAN RESOURCES | |
| 6. | BOARD REPORTS | |
| 7. | SCHOOL BOARD | |
| | A. Tentative Board Agenda for June 8, 2009 - J. Moroz | 83 |
| 8. | ADJOURN | 84 |

WAYZATA PUBLIC SCHOOLS

Independent School District 284
Wayzata, Minnesota

MISSION

Our Core Purpose:

The mission of Wayzata Public Schools is to ensure a world-class education that prepares each and every student to thrive today and excel tomorrow in an ever-changing global society.

VISION

What We Intend to Create and Experience:

The vision of Wayzata Public Schools is to be a model of excellence where all students discover their unique talents, develop a love and tenacity for learning and demonstrate confidence and capacity for success through:

Exceptional Student Learning, Experiences and Relationships:

- High achievement by each and every student—no exceptions, no excuses;
- Content-rich, rigorous and personalized education;
- Meaningful relationships with teachers, staff, mentors and peers in a welcoming, nurturing and safe environment where all are valued for who they are and the contributions they make.

Community Trust, Confidence and Partnership:

- Comprehensive learning opportunities meeting diverse learner needs and community aspirations;
- Committed to being the first choice for students and families;
- Maintaining the highest levels of satisfaction and pride by staff, parents and community.

Operational Excellence:

- Attraction, development and retention of exemplary, creative and engaged employees;
- Accountability by all staff for individual and collective performance;
- Effective and efficient use of time and human, financial and physical resources;
- Culture of continuous improvement and responsive innovation;
- High performing district governance, management and partnerships.

WAYZATA PUBLIC SCHOOLS
Independent School District 284
Wayzata, Minnesota

BOARD OF EDUCATION

Work Session – May 18, 2009

AGENDA ITEM: 1. CALL TO ORDER/ROLL CALL

COMMENTS BY: Board Chair Moroz

	<u>PRESENT</u>	<u>ABSENT</u>
Ms. Linda A. Cohen	_____	_____
Ms. Susan J. Droegemueller	_____	_____
Ms. Patricia L. Gleason	_____	_____
Mr. Jay A. Hesby	_____	_____
Mr. John A. Moroz	_____	_____
Ms. Carter G. Peterson	_____	_____
Mr. Greg D. Rye	_____	_____
Dr. Chace B. Anderson, Ex Officio	_____	_____

Wayzata East Middle School

May 18, 2009

School Board Work Session

A Model of Excellence Among
Learning Communities

Wayzata Public Schools

2008 / 2009 Q-Comp Goal

57.18% of all students who participate in Spring MAP testing will meet or exceed their individual NWEA Reading RIT growth target score

A Model of Excellence Among
Learning Communities

Wayzata Public Schools

Reading Quadrant

		Growth Index	
		Below	Above
Projected Proficiency	Above	29.7% (194)	53.5% (350)
	Below	11.8% (77)	5.0% (33)

Growth Seasons

Spring 2007

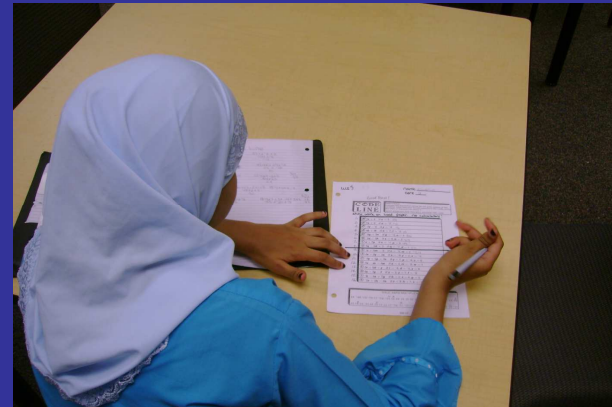
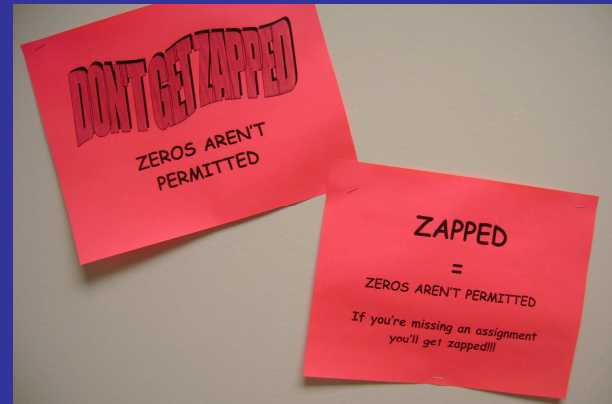
through

Spring 2008

A Model of Excellence Among
Learning Communities

Wayzata Public Schools

Zeros Aren't Permitted (ZAP)



A Model of Excellence Among Learning Communities

Wayzata Public Schools

Literacy Strategies

★ Building Wide Professional Development

Reading

How-To

Guide

A Toolkit for
Common Reading
Problems in the
Classroom

Composed and organized by Katie
Moe and Ericka Downie

**A Model of Excellence Among
Learning Communities**

Wayzata Public Schools

Advisory

★ Building Relationships for Learning



A Model of Excellence Among
Learning Communities

Wayzata Public Schools

Wayzata East Middle School

★ Paul Paetzel

Principal

★ Jill Rush

Parent

★ Britta Hageness

Student

★ Amy Van Dunk

Social Worker

★ Ericka Downie

Teacher

★ Katie Moe

Teacher

A Model of Excellence Among
Learning Communities

Wayzata Public Schools



Independent School District 284
Wayzata, Minnesota

VISION

A model of excellence among learning communities

MISSION

The mission of the Wayzata School District is to prepare all students for the future by providing a challenging education which builds academic competence, develops responsible citizenship, encourages creativity, promotes lifelong learning, advances critical thinking skills, instills a commitment to personal wellness, and fosters respect for self and others.

DISTRICT DIRECTIONS for 2008-2010

- *Provide a more personalized education for each student.*
- *Eliminate the predictability of student achievement based on race.*
- *Provide opportunities for students to engage in global connections.*
- *Prepare students in skills that they will need to function effectively in the future including creative thinking, diplomacy, problem solving and teamwork.*
- *Enhance the sense of ownership and engagement in the district by all segments of the community.*



Shared Decision Agreement Between School and the Wayzata School Board for

School Name: *Wayzata East Middle School*

This plan was reviewed on: _____

Signature of District Design Team _____

This plan was approved on: _____

Signature of School Board Chair _____



Shared Decisions Agreement Review Team Check List Form

Procedure:

Prior to presentation to the Board, Site Improvement Plans will be reviewed for compliance with statutes, contracts, policies, and administrative regulations. Site Teams are advised that plans should be submitted at least thirty (30) days prior to date of desired Board action.

- Site Improvement Plans are sent to the Office of the Superintendent of Schools.
- Copies of the Site Improvement Plan will be sent to the following members of the review team as designated by the District Shared Decisions Design Team.
- This response sheet will be returned by reviewer to the Superintendent’s Office within ten (10) days.
- Any areas of concern will be noted on response sheet along with suggestions for waivers where applicable.
- All response sheets will be forwarded to the chair of the site team.
- Review team members will decide if the Site Improvement Plan should be reviewed by any other departments such as Transportation, Food Service, Building and Grounds, etc. and forward a copy with a cover sheet for check-off response to the appropriate individual.

Review Team Response

Office of the Superintendent

Check here if an additional page is attached detailing questions or concerns.

Signature and Date

Executive Director of Curriculum and Instruction

Check here if an additional page is attached detailing questions or concerns.

Signature and Date

Executive Director of Finance

Check here if an additional page is attached detailing questions or concerns.

Signature and Date

Executive Director of Human Resources

Check here if an additional page is attached detailing questions or concerns.

Signature and Date

Wayzata Education Association Representative

Check here if an additional page is attached detailing questions or concerns.

Signature and Date



Site Team Members:

<u>Name</u>	<u>Position</u>	<u>Year</u>
Jill Rush	Parent / PTA	2008-2009
Sonya Johnson	Parent	2008-2009
Kris Machut	Parent	2008-2009
Linda Picek	Parent	2008-2009
Lauri Garvey	Parent	2008-2009
Lenny Newman	Parent	2008-2009
Britta Hageness	Student – Grade 8	2008-2009
Monika Weimer	Student – Grade 7	2008-2009
Lisa Rudolph	Teacher - Spanish	2008-2009
Jeff Metzler	Teacher – Grade 8	2008-2009
Donna Ness	Teacher – Grade 7	2008-2009
Erin Boltin	Teacher – Grade 6	2008-2009
Katie Moe	Teacher – Read 180	2008-2009
Tricia Warfield	Paraprofessional	2008-2009
Paul Paetzel	Principal	2008-2009



School Name: Wayzata East Middle School

School Year: 2008 /2009



**Wayzata East Middle School
Student Demographics**

Student Population by Grade

(Please insert 3 years of data provided by the Office of Assessment)

	2007-2008			2006-2007			2005-2006		
Grade	# of Males	# of Females	Avg. Class Size	# of Males	# of Females	Avg. Class Size	# of Males	# of Females	Avg. Class Size
6	123	115	26.4	116	99	26.8	131	109	26.6
7	118	105	24.8	36	120	28.4	125	113	26.4
8	137	122	25.9	132	125	25.7	131	125	25.6
Total	378	342	25.7	384	344	26.9	387	347	26.2



**Wayzata East Middle School
Student Demographics**

Ethnic Distribution

(Please insert 3 years of data provided by the Office of Assessment)

	2007-2008	2006-2007	2005-2006
White American	548	569	610
African American	73	78	56
Asian American	73	51	44
Hispanic/Latino American	25	26	20
Indian American	1	4	4

Percent of Students on Free/Reduced

(Please insert 3 years of data provided by the Office of Assessment)

	2007-2008	2006-2007	2005-2006
Free	15.1%	14.2%	11.3%
Reduced Price	5.1%	3.4%	4.1%

Student Mobility

(Please insert 3 years of data provided by the Office of Assessment)

The percent of students entering and leaving during the year, computed by dividing the number of transfers by the October 1 enrollment.

2006-2007	2005-2006	2004-2005
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Student Demographics

Average Daily Attendance

(Please insert three years of data provided by the Office of Assessment.)

2006 - 2007				2005 - 2006				2004 - 2005			
6 th	7 th	8 th		6 th	7 th	8 th		6 th	7 th	8 th	
96.5	96.4	96.2		96.2	96.2	95.4		96.1	95.7	96.3	

Percent of Parents Attending Conferences

(Please insert data provided by the individual building.)

2008 - 2009		2007 - 2008		2006 - 2007	
Fall	Spring	Fall	Spring	Fall	Spring
98%	95.4%	97%	93%	96%	91%



**Wayzata East Middle School
Student Achievement**

Minnesota Comprehensive Assessment (MCA-II)

2007-2008 MCA-II

	Grade 6 Math		Grade 6 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	82.9	661.6	80.0	660.0
Wayzata	85.5	662.3	87.8	663.2
State	64.6	653.7	69.6	655.0

	Grade 7 Math		Grade 7 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	77.0	758.9	74.8	758.4
Wayzata	83.5	761.5	84.4	762.3
State	61.4	752.8	64.7	753.6

	Grade 8 Math		Grade 8 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	70.8	858.3	76.7	857.8
Wayzata	78.1	859.4	83.8	861.2
State	58.2	851.3	65.7	853.4

2006-2007 MCA-II

	Grade 6 Math		Grade 6 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	81.0	661.0	79.6	660.4
Wayzata	85.2	663.0	86.6	663.4
State	60.8	652.1	66.6	654.1

	Grade 7 Math		Grade 7 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	74.6	761.5	78.5	758.7
Wayzata	79.4	761.3	82.5	760.9
State	59.4	752.0	63.2	752.7

	Grade 8 Math		Grade 8 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	76.6	860.0	79.2	860.3
Wayzata	80.7	860.4	86.3	863.6
State	56.9	850.5	63.3	853.4

2005-2006 MCA-II

	Grade 6 Math		Grade 6 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	81.7	662.6	93.1	665.1
Wayzata	83.3	662.5	89.3	663.8
State	59.2	652.0	71.6	656.0

	Grade 7 Math		Grade 7 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	83.3	761.9	85.5	762.6
Wayzata	85.8	763.0	89.1	764.0
State	57.5	751.2	66.6	754.6

	Grade 8 Math		Grade 8 Reading	
	% Proficient	Average Score	% Proficient	Average Score
East Middle	76.0	859.0	85.8	860.3
Wayzata	80.7	860.0	87.1	861.1
State	56.7	850.8	64.6	853.3



Wayzata East Middle School
Student Achievement

**Northwest Evaluation Association
MAP (Measure of Academic Progress)
Average Scale Score and Percentile results of Spring 2008 MAP Testing**

Math	Grade 6		Grade 7		Grade 8	
	Scale Score	Percentile	Scale Score	Percentile	Scale Score	Percentile
East Middle	237.3	73	239.4	69	243.6	66
Wayzata	238.9	77	242.7	74	245.0	69
National	224	50	229	50	234	50

Reading	Grade 6		Grade 7		Grade 8	
	Scale Score	Percentile	Scale Score	Percentile	Scale Score	Percentile
East Middle	224.1	70	224.6	65	228.5	65
Wayzata	224.7	71	227.3	72	229.9	69
National	217	50	220	50	223	50

Average Scale Score and Percentile results of Spring 2007 MAP Testing

Math	Grade 6		Grade 7		Grade 8	
	Scale Score	Percentile	Scale Score	Percentile	Scale Score	Percentile
East Middle	236.2	73	241.7	72	246.0	70
Wayzata	239.3	77	242.2	73	247.0	72
National	224	50	229	50	234	50

Reading	Grade 6		Grade 7		Grade 8	
	Scale Score	Percentile	Scale Score	Percentile	Scale Score	Percentile
East Middle	223.1	68	226.1	68	229.5	68
Wayzata	224.8	72	226.9	69	231.0	71
National	217	50	220	50	223	50



Staff Demographics

(Please insert data provided by Human Resources Department.)

Experience Profile of Staff (Percent of Licensed Staff by Years of Teaching Experience)				Education Profile of Staff (Percent of Licensed Staff by education/training)		
1 st Year	2 - 7	8 - 20	20+	BA	Masters	Doctorate
6%	48%	38%	8%	27%	73%	0%

Staff Roster

LAST	FIRST	DIST YRS	STEP	LANE
Backes	Brenda	10	14	MA+60
Baker	Kathryn	6	7	MA+15
Baum	Laura	5	11	MA
Benezra	Beth	3	4	MA
Blevins	Jennifer	10	13	MA+45
Boltin	Erin	3	5	MA
Bostrom	Theresa	14	15	MA+60
Bowar	Melissa	24	25	MA+60
Critzler	Scott	15	21	MA
Cunnien	Laurie	0	9	MA+15
DeVoe	Marc	2	3	MA
Downie	Ericka	1	4	MA
Eberhardt	Jim	11	12	MA+60
Fischer	Phyllis	11	15	MA+60
Gardner	Lucia	2	3	BA
Gjevre	Katianne	8	13	MA+45
Hannon	Joseph	3	5	MA
Helmke	Elisa	4	9	BA+15
Herrscher	Jessi	2	3	BA+30
Hickner	Corey	1	2	BA
Hill	Kathryn	2	3	BA+30
Jeppson	Rob	1	3	BA+30
Johaneson	Linda	19	25	MA
Johnson	Nicole	9	10	MA+60
Jones	Justin	0	12	MA

Kim	Susan	2	11	BA
Kimlinger	Debra	0	9	MA+15
Kinzler	Catherine	11	14	MA+60
Knudtson	Cory	1	7	MA+30
Kovacs	Kristin	3	4	MA
Marcellus	Lisa	2	3	BA
Marcouiller	Rachel	9	13	MA+30
	Abram			
Metzler	Jeffrey	6	7	MA
Miller	Curtis	14	15	BA
Misuraco	Nicole	9	11	MA+60
Moe	Kathryn	6	8	MA
Mozey	Michelle	14	15	MA+30
Ness	Donna	23	25	MA+60
Peters	Karen	33	25	MA+60
Peterson	Kristin E.	4	5	MA
Pieper	Thomas	4	9	BA+60
Pote	Kevin	2	3	BA+45
Prendergast	Curran	1	7	BA
Rudolph	Lisa	18	22	MA+45
Scheidler	Matthew	8	11	MA+60
Siegrist	John	2	6	BA
Simson	Kathryn	14	15	MA+60
Snuggerud	David	13	14	MA+30
Soule	Betty	24	25	MA
Stirratt	Andrea	4	5	BA
Thomas	Nancy	13	17	MA
Van Dunk	Amy	15	20	MA+60



Indicate the District student academic achievement goal for the Q Comp plan:

Improve student achievement in the areas of reading and math as measured by performance on Measures of Academic Progress (MAP).

Indicate the Q Comp school wide student academic achievement SMART goal:

57.18% of all students who participate in Spring MAP testing will meet or exceed their individual NWEA Reading RIT growth target score.

Provide the rationale and supporting data used to determine the above Q Comp schoolwide goal.

a) Rationale for this goal:

This goal was determined using the one year of achievement data available at Wayzata East Middle School and the district data representing the impact of mobility for the Wayzata Schools. The average percent of 6th, 7th, and 8th grade students who met or exceeded their Reading RIT target score was 58.76. ($67.2 + 52 + 57.1$ divided by $3 = 58.76$) The district data indicating the impact of mobility from the spring of 08 to the fall of 08 shows a decrease of 3.58 percent of students who met or exceeded their target Reading RIT score. This decrease can be seen by comparing the NWEA School Overview Report dated fall of 2008 to the same report dated June of 2008, (which lists the percent of students at each grade level who met or exceeded the Target RIT score). With this trend data, the percentage of students who met or exceeded their reading RIT target score would be 55.18. The goal, 56% of all students who participate in spring MAP testing will meet or exceed their target Reading RIT score, is an increase in achievement that also takes into account the new 2008 NWEA Norms. The 2008 NWEA Norms information states that districts might notice a slightly smaller proportion of kids at the high end of the RIT scale for their grade exceeding their target growth norms than they saw with the 2005 norms. As indicated in the chart below, the district has a high number of high achieving students, which could result in a smaller proportion of kids exceeding their target growth norms.

b) Supporting data:

Identify standardized assessment: MAP (Middle Schools started using MAP assessment in the spring of 2007)									
<input checked="" type="checkbox"/> Reading <input type="checkbox"/> Mathematics <input type="checkbox"/> Other (academic content)	Identify assessed grades: 6-8						District Performance on MCA II (percent proficient)		
	School trend data			District trend data					
	05-06	06-07	07-08	05-06	06-07	07-08	06 Actual	07 Actual	08 Projected
Measure of student achievement (Percent Meeting Growth Target.):			Spring-Spring Growth 6 th - 67.2% 7 th - 52% 8 th - 57.1%			Spring-Spring Growth 6 th - 58.6% 7 th - 55.5% 8 th - 58.6	Spring 2006 3 rd - 89.5% 4 th - 90.5% 5 th - 90.6% 6 th - 89.3% 7 th - 89.1% 8 th - 87.1%	Spring 2007 3 rd - 89% 4 th - 85% 5 th - 83% 6 th - 85% 7 th - 79% 8 th - 81%	Spring 2008 3 rd - 93.5% 4 th - 90.2% 5 th - 89.9% 6 th - 88.3% 7 th - 85.1% 8 th - 82.4%
Number of students tested:			653			2156	4268	4607	4518

Indicate the action plan for the Q Comp school wide goal:

1. Create a literary-rich environment in all classrooms

- Homeroom teachers will read common literature (books, vignettes, articles)
- Common Language and Visual Cues in all classrooms (will include NUA strategies)
- Word Walls (content-specific vocabulary words displayed on a wall or bulletin board in classroom)
- Individual teachers, teams and school wide we will create opportunities to share “a love of reading” with our students.

2. Training Teachers

- Commitment to updating/training teachers new to our building
- Train teachers in more effective team meeting strategies that focus on student learning.
- Offer out of school professional study groups that address student literacy needs (may or may not include an AWE class)
- Professional Growth Plan Goals will reflect action plans that address student literacy needs
- Use classroom visits and observations to gain feedback about reading instruction in individual classrooms.
- Train a 2nd cohort of teachers in the National Urban Alliance (NUA) strategies related to vocabulary, comprehension skills and thinking maps. Using the train the trainer model, these teachers will come back and hold workshops for the rest of the staff.

3. Identify and support all readers not meeting his/her target growth

- Continue implementation of the Read 180 program to service the needs of our struggling readers.
- Continue to utilize team meetings to discuss specific readers and create individualized learning plans to foster growth in our classrooms.
- Continue to use Just 5 Clicks data for identification purposes.

Become more aware of ALL of our readers not meeting targeted growth and be open to differentiation strategies to meet their developmental needs.



DATA ANALYSIS OF PREVIOUS ALT COMP GOAL

Goal:

East Middle's goal was 51.6% growth in reading

Summary/Interpretation of Data Analysis:

Spring 07 to Spring 08 growth is 58.6% in reading

Goal Achieved: X Yes No

Reading Quadrant

Growth Index	
29.7% (194)	53.5% (350)
11.8% (77)	5.0% (33)

Quadrant Legend:

Below Growth: Student's growth index is less than zero

Above Growth: Student's growth index is greater than or equal to zero

Above Proficiency: Student's performance is projected to be above the state standard

Below Proficiency: Student's performance is projected to be below the state standard

Grade	Student Count for Growth	% Growth	Student Count for Season	% Proficient	% Median
6	205	67.3%	238	86.6%	76.9%
7	204	51.5%	229	79.0%	72.9%
8	245	57.1%	273	76.6%	70.7%

Mathematics Quadrant

Growth Index	
Below	Above
38.0% (252)	41.8% (277)
15.1% (100)	5.1% (34)

Quadrant Legend:

Below Growth: Student's growth index is less than zero

Above Growth: Student's growth index is greater than or equal to zero

Above Proficiency: Student's performance is projected to be above the state standard

Below Proficiency: Student's performance is projected to be below the state standard

Grade	Student Count for Growth	% Growth	Student Count for Season	% Proficient	% Median
6	209	45.9%	239	81.2%	81.6%
7	204	53.4%	229	75.5%	76.9%
8	250	42.4%	277	72.6%	74.7%



Please list other building initiatives.

Initiative:

ZAP Program – Zeros Aren't Permitted

What is ZAP?

It's a shift in how we look at zero grades for missing work. Research states receiving zeros does not teach responsibility but reinforces underachievement and poor grades.

The goal of the 'ZAP' program is to encourage all students to be responsible and successful at school as well as improve overall academic achievement through the reinforcement of materials by improving student understanding of subject matter. Homework should reinforce classroom instruction and increase understanding of the material.

Strategies/Activities: (copy format if need more)

ZAP 1

If you do not turn in an assignment on the due date you will receive a ZAP TICKET stating that you have until the next school day to complete the assignment and turn it in to the teacher without penalty. (Warning or Head's Up)

ZAP 2

If the student fails to turn the assignment in the next school day the teacher will complete a ZAP Form and you must stay after school to complete the work. If the assignment is completed before the end of that day the student can turn it in and be removed from the ZAP List and not be required to remain after school. Student should have the teacher initial their planner indicating you are 'off Zap' and show this to the ZAP supervisor. If the student is unable to complete the assignment before 3:10 he must go to the Media Center to complete the work. Once it is completed, the student turns the work in to the supervisor and is then removed from the list. The student can then leave and participate in after school activities or go home.

ZAP 3

If the assignment is still missing, the student will receive a 'working lunch' and is allowed to go to the head of the lunch line, get a lunch, grab their homework and report to the designated classroom to complete the assignment. If the assignment is finished before the end of the lunch period the student can return to the cafeteria. If the assignment is not finished during lunch the student must remain after school to finish the assignment.

- It is the students responsibility to complete the school work and turn it in to the teacher.
- It is the students responsibility to have the teacher initial their planner to indicate the assignment is complete in order to be removed from the ZAP list and not be required to remain after school.

Status:

Date Completed: **Ongoing: X**

- The ZAP program will be implemented at the start of the next school year and run Monday through Thursday when school is in session. The results of the program indicate a significant increase in the amount of homework completion directly impacting the final grade at the end of each quarter. Feedback from teachers strongly recommends the continuation of the ZAP program at EMS.

Status:

Date Completed: **Ongoing:**

Person/Group Responsible:

Individual teachers – record student name, missing work and submit list on a daily basis.
 Paraprofessional – Karen Ortman - compiles and prints off all ZAP forms and daily list.
 Amy Van Dunk, School Social Worker – supervises program, collects completed assignments and turns them into teachers at the end of the ZAP program.

Timeframe:

Current: Began at start of 3rd Quarter (1/26/09) and continues through 4th quarter.

Summer plan: compile data of students

- Gather list of students who received D/F's; compare with the number of missing assignments recorded in grade book; determine how often student was Zapped and how often student remained after school and completed the missing assignment.
- Work with technology specialist to determine if a ZAP form can be sent to the parent of the student via email when a teacher submits a form to the para.
- Restructure the after school program to include the ZAP program.
- Discuss the possibility of using the last 3-5 minutes of the school day to gather the students who have been placed on the ZAP list and have them report to the media center in order to ensure student do not leave school.
- **2009 -2010 SCHOOL YEAR:**Implement the ZAP program at the start of the school year.



Please list other building initiatives.

Initiative:

Literacy Strategies

Building Wide Professional Development

Strategies/Activities: (copy format if need more)

- **Our Site goal for the 2008-2009 school year was for each student to improve their reading score. To assist in meeting this goal, professional development focused on literacy strategy instruction. One staff meeting a month was dedicated to train teachers in best practice literacy instruction.**

Status:

Date Completed:

Ongoing: X

- **We will have continuous professional development using the internal expertise of the East Middle School Staff**

Person/Group Responsible:

Katie Moe

Ericka Downie

Timeframe:

Continuous



Please list other building initiatives.

Initiative:

Advisory

Strategies/Activities: (copy format if need more)

- The advisory committee focused on two main aspects of EMS's advisory program. The first focus was creating curriculum organized by monthly themes. We developed a routine for each day of the week to keep the curriculum regimented. Mondays were a recap of the weekend and an overview of the week ahead. Tuesdays and Wednesdays were curriculum days about the monthly themes; this usually involved reading and discussing since our site's goal is to improve reading. Thursdays emphasized journaling and conferencing while Fridays were reserved for celebrations and competitions. The second focus was to evolve the advisory program into something useful and fun for the students and staff. We constantly self-assessed to improve communication, delivery of materials, curriculum, and the overall moral of the building towards advisory. Besides reflection, the committee is using student and staff surveys to continue to tweak our performance.

Status:

Date Completed: **Ongoing: X**

- **Full Implementation of the Advisory program will be achieved in the 2010 – 2011 school year. At that time all students will experience three consecutive years of advisory.**

Person/Group Responsible:

Advisory Committee

Timeframe:

Ongoing

Update on Curriculum Process

Presented to the Wayzata School Board,

By Jane L. Sigford

May 18, 2009

2008-09 year

Overview:

Overall, the focus of any curriculum review is to stimulate thinking, shape the content of that curriculum for the future, purchase needed materials, infuse technology, and identify best practice instructional strategies. All reviews start with conversations about what skills and knowledge students need for the future in a world that demands word/print literacy, math literacy, and technology literacy. We begin a review with an exploration of the future by discussing assigned readings, such as excerpts from Daniel Pink and Richard Florida, and by viewing short videos such as *2020* by Karl Frisch, a clip on Second Life from *CBS Sunday Morning*, and webcasts from Sir Ken Robinsons. We must create our own language of the future in order to create the destiny we want to achieve.

Another focus of the curriculum work is to create effective assessments. We are working on common assessments, summative assessments, and formative assessments, which are one of the most effective ways to increase student achievement, if used properly. As part of this work, we are testing various technological assessment tools, QuickScan and online testing for example, to be able to have quick, rich data that can be analyzed by learning target.

An outgrowth of this assessment work next year will be an examination of current grading practices in the district. I will create a district-wide task force to make recommendations for our entire staff by the end of next year, hopefully. Also, because of the focus on effective assessments, I have extended the intense part of a curriculum review process to three years, instead of two. Teachers need a year with new materials before they can design and implement quality assessments. They also need that time to analyze overlaps and holes in the materials as related to the Minnesota standards.

Plus, over the past year and a half the curriculum website has been redone to reflect the district website format. The website will be a “one-stop shop” for teachers for curriculum, alternative compensation forms, and professional development opportunities. It will be

unveiled to the entire district on September 1. Parents will have access to the first level of information so they can see what their children will be learning.

Departments

Family and Consumer Science (FACS)

- Our goal is to move the group to examine a curriculum reflective of the 21st century .
- A new focus will be food science which is part of a career pathway and a growth industry. Two teachers are being trained this summer in Colorado. This food science course is an addition STEM course (Science, Technology, Engineering, and Math) for students to use to complete our rigorous high school graduation requirement.
- Middle school is also doing food science and nutrition.
- We worked to eliminate the overlap with health.

Language Arts

- This was the first year with the new Scott-Foresman series at the elementary. As part of this adoption, and in conjunction with the need to target instruction to specific skills, teachers were asked to give six unit assessments this year which we scanned with Quick Scan. Teachers were brought together to analyze the data. We were very surprised, upon analysis, to realize that the tests were faulty. Therefore, language arts teachers will be redesigning them by summer so that when we give them next year, we can identify the specific skills as linked to standards that we need to teach.
- The middle school teachers worked with their new book to design common assessments as well. We are bringing the middle schools to a point where all three schools are offering the same experience to our students.
- At the high school the 9th and 10th grade teachers have worked to delineate a common course with common expectations among all the teachers. We are purchasing a new 9th grade textbook this summer.
- We examined courses at the high school. There will be two new courses offered at the high school next year—Styles of Acting which replaces Advanced Performance and Dynamics of Speech, a new course.
- Conversation continues about broadening the literature offerings in every course to reflect a broader world view. We are purchasing some new titles which will be incorporated throughout.

- The high school Communications department will all have Smartboards after this summer. The staff will receive training in their use and we will continue the professional development on technology throughout next year.

Physical Education

- Overall, we are changing to a fitness and lifetime wellness focus. We are redoing 9th grade to provide experiences in physical activity that can be maintained throughout life. Kids will focus on such skills as learning about BMI, Body Mass Index, for example.
- We are purchasing fitness machines for all four secondary buildings to provide cardiovascular workouts in more areas to promote lifetime physical activity and wellness
- Middle level—purchased technology that will allow students to check their fitness levels and record it. This data will be available eventually for parents to see online.
- Increased teaching stations at the high school—Last year added projector and sound system to the weight room . Previously the room had been used infrequently and is now used each block for dance, aerobic exercise, fitness and so on.
- In a new experiment, we are pairing classes with math because research suggests that physical activity prior to intense learning or testing increases achievement. Next year we will be consciously scheduling some 9th graders in to P.E. prior to their yearlong math class. We are going to monitor the data to see if those students do better than those students who do not have P.E. immediately prior to math.
- You will receive a more in-depth formal presentation in the fall about the entire process.

Math

- Although math is not under formal review, there is always work in math.
- We are describing the learning targets by grade level and designing common assessments in target areas to analyze what our students do and do not know.
- We have concentrated on middle school and high school. Integrated 1 has developed a common final exam and will analyze the data next fall.

- We investigated a standards-based report card for secondary and put this on hold until the technology is friendlier for this initiative.
- We designed CGI (Cognitively Guided Instruction) training throughout the school year for elementary math intervention specialists. We are also providing in depth CGI training with Jim Brickwidde from Hamline for elementary and secondary teachers this summer. They may earn up to 4 credits. The training lasts 40 hours—with follow-up training during the school year.
- Last summer a group of teachers designed math Smart notebook lessons that coincided with the elementary math curriculum. These are on the website and are available for immediate use by all elementary teachers.

Music

- The elementary program was examined to make certain that we were incorporating effective technology in the teaching of music. We purchased new elementary music books which were accompanied by some wonderful technological pieces using smartboards and other technologies.
- At the middle level we are changing the General Music course to include such things as African drumming to invite participation in a wide variety of ways. We needed a course that was not just a place for students who did not want to be in band, orchestra, or choir. Our choir teachers were telling us that many students did not want to be in choir which was perceived as the final alternative for students who did not play an instrument. We hope to have a course now that students elect to take.
- At the high school we continue to develop strong musicians. We offer Electronic Music, AP Music Theory in addition to our strong band, choir, and orchestra programs. We are incorporating more and more software to enrich the music experience. Some of the programs allow students to play a piece, and the computer records and then writes the music into musical notation so that all students can play the piece.
- Music will be presenting a more formal, in-depth curriculum overview this fall.

Science

- Although science is not in formal curriculum review, work still continues.

- Elementary teachers have been trained in the effective use of science notebook. The notebook is a way to teach students scientific thinking, the incorporation of writing in science, vocabulary building, to name a few of the skills. Cari Jo Kiffmeyer has designed the questions to be asked per unit which are included in all of the science kits for elementary teachers to adopt.
- Cari Jo has designed Smart Notebook lessons that are on the website that accompany the science lessons for elementary teachers. They are available for download and immediate use.
- Middle school science teachers have identified learning targets for their lessons that are student-friendly. They have composed assessments which have used QuickScan to gather immediate data. Students take the test one day, get their results the following day, knowing what they need to still learn, and they can retest the following day after more study. The focus is for students to master the content, not just move on.
- High school courses are involved in common assessments as well which ensures that students in a course, regardless of who the teacher is, receives the same instruction.
- This is the first year of the 9th grade Honors Science course which has gone very well.
- We have piloted some new science kits at the elementary which we will now purchase for adoption. The new kits were chosen to fill some of the holes we had in meeting the Minnesota Academic Science Standards.

Social Studies

- Although social studies is also not in formal review, teachers have worked, particularly at the middle level, to identify learning targets and design common assessments.
- Teachers have collaborated across all three middle schools to ensure that all of our students are getting the same content, albeit delivered differently.

Technology

- Technology is unique in that it is both a curriculum with standards and it is a vehicle to deliver all other contents.
- One focus this year was to get people to explore the future. What will our students need? How do we need to change how we teach? What does “learning anytime anyplace” really mean?

- By the end of summer the review team will have articulated the technology standards across the other curricular areas. For example, research is a strand that runs throughout the technology standards. The team will look at each curriculum and grade level to see what component of research is taught through that curriculum.
- There are also standards for teachers (and administrators.) One of the tasks next year will be to survey all staff to ascertain their level of skill in many areas. We then need to design professional development based on needs of our staff.
- We have offered many classes after school, through the Technology Summit in the summer, and through other review processes so that teachers see technology as a tool that is indispensable in their classroom.

World Language

- One of the biggest changes this year was the increase in the Spanish offering at the middle level. Students will now take a semester of Spanish in 6th and 7th grade with a full year of Spanish as an option in 8th grade. Prior to this, students only had a quarter in 6th and 7th grade with an elective option in 8th. The hope is that with the elementary background and the increase in middle school, students can start the high school at a more advanced level.
- We also offered a new course at the high school for next fall. That new course is Arabic. To my knowledge, we will be the only high school outside of Roosevelt High School in Minneapolis to offer this course. We are contracting with 287 for a teacher.
- We are purchasing textbooks for the elementary program so that they can make their experience more rigorous for students. In the past they had more of an exposure, experiential model based on TPR-Total Physical Response where students hear a language and construct a physical response to spur memory of the learning.
- We are redoing the high school language lab which is 12 years old. The purpose of the lab is to give students experience in speaking and hearing the target language. The technology that is currently in place was installed when the high school was opened and needed to be updated.

Goals for 2009-2010

ALC—Alternative Learning Center

- We will begin a review of the programs taught through our alternative learning program. The program starts at the elementary with targeted services, continues at middle school with MAP, and concludes with the FOCUS program at grades 9 & 10, and TAP at grades 11 & 12 which also contains the Independent Study program.
- We will have to examine data to see how students enter the program and what skills they have when they leave. Are we doing more than helping them complete their diploma? Are we truly preparing them for some type of post-secondary education?

FACS

- Will complete the materials adoption phase. By the end of the year teachers will have written their new curricula and purchased materials.

Physical Education

- We will complete the design of assessments in physical education.
- We will analyze the data on our students' fitness levels and modify our curriculum to meet their needs.
- We will analyze the data from the 9th grade physical education/math students.
- We will finalize the 9th grade curriculum.

Science

- Begin the curriculum review based on the new Minnesota standards which will be finalized summer of 2009.
- Changes will be in the areas of adding more engineering and more environmental science.
- We are preparing for the new graduation requirement that will ask students to take an end of course test in either chemistry or physics, in addition to the end of course test currently required of biology.

Technology

- Complete the articulation of standards in student curriculum.
- Design professional development for all staff so they know what they are responsible for teaching in their classroom.

- Complete the staff survey and design professional development.

World language

- Analyze the new materials for overlap and holes
- Complete the common assessments
- Analyze the data from common assessments to make certain that our students are learning what they need.

Other curricular areas will also have projects throughout the year. I recognize that a curriculum review is never really completed but must be ongoing in order to stay current.

Conclusion:

Please recognize that this work is not possible without the dedication and hard work of the Curriculum Resource Teachers—Allan Christopherson, Scott Critzer, Belinda Hartzler, Kris Jones, Cari Jo Kiffmeyer, Nancy McCoy, Karen Nickel, Jean Rakun, Amy Swenson, and David Zukor. They are teacher leaders in every sense of the words.

Wayzata School District
Preliminary Budget
July 1, 2009 through June 30, 2010

Draft
May 18, 2009

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**Preliminary Budget
For the Fiscal Year July 1, 2009 through June 30, 2010**

DISTRICT OFFICIALS

SCHOOL BOARD:

John A. Moroz	Chairperson
Patricia L. Gleason	Vice Chair
Carter G. Peterson	Treasurer
Susan J. Droegemueller	Clerk
Linda A. Cohen	Director
Jay A. Hesby	Director
Greg Rye	Director
Chace B. Anderson	Ex-Officio

ADMINISTRATIVE STAFF:

Chace B. Anderson	Superintendent of Schools
James Westrum	Exec. Director of Finance and Business Services
Annie Doughty	Executive Director of Human Resources
Jane Sigford	Exec. Director of Curriculum & Instruction
Lori Fildes	Director of Special Services
G. William Rueber	Controller
James A. Scheuer	Senior Accountant
Robert B. Noyed	Director of Communications

Vision

A model of excellence among learning communities

Mission Statement

The mission of the Wayzata School District is to prepare all students for the future by providing a challenging education which builds academic competence, develops responsible citizenship, encourages creativity, promotes lifelong learning, advances critical thinking skills, instills a commitment to personal wellness, and fosters respect for self and others.

The School District

The first school in the Wayzata area was established about 1855. It began with a one-room log school built near what is now the second green of the Wayzata Country Club. By 1903 Wayzata had established a four-year high school and in 1906 graduated its first class of three students. The Wayzata Public Schools community area lies approximately ten miles west of Minneapolis. The district extends north and east from Wayzata Bay on Lake Minnetonka and serves all or portions of Corcoran, Maple Grove, Medicine Lake, Medina, Minnetonka, Orono, Plymouth and Wayzata. The Wayzata Public Schools system operates seven elementary schools which serve kindergarten through grade five, three middle schools which serve grades 6, 7, and 8, and one senior high school which serves grades 9, 10, 11, and 12. Wayzata West Middle School is located in Wayzata; all other schools are in Plymouth.

◆ Elementary Schools

Birchview, Gleason Lake, Greenwood, Kimberly Lane, Oakwood,
Plymouth Creek, Sunset Hill

◆ Middle Schools

Central, East and West

◆ Senior High School

EXECUTIVE SUMMARY

**INDEPENDENT SCHOOL DISTRICT 284
WAYZATA, MINNESOTA**

Table I

2009-2010 Preliminary Budget

Revenue

General Fund	\$106,247,459
Health & Safety	<u>2,861,077</u>
Total General Fund	\$109,108,536
Food Service	\$ 4,901,647
Community Service	7,632,222
Construction	6,948,021
Debt Service	<u>9,762,061</u>
All Funds Combined	\$138,352,487
All Funds Excluding Construction	\$131,404,466

Expenditures

General Fund	107,113,867
Health & Safety	<u>2,839,377</u>
Total General Fund	\$109,953,244
Food Service	\$ 4,972,354
Community Service	7,493,829
Construction	6,438,894
Debt Service	<u>9,764,556</u>
All Funds Combined	\$138,622,877
All Funds Excluding Construction	\$132,183,983

Note: Construction Fund Revenue and Expenditures included in General Fund also; exclude from totals for a more accurate measure of total revenue and expenditures

Budget at a Glance

General

- ◆ This budget year commences July 1, 2009 and ends June 30, 2010. It is for the 2009-10 school year and is also referred to as “Fiscal Year 2010”, abbreviated “FY10”.
- ◆ Student enrollment as of October 1st remains stable at 10,143, compared with 10,152 in the prior year.
- ◆ The general fund unreserved, undesignated balance at June 30, 2010 is estimated to be \$8,473,707, or 8.7% of the expenditures. This represents 4 weeks of operations and is deemed to be adequate at year end.
- ◆ This budget assumes that there are no changes in the formula allowance enacted by the 2009 Legislature.

Revenues

- ◆ Total general fund revenues are estimated to be \$109,108,536 an increase of \$422,023 from FY09 to FY10.
- ◆ Revenue includes the referendum levy of \$1,571.00 per pupil unit.
- ◆ State special education aid and excess cost aid will still be prorated at 85% and 66%, respectively.
- ◆ Revenue also includes a technology levy of \$4,888,894.
- ◆ Investment earnings in the general fund are expected to be approximately \$415,000 due to reduced rates of return in the marketplace.
- ◆ Deferred maintenance revenue of \$594,000 is included in the budget, while \$637,000 of “one-time” operating capital aid is no longer available in 2009-2010.
- ◆ Federal Title I revenue of \$282,400 is included. The district began receiving this revenue in FY 2009.

Expenditures

- ◆ General fund expenditures are estimated to be \$109,953,244, a decrease of \$2,906,764.
- ◆ Budget includes \$4.8 million for technology through the capital projects levy.
- ◆ Budget includes \$2.6 million for the alternative compensation plan.
- ◆ Salaries are budgeted to increase 3.6%, including step advancement, lane changes, and scheduled improvements for settled bargaining units as well as estimates for non-settled groups.
- ◆ Health insurance premiums will increase by 4.5%.
- ◆ Dental premiums will remain constant at current rates.
- ◆ Public Employee Retirement Association (P.E.R.A.) employer contribution rates for non-licensed employees increased to 6.75% on January 1, 2009 and is projected forward to the 2009-10 fiscal year.

Budget at a Glance **(Continued)**

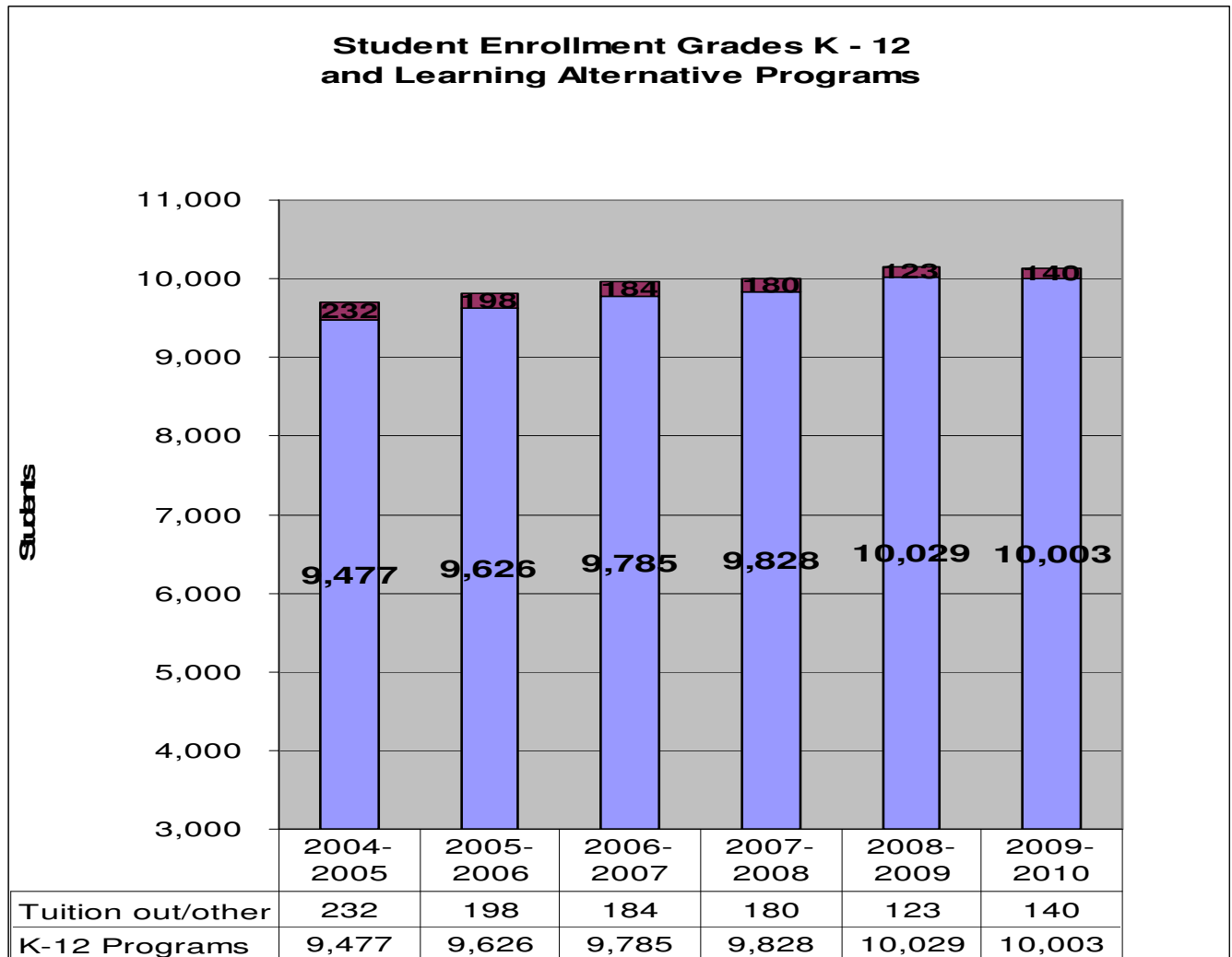
- ◆ The budget for the textbook replacement cycle is \$400,000. An additional \$50,000 is budgeted for textbooks for enrollment changes at particular grade levels.
- ◆ The total budget for operating capital expenditures exceeds operating capital revenue by \$906,315. Operating capital reserves designated for roof repairs will cover this.
- ◆ Budget includes a reserve of 6 teacher FTE's to address hot spots.
- ◆ Schools' allocations per pupil for supplies remain constant at current rates.
- ◆ Heating, ventilating, and air conditioning (HVAC) improvements are planned at Central Middle School. This is the third year of a four-year project.
- ◆ Other deferred maintenance projects include scheduled pavement rehabilitation and flooring replacements.

◆ **Enrollments**

The state of Minnesota had 339 school districts with a statewide public school enrollment of 811,000 for 2007-2008. Slightly more than one percent of Minnesota's public school students are educated in Wayzata Public Schools. In 2009-2010, enrollment at Wayzata Public Schools remains stable at 10,143. Of these students 10,003 are served in the district's facilities, while 140 students are served through tuition agreements by other districts.

Student enrollment growth has leveled off, and enrollment is expected to remain level over the next ten years. In some areas of the district new homes are under development. In general, however, this new development is expected to be offset by slight enrollment declines in mature parts of the district. These projections are based upon demographic studies commissioned by the District in 2008 that are currently being updated as of June 2009.

**Table II
Enrollment History**



Enrollment includes F.A.I.R. School IDDS students, and resident students served in Intermediate District #287 under tuition agreements.

General Fund

Purpose

The General Fund contains all revenue and expense for the general, day-to-day operations of the school district. This includes salaries and benefits for teachers, administrators, custodians, secretaries, and paraprofessionals; instructional supplies; technology; transportation; textbooks, and money spent to operate and repair district buildings.

In some ways, it is clearer to express the general fund in terms of what it does not cover. The general fund does not cover Culinary Express; Community Education (including Home Base latchkey programs); debt service payments on bonds issued by the District; and the cost of major construction projects financed through the issuance of bonds.

The general fund does include expenditures funded with the Health and Safety levy, but in this document these expenditures are shown separately. This is because Health and Safety expenditures can fluctuate considerably from year to year and can give a distorted view of the district's funding picture.

The preliminary budget for 2009-10 contains moderate changes in staffing and programs from the previous year. The 2009 Legislature was currently in session at the time that this budget was prepared. This budget assumes that the state formula allowance will be frozen at the 2008 level.

Fund Balance Policy

The level of spending is set with a number of considerations in mind, but one of the chief considerations is to maintain an adequate level of reserves for unanticipated events. The district has a formal policy calling for an undesignated balance in the general fund equal to at least 5% to 7% of one year's expenditures. This balance could be considered to be the District's "savings account". Maintaining a prudent fund balance is important for the stability of the district, and is a key measure that bond rating agencies examine when assigning a credit rating to a district's bond sale.

The projected undesignated, unreserved general fund balance as of June 30, 2009 is \$8,473,707. This is 8.7% of the expenditure budget.

Unanticipated events that could occur that would require the District to dip into its undesignated fund balance include:

- Property tax delinquencies and abatements
- Enrollment fluctuations
- Unanticipated price increases for essential purchases, e.g. fuel for heating and transportation
- State revenue reductions or "aid pro-rations"
- Severe weather

General Fund Revenue

Wayzata Public Schools receives revenues from two primary sources: local property taxes and state funding. A relatively small amount of revenue is also received from the federal government; fees and charges; non-resident tuition; and interest income. A detailed explanation of general fund revenue begins on page 13. Highlights for 2009-2010 include:

Wayzata Public Schools will receive approximately \$109.1 million to support the general operations of the district. This is an increase of \$422,023 from the preceding year.

State aid estimates are primarily based on session laws 2008 with the assumption that there will be no increase in the formula allowance. Special Education aid is also expected to remain the same and prorated at 85% for general aid and 66% for excess cost aid.

Some of the major features of the general fund revenue for Wayzata Public Schools for FY10 are:

- State revenues are the single largest source of general fund revenue (67%) for Wayzata Public Schools.
- Revenue for the Alternative Compensation Plan is \$2,655,640.
- The technology levy is increased to \$4,888,894. Only \$4,421,700 of this will be budgeted for expenditures in FY10; the remaining \$467,194 will be reserved for use after FY2011, when one of two approved levies expires.
- Deferred maintenance revenue of \$594,916 is in the budget. This revenue is designated for building repairs.
- Compensatory revenue, which is state aid allocated on the basis of students eligible for free and reduced-price lunches, is increasing from \$613,195 to \$683,278. This is principally due to the fact that 103 more students are eligible for free lunches and 45 more for reduced-price lunches.
- Also included in revenue is \$1,600,000 in state integration aid and the local integration levy, as well as \$1,100,000 for integration-related transportation.

General Fund

Change in Budgeted Revenues 2008-2009 and 2009-2010

	FY09	FY10	Difference
Basic Formula	59,900,325	59,974,472	74,147
<i>2% formula increase; slight increase in pupil units</i>			
Referendum Levy	15,739,043	16,972,457	1,233,414
<i>Inflation adjustment; prior year adjustments</i>			
Technology Levy	4,568,597	4,888,894	320,297
<i>Inflation adjustment of 2%; build reserves</i>			
Special Education Aid	6,796,889	6,903,749	106,860
<i>Additional staff & transp. costs; state proration increases for FY09</i>			
Alternative Compensation	2,597,140	2,655,640	58,500
Integration Revenue*	2,654,724	2,700,000	45,276
<i>Increased transportation aid</i>			
Deferred Mntnce. Revenue	574,217	594,916	20,699
Interest Income	415,000	415,000	
<i>Rates declined</i>			
Tuition	700,000	20,000	-680,000
Federal Funding	2,277,231	2,277,232	1
Other Local Revenue	2,664,118	2,222,181	-441,937
Other Levy Revenue	4,632,308	5,298,825	666,517
Other State Aid	1,261,041	1,324,093	63,052
TOTAL	104,780,633	106,247,459	1,466,826

*Includes transportation aid for integration programs

Property Taxes

Property taxes became a far less significant source of revenue for Wayzata Public Schools due to major legislative changes enacted in the 2001 Session. Two large property tax components of the school levy were eliminated or reduced, and replaced with an equivalent amount of state aid. As a result Wayzata's certified property tax levy declined by more than half, from \$55.4 million in the levy for FY02 to \$26.5 million in the levy for FY04.

In November 2005, the voters of the District approved an increase in the referendum levy that included an allowance for future inflation. The referendum levy for 2009-10 is \$1,571.00 per resident pupil unit. Total referendum revenue is \$16,972,457 for this year.

The District's property tax base remains strong. The District's referendum market value grew to just over \$10 billion in 2008.

For FY10, local property taxes will provide \$33.6 million in revenue for the general fund. This source of revenue will also provide \$1.2 million for the community services fund and \$9.6 million for debt redemption fund. The total property tax levy for FY10 for all funds is \$44.5 million.

Federal Aid

Federal funding is generally provided to supplement the costs of providing instructional services in specific vocational, adult, and special education programs for educationally or economically disadvantaged students. Federal funds are a relatively modest revenue source for the general fund, but significant for target population groups. In FY10, Wayzata Public Schools will receive approximately \$2,277,231 in federal funding, which is less than 2.2% of the general fund budget.

About 75% of federal aid is designated for special education programs. In FY09, the district estimates that it will receive \$282,400 in Title I revenue.

Other Revenue

About \$2.9 million in miscellaneous revenues from various sources is projected to be available in FY10. This includes interest earnings, tuition paid from other districts, donations, and fees.

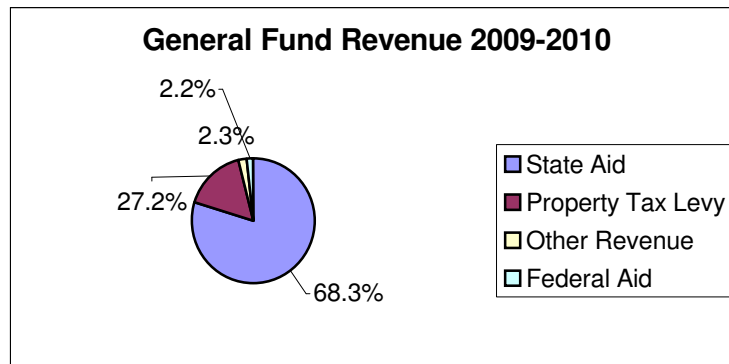
General Fund Revenue—Detailed Explanation

Most attention during this budget process is focused on the General Fund. This is the source of most expenditures having to do with general operations of Wayzata Schools for the primary mission of the District - - educating children.

The District has budgeted revenue of \$106,247,459 in its general fund for 2009-2010. Other funds will bring in additional revenue, but this money is not available to pay the general operating expenses of the District.

Where Does the Money Come From?

As the pie chart below shows, most general fund revenue for Wayzata Schools is state aid - - 68.3%. The second largest portion, 27.2%, comes from property taxes assessed on property within the District. Another 2.3% comes from local revenues, fees, admission charges, earnings on investments, and tuition payments from other school districts or from individuals. Finally, federal aid provides 2.2% of general fund revenue. Both state aid and local property tax revenues are strictly controlled by the state.



State Aid	\$72,549,862	68.3%
Property Tax Levy	\$28,898,187	27.2%
Other Revenue	\$ 2,522,179	2.3%
Federal Aid	<u>\$ 2,277,231</u>	<u>2.2%</u>
Total	\$106,247,459	100%

(The figures and chart above exclude Health and Safety Revenue)

State Aid in the General Fund

State Aid falls into three major categories:

- **General Education Aid** (\$59,974,473)
- **State “Categorical” Aid** (\$9,653,445)
- **State Property Tax Credits** (\$166,032)

General Education Aid - Basic Formula

The principal component of **General Education Aid** is the “general education basic formula”. For 2009-2010, this formula will provide the District with \$5,124 in state aid for each “pupil unit.” (A “pupil unit” is essentially one child enrolled for the entire school year, but each child is counted as more or less than 1 pupil unit, depending on grade level.) Currently pupils are weighted as “pupil units” according to the following:

<u>Grade Level</u>	<u>“Pupil Unit” Weight</u>
Kindergarten	0.612
Grades 1 – 3	1.115
Grades 4 – 6	1.06
Grades 7 – 12	1.3

For example, since each high school student counts as 1.3 pupil units, the school district receives 1.3 X \$5,124 in general education basic revenue for each high school student, or \$6,661.

The general education basic aid formula is the single largest source of revenue for Wayzata Public Schools, providing an estimated \$59,974,473 in 2009-2010. This comprises 57% of the District’s total general fund revenue for the year.

Other General Education Aid Components

The remaining components of general education aid for Wayzata total \$2,937,210. This includes the following:

Compensatory Revenue	683,279
L.E.P. Revenue	119,140
Referendum Tax Base Reduction Aid	29,736
Extended Time Revenue	242,933
Transportation Sparsity Revenue	2,809
Gifted and Talented Aid	140,455
Alternative Compensation Aid	1,743,341
Pension Subtraction	(307,541)
Endowment Fund	<u>309,818</u>
	\$2,937,210

Other General Education Aid Components- Continued

- **Operating Capital Aid** is designated for capital expenditures for buildings and equipment. It is based on the number of students enrolled and the age of the District's buildings. Beginning in FY05, much of this revenue comes from a property tax levy; previously it was all state aid. Beginning in 2008-09, Wayzata does not receive this aid; all of the District's operating capital revenue comes from levy.
- **Compensatory Revenue** is based on the number and percentage of students eligible for free or reduced-price lunch. This revenue goes to the school where the low-income students are enrolled, and must be used to serve students needing extra assistance.
- **Limited English Proficiency (L.E.P.) Revenue** is based upon the number and percentage of students whose native language is not English.
- **Referendum Tax Base Reduction Aid** is money paid to districts because the Legislature reduced the referendum property tax base in 2001 by exempting certain types of property (farmland and cabins) from school operating referendum taxes. The referendum levy of the District is reduced by the amount of the aid.
- **Extended Time Revenue** is aid for "extended time" pupil units, that is, students who attend school for an extended day or extended year (e.g. summer school). The program must be affiliated with an Area Learning Center (ALC). The extended time cannot exceed 20% of the regular school day/school year.
- **Transportation Sparsity Revenue** is based on the student population, and area of the district in square miles. It is a small amount for Wayzata, but a significant revenue source for rural school districts.
- **Gifted and Talented Revenue** is equal to \$12 per pupil unit, and is to be used to enhance programs for gifted and talented students.
- **Alternative Compensation Revenue** is a new program established by the 2005 Legislature to encourage school districts to implement merit-based compensation plans for teachers. The total revenue is \$260 per pupil. Part of this revenue comes from a property tax levy.
- **Pension Subtraction** is a reduction in aid to the District. In 1997 the Legislature reduced employer pension contribution rates on behalf of teachers, but reduced school district aid so that the reduced expenditures would not accrue to the benefit of school districts. The reduction was modified for 2007-08 to offset the effects of an increase in the employer's share of teacher retirement costs.
- **Endowment Fund** is revenue from a statewide trust fund for education, established at the time Minnesota attained statehood. Revenue from the trust fund is distributed to all school districts in proportion to enrollment. Prior to FY 2009-2010, the revenue amount was subtracted from general education aid, so there was no net gain to the District. Beginning in 2009-2010, the subtraction no longer occurs, resulting in approximately 300,000 of additional revenue to the district.

State “Categorical” Aid

State categorical aid is calculated on the basis of expenditures for a particular program or “category.” The District’s largest categorical aid is special education aid, which is based on a formula that considers the District’s expenditures on salaries of special education personnel, special education transportation costs, and other factors. Categorical aid amounts for 2009-2010 for Wayzata Public Schools are as follows:

Special Education Aid	\$6,813,628
Special Education Excess Cost Aid	633,611
Integration Aid	1,062,326
Alternative Attendance Aid	90,000
Nonpublic Pupil Transportation Aid	465,630
Integration Transportation Aid	1,100,000
Advanced Placement Testing Aid	<u>58,500</u>
Total State Categorical Aid	\$9,653,445

Special Education Aid is paid to offset the additional expense associated with serving students with special needs. This aid formula provides approximately 68 percent of salary of special education teachers and aides. It also contains factors for special education transportation costs, supplies and equipment, and contracted special education services. The state appropriation for this aid was increased substantially in 2007. Still, the appropriation does not cover the full cost, so the aid is still pro-rated. For FY10, school districts can expect to receive only 85% of the revenue that the formula would provide if fully funded.

Special Education Excess Cost Aid is paid via an aid formula that is triggered when a district’s expenditures for special education exceed certain thresholds. This aid is volatile, and is very difficult to predict. The state appropriation for this aid is expected to be insufficient to fund more than about 66% of the aid that the formula would provide if fully funded.

School to Work Special Education Aid, formerly a separate aid category, is now included in the regular special education aid formula.

Integration Aid is revenue of \$129 per pupil unit to provide services relating to voluntary integration programs. There is a tax levy component to this also.

Alternative Attendance Aid is aid of \$351 per pupil unit for students who reside in Minneapolis and attend school in Wayzata under integration programs.

Nonpublic Pupil Transportation Aid is aid to offset the cost of providing transportation to District residents who attend nonpublic schools.

Integration Transportation Aid is paid to reimburse the District for the cost of transporting students who come to Wayzata under a voluntary integration program (“Choice is Yours.”) This aid also covers the cost to transport Wayzata students to two integration magnet schools: Fine Arts interdisciplinary Resource (F.A.I.R.) School in Robbinsdale, and the Interdistrict Downtown School in Minneapolis.

Advanced Placement Testing Aid is aid paid to offset the cost of advanced placement tests for high school students.

State Property Tax Credits

The state pays a portion of the property tax bill on homesteads and agricultural homesteads. The credit is a maximum of \$304 for low-value homes, and declines in amount as the value of the home increases. The credit is paid to the school district, city, county, township, etc., in proportion to each taxing jurisdiction’s levy. The Wayzata School District’s estimated share of this credit for the general fund is \$166,032.

Property Tax Levy

The District’s property tax levy is limited by state law. The property tax components in the general fund for 2009-2010 are as follows:

Referendum Levy	\$16,972,457
Technology levy	4,888,894
Integration Levy	447,674
Building Lease Levy	1,283,303
Ice Arena Operating Levy	183,274
Safe Schools Levy	462,712
Operating Capital Levy	2,333,005
Deferred Maintenance Levy	594,916
Equity Levy	786,466
Transition Levy	12,956
Secondary Vocational Levy	190,727
Alternative Compensation Levy	912,299
Judgment Levy	9,000
Reemployment Levy	(16,556)
Abatements & CoAuditor Adjustments	53,092
Adjustment for Estimated Tax Delinquency	(50,000)
Less State-Paid Property Tax Credits	<u>(166,032)</u>
Total Property Tax Revenue	\$ 28,898,187

Referendum Levy

This levy requires voter approval. In 2005 Wayzata voters approved an increase in the levy to \$1,609.08 per pupil unit, which is above the maximum that state law allows for Wayzata. The district levied the maximum allowed--\$1,571.00 per pupil unit. Inflation in future years will eventually raise the state maximum to reach or exceed the full amount approved by the voters. (Some districts are grandfathered in at higher amounts, and rural districts are exempt from the state maximum limits.)

Technology Levy (also known as Capital Projects Levy)

This is a voter-approved levy. This money can be spent only on technology and telecommunications (including staffing).

Integration Levy

This levy is used to support integration and diversity education programs.

Building Lease Levy

This levy is for payment of costs to rent space for instructional purposes or storage. The largest single lease is the lease/purchase agreement for the athletic bubble at Central Middle School. Also included in this levy is the District's share of leased space for District 287 special education programs. Also included are short-term athletic facility leases, such as ice time for hockey teams.

Ice Arena Operating Levy

This levy is for the net operating costs of the District ice arena.

Safe Schools Levy

This levy is \$30 per pupil unit for 2009-2010. The money can be spent for a variety of security items, ranging from personnel to technology.

Operating Capital Levy

Operating capital revenue in previous years was all state aid; now districts must levy for much or all of the revenue. This revenue is for equipment, building construction projects, and textbooks.

Deferred Maintenance Levy

New since 2007-08, this is to pay the costs of major building maintenance projects.

Equity Levy

Is additional money for districts whose revenue from other sources is low compared to the highest revenue districts in the region.

Transition Levy

Is a "grandfather" provision. Some aid formula changes regarding Limited English Proficiency and Alternative Learning Center students reduced aid for districts, and this provision allows districts to levy for the lost revenue.

Secondary Vocational Levy

Is a levy to pay for secondary vocational programs.

Alternative Compensation Levy

This levy is to pay the additional costs of a merit-based compensation plan for teachers. There is a state aid component to this as well.

Judgment Levy

Districts can levy for the cost of court-ordered judgments imposed on them. This amount is Wayzata's share of a judgment against Intermediate District 287, of which Wayzata is a member.

Reemployment

This levy is for costs of reemployment compensation. This is actually a negative adjustment for prior years.

Adjustments for Tax Abatements

Tax abatements are property tax assessment adjustments for prior years. When these occur, the district loses tax revenue, which is recovered through an additional levy amount.

Tax Delinquency

Adjustments are necessary because not all taxes are paid in a timely fashion.

Federal Aid

Federal aid in the general fund budget for the 2009-2010 school year totals \$2,277,231. Of this amount, 75% is for special education programs. Most federal programs have restrictions as to how the money can be spent. Even when increases in federal aid are enacted, the money can seldom be used to fund existing positions or programs; instead it must be used to “supplement, not supplant” existing expenditures.

Other Revenue

This catchall category includes a number of revenue sources, most of which are local in nature (i.e. not state or federal aid).

The major categories are:

Other Local Revenue	\$ 428,476
Tuition	20,000
Investment Income	415,000
Fees from Patrons	1,087,460
Gate Receipts	123,520
County Apportionment	300,000
Miscellaneous	<u>147,723</u>
Total	\$2,522,179

Other Local Revenue

This includes a variety of items. Private music lessons of \$95,000 are included here. There are Local Collaborative Time Study grants of \$124,300. Also included is a federal “e-rate” rebate on telecommunication costs of \$41,000.

Tuition

Tuition is paid by other school districts, usually for special education services to students who are not residents of Wayzata. (In Minnesota, special education costs are normally the responsibility of the school district where the child’s parents reside.) On occasion, but rarely, tuition is paid by a student’s family, usually when they are residents of another state or country.

Investment Income

This is interest earned on cash balances held by the District.

Fees from Patrons

These fees consist of athletics participation fees (\$367,340), parking fees (\$125,000), and advanced placement testing fees (\$36,800), ice arena rentals (\$37,000), and music instrument rental fees (\$13,000). Rental fees of \$265,500 to cover the operating costs of the athletic bubble are included. Also, this category includes \$327,150 in fees for field trips.

Gate Receipts

Are the admission charges for athletic events.

County Apportionment

State Law requires that certain fees and fines collected by the county must be allocated to school districts. These fees in turn are subtracted from state aid, so there is no net gain to the district.

General Fund Expenditures

Technology Levy

The capital projects levy revenue for technology in FY 2010 is \$4,888,894. This amount is transferred out of the general fund and into the construction fund. The actual expenditure items will be accounted for in the construction fund.

The budgeted amounts for this levy include the following:

Equipment	\$1,616,600
Personnel	1,862,700
Consulting/fees for service	130,000
Repairs/maintenance	148,300
Supplies/materials	423,100
Other	241,000
Sub-total	\$4,421,700
Unspent (reserved for future use)	467,194
Total	\$4,888,894

The focus of this program is curriculum and classroom technology, particularly expansion of classroom tools: projection and soundfield systems, smartboards, and software.

- The focus of the Technology Levy for the 2009-2010 school year remains curriculum and classroom technology. All regular grades 1-12 have been outfitted with projector and sound fields. Kindergarten classrooms will receive projectors, and the sound fields will be the first priority for the summer of 2009. Approximately 160 systems will be put into place.
- With the increase of classroom tools, there is a need to upgrade the network storage capacity and backup system. Teachers simply need more space to store their curriculum related data, videos and other classroom files.
- About 400 computers will be purchased as part of the computer replacement cycle. New computer labs will be put into Engineering, Technology and Design at the middle schools. Computers will be replaced at several High School Business Labs, the High School Art Lab and Sunset Hill Elementary School. East Middle School teachers will be given the opportunity to upgrade to a laptop computer.

Transportation Expenditures

The transportation budget is increased by \$436,550, or 6.8% over the 2009-10 budget. This is primarily attributable to an increase in transportation of Minneapolis students for desegregation purposes and an increase in special education transportation costs. State transportation aid reimburses the district for most of this increased amount.

Health and Dental Insurance

The District has a self-insurance plan for employee health insurance with stop-loss coverage for extraordinarily high claims. Premiums in the aggregate have been increased by 4.5% for FY10. The employee/employer share of this increase depends on the employee's bargaining unit contract. Dental premiums will remain at current rates.

Allocations

Amounts distributed to schools and other offices for supplies and similar expenses remained the same as in the prior year.

Expenditures by Category 2009-2010

<u>Object</u>	<u>Amount</u>
Salaries	\$ 60,691,900
Benefits	\$ 16,956,600
Purchased Services	\$ 17,870,549
Supplies/Material	\$ 3,205,446
Capital	\$ 3,330,060
Misc. & Other	\$ 170,418
Transfer to Other Funds	<u>\$ 4,888,894</u>
Total	\$ 107,113,867

The school district budget consists of the following types of expenditures. About 75 cents of each dollar will be spent for salaries and employee benefits.

Salaries (\$60.7 million)

Regular salary related to personnel positions, extra curricular assignments, overtime, substitute cost.

Employee Benefits (\$17 million)

Health, Dental, Life, Long-term disability, workers' compensation, retirement plans and recording of post retirement benefits for current employees. Health insurance costs are of great concern from a budgeting standpoint. The district's rates have been very stable since 2002. The rate increase in the district's self-insured health plan this year was 2.6%.

Purchased Services (\$17.9 million)

Includes consultants, postage, insurance, repair and maintenance services, transportation contracts, travel/conferences, payments to other districts and tuition.

Supplies & materials (\$3.2 million)

Textbooks, instructional supplies, office and custodial supplies, computer software, and related copier costs. Includes fuel for buildings.

Capital (\$3.3 million)

Replacement and additional equipment, facilities repair and maintenance, vehicles, and computer equipment.

Miscellaneous and Other expenditures (\$0.2 million)

Includes all expenses that cannot be classified as above.

Transfer to Other Funds (\$4.9 million)

Includes transfer of technology levy to Construction Fund; also some transfers from General Fund to Community Services Fund.

Expenditures by Program

GENERAL FUND

CHANGE IN EXPENDITURES BY PROGRAM BUDGET 2008-2009 VS. BUDGET 2009-2010
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<u>PROGRAM DESCRIPTION</u>	<u>PROGRAM CODE</u>	<u>BUDGET 2008-2009</u>	<u>BUDGET 2009-2010</u>	<u>CHANGE</u>
Administration	000-099	2,833,423	0	0
District Support Services	100-199	3,426,032	00	0
Regular Instruction (Elem/Sec)	200-299	39,868,819	0	0
Vocational Instruction	300-399	1,424,151	0	0
Special Education Instruction	400-499	12,533,246	0	0
Instructional Support Services	600-699	7,166,390	0	0
Pupil Support Services	700-799	8,921,869	0	0
Sites & Buildings	800-899	10,987,708	0	0
Fiscal & Other Fixed Program Costs	900-999	19,722,496	0	0
GRAND TOTALS-- ALL PROGRAMS		106,884,134	0	0

ADMINISTRATION: Includes all costs for general administration, instructional administration and school site administration. This area covers the school board, superintendent, principals, and directors.

DISTRICT SUPPORT SERVICES: Consists of activities related to general administrative support not listed above. This area covers federal programs, human resources, government relations, school elections, and miscellaneous district administration not otherwise classified. Anticipated salary increases and district contingency reserves have temporarily been budgeted here.

ELEM/SEC REGULAR INSTRUCTION: Consists of all activities dealing directly with the teaching of pupils, the interaction between teachers and pupils in the classroom and co-curricular activities at the kindergarten, elementary and secondary levels.

Expenditures by Program (continued)

VOCATIONAL INSTRUCTION: Courses and activities which develop knowledge, skills, attitudes and behavioral characteristics for students seeking career exploration and employability.

SPECIAL EDUCATION INSTRUCTION: Activities providing learning experiences for pupils of any age who, because of certain atypical characteristics or conditions, need, or who would benefit by, educational programs different from those provided pupils in regular or vocational instruction.

INSTRUCTIONAL SUPPORT SERVICES: Activities for assisting the instructional staff with the content and process of providing learning experiences for pupils in kindergarten through twelfth grade.

PUPIL SUPPORT SERVICES: Includes all services provided to pupils who do not qualify to be classified as instructional services (counseling/guidance, health, psychological, social work, transportation, other)

SITES & BUILDINGS: Activities related to the acquisition, operation, maintenance, repair and remodeling of all physical plant, facilities and grounds of the school district.

FISCAL & OTHER FIXED COSTS: Fiscal and fixed cost activities that are not recorded elsewhere. This includes all fringe benefits for all employees.

GENERAL FUND

CHANGE IN EXPENDITURES BY CATEGORY BUDGET 2008-2009 VS. BUDGET 2009-2010

<u>OBJECT DESCRIPTION</u>	<u>OBJECT CODE</u>	<u>BUDGET 2008-2009</u>	<u>BUDGET 2009-2010</u>	<u>CHANGE</u>
SALARIES	100	59,008,510	0	3,216,865
BENEFITS				
FICA/Medicare	210/211	4,368,103	0	171,522
Pension	214/218	3,310,759	0	234,876
Hlth/Dtl/Life/LTD	220	7,759,656	0	171,303
TSA Matches	250	919,551	0	41,943
Health [Retirement]	291	1,127,000	0	(479,725)
All Other	200	340,058	0	(8,070)
Total 200 Series		17,825,127	0	131,849
PURCHASED SERVICES				
Prof/Tech Svc	305	1,527,595	0	(30,123)
Utilities	330	2,336,247	0	316,637
Property/Liability Ins	340	281,899	0	(81,565)
Transportation	360	6,362,812	0	575,732
Tuition	390	456,559	0	(1,822,630)
Pmts-Other Dists	391	3,237,749	0	2,425,926
All Other	300	2,894,575	0	320,914
Total 300 Series		17,097,436	0	1,704,891
SUPPLIES/MATERIALS				
General Supplies	401-409	1,161,560	0	85,037
Instructional Supplies	430/433	1,131,783	0	(80,914)
Fuel	440/441	98,060	0	3,560
Textbooks	460	483,808	0	(35,564)
Library Books	470	51,290	0	(1,198)
All Other	400	224,056	0	11,586
Total 400 Series		3,150,557	0	(17,493)
CAPITAL	500	4,301,074	0	1,600,803
MISC/OTHER				
Judgments	810	1,564	0	1,564
Dues/Memberships	820	401,565	0	10,975
Misc./Other	899	458,704	0	(2,941,652)
Total 800 Series		861,833	0	(2,929,113)
TRANSFERS--OTHER FUNDS	910	4,639,597	0	389,597
 GRAND TOTAL		106,884,134	0	4,097,399

Personnel

Wayzata Public Schools has five collective bargaining units. Principals, teachers, custodial and maintenance employees, food service employees, and clerical employees are organized for bargaining purposes. In addition, some administrative and confidential employees, referred to as “unaffiliated,” are not in a collective bargaining unit.

The number of FTE personnel is increased slightly for 2009-2010 over the preceding year.

- The complement of employees for 2008-2009 and 2009-2010 is as follows:

	2008-2009	2009-2010
Teachers	688.1545 FTE	686.1545 FTE
Secretaries	46.75 FTE	46.75 FTE
Paraprofessionals	303.07 FTE	303.07 FTE
Custodians and Maintenance	75.875 FTE	75.875 FTE
Principals (includes assistant principals)	18 FTE	18 FTE
Culinary Express	72 employees	72 employees
Unaffiliated	63 employees	63 employees

Operating Capital Expenditures

Operating capital revenue is allocated by state law based on a formula that considers the number of pupils in the District and the average age of District facilities. For Wayzata Public Schools, the formula will provide an estimated \$201.68 per pupil unit in 2009-10 for a total of \$2,360,579. This money can only be used for capital expenditures as defined in state law.

In addition, in 2009-10 the district will receive deferred maintenance revenue. This is a fairly new category of revenue, enacted in 2005 by the Legislature. This revenue is intended to correct inequities in revenue available to different school districts for building repairs. Deferred maintenance revenue totals \$594,916 for 2009-10.

In this budget the District's operating capital and deferred maintenance revenue is allocated as follows:

Basic facilities repair and maintenance	\$ 1,667,000
Allocated to buildings for projects	280,000
Special assessments/taxes	25,000
Roof repairs, & reserve for future roof repairs	790,916
Copier leases	232,000
Tractor lease (3)	24,000
Zamboni lease	21,886
Replacement of classroom furniture & equipment	75,000
Furniture – enrollment changes	25,000
Textbooks	450,000
Special education equipment	10,000
Building and grounds equipment & vehicles	140,000
Administration	10,000
Piano replacement	8,000
Orchestra	20,000
Band	28,000
Central Middle School Auditorium	35,000
Damage contingency	<u>20,000</u>
Total Capital Revenue/Expense	\$ <u>3,861,802</u>

The District annually reserves \$325,000 of its operating capital for current and future roof repairs. The District has over \$2.9 million reserved for this purpose.

Larger projects funded with operating capital reserves in FY10 include:

- Pavement rehabilitation, parking improvements
at West Middle School \$220,000
- Flooring replacement at various schools \$105,000
- Roof replacement at West Middle School \$312,000
- Exterior wall repair, window & door replacements \$300,000
- Phase 3 of Indoor Air Quality upgrades at Central Middle School \$869,000

The amount of operating capital expenditures in this budget exceed revenue by \$906,315. This is a planned expenditure of reserves.

**Independent School District 284
Wayzata, Minnesota**

**2009-2010 Preliminary Budget
General Fund
Revenue and Expenditure Budgets**

REVENUE		
Local Tax		\$ 28,898,187
State General Education Aid		\$ 59,974,473
Special Education State Aid		\$ 6,813,628
State Property Tax Relief		\$ 166,032
Other State Aid		\$ 4,915,729
Other Local Revenue		\$ 3,202,179
Federal Aid		\$ 2,277,231
Total Revenue		\$ 106,247,459
EXPENDITURES		
Salaries		\$ 60,691,900
Benefits		\$ 16,956,600
Employment		\$ 77,648,500
Non-Employment		\$ 29,465,367
Total Expenditures		\$ 107,113,867

**Independent School District 284
Wayzata, Minnesota**

**2009-2010 Preliminary Budget
General Fund**

Change In Fund Condition Analysis

<u>FUND CONDITION</u>	
Undesignated, Unreserved Balance, July 1, 2008	\$ 8,410,435
Budgeted Revenue 2008-2009	\$ 96,333,033
Budgeted Expenditures 2008-2009	\$ 96,326,735
Net 2008-2009 fund balance change	\$ 6,298
Estimated unreserved balance, June 30, 2009	\$ 8,416,733
Preliminary revenue budget 2009-2010	\$ 97,220,145
Preliminary expenditure budget 2009-20010	\$ 97,163,171
Net 2009-2010 fund balance change	\$ 56,974
Preliminary unreserved balance, June 30, 2010	\$ 8,473,707

Culinary Express Food Service Fund

Culinary Express is the District department that provides meal services and nutrition education services in Wayzata Schools. Over 7,000 lunches are served each day, and over 1,250,000 meal equivalents are served each year. Lunch prices for FY10 will remain the same as the prior year.

Prices are as follows:

	<u>2008-09</u>	<u>2009-10</u>
Elementary	\$2.30	\$2.30
Secondary	\$2.60	\$2.60
Adult	\$3.30	\$3.30
Milk	.45	.45

All revenues and expenses associated with the program must be accounted for in a separate fund. By law, these revenues can only be spent to provide school lunches and pay certain closely related expenses.

Revenues consist of:

- Lunch sales to student and adults
- A-La-carte sales to students and adults
- Federal aid (generally, commodities)
- State aid provided on each lunch served
- Federal subsidies for food served to students from families with low incomes
- Catering sales to groups using the schools

Expenses consist primarily of food and labor costs.

Revenue, expense, and fund balance information follows. In the preliminary budget, expenditures exceed revenues by \$70,707.

**Independent School District 284
Wayzata, Minnesota**

2008-2009 Budget and 2009-2010 Preliminary Budget

Food Service Fund

Revenue

Revenue	2008-09	2009-2010
Lunch Sales	\$3,926,141	\$4,043,905
Federal aid	\$707,372	\$728,593
State aid	\$118,125	\$129,149
Other Local Revenue	-0-	-0-
Total Revenue	\$4,751,638	\$4,901,647

Expenses

Expenditures	2008-2009	2009-2010
Salaries/Benefits	\$1,922,076	\$1,989,348
Food	\$2,098,450	\$2,171,895
Other	\$807,700	\$811,111
Total Expenditures	\$4,828,226	\$4,972,354

Surplus/(deficit)	\$ (76,588)	\$ (70,707)
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Food Service Fund Condition

Fund Condition	
Balance, July 1, 2008	\$974,255
Estimated revenue 2008-2009	\$4,751,638
Estimated expenditures 2008-2009	\$4,828,226

Estimated Balance, June 30, 2009	\$897,667
Proposed 2009-2010 revenue budget	\$4,901,647
Proposed 2009-2010 expenditure budget	\$4,972,354
Projected Balance, June 30, 2010	\$ 826,960

Community Services

Community Education programs provide school district residents with the opportunity to use educational facilities and programs during non-school hours. Community Education programs are also available to K-12 students during the summer. Major programs include Adult Basic Education, Wishes (after-school enrichment program), Home Base (latch-key programs), Wayzata Plus (kindergarten combined with latch-key to provide full-day services), and Peppermint Fence Nursery School and other Early Childhood Family Education programming.

The Community Education Department also schedules the use of the district's facilities outside of school hours, including athletic facilities.

Fiscal Year 2010 revenue is budgeted at \$7,632,222 for an increase of 2.5% when compared to FY09. Expenditures are budgeted at \$7,493,829 for an increase of 4.2%.

The increases in revenue and expense are primarily attributable to increased participation and increased costs in the category of school-aged care, including the Wayzata Plus Program for kindergarten. School-aged care comprises over 60% of the Community Education budget in Wayzata.

**Independent School District 284
Wayzata, Minnesota**

2008-2009 Budget and 2009-2010 Preliminary Budget

Community Services

Revenue	2008-2009	2009-2010
Local Tax	\$ 1,100,860	\$ 1,128,382
Fees and charges	\$ 5,749,810	\$ 5,893,555
State aids and grants	\$ 481,070	\$ 493,096
Interest income	\$ 42,700	\$ 42,000
Transfers	\$ 71,000	\$ 75,189
Total Revenue	\$ 7,445,440	\$ 7,632,222

Expenditures	2008-2009	2009-2010
Salaries/Benefits	\$ 5,968,650	\$ 6,147,709
Non-Employment	\$ 1,209,162	\$ 1,346,119
Total Expenditures	\$ 7,177,812	\$ 7,493,829

Difference	\$267,628	\$138,393
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Community Services Fund Condition

Fund Condition	
Balance, July 1, 2008	\$ 1,048,608
Estimated revenue 2008-2009	\$ 7,445,440
Estimated expenditures 2008-2009	\$ 7,177,812
Estimated Balance, June 30, 2009	\$ 1,316,236

Proposed 2009-2010 revenue budget	\$ 7,632,222
Proposed 2009-2010 expenditure budget	\$ 7,493,829
Projected Balance, June 30, 2010	\$ 1,454,629

Health and Safety Activity

Wayzata Public Schools continues to budget all activities associated with Health and Safety projects separately. Types of projects within this activity include hazardous substance removal, fire and safety code repair systems, indoor air quality, ADA and OSHA compliance, and asbestos removal.

Any single Health and Safety project may not exceed \$500,000 in cost. Projects that exceed \$500,000 must be financed via a separate provision known as the Alternative Facilities program. The Alternative Facilities program is quite similar to the Health and Safety program in most respects. However, the Minnesota Department of Education requires that expenditures for Alternative Facilities projects be recorded in the Construction Fund. Alternative facilities revenue is initially received in the Health & Safety account, then transferred to the Construction Fund.

In Wayzata, Health and Safety revenue and Alternative Facilities revenue consists entirely of property tax revenue. State approval of each project is required before the district can collect the revenue. This program often runs at a deficit in the school district due to the structure of the financing mechanism for the program, although currently Wayzata carries a positive balance. There is sometimes a long elapsed time period between a project's inception and the collection of the tax levy funding the project, and it is often not feasible or advisable to delay projects until the revenue is in hand.

Health and Safety revenue for FY10 is \$801,950, and Alternative Facilities revenue is \$2,861,077 (to be transferred to the construction fund for expenditure). The total expenditure for health & safety will be \$780,250.

**Independent School District 284
Wayzata, Minnesota**

2009-2010 Preliminary Budget

Health & Safety

Balance, July 1, 2008	\$229,238
Estimated Revenue 2008-2009	\$470,276
Estimated Expenditures 2008-2009	\$535,826
Estimated Balance, June 30, 2009	\$163,688

Revenue Budget 2009-2010	\$801,950
Expenditure Budget 2009-2010	\$780,250

Estimated Balance, June 30, 2010	\$ 185,388
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Construction Fund

The construction fund is used for three purposes:

- Expenses of construction projects financed with bond proceeds;
- Expenses of alternative facilities projects (health and safety projects exceeding \$500,000); and
- Expenses associated with the capital projects (technology) levy.

The revenue budget is \$6,948,021. This is comprised of \$4,888,894 from the general fund for the capital projects levy, and \$2,059,127 for alternative facilities projects.

The expenditure budget is \$6,438,894. This includes an alternative facilities project at Central Middle School (\$1,900,000) in FY10. The Central Middle School project will cost a total of \$5.6 million and will be completed in FY2010.

The expenditure budget also includes technology expenditures of \$4,888,894. Of this, \$467,194 is identified as “miscellaneous expense” and will be reserved for future expenditures. This is because in 2012-13 the authorized technology levy amount will be reduced. The intent is to build a reserve so the amount of revenue available does not drop substantially at that time.

2008-2009 Budget and 2009-2010 Preliminary Budget

Construction Fund

Revenue

Revenue	2008-2009	2009-2010
Technology Levy	\$4,568,597	\$4,888,894
Alternative Facilities Levy	\$2,635,604	\$2,059,127
Total Revenue	\$7,204,201	\$6,948,021

Expenses

Expenditures	2008-2009	2009-2010
Salaries/Benefits	\$1,616,600	\$1,673,181
Equipment	\$1,776,000	\$1,780,000
Capital Improvements	\$2,044,000	\$2,044,000
Other	\$1,031,997	\$ 941,713
Total Expenditures	\$6,468,597	\$6,438,894

Excess Revenue Over Expenditures	\$735,604	\$509,127
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Debt Service Fund

The debt service fund is designated to account for revenues and expenditures associated with redemption of bonds issued by the school district. These bonds were issued to finance the acquisition, improvement and equipping of the district's buildings. By state law, debt service revenues and expenditures must be maintained in a separate fund.

Revenue consists of local taxes levied to pay the obligations, plus interest earnings on the balance in the fund. Expenses consist of principal and interest on bonds, plus a small amount for bank fees, service fees, etc.

The district's underlying bond rating by Moody's Investors Service is Aa1 and the district's underlying bond rating by Standard & Poor's is AAA. This rating was upgraded in September, 2008 and affirmed in May 2009, when the district issued bonds. These ratings are the highest received of any school district in the State of Minnesota.

The debt service fund budget for FY10 shows revenue of \$9,762,061 and expense of \$9,764,556. The fund balance is projected to decrease to \$2,346,978 by June 30, 2010. No bond issuance for new projects is expected in FY10.

**Independent School District 284
Wayzata, Minnesota**

2008-2009 Budget and 2009-2010 Preliminary Budget

Debt Service Fund

Revenue	2008-2009	2009-2010
Local Tax	\$ 9,324,681	\$ 9,571,125
State Aid	\$ 117,189	\$ 100,000
Interest	\$ 191,250	\$ 90,936
Sale of Bonds	\$ 32,795,405	\$ -0-
Bond Premium	\$ -0-	\$ -0-
Total Revenue	\$ 42,428,525	\$ 9,762,061

Expenditures	2008-2009	2009-2010
Bond Principal--Current	\$ 6,395,000	\$ 6,790,000
Bond Principal--Refunding	\$ 32,792,366	\$ -0-
Bond Interest	\$ 3,150,200	\$ 2,971,556
Bank Fees & Others	\$ 3,000	\$ 3,000
Total Expenditures	\$ 42,340,566	\$ 9,764,556

Difference	\$ 87,959	\$ (2,495)
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Debt Service Fund Condition

Fund Condition	
Unreserved Balance, July 1, 2008	\$ 2,261,514
Estimated revenue 2008-2009	\$ 42,428,525
Estimated expenditures 2008-2008	\$ 42,340,566
Estimated Balance, June 30, 2009	\$ 2,349,473

Proposed 2009-2010 revenue budget	\$ 9,762,061
Proposed 2009-2010 expenditure budget	\$ 9,764,556
Projected Balance, June 30, 2010	\$ 2,346,978

(Note: The schedules above include Refunding Bond activity in FY 2009.)

2008-2009 School Year Highlights

Wayzata Public Schools strives each year to be a “model of excellence among learning communities” and regularly achieves accomplishments that demonstrate the overall quality of the district. The highlights for the 2008-09 school year include the following:

- Oakwood Elementary School celebrated its 50th anniversary in November of 2008. The school opened late in the fall on November 17, 1958, because of construction delays.
- The bond rating of Aa1 for Wayzata Public Schools was reaffirmed by Moody’s Investors Service. Only three other Minnesota School districts have a rating of “Aa1” and none exceed this rating.
- Wayzata Public Schools received an “AAA” enhanced credit rating from Standard and Poor’s and is the only district in Minnesota to receive an “AAA” bond rating from Standard and Poor’s.
- Wayzata High School received a silver medal from U.S. News and World Report for its ranking of “America’s Best High Schools 2009 Matters.”
- Almost 90 percent of Wayzata High Schools class of 2008 chose to attend two- or four-year colleges or universities. Students were accepted to prestigious public and private colleges and universities throughout the nation.
- Chace Anderson began his role as superintendent of Wayzata Public Schools.
- Wayzata Public Schools’ students continued to score well on the state MCA-II tests. The district was among the top three school districts in its class-size category of 300 or more students per grade. Approximately 81.5 percent of students are proficient in math and 87.4 percent are proficient in reading.
- With more students tested this year than in previous years, the average ACT score of Wayzata High Schools students climbed to an average composite score of 25.01. The state average was 22.6 and the national average was 21.1. In addition, one Wayzata High School student earned a perfect score on the ACT. Another Wayzata High School student earned the only perfect score in the state on the PSAT.
- Thirteen Wayzata High School students were named National Merit Scholarship Finalists and qualify for awards of up to \$10,000 annually for up to four years of undergraduate study.
- Plymouth Creek Elementary School was named a 2008 No Child Left Behind Blue Ribbon School. The award is the highest honor bestowed by the U.S. Department of Education and is given to schools that challenge students to perform at high academic levels.
- The Wayzata High School football team went undefeated and won the 2008 Class 5A state championship title.
- The Wayzata High School boys’ cross country team earned its second, consecutive class AA state championship and running as a club team won the Seven State Heartland Regional Cross Country meet for a second consecutive year.
- The Wayzata High School Trojets Dance Team won its third Class AAA state title in the past four years in the jazz category.

Basic Fund Structure

To understand this budget document, it is helpful to know that there are a number of legal restrictions on how school districts must spend and account for the public funds that they receive. Because of state requirements, Wayzata Public Schools must separate its money into six major areas. They are as follows:

- **General Fund** – Used for all operating expenses for the general purposes of the school district. This fund includes salaries and benefits for teachers, principals, custodians, secretaries, paraprofessionals, and administrators; cost of supplies, textbooks, transportation contracts, utilities, repairs, equipment, and so on.
- **Health and Safety** – Used for essential improvements to district buildings related to protecting the health and safety of the occupants. Expenditures for asbestos removal, fire safety, indoor air quality, and the like can be made with money in this fund. It is actually a subpart of the general fund, but we account for these funds separately in Wayzata, largely because the amounts spent can fluctuate widely from year to year, distorting the apparent spending patterns. Health and Safety money comes from the property tax levy. State approval of all expenditures is required before the District can collect this tax.
- **Food Service Fund** – Used for all expenses related to operating the Culinary Express Department, including food, salaries, benefits, supplies, and equipment. Food Service revenues come primarily from the sale of meals to students and adults. Some federal and state aid is also provided.
- **Community Services Fund** – Used for expenses related to community education programs such as Early Childhood Family Education, Adult Basic Education, Home Base (after-school and summer child care programs), WISHES (summer enrichment programs), and Community Education Programs. Community Services revenue primarily comes from fees charged for the programs, and property tax revenue dedicated to community services.
- **Building Construction Fund** – Used for expenses of major building projects. Proceeds from sale of bonds authorized in an election are placed in this fund. Under recent changes in law and state policy, this fund now is also used for alternative facilities projects (health and safety projects exceeding \$500,000) and for the capital projects levy (technology levy).
- **Debt Service Fund** – Used to pay the debt service on bonds sold to finance construction. These are akin to a homeowner's payments on a mortgage.

Why is all of this important? - It is important to be aware of the fund structure because, ***with very few exceptions, money cannot be transferred from one fund to another.*** So, for example, raising school lunch prices or Home Base tuition is not a solution to a shortfall in the general fund. Similarly, money in the debt service fund or the construction fund cannot be used to pay teacher salaries.

Table I on page 5 shows the revenue and expenditure budgets by fund for Wayzata Public Schools for 2009-10.

WAYZATA PUBLIC SCHOOLS

Independent School District 284
Wayzata, Minnesota

BOARD OF EDUCATION

Regular Meeting - June 8, 2009 - 7:00 PM
Wayzata City Hall, 600 Rice Street, Wayzata

AGENDA

1. CALL TO ORDER/ROLL CALL
2. APPROVAL OF AGENDA AND CONSENT AGENDA ITEMS
Consent Agenda items are considered to be routine in nature and will be enacted by one motion. There will be no separate discussion of these items unless a Board member or citizen so requests, in which event the item will be removed as a Consent Agenda item and addressed. Consent Agenda Items are as follows:
 - A. Approval of Minutes
 1. Regular Meeting - May 11, 2009
 - B. Finance and Business Recommendations
 - C. Human Resource Recommendations
3. STUDENT CURRICULUM PRESENTATION
4. RECOGNITIONS
5. REPORTS FROM ORGANIZATIONS
This section of the agenda provides the opportunity for parent, teacher, and/or student associations/organizations to provide the School Board with reports/updates.
6. SUPERINTENDENT'S REPORTS AND RECOMMENDATIONS
 - A. Superintendent
 - B. Curriculum and Instruction
 1. Approval of 2009-2011 East Middle School Site Plan
 2. Approval of Alternative Compensation Final Report
 - C. Finance and Business Services
 1. Monthly Financial Reports
 2. Approval of 2009-2010 Preliminary Budget
 - D. Human Resource Services
7. OTHER BOARD ACTION
 - A. Approval of the School Board Meeting Schedule for 2009-2010 School Year
8. AUDIENCE OPPORTUNITY TO ADDRESS SCHOOL BOARD
This section of the agenda provides an opportunity for those who have called and placed their names on the list and for members of the audience to address the School Board.
9. BOARD REPORTS
 - A. Legislative Action Committee Update - S. Droegemueller
10. NEW BUSINESS
11. ADJOURN

WAYZATA PUBLIC SCHOOLS

Independent School District 284
Wayzata, Minnesota

BOARD OF EDUCATION

Work Session – May 18, 2009

AGENDA SECTION: 8. **ADJOURN**

ITEM: _____

COMMENTS BY: Board Chair Moroz

If there is no additional business before the School Board, the Chair will adjourn the meeting.