

**INDEPENDENT SCHOOL
DISTRICT #624**



**WORK-STUDY
MEETING PACKET**

July 10, 2017

To: Members of the School Board

From: Dr. Wayne Kazmierczak
Superintendent of Schools

Date: July 3, 2017

A work-study session of the White Bear Lake Area School Board will be held on **Monday, July 10, 2017**, at 4:00 p.m. in Community Room 112 at the District Center, 4855 Bloom Avenue, White Bear Lake, MN.

WORK-STUDY AGENDA

A. PROCEDURAL ITEMS

1. Call To Order
2. Roll Call

B. DISCUSSION ITEMS

- | | |
|---|-----------|
| 1. Site Assessment Report by DLR Group | 4:00 p.m. |
| 2. School Board/Superintendent Priorities for 2017-18 | 4:30 p.m. |
| 3. Overview of Strategic Plan Development | 5:00 p.m. |
| 4. Discussion on Operating Levy Renewal | 5:30 p.m. |
| 5. Negotiations Session | 6:00 p.m. |

C. ADJOURNMENT	6:15 p.m.
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<p>*This portion of the meeting may be closed to consider strategy for labor negotiations, including negotiation strategies or developments or discussion and review of labor negotiation proposals, conducted pursuant to Minnesota Statutes 179.A.01 to 179.A.25.</p>

AGENDA ITEM: **Site Assessment Report by DLR Group**

MEETING DATE: **July 10, 2017**

SUGGESTED DISPOSITION: **Discussion Item**

CONTACT PERSON(S): **Dr. Wayne A. Kazmierczak, Superintendent**
Tim Wald, Assistant Superintendent for Finance and Operations

BACKGROUND:

At the July 10, 2017 work-study session, Mr. Chris Gibbs from DLR Group will provide the School Board with an update on the recently completed comprehensive assessment of all District facilities. Mr. Gibbs and his team spent time with building administrators and other staff to compile a report that will serve as baseline data for the development of the District's long-term facilities maintenance plan and an upcoming comprehensive facilities planning process that will get underway in early 2018.



White Bear Lake Area Schools School Board Update

July 12, 2017

SCHOOL BOARD UPDATE



The rendering shows a modern school building with a dark facade and large glass windows. A sign on the building reads "Richard J. Daley". In the foreground, there is a lush green lawn with some landscaping. A few students are visible, including one with a backpack walking away from the camera.

Agenda

- Facility Assessment
 - Process
 - Schedule
 - Next steps
- Facility report card
- Listening tours
 - Process
 - Observations
- Question and answer

White Bear Lake Area Schools
Facility Assessment

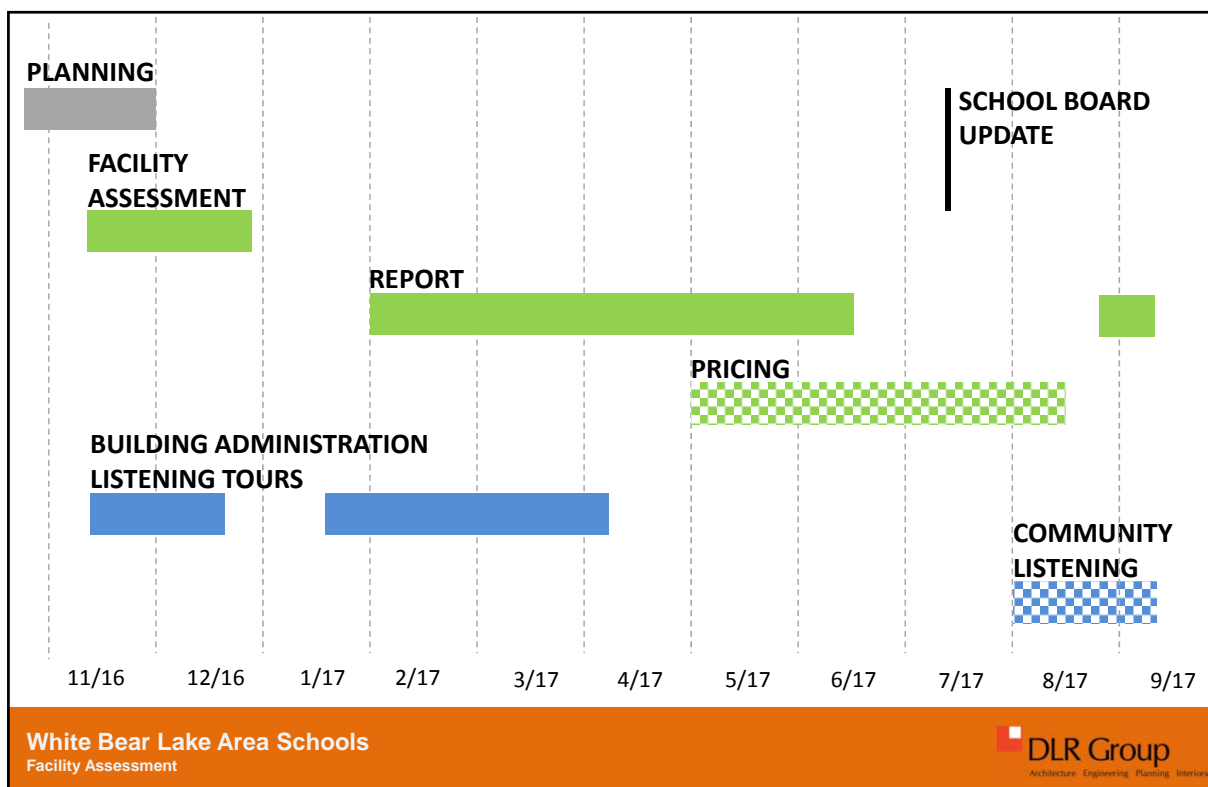
 **DLR Group**
Architecture Engineering Planning Interiors

FACILITY ASSESSMENT PROCESS



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors



White Bear Lake Area Schools
Facility Assessment

DLR Group
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FACILITY REPORT CARD

What We Evaluated

Site (0-4 points)
 Exterior (0-8 points)
 Building Structure (0-12 points)
 Roofing (0-8 points)
 Interior (0-4 points)
 Accessibility (0-14 points)
 Electrical (0-9 points)
 Technology (0-4 points)
 Electrical Fire/Safety (0-8 points)
 HVAC (0-13 points)
 Plumbing (0-8 points)
 Mechanical Fire/Safety (0-8 points)

What We Did NOT Evaluate

User Comfort
 Indoor Air Quality
 Educational Readiness
 Enrollment Capacity
 Furniture and Equipment

Total Points Possible – 100.0

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD Belaire Elementary School

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 5.8
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 6.4
 Interior (0-4 points) – 1.7
 Accessibility (0-14 points) – 9.8
 Electrical (0-9 points) – 5.1
 Technology (0-4 points) - 2.8
 Electrical Fire/Safety (0-8 points) – 4.8
 HVAC (0-13 points) - 8.6
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 4.8

Overall Grade – 67.0



White Bear Lake Area Schools
Facility Assessment

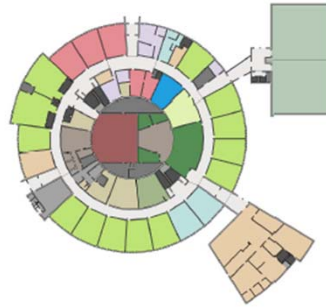
DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Birch Lake Elementary School

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 3.2
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 7.2
 Interior (0-4 points) – 2.6
 Accessibility (0-14 points) – 9.8
 Electrical (0-9 points) – 5.4
 Technology (0-4 points) - 2.6
 Electrical Fire/Safety (0-8 points) – 4.8
 HVAC (0-13 points) - 8.9
 Plumbing (0-8 points) – 4.8
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 66.5

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

ALC Golfview School

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 3.2
 Building Structure (0-12 points) - 6.0
 Roofing (0-8 points) – 3.2
 Interior (0-4 points) – 2.0
 Accessibility (0-14 points) – 9.8
 Electrical (0-9 points) – 6.0
 Technology (0-4 points) - 2.4
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 6.2
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 60.0

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Hugo Elementary School

Report Card

Site (0-4 points) – 3.2
 Exterior (0-8 points) - 4.8
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 5.6
 Interior (0-4 points) – 3.3
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 6.1
 Technology (0-4 points) - 2.4
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 8.1
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 71.9



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Lakeaires Elementary School

Report Card

Site (0-4 points) – 3.6
 Exterior (0-8 points) - 5.3
 Building Structure (0-12 points) - 9.6
 Roofing (0-8 points) – 8.0
 Interior (0-4 points) – 2.2
 Accessibility (0-14 points) – 14.0
 Electrical (0-9 points) – 5.7
 Technology (0-4 points) - 2.6
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 9.6
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 79.4



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD Lincoln Elementary School

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 5.3
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 3.2
 Interior (0-4 points) – 2.2
 Accessibility (0-14 points) – 9.8
 Electrical (0-9 points) – 5.7
 Technology (0-4 points) - 2.6
 Electrical Fire/Safety (0-8 points) – 4.8
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 67.6



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD Matoska Elementary School

Report Card

Site (0-4 points) – 3.6
 Exterior (0-8 points) - 5.6
 Building Structure (0-12 points) - 10.8
 Roofing (0-8 points) – 3.2
 Interior (0-4 points) – 2.7
 Accessibility (0-14 points) – 14.0
 Electrical (0-9 points) – 5.1
 Technology (0-4 points) - 2.4
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 76.6



White Bear Lake Area Schools
Facility Assessment

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FACILITY REPORT CARD

Vadnais Heights Elementary School

Report Card

Site (0-4 points) – 2.8
 Exterior (0-8 points) - 4.2
 Building Structure (0-12 points) -
 Roofing (0-8 points) – 4.8
 Interior (0-4 points) – 2.4
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 6.2
 Technology (0-4 points) - 2.4
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 71.2

White Bear Lake Area Schools
Facility Assessment

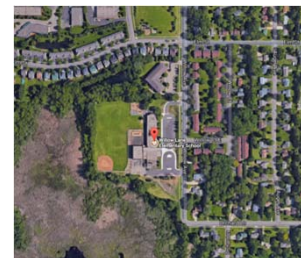
DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Willow Lane Elementary School

Report Card

Site (0-4 points) – 3.2
 Exterior (0-8 points) - 5.8
 Building Structure (0-12 points) - 10.8
 Roofing (0-8 points) – 4.0
 Interior (0-4 points) – 3.5
 Accessibility (0-14 points) – 14.0
 Electrical (0-9 points) – 5.4
 Technology (0-4 points) - 2.2
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 5.6
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 77.3

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Otter Lake Elementary School

Report Card

Site (0-4 points) – 2.8
 Exterior (0-8 points) - 2.4
 Building Structure (0-12 points) - 7.2
 Roofing (0-8 points) – 4.8
 Interior (0-4 points) – 2.4
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 5.4
 Technology (0-4 points) - 2.2
 Electrical Fire/Safety (0-8 points) – 6
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 5.6
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 66.8

White Bear Lake Area Schools
Facility Assessment

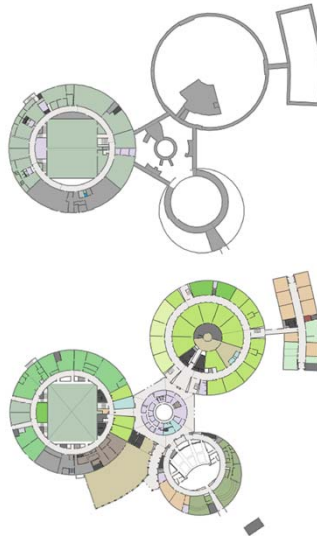
DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

High School North Campus

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 2.4
 Building Structure (0-12 points) - 7.2
 Roofing (0-8 points) – 7.2
 Interior (0-4 points) – 2.4
 Accessibility (0-14 points) – 9.8
 Electrical (0-9 points) – 5.8
 Technology (0-4 points) - 2.2
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 9.6
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4



Overall Grade – 67.8

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

High School South Campus

Report Card

Site (0-4 points) – 2.8
 Exterior (0-8 points) - 4.2
 Building Structure (0-12 points) - 9.6
 Roofing (0-8 points) – 5.6
 Interior (0-4 points) – 2.9
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 6.0
 Technology (0-4 points) - 2.8
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 8.8
 Plumbing (0-8 points) – 4.8
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 71.1



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Central Middle School/District Center

Report Card

Site (0-4 points) – 2.8
 Exterior (0-8 points) - 5.8
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 5.6
 Interior (0-4 points) – 3.0
 Accessibility (0-14 points) – 14.0
 Electrical (0-9 points) – 6.2
 Technology (0-4 points) - 2.0
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 9.0
 Plumbing (0-8 points) – 5.6
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 74.8



White Bear Lake Area Schools
Facility Assessment

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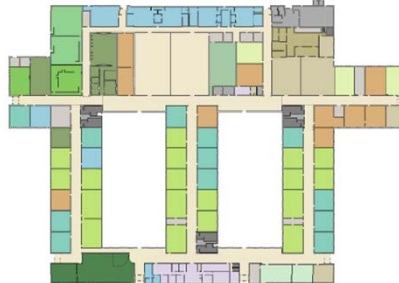
FACILITY REPORT CARD

Sunrise Middle School

Report Card

Site (0-4 points) – 3.2
 Exterior (0-8 points) - 6.4
 Building Structure (0-12 points) - 8.4
 Roofing (0-8 points) – 4.8
 Interior (0-4 points) – 2.2
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 5.4
 Technology (0-4 points) - 2.2
 Electrical Fire/Safety (0-8 points) – 4.8
 HVAC (0-13 points) - 10.4
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 71.8



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Normandy Park Early Education

Report Card

Site (0-4 points) – 2.4
 Exterior (0-8 points) - 5.0
 Building Structure (0-12 points) - 9.6
 Roofing (0-8 points) – 8.0
 Interior (0-4 points) – 3.0
 Accessibility (0-14 points) – 11.2
 Electrical (0-9 points) – 5.8
 Technology (0-4 points) - 2.0
 Electrical Fire/Safety (0-8 points) – 6.0
 HVAC (0-13 points) - 8.6
 Plumbing (0-8 points) – 6.4
 Mechanical Fire/Safety (0-8 points) - 6.4

Overall Grade – 74.4



White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

FACILITY REPORT CARD

Oneka Elementary School

Report Card

Site (0-4 points) – 3.6
 Exterior (0-8 points) - 7.2
 Building Structure (0-12 points) - 12
 Roofing (0-8 points) – 6.4
 Interior (0-4 points) – 3.9
 Accessibility (0-14 points) – 14.0
 Electrical (0-9 points) – 8.1
 Technology (0-4 points) - 3.6
 Electrical Fire/Safety (0-8 points) – 8.0
 HVAC (0-13 points) - 12.2
 Plumbing (0-8 points) – 8.0
 Mechanical Fire/Safety (0-8 points) - 8.0

Overall Grade – 95.0



White Bear Lake Area Schools
Facility Assessment

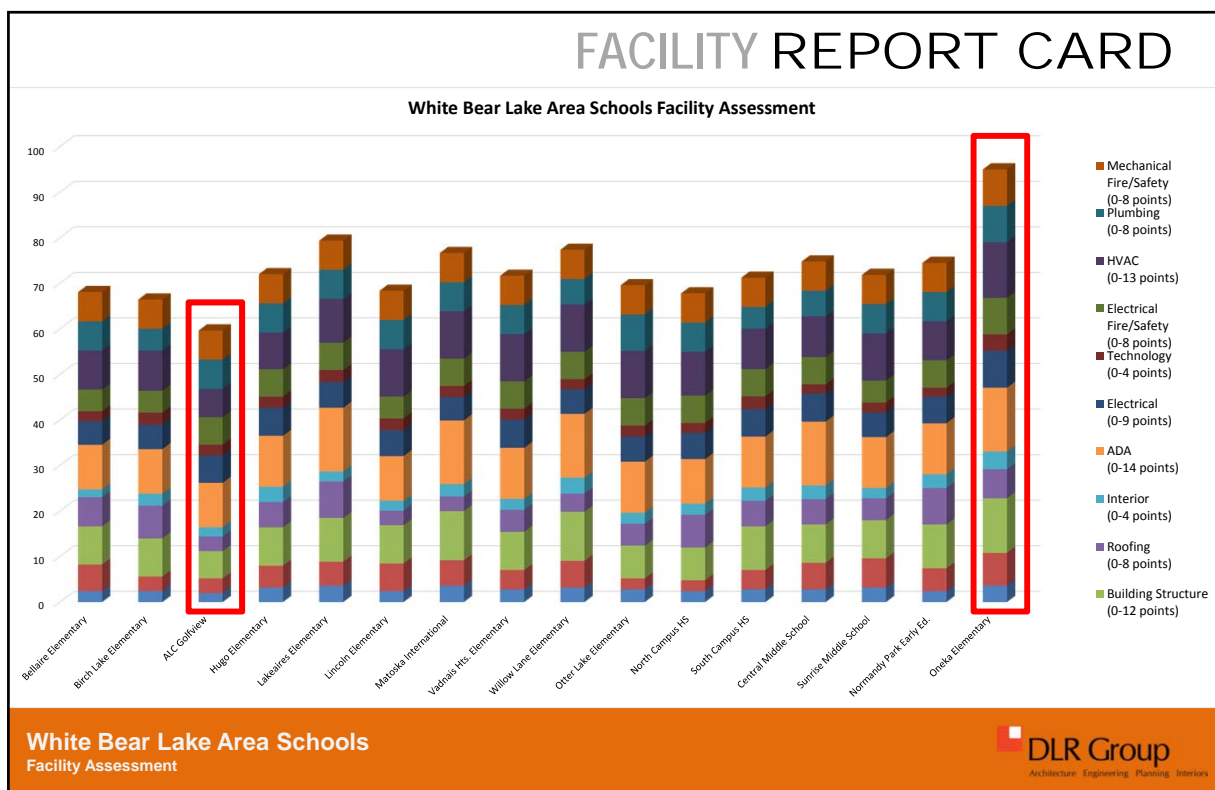
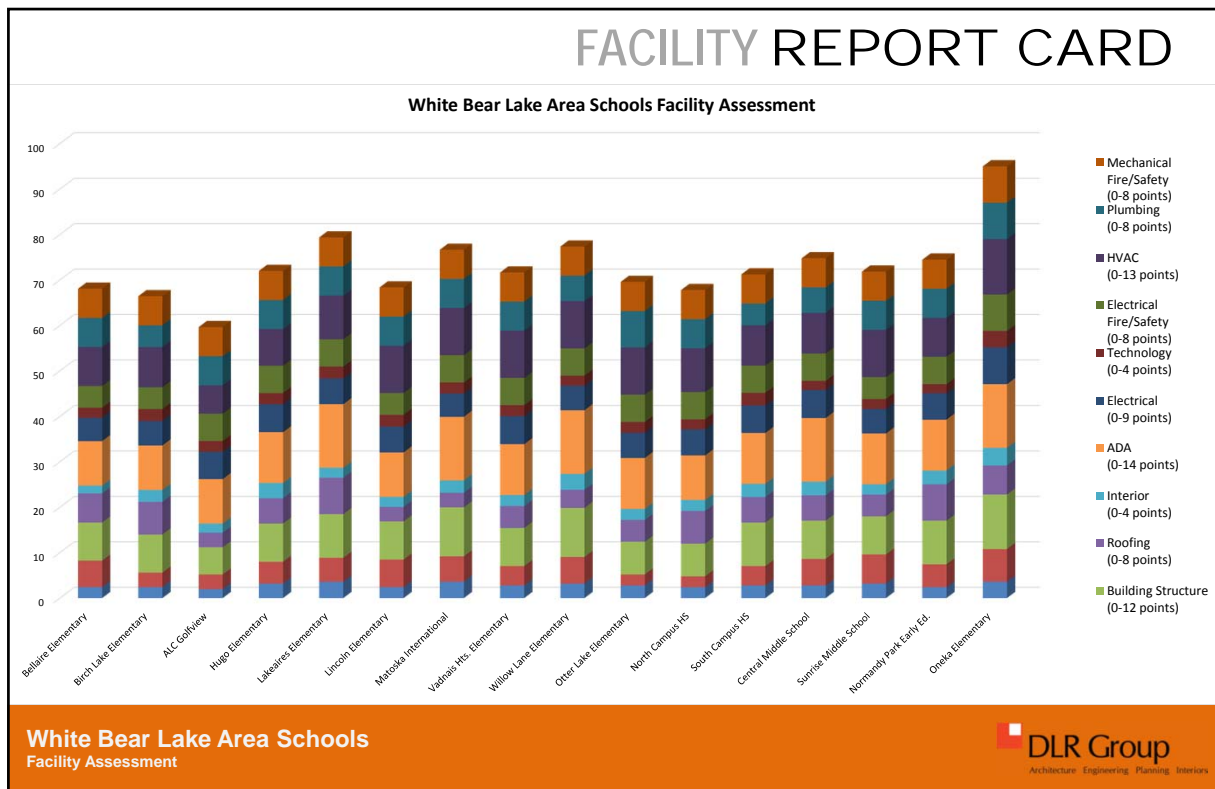
DLR Group
Architecture Engineering Planning Interiors

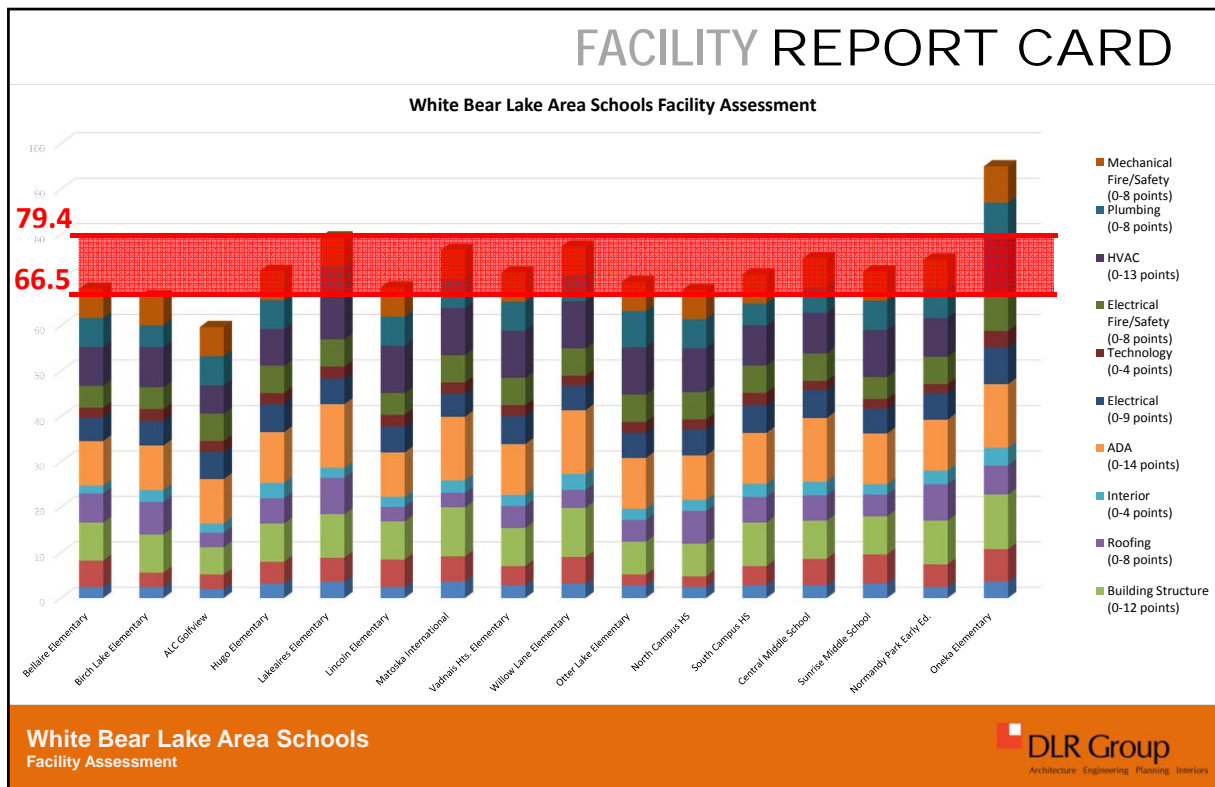
Facility Assessment - OBSERVATIONS

Building	Site (0-4 points)	Exterior (0-8 points)	Building Structure (0-12 points)	Roofing (0-8 points)	Interior (0-4 points)	ADA (0-14 points)	Electrical (0-9 points)	Technology (0-4 points)	Electrical Fire/Safety (0-8 points)	HVAC (0-13 points)	Plumbing (0-8 points)	Mechanical Fire/Safety (0-8 points)	TOTAL
Bellaire Elementary	2.4	5.84	8.4	6.4	1.72	9.8	5.13	2.2	4.8	8.58	6.4	6.4	68.07
Birch Lake Elementary	2.4	3.2	8.4	7.2	2.6	9.8	5.4	2.6	4.8	8.84	4.8	6.4	66.44
ALC Golfview	2	3.2	6	3.2	2	9.8	5.99	2.4	6	6.24	6.4	6.4	59.63
Hugo Elementary	3.2	4.8	8.4	5.6	3.32	11.2	6.14	2.48	6	8.06	6.4	6.4	72
Lakeaires Elementary	3.6	5.28	9.6	8	2.2	14	5.67	2.6	6	9.62	6.4	6.4	79.37
Lincoln Elementary	2.4	6.08	8.4	3.2	2.2	9.8	5.67	2.6	4.8	10.4	6.4	6.4	68.35
Matoska International	3.6	5.6	10.8	3.2	2.72	14	5.13	2.4	6	10.4	6.4	6.4	76.65
Vadnais Hts. Elementary	2.8	4.24	8.4	4.8	2.44	11.2	6.17	2.4	6	10.4	6.4	6.4	71.65
Willow Lane Elementary	3.2	5.84	10.8	4	3.52	14	5.4	2.2	6	10.4	5.6	6.4	77.36
Otter Lake Elementary	2.8	2.4	7.2	4.8	2.44	11.2	5.54	2.4	6	10.4	8	6.4	69.58
North Campus HS	2.4	2.4	7.2	7.2	2.4	9.8	5.76	2.2	6	9.62	6.4	6.4	67.78
South Campus HS	2.8	4.24	9.6	5.6	2.92	11.2	6.03	2.8	6	8.84	4.8	6.4	71.23
Central Middle School	2.8	5.84	8.4	5.6	3	14	6.16	2	6	8.97	5.6	6.4	74.77
Sunrise Middle School	3.2	6.4	8.4	4.8	2.24	11.2	5.4	2.2	4.8	10.4	6.4	6.4	71.84
Normandy Park Early Ed.	2.4	5.04	9.6	8	3.04	11.2	5.81	2	6	8.58	6.4	6.4	74.47
Oneka Elementary	3.6	7.2	12	6.4	3.88	14	8.1	3.6	8	12.22	8	8	95
	2.85	4.85	8.85	5.50	2.67	11.64	5.84	2.44	5.83	9.50	6.30	6.50	72.76

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors





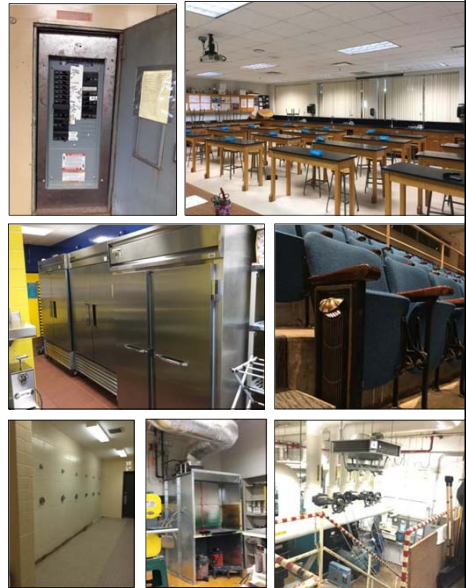
Facility Assessment - OBSERVATIONS

- **“Good bones”** – District wide average score 72.8
- **Well maintained**
- **Amazingly consistent** – 87% of facilities within 13 points
 - Similar repair cycles
- **Aging building systems will need attention**
 - Exterior envelop
 - Mechanical
 - Technology



Facility Assessment - OBSERVATIONS

- **The Good**
 - ADA – 11.6/14
 - Structure – 8.9/12
 - Plumbing – 6.3/8
 - Mechanical Fire Safety – 6.5/8
- **The Not as Good**
 - Site – 2.8/4
 - Exterior – 4.8/8
 - Technology - 2.4/4



White Bear Lake Area Schools
Facility Assessment

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LISTENING TOURS PROCESS



White Bear Lake Area Schools
Facility Assessment

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Listening Tours - EARLY OBSERVATIONS

- Whole child focus
- Enrollment increases = space crunch
- Pre-K program growth
- Special education needs continue to rise
- Circulation and wayfinding can be challenging
 - Safety
 - Security
- Operational silos
 - Departmentalization
- High demand spaces
 - Maker (hands-on, project-based)
 - Collaboration
 - Large group spaces
- Expand partnerships

White Bear Lake Area Schools
Facility Assessment

DLR Group
Architecture Engineering Planning Interiors

SCHOOL BOARD UPDATE

Next Steps

- Finalizing pricing
- Coordinate prioritization
- Final report
- Community assessment



White Bear Lake Area Schools
Facility Assessment

DLR Group
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School Board Update

Question and Answer

AGENDA ITEM: **School Board/District Administration Priorities for 2017-18**

MEETING DATE: **July 10, 2017**

SUGGESTED DISPOSITION: **Discussion Item**

CONTACT PERSON(S): **Dr. Wayne A. Kazmierczak, Superintendent; Tim Wald, Assistant Superintendent for Finance and Operations; and Sara Paul, Assistant Superintendent for Teaching and Learning**

BACKGROUND:

At the July 10, 2017 work-study meeting, the School Board and District administration will discuss priorities for the 2017-18 school year. Several of the listed items are continued priorities from the 2016-17 school year.

- **Improving Instructional Practices:** A focus on digital learning and on core literacy instruction will continue with additional professional development and collaboration time for staff.
- **Expanding College and Career Opportunities:** A focus on increasing the number of students accessing college level coursework and on expanding opportunities career pathways will continue into the 2017-18 school year.
- **Equity: Closing Achievement and Opportunity Gaps:** A focus on equitable educational opportunities for each student will continue into the 2017-18 school year. This will include AVID program expansion to develop college readiness skills and increasing the District's level of family engagement.
- **Operating Levy Renewal:** A key source of revenue, securing the District's current level of operating levy funding with a renewal referendum in November is a top priority for the coming year.
- **Strategic Planning Process:** A strategic planning process will begin later this summer with a targeted completion of early 2018. This process will help the School Board establish priorities for the next several years and will inform the forthcoming facilities discussions.
- **Comprehensive Facilities Planning:** Upon completion of the strategic planning process, a comprehensive facilities planning process will get underway. With a growing student population and several long-standing facilities needs, this process will lead to a recommendation that will be considered by the School Board sometime during the 2018-19 school year.

Following the discussion at the work-study meeting, adjustments to the priorities will be made as necessary and the established priorities will become the focus of the School Board and District administration for the 2017-18 school year.

AGENDA ITEM: **Overview of Strategic Plan Development**

MEETING DATE: **July 10, 2017**

SUGGESTED DISPOSITION: **Discussion Item**

CONTACT PERSON(S): **Dr. Wayne A. Kazmierczak, Superintendent; Tim Wald, Assistant Superintendent for Finance and Operations; and Sara Paul, Assistant Superintendent for Teaching and Learning**

BACKGROUND:

At the July 10, 2017 work-study meeting, an overview of the upcoming strategic plan development process will be provided. Generally, the planning will begin later this summer with internal facilitator training in early August while the planning team sessions will get underway in late August or mid-September. Additional information will be provided at the work-study meeting.

AGENDA ITEM: **Operating Levy Renewal Parameters**

MEETING DATE: **July 10, 2017**

SUGGESTED DISPOSITION: **Discussion Item**

CONTACT PERSON(S): **Dr. Wayne A. Kazmierczak, Superintendent**
Tim Wald, Assistant Superintendent for Finance and Operations

BACKGROUND:

Local operating levies are an essential source of revenue for Minnesota schools as more than 99% of the state's school districts receive operating levy referendum revenue. The communities that comprise White Bear Lake Area Schools have supported this source of funding in the past. The existing operating levy was originally approved in November 2007 with over 63% of voters supporting the measure. The operating levy was renewed in November 2011 with 73% of voters showing support. The operating levy is set to expire following the 2018-2019 school year.

At the June 12, 2017 School Board meeting, District administration was directed to develop parameters for an operating levy renewal question to be discussed at the July 10, 2017 work-study meeting and acted upon at the July 10, 2017 regular meeting. The parameters to be discussed at the work-study meeting include the following:

- **Amount per pupil**: \$1,545.31 per pupil unit. This amount represents a renewal of the existing operating levy amount with no increase.
- **Annual inflation adjustment**: The current operating levy is annually adjusted by an inflation factor as determined by the Minnesota Department of Education; the proposed operating levy would maintain this annual adjustment.
- **Length of levy**: The existing operating levy was approved for a period of 6 years, the renewal can be sought for up to 10 years. District administration recommends that the length be extended to 10 years.
- **Tax impact**: No tax increase is projected as the current tax rate is maintained.

Please see the attached documents for a detailed breakdown of the estimated referendum revenue and tax rates as provided by the District's financial advisors, Ehlers & Associates.

PRELIMINARY INFORMATION - FOR DISCUSSION ONLY

White Bear Lake School District, ISD 624

Estimated Referendum Revenue and Tax Rates

Proposed Renewal of Referendum Levy for Taxes Payable 2019, FY 2019-20

(Including Equity and Local Optional Revenue)

**Renewed Referendum
\$1,545.31 Per Pupil Unit**

June 23, 2017

Year Taxes are Payable Fiscal Year	2017 2017-18	2018 2018-19	2019 2019-20
	Existing Authority	Existing Authority	Renewed Authority
1. Est. Adjusted Pupil Units (APU) *	9,091.30	9,165.43	9,269.09
2. Est. Resident Pupil Units (RPU)	9,989.90	10,082.96	10,162.42
3. Net Referendum Authority per APU	1,507.44	1,545.31	1,545.31
4. Initial Referendum Revenue (#1 x #3)	\$13,704,589	\$14,163,430	\$14,323,618
5. Referendum Market Value (RMV)	6,573,881,600	6,904,085,300	7,042,167,006
6. RMV per Resident Pupil Units (#5 / #2)	658,053	684,728	692,962
FIRST TIER OF REVENUE			
7. Revenue per Pupil Unit (lesser of #3 or \$300)	300.00	300.00	300.00
8. Revenue (#1 x #7)	2,727,390	2,749,629	2,780,727
9. State Equalizing Factor	880,000	880,000	880,000
10. Levy Portion of Revenue (lesser of 100% or #6 / #9)	74.78%	77.81%	78.75%
11. Aid Portion of Revenue (100% - #10)	25.22%	22.19%	21.25%
12. First Tier Aid (#8 x #11)	687,882	610,142	591,026
SECOND TIER OF REVENUE			
13. Revenue per Pupil Unit (lesser of \$460 or #3 - #7)	460.00	460.00	460.00
14. Revenue (#1 x #13)	4,181,998	4,216,098	4,263,782
15. State Equalizing Factor	510,000	510,000	510,000
16. Levy Portion of Revenue (lesser of 100% or #6 / #15)	100.00%	100.00%	100.00%
17. Aid Portion of Revenue (100% - #16)	0.00%	0.00%	0.00%
18. Second Tier Aid (#14 x #17)	0	0	0
THIRD TIER OF REVENUE			
19. Revenue per PU ((lesser of (25% of Basic Allow) or #3 - #7 - #13)	747.44	756.75	756.75
20. Revenue (#1 x #19)	6,795,201	6,935,939	7,014,384
21. State Equalizing Factor	290,000	290,000	290,000
22. Levy Portion of Revenue (lesser of 100% or #6 / #21)	100.00%	100.00%	100.00%
23. Aid Portion of Revenue (100% - #22)	0.00%	0.00%	0.00%
24. Third Tier Aid (#20 x #23)	0	0	0
TOTALS			
25. Initial Referendum Aid (#12 + #18 + #24)	687,882	610,142	591,026
26. Tax Base Replacement Aid	16,224	16,224	16,224
27. FY 2015 Old Law Referendum Net Aid Guarantee Balance	0	0	0
28. Net Referendum Aid (greater of 0 or (#25 - #26))	671,659	593,919	574,803
29. Certified Referendum Levy (#4 - #28)	13,016,707	13,553,288	13,732,592
30. Referendum Fiscal Disparities Distribution Amount **	1,357,867	1,357,867	1,357,867
31. Net Levy (#29 - #30) ***	11,658,840	12,195,421	12,374,725
32. Taxable Referendum Market Value + Est. Percentage change in value	6,904,085,300 5.02%	7,042,167,006 2.00%	7,183,010,346 2.00%
33. Tax Rate for referendum (#31 / #32)	0.16887%	0.17318%	0.17228%
34. Total Referendum Aid (#26 + #28)	687,882	610,142	591,026
35. Total Referendum Levy (#31)	13,016,707	13,553,288	13,732,592
36. Total Referendum Revenue (#34 + #35)	13,704,589	14,163,430	14,323,618
ESTIMATED EQUITY REVENUE			
37. Est. Equity Aid	0	0	0
38. Est. Equity Levy	791,284	859,717	889,485
39. Est. Equity Revenue	791,284	859,717	889,485
40. Tax Rate for Equity Revenue (#38 / #32)	0.01146%	0.01221%	0.01238%
ESTIMATED LOCAL OPTIONAL REVENUE			
41. Est. Local Optional Aid	0	0	0
42. Est. Local Optional Levy	3,854,711	3,886,142	3,930,094
43. Est. Local Optional Revenue	3,854,711	3,886,142	3,930,094
44. Tax Rate for Local Optional Revenue (#42 / #32)	0.05583%	0.05518%	0.05471%
ESTIMATED TOTAL REVENUE (Referendum + Equity + Local Optional)			
45. State Aid (#34 + #37 + #41)	687,882	610,142	591,026
46. Tax Levies (#35 + #38 + #42)	17,662,702	18,299,148	18,552,172
47. Total Revenue (#45 + #46)	18,350,584	18,909,290	19,143,198
48. Combined Tax Rate (#33 + #40 + #44)	0.23616%	0.24057%	0.23937%

* Pupils units for 2017-18 are estimated pupil units used to compute Payable 2017 taxes, and for 2018-19 and 2019-20 are the most recent

** Fiscal disparities distribution amounts for taxes payable in 2018 and 2019 are estimated to be the same as for taxes payable in 2017.

*** Levy amounts shown above include the "initial levy limitation" only, and do not include adjustments for prior years' levies.

+ For all referendum authority, calculations are based on the total RMV of the district.

PRELIMINARY INFORMATION - FOR DISCUSSION ONLY

White Bear Lake School District, ISD 624

Analysis of Tax Impact for Potential Referendum Levy

June 23, 2017

Year Taxes are Payable	2018	2019	
	Expired Authority	Proposed Authority	NET CHANGE
Revenue per Pupil Unit	-\$1,545.31	\$1,545.31	\$0.00
Est. Net Change in Ref. Rev.	-\$14,163,430	\$14,323,618	\$160,188
Est. Market Value Tax Rate	-0.17318%	0.17228%	-0.00090%

Type of Property	Estimated Market Value	Estimated Taxes for Referendum Levy Only*		
	\$100,000	-\$173	\$172	-\$1
	125,000	-216	215	-1
	150,000	-260	258	-2
	175,000	-303	301	-2
	200,000	-346	345	-1
	225,000	-390	388	-2
	250,000	-433	431	-2
	300,000	-520	517	-3
Residential	350,000	-606	603	-3
Homesteads,	400,000	-693	689	-4
Apartments,	450,000	-779	775	-4
and Commercial-	500,000	-866	861	-5
Industrial Property	600,000	-1,039	1,034	-5
	700,000	-1,212	1,206	-6
	800,000	-1,385	1,378	-7
	900,000	-1,559	1,550	-9
	1,000,000	-1,732	1,723	-9
	1,250,000	-2,165	2,153	-12
	1,500,000	-2,598	2,584	-14
	2,000,000	-3,464	3,446	-18

* The figures in the table are based on school district taxes for the referendum levy only, and do not include tax levies for other purposes. Tax increases shown above are gross increases, not including the impact of the Minnesota Homestead Credit Refund ("Circuit Breaker") program. Many owners of homestead property will qualify for a refund, based on their income and total property taxes. This will decrease the net effect of the referendum levy for many property owners.

NOTE: Agricultural property will pay taxes for the proposed referendum based only on the value of the house, garage and one acre. Seasonal recreational residential property (i.e., cabins) will pay no taxes for the proposed referendum.

AGENDA ITEM: **Negotiations Study Session**
MEETING DATE: **April 24, 2017**
SUGGESTED DISPOSITION: **Discussion Item**
CONTACT PERSON(S): **Linda Goers, Director of Human Resources**

BACKGROUND:

Director of Human Resources Linda Goers will provide an update on the status of negotiations.

<p>*This portion of the meeting may be closed to consider strategy for labor negotiations, including negotiation strategies or developments or discussion and review of labor negotiation proposals, conducted pursuant to Minnesota Statutes 179.A.01 to 179.A.25.</p>
