

MINNETONKA SCHOOL BOARD
SPECIAL MEETING, STUDY SESSION AND CLOSED SESSION
May 19, 2022 – 6:00 p.m.
AGENDA

SPECIAL MEETING

- 6:00 I. Call to Order
- 6:02 II. Pledge of Allegiance to the Flag
- III. Adoption of the Agenda
- IV. Review and Approval of Bid for VANTAGE/MOMENTUM Building Construction
- 6:25 V. Adoption of Vision Document
- 6:30 VI. Adjournment

STUDY SESSION

- 6:31 1. Report from the CAREI Institute on MTSS Phase II Evaluation
- 7:00 2. Reports on Goals
 - a) MTSS Three-Year Action Plan Update
 - b) 2021-22 MTSS Action Plan
 - c) Communications Update
 - d) Update on Wilson Reading
 - e) Update on Summer Learning
- 8:15 3. Report on Elementary STAMP Results
- 8:45 4. Review of FY23 Budget
- 9:25 5. Review of Long-Term Financial Projections
- 10:00 6. Adjournment to Closed Session for Negotiations

CITIZEN INPUT

7:00 p.m. Citizen Input is an opportunity for the public to address the School Board on any topic in accordance with the guidelines printed on the reverse.

GUIDELINES FOR CITIZEN INPUT

Welcome to the Minnetonka School Board's Study Session! In the interest of open communications, the Minnetonka School District wishes to provide an opportunity for the public to address the School Board. That opportunity is provided at every Study Session during *Citizen Input*.

1. Anyone indicating a desire to speak to any item about educational services—except for information that personally identifies or violates the privacy rights of employees or students—during *Citizen Input* will be acknowledged by the Board Chair. When called upon to speak, please state your name, address and topic. All remarks shall be addressed to the Board as a whole, not to any specific member(s) or to any person who is not a member of the Board.
2. If there are a number of individuals present to speak on the same topic, please designate a spokesperson that can summarize the issue.
3. Please limit your comments to three minutes. Longer time may be granted at the discretion of the Board Chair. If you have written comments, the Board would like to have a copy, which will help them better understand, investigate and respond to your concern.
4. During *Citizen Input* the Board and administration listen to comments. Board members or the Superintendent may ask questions of you in order to gain a thorough understanding of your concern, suggestion or request. If there is any follow-up to your comment or suggestion, you will be contacted by a member of the Board or administration.
5. Please be aware that disrespectful comments or comments of a personal nature, directed at an individual either by name or inference, will not be allowed. Personnel concerns should be directed first to a Principal, then to the Executive Director of Human Resources, then to the Superintendent and finally in writing to the Board.

**School Board
Minnetonka I.S.D #276
5621 County Road 101
Minnetonka, Minnesota**

Special Meeting Agenda Item IV.

**Title: Approval of Bid for Construction of
VANTAGE/MOMENTUM Building**

Date: May 19, 2022

EXECUTIVE SUMMARY:

At the October 7, 2021 School Board Meeting, the School Board approved the construction of a 36,300-square-foot building to house the VANTAGE Program and future strands of the MOMENTUM Program at 5735 County Road 101, Minnetonka, MN at a total project cost estimated at \$14,000,000.

Over the ensuing months the project has been designed and has received all the necessary permits from permitting authorities in order to proceed to construction.

Bids for the VANTAGE/MOMENTUM building construction were opened at the District Service Center at 4:00 PM on Tuesday, May 2, 2022. Eight (8) bids were received as follows:

Morcon Construction	\$15,555,083
Rochon Construction	\$15,825,000
Donlar Construction	\$16,126,000
Ebert Construction	\$16,333,000
Shaw-Lundquist Construction	\$16,390,000
Jorgenson Construction	\$16,545,000
CM Construction	\$17,248,800
Construction Results	\$17,554,770

All of the bids have come in higher than the construction estimate, including the low bid of Morcon Construction. This is highly unusual as in past times, which are probably more normal times, the estimates provided by ATSR have proven to be spot on.

The range of bids from the large a group of large construction contractors tells a story in itself. The key takeaway is that inflation is hitting the construction market in a significant way.

The District interviewed the low bidder on Wednesday, May 4 to review the cost estimates of the low bid. Morcon Construction indicated to us that they have seen steady and rapid cost increases almost weekly in bid prices for other jobs that they have been bidding. Costs of concrete and steel, both of which are significant components of this project, were mentioned as having significant cost increases.

Another key factor for building construction is the cost per gallon of diesel fuel. All construction materials are shipped, often several times, and of course, large construction equipment runs on diesel fuel. In April 2021 the average for a gallon of diesel fuel was \$3.06 per gallon. In April 2022, the average for a gallon of diesel fuel was \$5.12 per gallon, which is an increase of \$2.06 or 67% from April 2021.

The following table is the percent increase year over year in the Minneapolis statistical area for the Builders Cost Index (BCI).

January 2020	1.0%
February 2020	0.6%
March 2020	0.8%
April 2020	1.0%
May 2020	1.7%
June 2020	2.5%
July 2020	2.4%
August 2020	1.4%
September 2020	2.0%
October 2020	2.5%
November 2020	3.8%
December 2020	4.0%
January 2021	3.4%
February 2021	3.7%
March 2021	5.0%
April 2021	5.6%
May 2021	7.4%
June 2021	8.0%
July 2021	10.4%
August 2021	12.7%
September 2021	14.6%
October 2021	12.9%
November 2021	11.6%
December 2021	11.0%
January 2022	13.0%
February 2022	14.7%
March 2022	15.4%
April 2022	15.4%

What is evident from the table is that construction inflation started increasing in November 2020 from prior more stable inflation and has been accelerating steadily since then.

Additional impacts mentioned by Morcon Construction to the bids was subcontractors allowing for an inflation cushion in their pricing and to cover any supply chain disruptions or material shortage issues.

In a time period when inflation is accelerating and there is great uncertainty as to how high it will get and how long it will last, that is an understandable business practice on the part of subcontractors.

The low bid of Morcon Construction of \$15,555,083 results in an estimated all-in construction cost of \$16,850,000, which would require the commitment of \$2,850,000 of additional resources.

The low bid is valid for a period of 60 days.

Administration has reviewed the overall construction bid environment and verified that construction inflation has been significant and is likely to continue to accelerate for the foreseeable future, which would make any re-bid likely to come in higher than the current bids.

Administration has also studied four different options to adjust the VANTAGE MOMENTUM project scope to get it to within the original \$14,000,000 estimate. Each of the four options has significant deficiencies for the long term. Administration has also developed an estimate of the potential revenue generation from the additional 300-student capacity at Grades 9-12 that will materialize when the VANTAGE MOMENTUM building is complete and open for operations.

All the data indicates the current bid price is the current market price for construction of the VANTAGE MOMENTUM building as currently designed, and given economic conditions, is the lowest price the District can get at this time for the construction of the building plan.

The potential additional revenue will more than cover the cost of operations of the VANTAGE MOMENTUM building and will leave resources left over to fund other General Fund Programs.

ATTACHMENTS:

VANTAGE/MOMENTUM Building Additional Resources Requirement
OPEB Trust Update And Potential Withdrawal Estimates

RECOMMENDATION/FUTURE DIRECTION:

It is recommended that the School Board approve the low bid of MORCON Construction in the amount of \$15,555,083.

RECOMMENDED MOTION

BE IT RESOLVED, that the School Board of Minnetonka Independent School District 276 does hereby accept the bid of MORCON Construction in the amount of \$15,555,083 for the construction of the VANTAGE MOMENTUM Building at 5735 County Road 101, Minnetonka, MN.

Submitted by: 
Paul Bourgeois, Executive Director of Finance & Operations

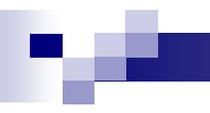
Concurrence: 
Dennis Peterson, Superintendent



MINNETONKA
PUBLIC SCHOOLS

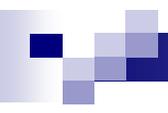
OPEB Trust Update and Potential Withdrawal Estimates

School Board Meeting
May 19, 2022



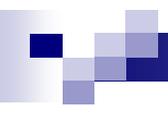
OPEB Revocable Trust History And Purpose (1)

- 2008 Legislature passed Minnesota Statutes 471.6175 allowing public entities to fund a trust for Other Post Employment Benefits (OPEB)
 - OPEB liabilities were primarily lifetime health insurance benefits paid to retirees that had been negotiated in bargaining unit contracts
 - To establish a trust, the participation in these types of benefits had to have been capped by July 1, 2002
 - The trust could be funded by the issuance of General Obligation Bonds
- The Legislature allowed the choice of two types of trust
 - An irrevocable trust locks in the funds for paying retiree benefits into perpetuity
 - A revocable trust allows more flexibility to utilize funds if the investment of the funds produced more assets over the liability



OPEB Revocable Trust History And Purpose (2)

- Minnetonka ISD 276 chose to establish a revocable trust because we knew excess assets were likely to accrue for several reasons
 - The actuaries were directed to use a conservative 3.00% discount rate to calculate the initial liability
 - We wanted to make sure there were going to be sufficient funds in the trust so that we would never be short of funds even in an economic downturn
 - At the time, 3.00% was what the District could earn on its own with its cash investments
 - We knew that with a fixed set of participants receiving benefits that over time normal mortality would result in the liability decreasing significantly

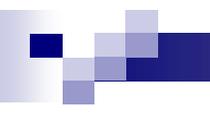


OPEB Revocable Trust History And Purpose (3)

- Because of those three reasons, we knew the chance of excess assets accruing over time was significant.

- The OPEB Revocable Trust was established in 2008 with a liability of \$17,742,555 for 615 participants
- Wells Fargo Private Wealth Management was selected as the investment manager for the OPEB Revocable Trust

- From FY2008 through FY2021, \$8,315,306 has been disbursed to the General Fund to pay for retiree benefits expenditures
 - Without the OPEB Trust, the General Fund Unassigned Fund Balance would be \$8,315,306 lower at \$15,771,390 rather than the actual \$24,086,696 at the end of FY21



OPEB Revocable Trust History And Purpose (4)

- June 30, 2021 Status
 - The OPEB Trust Assets had grown to \$28,051,380
 - The OPEB Liability had declined from \$17,742,555 in 2008 down to \$10,985,427
 - Participants had declined from 615 in 2008 down to 209

- MS Statutes 471.6175 Subd. 7(a) reads in part:
 - *“any amount in excess of 100 percent of that political subdivision’s or public entity’s actuarially determined liabilities for post employment benefits, as determined under standards of the Government Accounting Standards Board, may be withdrawn and used for any purpose”*

- On October 7, the School Board approved the use of \$7,000,000 in excess assets from the OPEB Revocable Trust for use to construct the strategic asset of the VANTAGE/MOMENTUM building



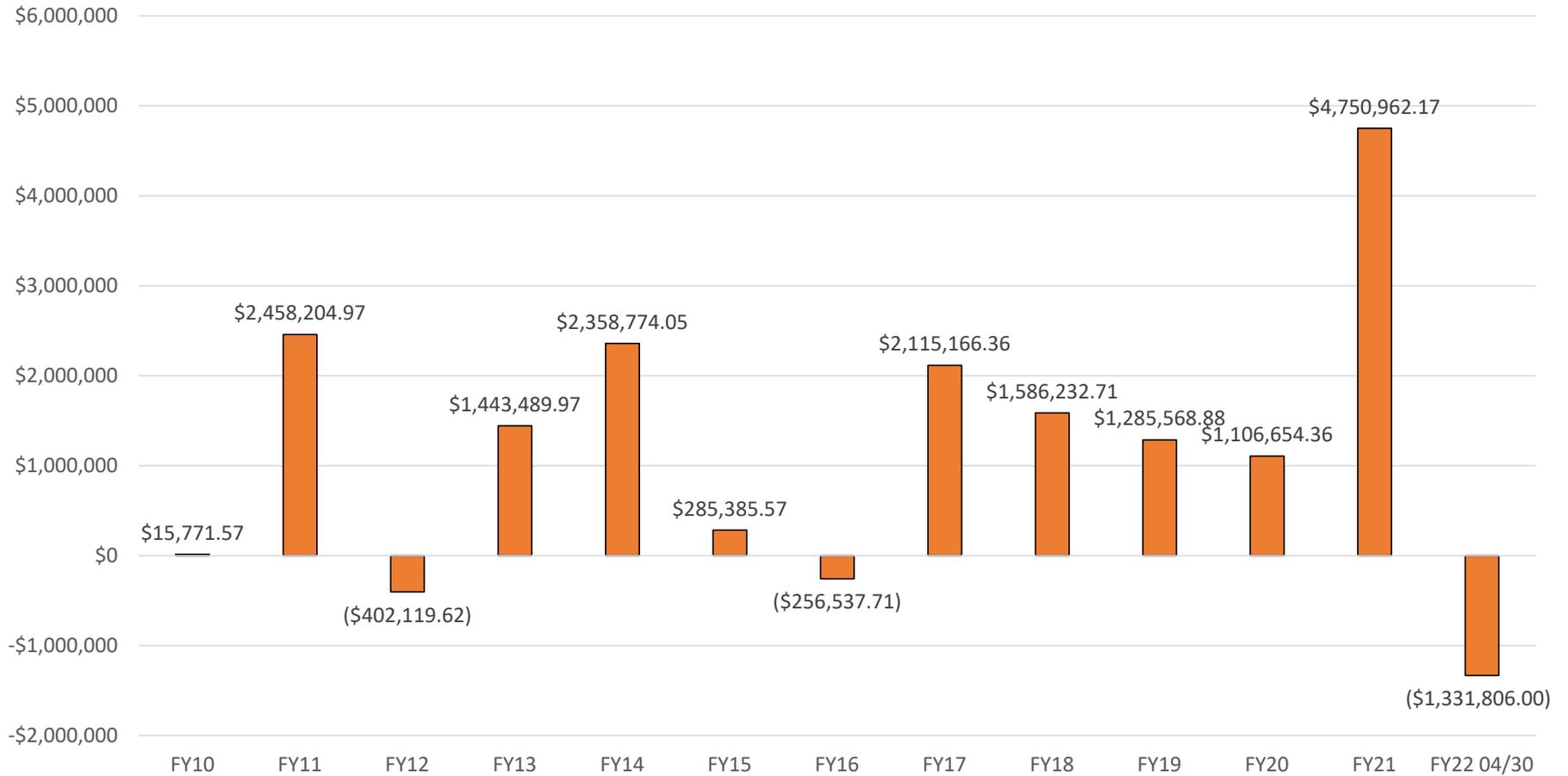
Funding Resources for Vantage/MOMENTUM Facility
at 5735 County Road 101 - \$16,850,000 All-In Project Costs

- \$7,000,000 from 2022A Bonds
 - Annual payments of \$416,509 funded from Operating Capital, primarily with \$320,000 annually shifted from Baker Road lease payments when lease expires
- \$7,000,000 from OPEB Revocable Trust Excess Assets

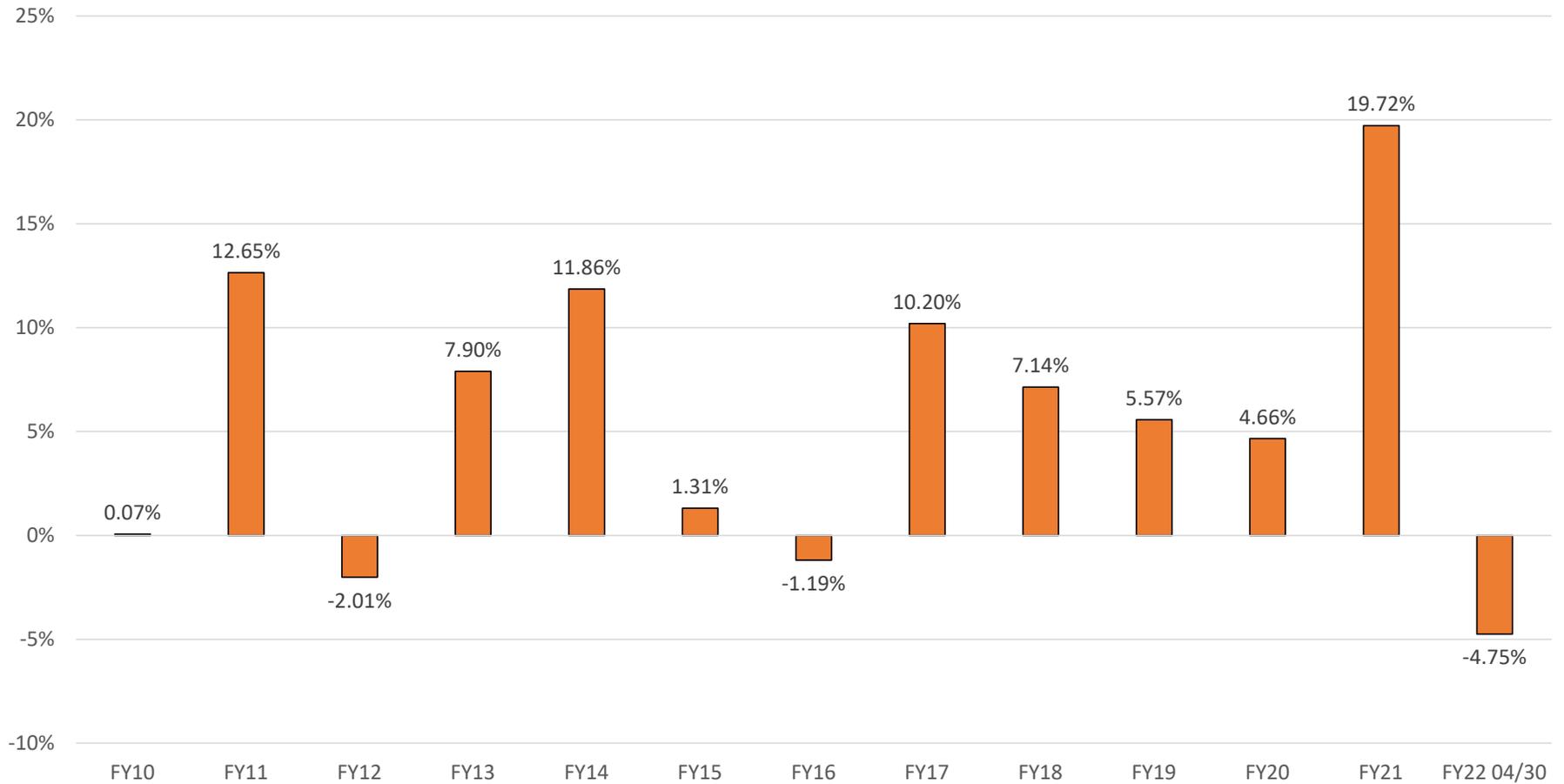
- \$2,850,000 from OPEB Revocable Trust Excess Assets?

- OPEB Trust Total Assets will be at an estimated \$16,089,494
- OPEB Liability is projected to be at \$10,587,615 on June 30, 2022
- Excess Assets above the liability will be at an estimated \$5,501,879
- Total Assets will be an estimated 146% of the OPEB Liability

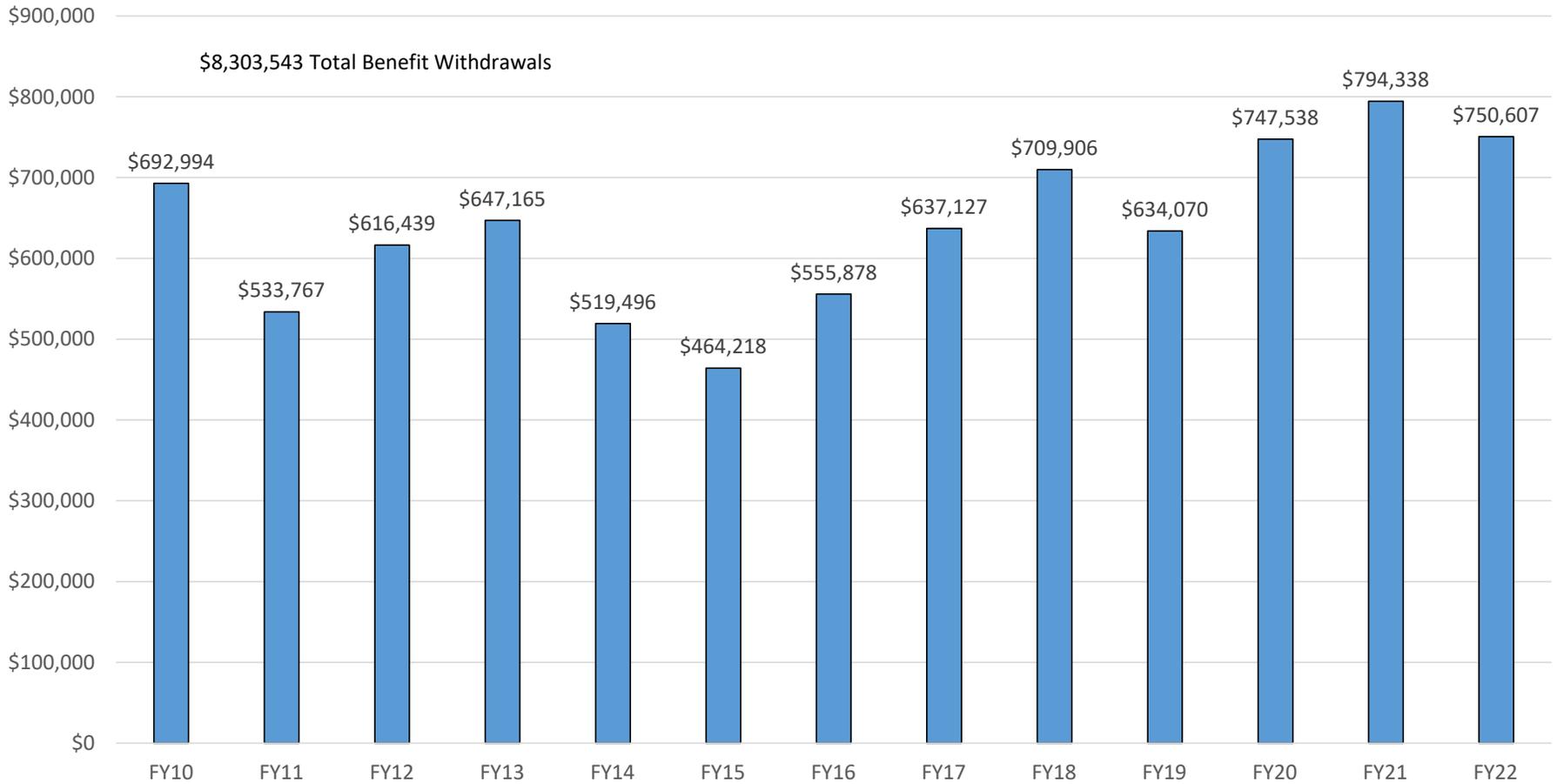
Minnetonka ISD 276 OPEB Revocable Trust Fund Fiscal Year Investment Return Amount



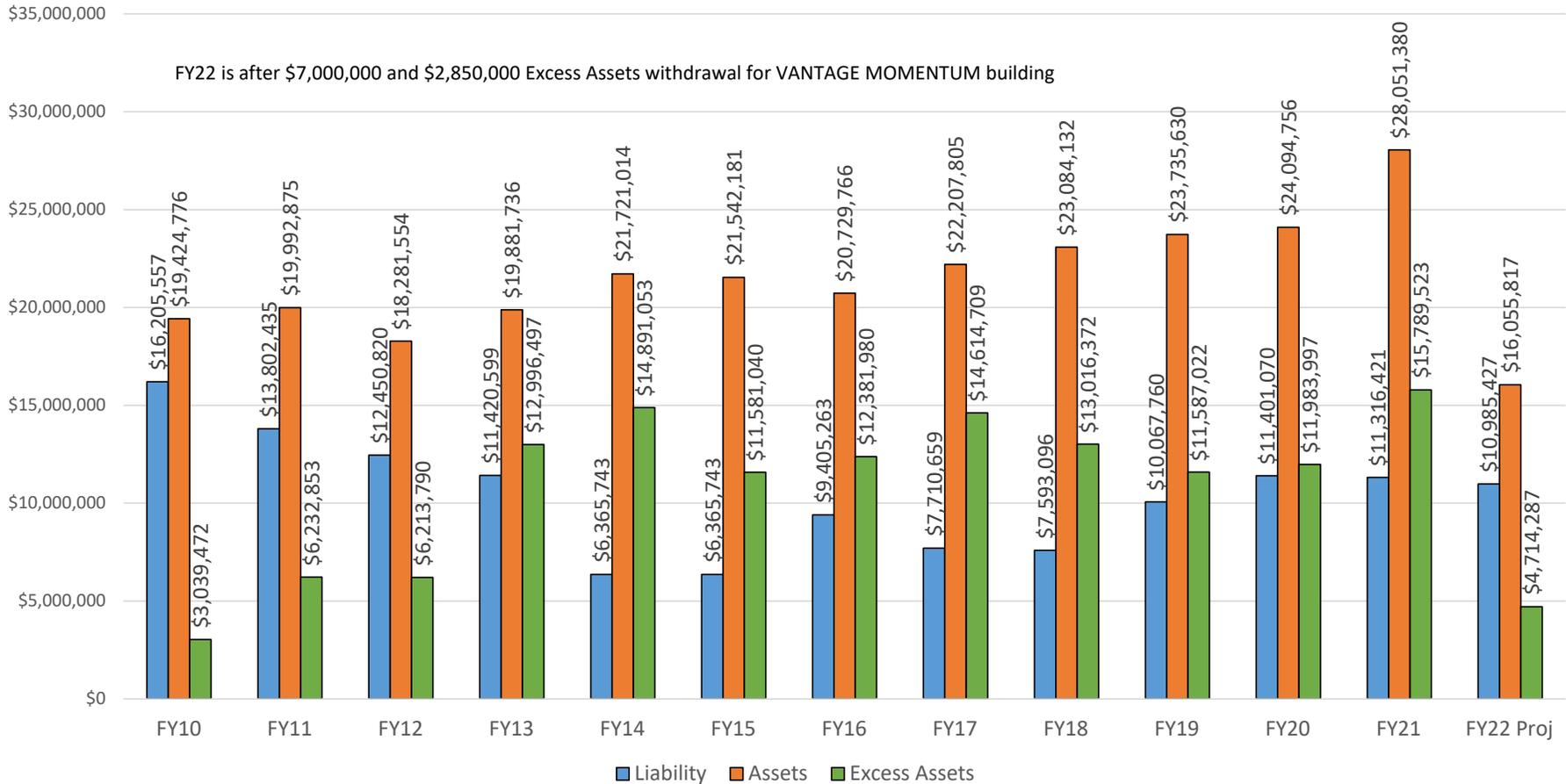
Minnetonka ISD 276 OPEB Revocable Trust Fund Fiscal Year Investment Return Percentage



Minnetonka ISD 276 OPEB Revocable Trust Fund Withdrawals For Benefit Payments

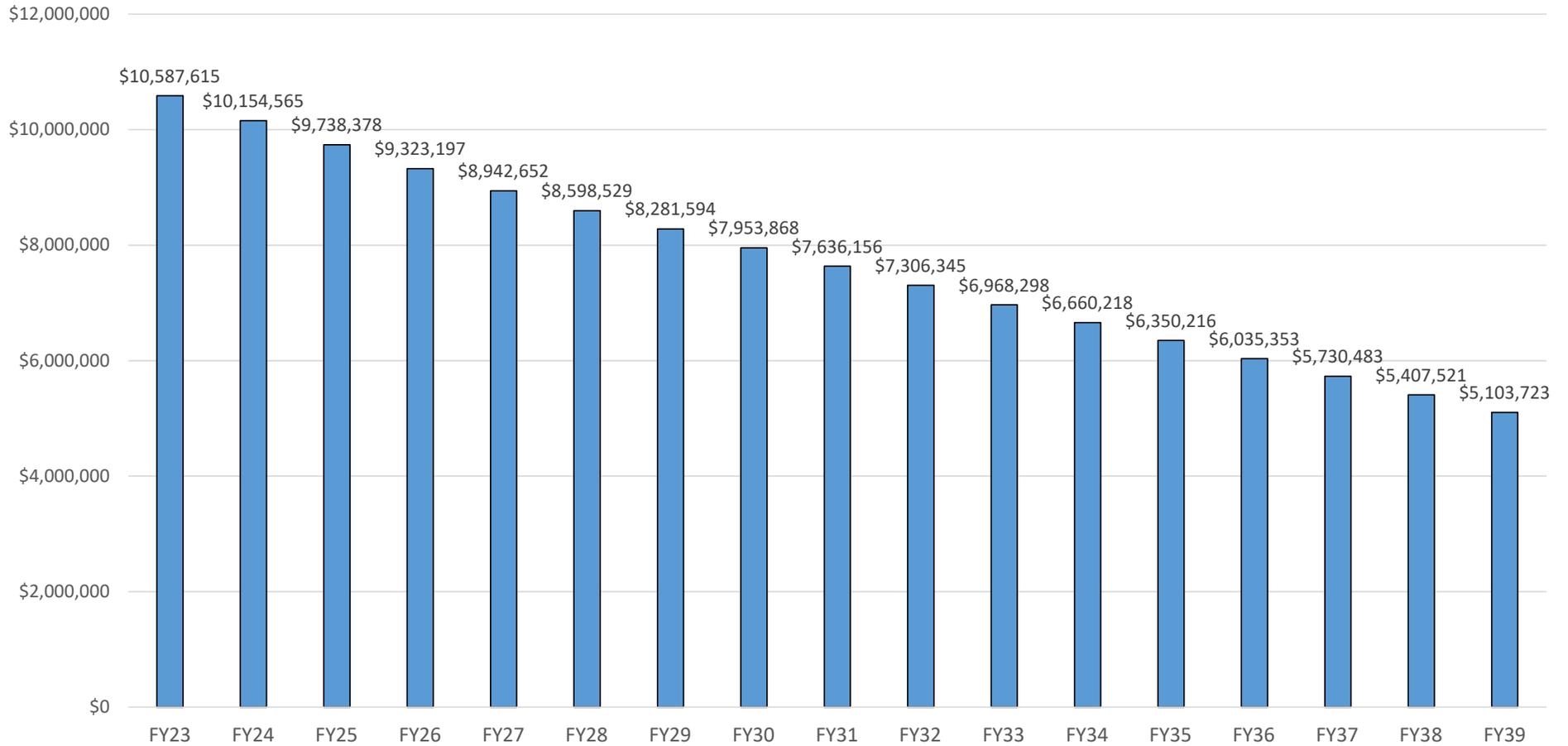


Minnetonka ISD 276 OPEB Revocable Trust Fund Liability, Total Assets & Excess Assets

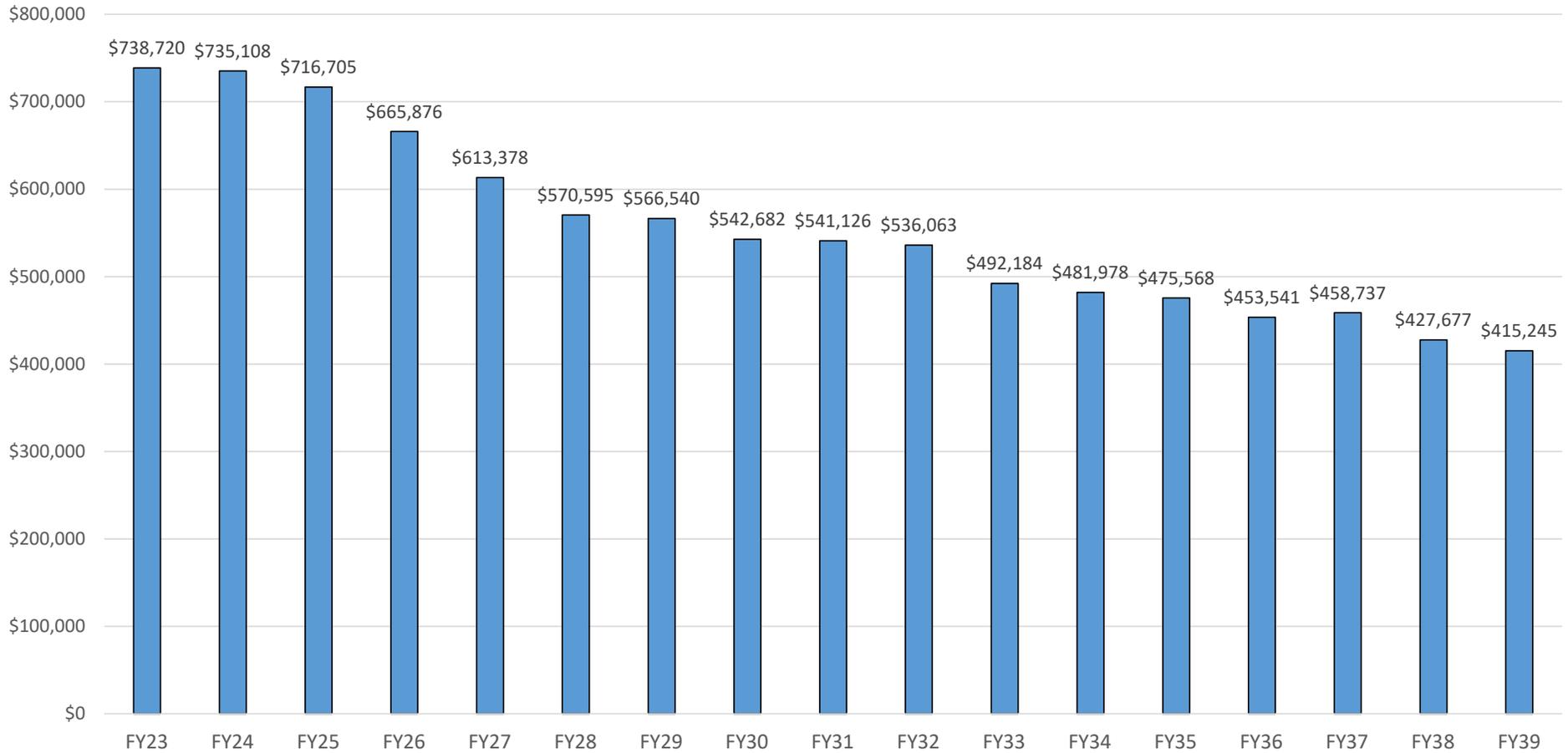


Minnetonka ISD 276 OPEB Revocable Trust Fund

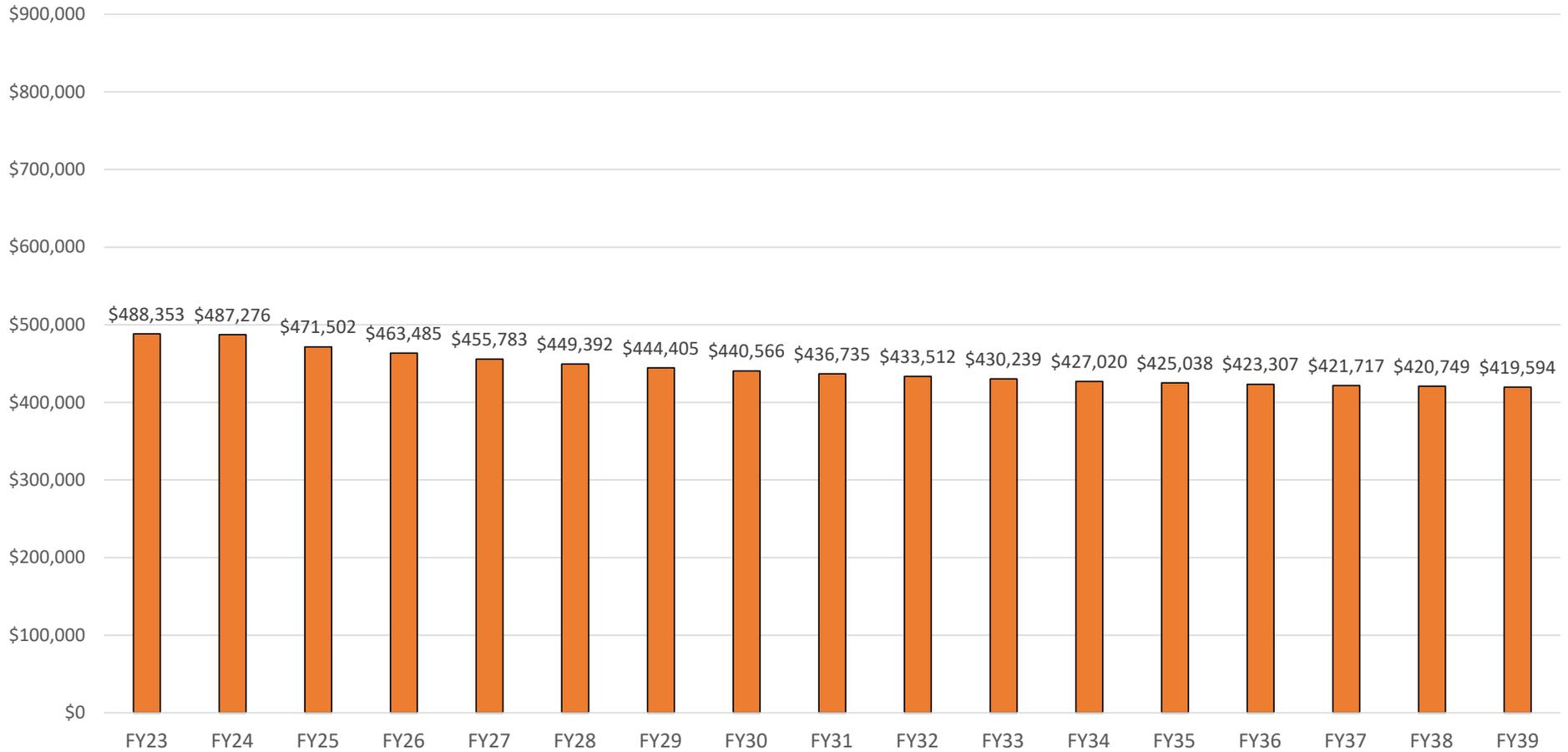
Actuarially-Projected Future Liability Calculated To Explicit Liability Amortization Year



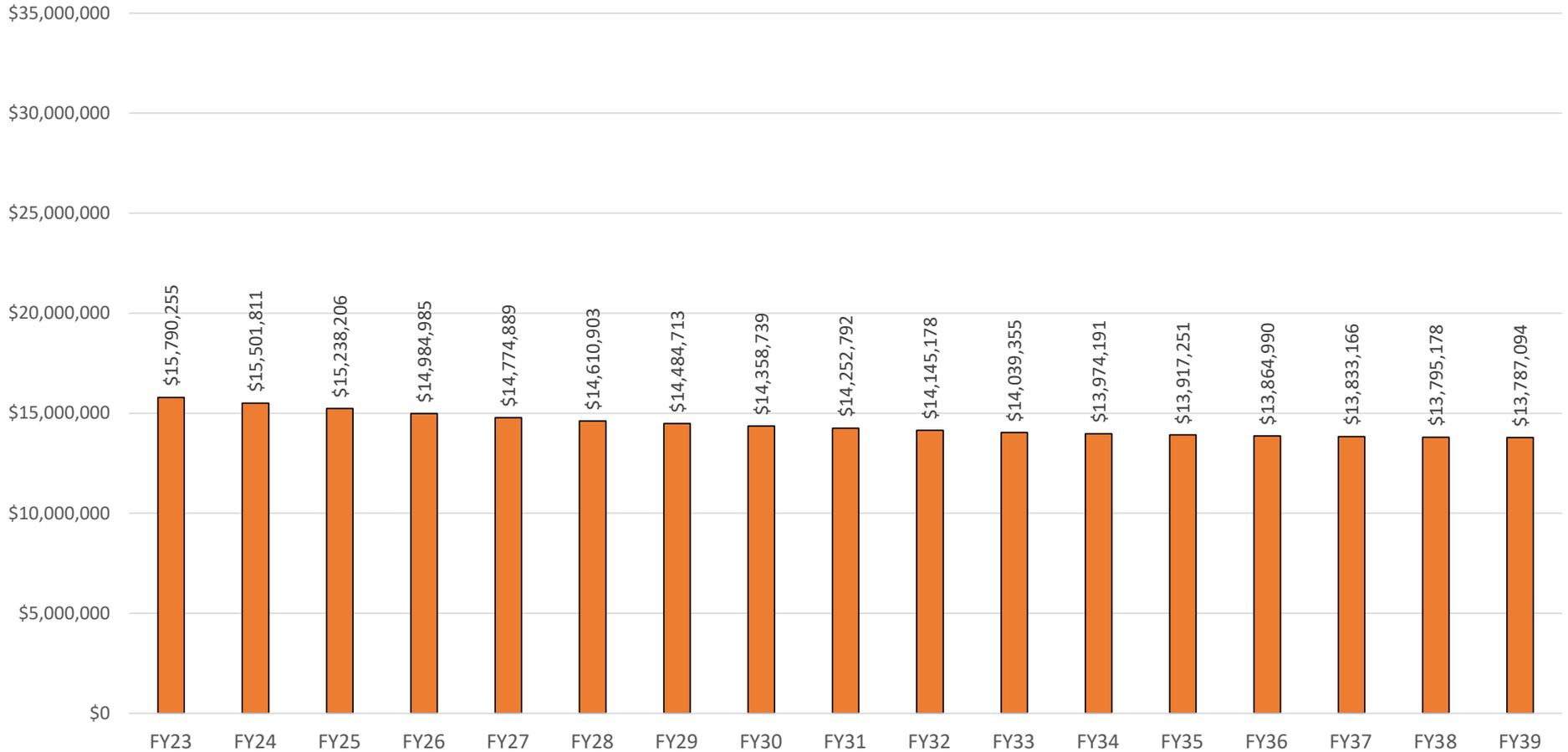
Minnetonka ISD 276 OPEB Revocable Trust Fund Actuarially-Projected Future Benefit Withdrawals



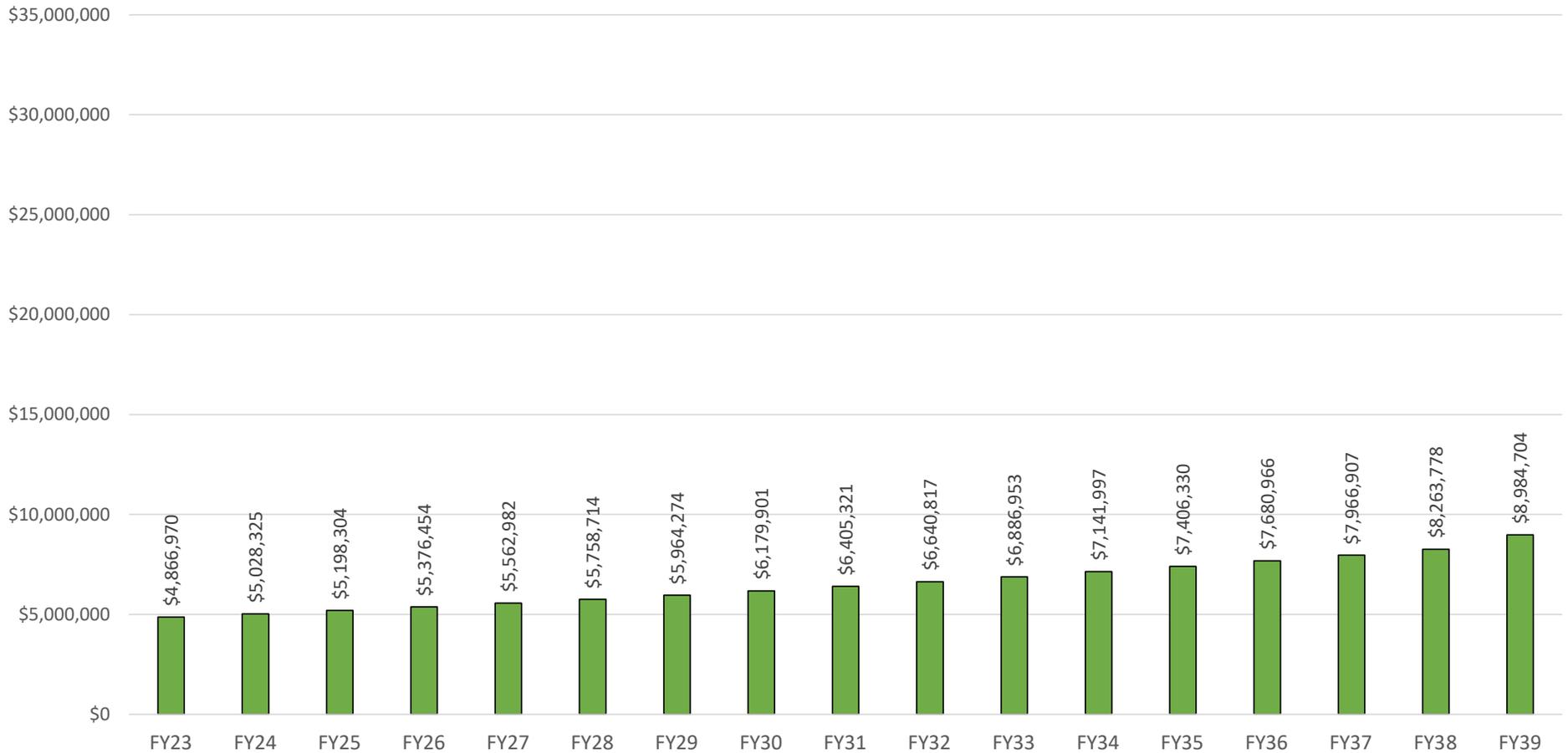
Minnetonka ISD 276 OPEB Revocable Trust Fund Projected Future Investment Earnings-3% Annual Returns \$7.00 MM And \$2.850 MM VANMO WD



Minnetonka ISD 276 OPEB Revocable Trust Fund Projected Future Asset Balance-3% Annual Returns \$7.00 MM And \$2.850 VANMO WD



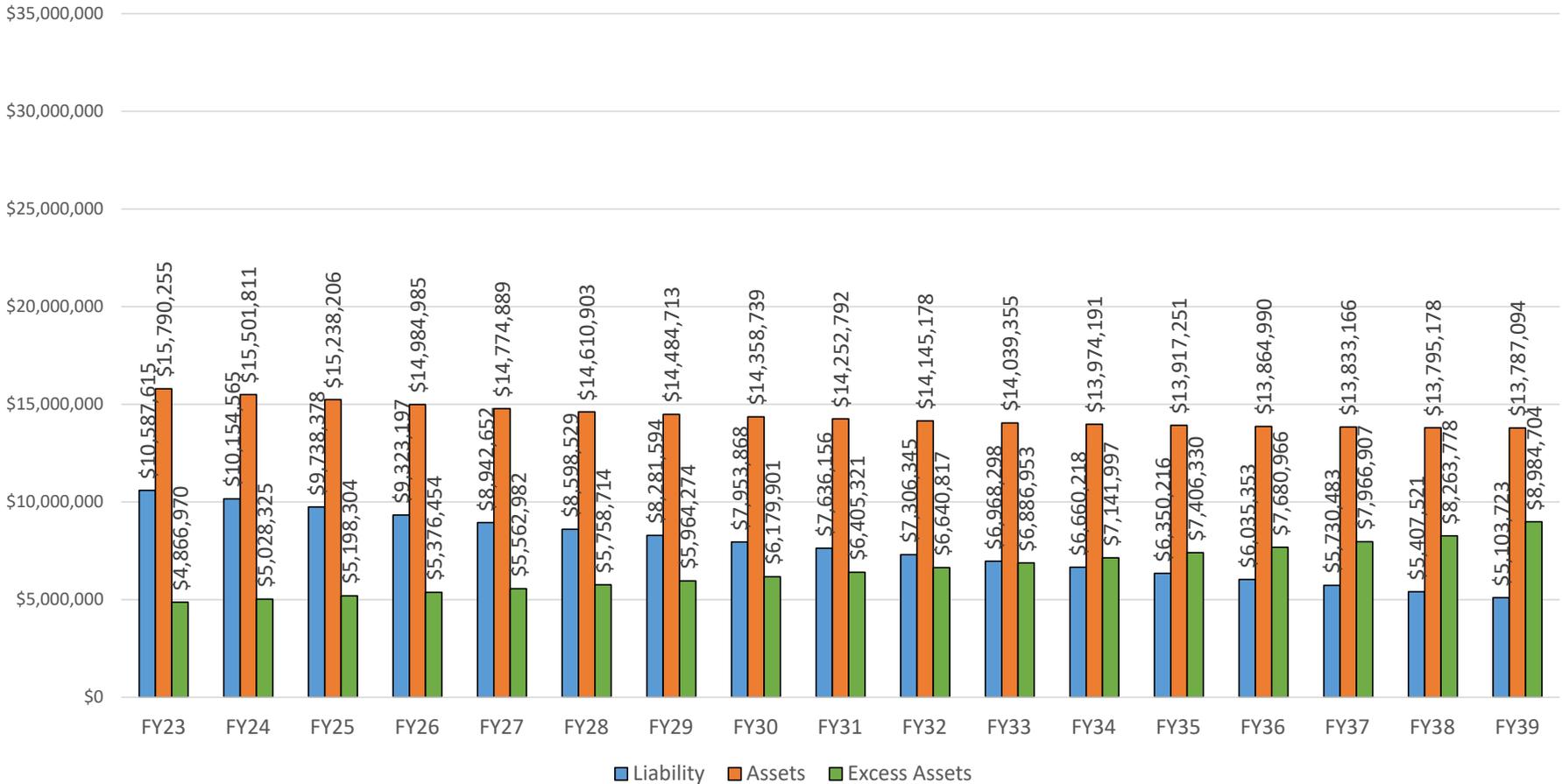
Minnetonka ISD 276 OPEB Revocable Trust Fund Projected Future Excess Assets Balance-3% Annual Returns \$7.00 MM And \$2.85 MM VANMO WD



Minnetonka ISD 276 OPEB Revocable Trust Fund

Liability, Total Assets & Excess Assets

\$7.00 MM And \$2.85 MM VANMO WD



Other Factors For Consideration – Potential General Fund Impact

- Construction of VANTAGE/MOMENTUM will increase grade 9-12 capacity by 300 students - generates 360 Adjusted Pupil Units
- In FY23 each APU generates:
 - \$9,848.55 in General Fund Revenue \$3,545,478 total
 - \$230.03 in Operating Capital Revenue \$ 82,811 total
 - \$212.00 in Lease Levy Capacity \$ 76,320 total
- In the General Fund:
 - \$9,848.55 x 360 APUs \$3,545,478
 - Less 15 teaching staff @ \$88,256 \$1,323,840
 - Less 3 custodial staff @ \$60,000 \$ 180,000
 - Less utilities \$ 100,000
 - Less 4 shuttle bus routes at \$54,000 \$ 216,000

 - Net General Fund Revenue \$1,725,638

 - 10.2% Annual ROIC on \$16.85 million investment



MINNETONKA
PUBLIC SCHOOLS

Base Building - 36,300 Square Feet
All VANTAGE Programs In The Building
MOMENTUM Growth Space
300-Student Capacity

FLOOR PLANS

- BASE BID 5/3/22 \$16,850,000 ALL-IN



MINNETONKA PUBLIC SCHOOLS

Capacity:
300 students
AM / PM

BUSINESS POD:

- ★ 124 • Global Business
- (79) • Business Analytics
- AP Stats

Business POD (60)

FORUM

- Large group room centrally located for all groups

Forum (140)

MOMENTUM POD:

- Future (CR/ Lab/ Stor.) programming

Board Room (20)



Service Yard



YARD STOR

REC'V

BOILER / ELEC ROOM



Floor Plan - Level 1

A T S R

BASE BID \$16,850,000

2/28/22

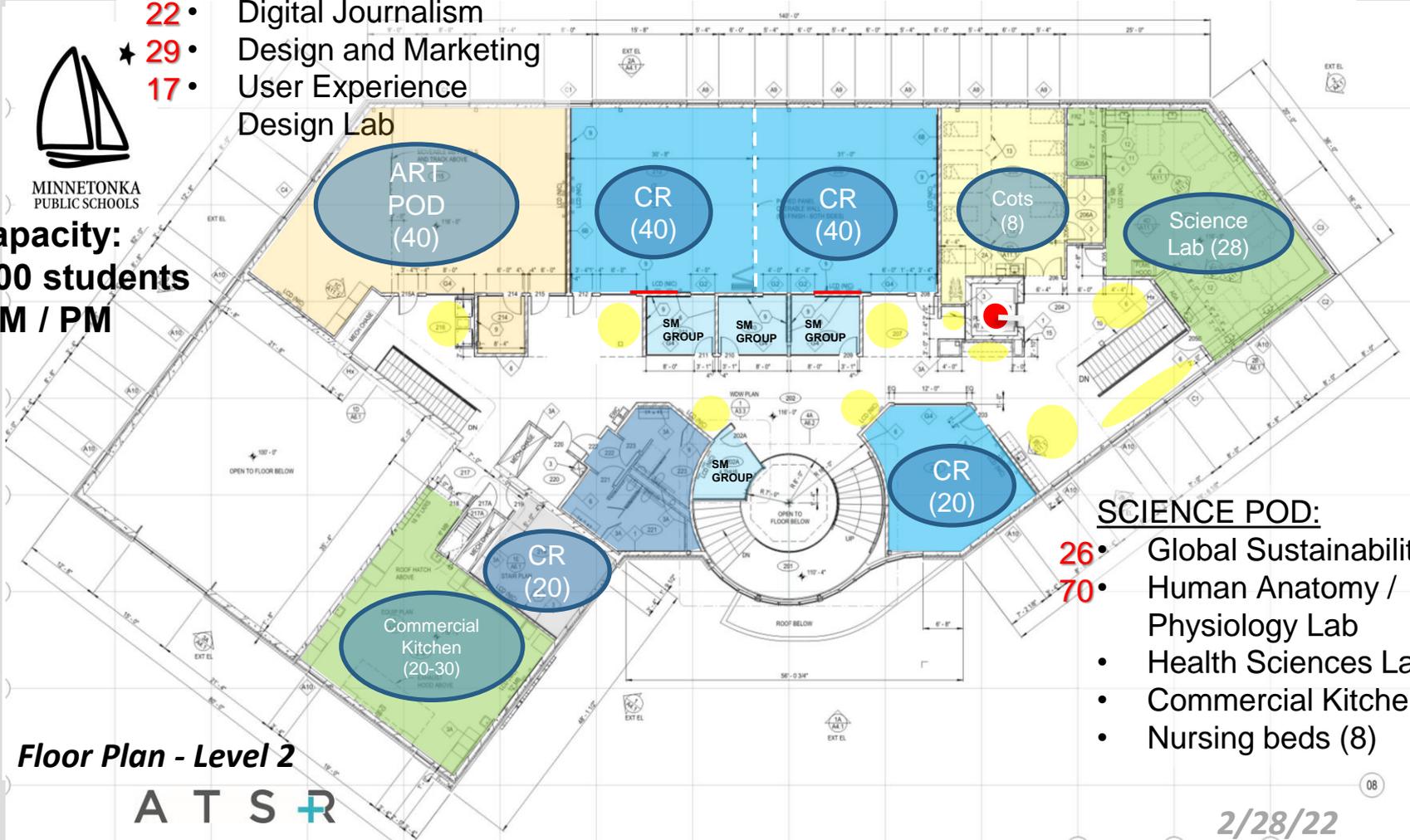


MINNETONKA
PUBLIC SCHOOLS

Capacity:
300 students
AM / PM

ART POD:

- 22 • Digital Journalism
- ★ 29 • Design and Marketing
- 17 • User Experience Design Lab



ART
POD
(40)

CR
(40)

CR
(40)

Cots
(8)

Science
Lab (28)

SM
GROUP

SM
GROUP

SM
GROUP

CR
(20)

CR
(20)

Commercial
Kitchen
(20-30)

SCIENCE POD:

- 26 • Global Sustainability
- 70 • Human Anatomy / Physiology Lab
- Health Sciences Lab
- Commercial Kitchen
- Nursing beds (8)

Floor Plan - Level 2

A T S R

2/28/22

08

BASE BID \$16,850,000



MINNETONKA
PUBLIC SCHOOLS

Capacity:
300 students
AM / PM



BUSINESS POD:

- (79) • Global Business
- 37 • Business Analytics
- AP Stats

Floor Plan - Level 0

A T S R

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2/28/22

BASE BID \$16,850,000



MINNETONKA
PUBLIC SCHOOLS

26,020 Square Feet

Remove Lower Level

MOMENTUM Growth Space Becomes VANTAGE Space

No MOMENTUM

Art Pod To TSP

Kitchen Uses To MHS

210-Student Capacity

FLOOR PLANS

- Post Bid Options (1) \$14,000,000 ALL-IN



MINNETONKA PUBLIC SCHOOLS

Capacity: 210 students

BUSINESS POD:

- 124 • Global Business
- (79) • Business Analytics
- AP Stats

Business POD (60)

FORUM

- Large group room centrally located for all groups

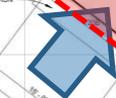
Forum (140)

BUSINESS POD:

- (79) • Global Business
- 37 • Business Analytics
- AP Stats

Business POD (60)

Board Room (20)



Service Yard



Tornado Shelter CR (500 occ)
 $(5 \times 497 + 10 \times 3) = 2,485$ net sf REQ'D
 $(3,000 \text{ sf} \times 0.85 = 2,550 \text{ sf} \text{ PROV'D})$

- Internal AHU
- Emergency Power (2 hrs)
- Hand wash station (2)
- Toilet (1per 200 occ)
- Wheelchair space (1per 200 occ)

MOMENTUM POD:

- Future (CR/ Lab/ Stor.) programming

Floor Plan - Level 1

A T S R

5/6/22

OPT. 1 \$14,000,000



MINNETONKA PUBLIC SCHOOLS

Capacity: 210 students

ART POD:

- 22 • Digital Journalism
- ★ 29 • Design and Marketing
- 17 • User Experience Design Lab

To HWY 7



To MHS +



Floor Plan - Level 2

A T S R



SCIENCE POD:

- 26 • Global Sustainability
- 70 • Human Anatomy / Physiology Lab
- Health Sciences Lab
- Commercial Kitchen
- Nursing beds (8)

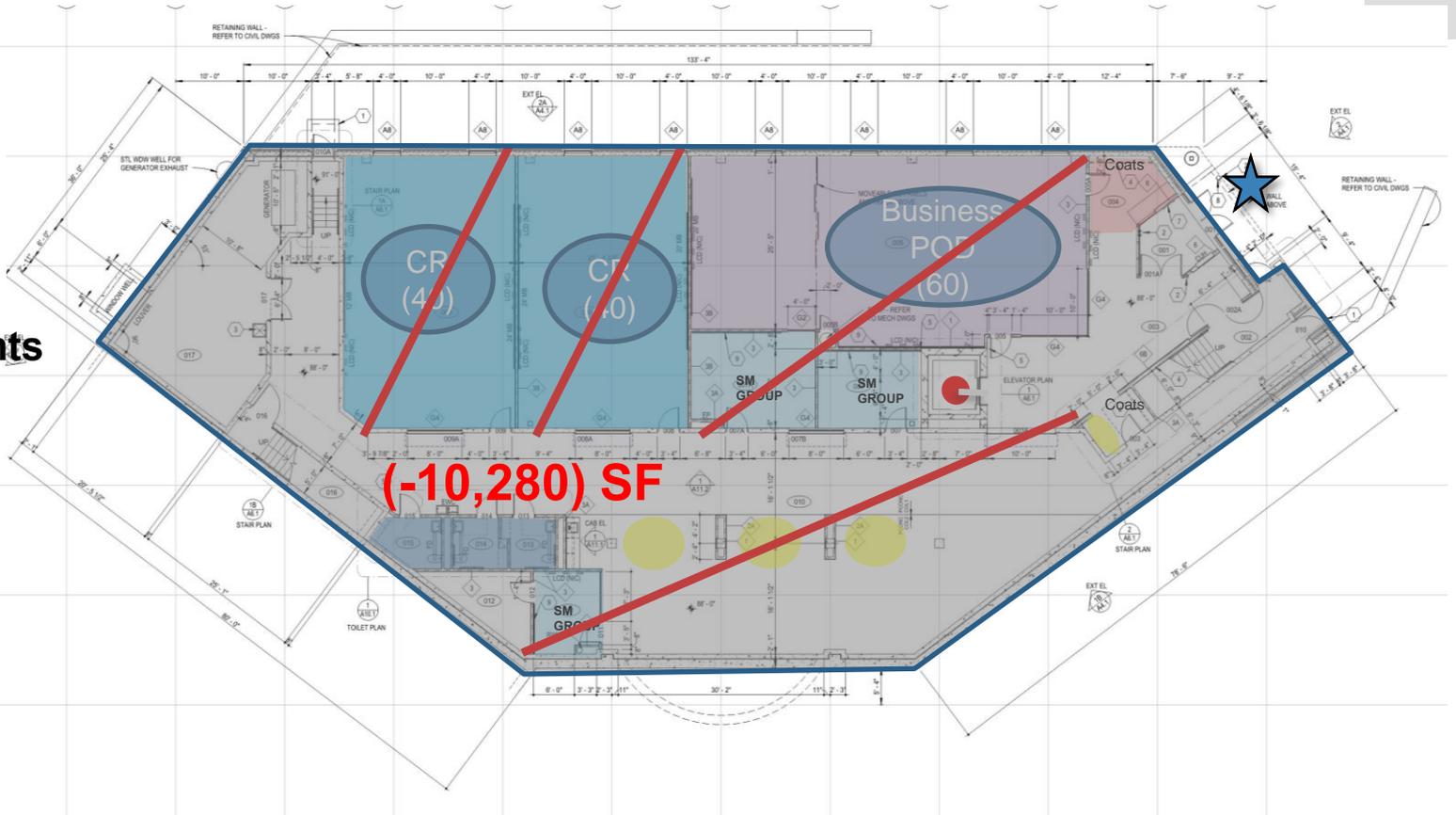
OPT. 1 \$14,000,000

5/6/22



MINNETONKA
PUBLIC SCHOOLS

Capacity:
210 students



(-10,280) SF

**REMOVE Level 0
(-10,280) SF**

Floor Plan - Level 0

A T S R

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5/6/22

OPT. 1 \$14,000,000



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
System

VANTAGE
MOMENTUM
MINNETONKA
PUBLIC SCHOOLS

Utility Face Brick

View from CR 101 from NW

OPT. 1 \$14,000,000

5/6/22



MINNETONKA
PUBLIC SCHOOLS

24,410 Square Feet

Remove Upper Floor

Art Pod And Science Pod Out Of Building

MOMENTUM Out Of Building

Art Pod And Health Science Beds To TSP

Kitchen And Science Lab Uses to MHS

180-Student Capacity

FLOOR PLANS

- Post Bid Options (2) \$14,000,000 ALL-IN



MINNETONKA PUBLIC SCHOOLS

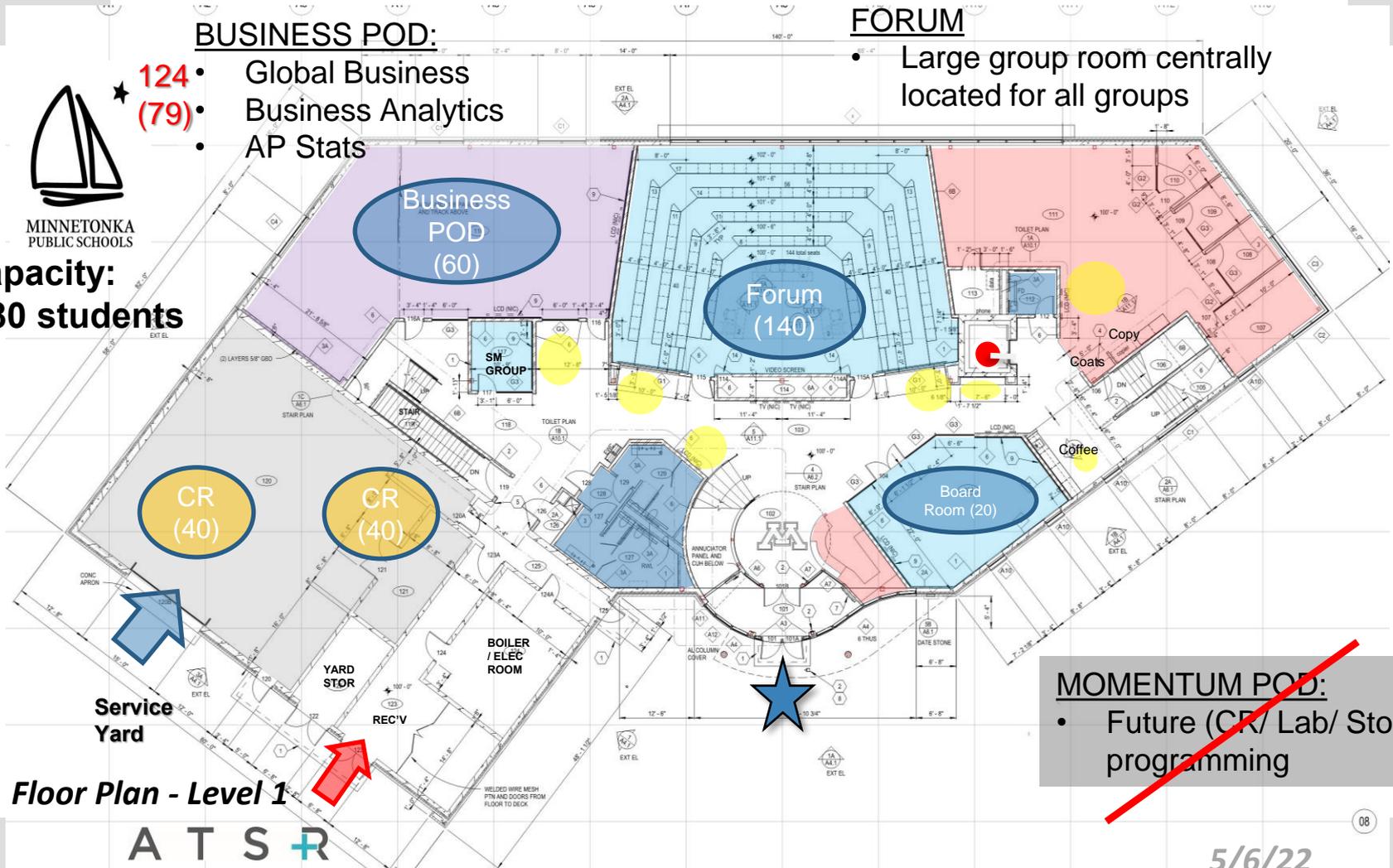
Capacity:
180 students

BUSINESS POD:

- ★ 124 • Global Business
- (79) • Business Analytics
- AP Stats

FORUM

- Large group room centrally located for all groups



CR (40)

CR (40)

Business POD (60)

Forum (140)

Board Room (20)

MOMENTUM POD:

- Future (CR/ Lab/ Stor.) programming

Floor Plan - Level 1

A T S R

5/6/22

OPT. 2 \$14,000,000



MINNETONKA PUBLIC SCHOOLS

Capacity:
180 students

ART POD:

- 22 • Digital Journalism
- ★ 29 • Design and Marketing
- 17 • User Experience Design Lab

To HWY 7

Cots (8)

ART POD (40)

To MHS +

Commercial Kitchen (20-30)

Science Lab (28)

(-11,890) SF

SCIENCE POD:

- Global Sustainability
- Human Anatomy / Physiology Lab
- Health Sciences Lab
- Commercial Kitchen
- Nursing beds (8)

26
70

REMOVE Level 2

(-11,890 SF)

(future development possible)

Floor Plan - Level 2

A T S R

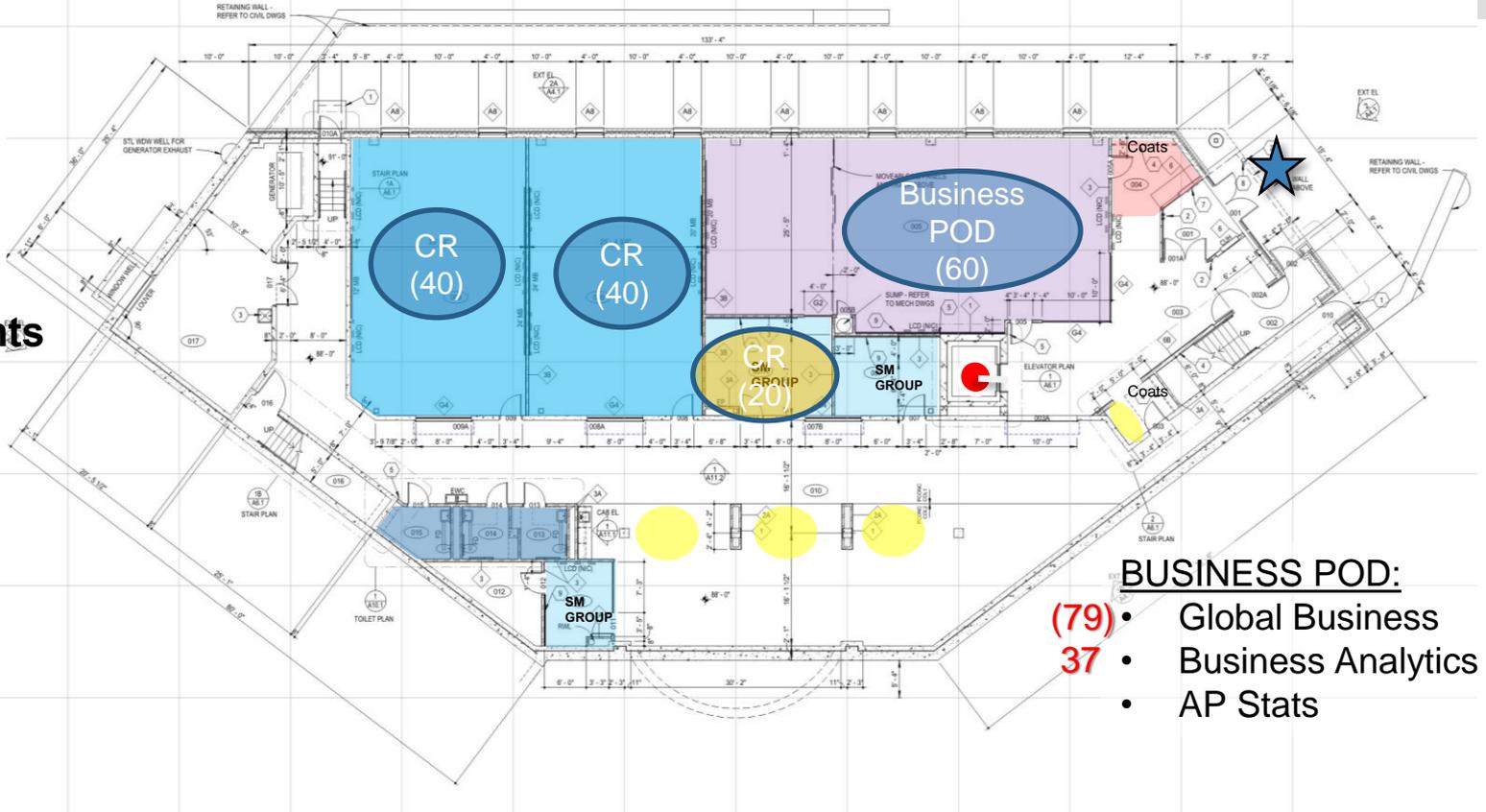
5/6/22

OPT. 2 \$14,000,000



MINNETONKA
PUBLIC SCHOOLS

Capacity:
180 students



BUSINESS POD:

- (79) • Global Business
- 37 • Business Analytics
- AP Stats

Floor Plan - Level 0

A T S R

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5/6/22

OPT. 2 \$14,000,000



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
System

Accessible
Main Entry

Utility Face Brick

View of Main Entry from SE

OPT. 2 \$14,000,000





Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
System

Utility Face Brick

View from SW

OPT. 2 \$14,000,000



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Utility Face Brick

View from CR 101 from NW

5/6/22

OPT. 2 \$14,000,000



MINNETONKA
PUBLIC SCHOOLS

31,770 Square Feet

Remove South End Levels 1 And 2

MOMENTUM Out Of Building

Kitchen Uses To MHS

Future Addition Possible

240-Student Capacity

FLOOR PLANS

- Post Bid Options (3) \$16,350,000 ALL-IN



MINNETONKA PUBLIC SCHOOLS

Capacity: 240 students

BUSINESS POD:

- ★ 124 • Global Business
- (79) • Business Analytics
- AP Stats

Business POD (60)

FORUM

- Large group room centrally located for all groups

Forum (140)

(-1,580) SF

BOILER ROOM

Board Room (20)

MOMENTUM POD:

- Future (CR/ Lab/ Stor.) programming

Floor Plan - Level 1

A T S R

2/28/22

OPT. 3 \$16,350,000



MINNETONKA
PUBLIC SCHOOLS

Capacity:
240 students

ART POD:

22 Digital Journalism

★ **29** Design and Marketing

17 User Experience Design

Lab

ART
POD
(40)

CR
(40)

CR
(40)

Cots
(8)

Science
Lab (28)

To MHS +

Commercial
Kitchen
(20-30)

(-2,950) SF

CR
(20)

SM
GROUP

SM
GROUP

SM
GROUP

SM
GROUP

CR
(20)

SCIENCE POD:

Global Sustainability

Human Anatomy /

Physiology Lab

Health Sciences Lab

~~Commercial Kitchen~~

Nursing beds (8)

26
70

Floor Plan - Level 2

A T S R

2/28/22

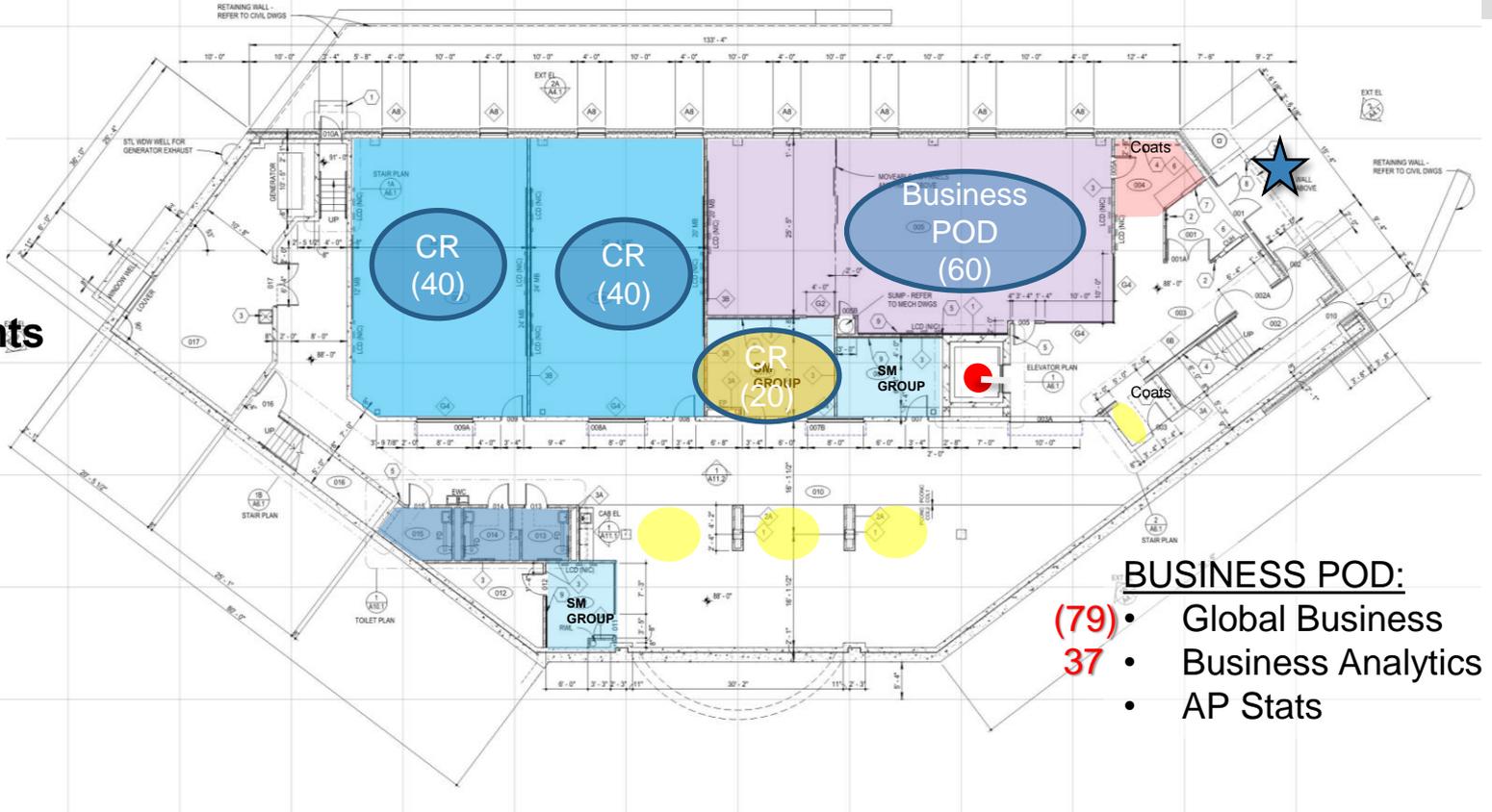
08

OPT. 3 \$16,350,000



MINNETONKA
PUBLIC SCHOOLS

Capacity:
240 students



- BUSINESS POD:**
- (79) • Global Business
 - 37 • Business Analytics
 - AP Stats

Floor Plan - Level 0

**REMOVE Portion Level 1,2
-2,950 + -1,580 = (-4,530 SF)
(future development possible)**

A T S R

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5/9/22

OPT. 3 \$16,350,000



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
System

VANTAGE

Accessible
Main Entry

Utility Face Brick

View of Main Entry from SE

OPT. 3 \$16,350,000



MINNETONKA
PUBLIC SCHOOLS

25,820 Square Feet

Further Reduce South End Levels 0, 1, 2

MOMENTUM Out Of Building

Forum Room Out Of Building

Art Pod To TSP

Kitchen Uses To MHS

210-Student Capacity

FLOOR PLANS

- Post Bid Options (4) \$14,000,000 ALL-IN



MINNETONKA PUBLIC SCHOOLS

Capacity: 210 students

(-4,920) SF

Service Yard

Floor Plan - Level 1

A T S R

BUSINESS POD:

- 124 • Global Business
- (79) • Business Analytics
- AP Stats

CR (40)

Business POD (60)

BOILER ROOM

FORUM

Large group room centrally located for all groups

To MHS +

Forum (140)

MOMENTUM POD:

- Future (CR/ Lab/ Stor.) programming

OPT. 4 \$14,000,000

5/9/22



MINNETONKA PUBLIC SCHOOLS

Capacity:
210 students

(-3,570) SF

ART POD:

- 22 Digital Journalism
- ★ 29 Design and Marketing
- 17 User Experience Design
- Lab

To HWY 7

ART POD (40)

To MHS +

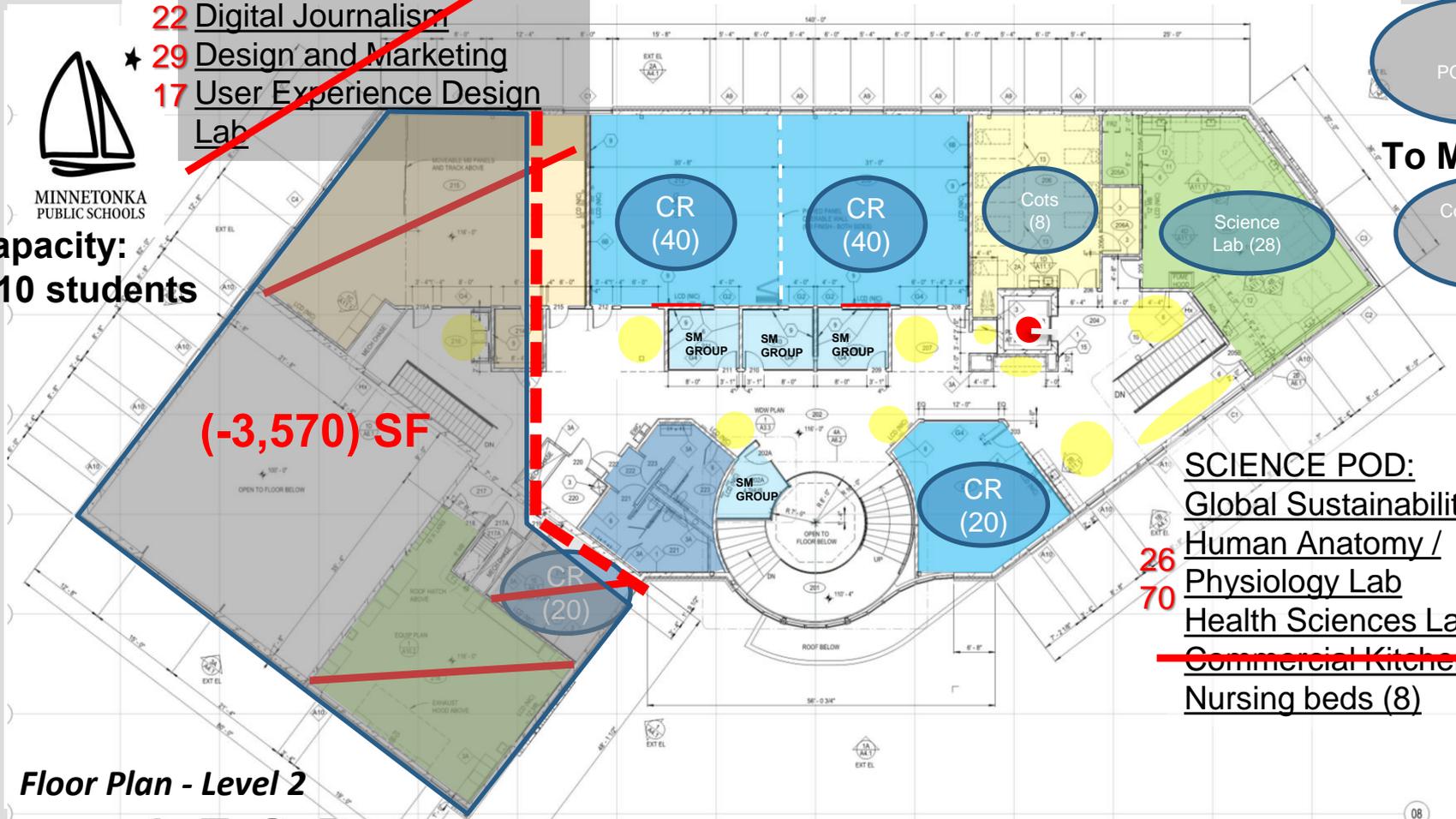
Commercial Kitchen (20-30)

Floor Plan - Level 2

A T S R

- SCIENCE POD:
- Global Sustainability
 - Human Anatomy / Physiology Lab
 - Health Sciences Lab
 - ~~Commercial Kitchen~~
 - Nursing beds (8)

26
70



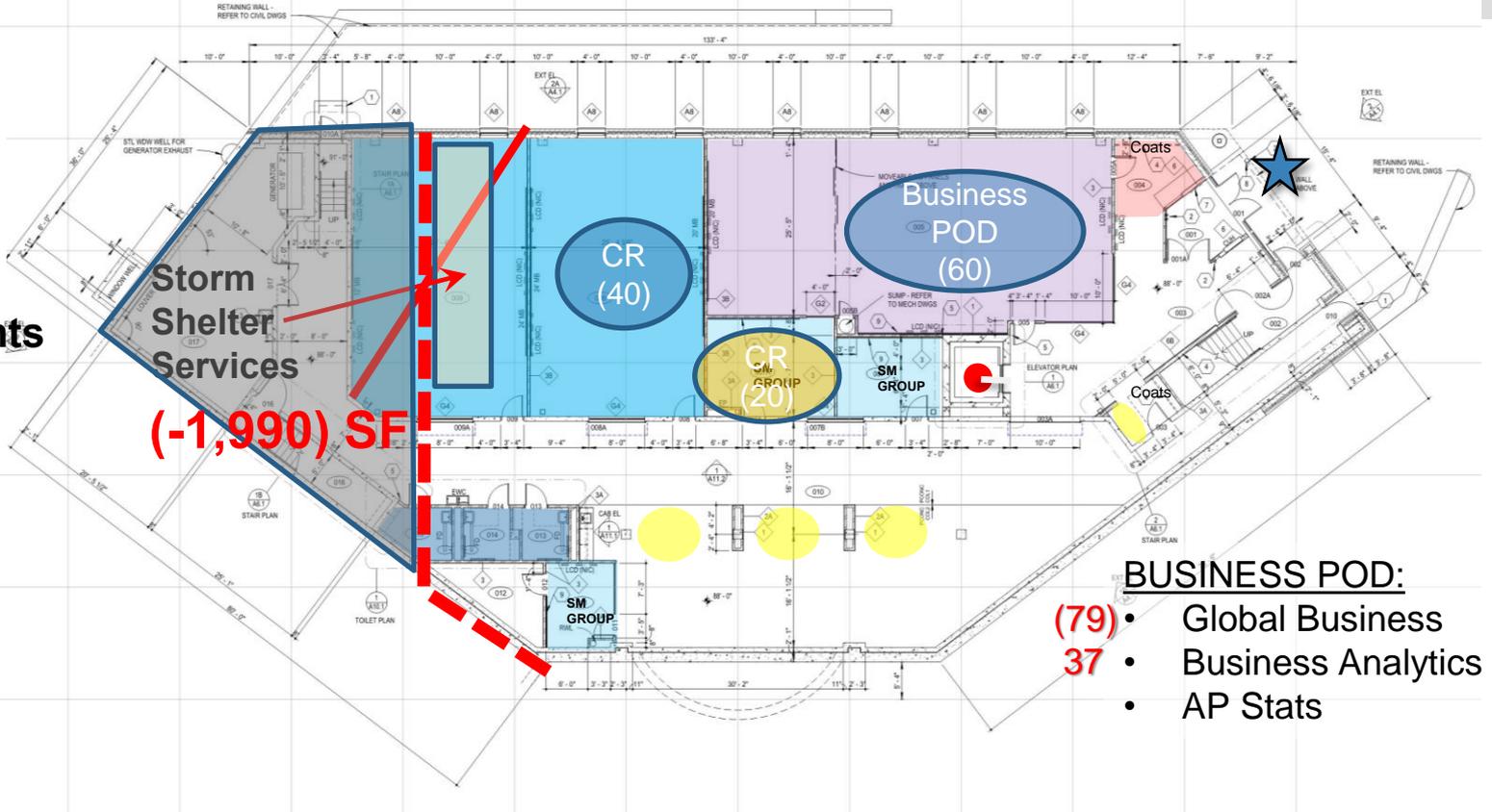
OPT. 4 \$14,000,000

5/9/22



MINNETONKA
PUBLIC SCHOOLS

Capacity:
210 students



(-1,990) SF

BUSINESS POD:

- (79)** • Global Business
- 37** • Business Analytics
- AP Stats

Floor Plan - Level 0

A T S R

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REMOVE Portion Level 0,1,2
-1,990 + -4,920 + -3,570 = (-10,480 SF)
(future development possible)

5/9/22

OPT. 4 \$14,000,000



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
System

VANTAGE

Accessible
Main Entry

Utility Face Brick

View of Main Entry from SE

OPT. 4 \$14,000,000

ATSR

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5/9/22



Splitface Limestone
"Kasota Blend"

Metal Panel
System

Alum Window
/ System

VANTAGE
MOMENTUM
MINNETONKA
PUBLIC SCHOOLS

Utility Face Brick

View from CR 101 from NW

OPT. 4 \$14,000,000

5/9/22

ADOPTION

**School Board
Minnetonka I.S.D. # 276
5621 County Road 101
Minnetonka, Minnesota**

Special Meeting Agenda Item V.

Title: Adoption of Vision Document

Date: May 19, 2022

OVERVIEW

The Minnetonka School Board has set its vision for the Minnetonka School District in a document entitled *Our Vision for the Future* that defines the direction in which it wants to lead the District. The Board has updated the language from the original version of this document. Final punctuation, grammar and style changes, as well as updated graphics and photos were added by District Administration. A final version of the *Our Vision for the Future* document will be presented for the School Board's consideration.

RECOMMENDATION/FUTURE DIRECTION:

Administration recommends adoption of the Vision document.

Submitted by:



Dr. JacQueline Getty, Executive Director of Communications

Concurrence:



Dennis L. Peterson, Superintendent

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #1

Title: MTSS Evaluation Phase 2 Report

Date: May 19, 2022

EXECUTIVE SUMMARY

During the 2021-2022 school year, the District has made significant efforts to deepen implementation and system-wide alignment of the Multi-tiered System of Supports (MTSS) Framework processes and practices. These efforts continue to support advancement of the Board established goals focused on Excellence in Student Well-being and Belonging and Excellence in Student Learning and Support.

The District is partnering with the University of Minnesota Center for Applied Research and Educational Improvement (CAREI) to complete a comprehensive evaluation of the District's Multi-Tiered System of Supports systems work. This systemic framework is designed to address academics as well as social and emotional development. Further, this work addresses recommendations from Dr. William Dikel's *Evaluation of Student and Family Well-Being* completed in 2019-2020.

The purpose of this report is to provide the School Board with the findings from Phase 2 of the Multi-Tiered Systems of Support (MTSS) Evaluation. Dr. Kim Gibbons, Director, and Dr. Ellina Xiong, Research Associate, from CAREI will present general findings from the evaluation.

OVERVIEW

During the second half of the 2020-2021 school year, the District began its partnership with the University of Minnesota, Center for Applied Research and Educational Improvement (CAREI) to engage in an evaluation of the District's Multi-Tiered System of Supports processes and implementation. Phase 1 of the evaluation centered on these first five guiding questions.

1. To what extent is Minnetonka Public Schools implementing an aligned (K-12) MTSS framework across all buildings?
2. To what extent do teachers and staff support implementation of a MTSS framework?
3. To what extent is staffing sufficient and equitable across tiers of service to support quality implementation of an MTSS framework?

4. What is the relationship between implementation of the MTSS framework and student achievement and behavioral outcomes?
5. To what extent is staffing efficient and responsive to appropriately address student needs?

Findings and recommendations from the first phase of the evaluation were reported on June 21, 2021. The data extracted from the first five guiding questions led the District to identify initial priorities and develop an action plan for this school year in order to build a sustainable model District-wide.

During the 2021-2022 school year, the District has worked with CAREI to complete Phase 2 of the evaluation by addressing questions six and seven, noted below. These questions are intended to further assist us in identifying priorities specific to individual student groups with a targeted focus on special education.

6. What is the impact of the MTSS framework on special education child count?
7. To what extent is special education programming for mild disabilities consistent with best practice research?

To address these questions, CAREI utilized data from job alike focus groups, teacher and staff surveys, as well as a random sampling of Individual Education Plans (IEPs) and Positive Behavior Support Plans (PBSPs) to analyze the impact of the MTSS framework on special education. Additionally, evaluation of the effectiveness of special education programming to meet the needs of students with disabilities was examined.

ATTACHMENTS:

Executive Summary for Phase 2 of the Evaluation of the Implementation of a Multi-Tiered System of Supports (MTSS)

RECOMMENDATION/FUTURE DIRECTION:

This report is submitted for the School Board's information.

Submitted by: Christine G. Breen
Christine Breen, Executive Director of Special Education

Submitted by: Amy LaDue
Amy LaDue, Assistant Superintendent for Instruction

Concurrence: Dennis L. Peterson
Dennis Peterson, Superintendent



Center for
Applied Research and
Educational Improvement

UNIVERSITY OF MINNESOTA

Driven to Discover®

**EVALUATION OF THE
IMPLEMENTATION OF A
MULTI-TIERED SYSTEM OF
SUPPORTS IN MINNETONKA PUBLIC
SCHOOLS: Addendum Report
April 2022**

Prepared by:

Ellina Xiong, PhD
Kim Gibbons, PhD
Michelle Marchant-Wood, PhD
Joe Schantz, B.A.

Research, Development and Engagement to Improve Education

How to Cite this Report

E., Xiong, Gibbons, K., Marchant-Wood, M., & Schantz, J. 2022). *Evaluation of the Implementation of the Multi-Tiered System of Supports in Minnetonka Public Schools: Addendum Report*. Center for Applied Research and Educational Improvement, College of Education and Human Development, University of Minnesota.

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www.cehd.umn.edu/CAREI/

Executive Summary

Minnetonka Public Schools contracted with the Center for Applied Research and Educational Improvement (CAREI) in January 2021 to conduct a comprehensive evaluation of their Multi-tiered System of Support (MTSS) framework. Minnetonka Public Schools have been implementing the MTSS framework for several years. As part of their continuous school improvement process, the district is seeking information to support prioritizing, planning, and implementing the framework with fidelity. The review was conducted in two phases resulting in a June 2021¹ report and the current report.

Eight evaluation questions guided the comprehensive evaluation (see Figure below). Per the district's request, the comprehensive evaluation was conducted in two phases. The first phase of the evaluation was completed and resulted in the June 2021 report that summarized findings for evaluation questions 1 - 5. The current report is an addendum to the June 2021 report.

The current report summarizes findings for evaluation questions 6 and 7. The [CEC Professional Preparation Standards](#) were used to guide in evaluating Minnetonka Public Schools' practices in special education programming for students with high incidence disabilities and best practice research. Data from the June 2021 report and the current report will continue to inform strategic planning and implementation efforts pertinent to evaluation question 8.

Evaluation Questions

1. To what extent is Minnetonka Public Schools implementing an aligned (K-12) MTSS framework across all buildings?
2. To what extent do teachers and staff support implementation of a MTSS framework?
3. To what extent is staffing sufficient and equitable across tiers of service to support quality implementation of an MTSS framework?
4. What is the relationship between implementation of the MTSS framework and student achievement and behavioral outcomes?
5. To what extent is staffing efficient and responsive to appropriately address student needs?
6. What is the impact of the MTSS framework on special education child count?
7. To what extent is special education programming for mild disabilities consistent with best practice research?
8. How will the results of the MTSS audit be organized into a 3-year implementation plan for the district and each building?

¹ All inquiries regarding the June 2021 MTSS Implementation Review Report should be directed to district leadership in Minnetonka Public Schools.

Evaluation Questions Summarized in the June 2021 Report

- 1. To what extent is Minnetonka Public Schools implementing an aligned (K-12) MTSS framework across all buildings?**
- 2. To what extent do teachers and staff support implementation of a MTSS framework?**
- 3. To what extent is staffing sufficient and equitable across tiers of service to support quality implementation of an MTSS framework?**
- 4. What is the relationship between implementation of the MTSS framework on student achievement and behavioral outcomes?**
- 5. To what extent is staffing efficient and responsive to appropriately address student needs?**

Evaluations Questions Summarized in the Current Report

- 6. What is the impact of the MTSS framework on special education child count?**
 - Generally, staff (e.g., administrators, general and special education teachers, related services staff) reported that the child find process is as efficient as possible. Moreover, survey data indicated that nearly 90% of general education teachers reported that the decisions evaluation teams make are accurate in identifying students with disabilities.
 - Overall, the district has a reasonable special education child count and rates are below the state average (11% vs 16%). The most prevalent disabilities categories identified in the district were speech/language impairment (SLI) and specific learning disability (SLD).
 - Several staff reported concerns with high caseloads for special education teachers and related services professionals, however, special education caseloads in the district are appropriate and well below the ratio of 1:25 (i.e., 1 service provider to 25 students) for the majority of service providers.
 - The district provides a variety of courses and programming at the secondary level to support students at risk and students with disabilities (SWD). Examples of these courses include Language Arts Workshop, Just Words, Wilson Reading, and math workshop at the middle level. High school courses include Just Words, Fluency Builder, Wilson Reading, and social emotional learning (SEL) supplemental course (EmpowerU).
 - Child count data may not fully reflect the number of students with a disability and who show a need for special education services. The following factors provide insight into this finding:
 - The district is experiencing a high volume of 504 Plans that is overwhelming staff in processing and implementing plans.
 - Some schools indicate concerns with current district guidelines that encourage delaying language immersion students English reading interventions until they are exposed to English instruction (i.e., 3rd grade and beyond), as opposed to providing reading interventions when a reading need is identified.

- o Assessment and data collection practices do not align with best practice (e.g., progress monitoring for SWDs is not collected at least weekly, behavior data are not routinely reviewed by teams, and a reliance on teacher reports).
- o Staff report being overwhelmed by the number of students in interventions and needing special education referrals in the spring.

7. To what extent is special education programming for mild disabilities consistent with best practice research?

- According to focus group and survey results, administrators are responsive to staff needs. Administrators are also actively involved in meetings and teams that address students with the highest needs (i.e., individualized education program [IEP] teams). Moreover, over 90% of administrators reported on the special education survey that they know the process to follow when they have questions about special education procedures that requires a response from the district office, and they feel that communication between the district office and building administrators creates a culture of shared responsibility.
- Special education staff reported that the most common service delivery models used for providing services to students with high incidence disabilities was a blend of pull-out and co-teaching. A blended model allows SWDs to receive services in the least restrictive environment.
- According to survey results,
 - o Fewer than half of general education teachers reported frequently implementing systematic and explicit reading instruction (48%), writing instruction (41%), and math instruction (44%) when providing instruction for students with high incidence disabilities.
 - o Fewer than half of special education teachers reported frequently implementing explicit writing instruction (48%), and explicit math instruction (45%) when providing instruction for students with high incidence disabilities. Only 70% of special education teachers reported frequently implementing explicit reading instruction. These results correspond with moderately low scores on the Continuous Improvement Monitoring Process Rubric (CIMP), particularly for the Goals: Objectives Related to Goal, and Overall Quality: Link Between Goals and Services indicators.
- The district uses a facilitator model to conduct initial and re-evaluations for SWDs. This is a highly valued model by staff and IEP teams; however, several unintended consequences are emerging from the model. First, facilitators indicate that due to inconsistent pre-referral processes across buildings, facilitators' time and resources are not equitably allocated. Second, because case managers are not actively involved in the evaluation process, they are experiencing difficulties understanding how to review and interpret the data and use this information to develop effective instructional strategies to support IEPs and positive behavior support plans (PBSP). Focus group data and ratings from the Continuous Improvement Monitoring Process Rubric (CIMP) and Technical Adequacy Tool for Evaluation (TATE) highlight these areas of concern.
- Many IEP team members indicate that they do not have sufficient skills to write high quality PBSPs. Teams are dependent on one or two individuals to support with developing PBSPs. This was further supported by low ratings on the TATE. It should also be noted that the district's PBSP template appears strictly narrow and does not include

explicit areas to specify proactive strategies for modifying challenging behaviors and teaching socially appropriate replacement behaviors.

- Current assessment practices and data-based decision making, with regard to progress monitoring, do not align with best practice. Data indicate that students with the most intense needs are not being monitored at least weekly, and data collected for monitoring are not consistently reliable or valid to use for progress monitoring (e.g., teacher reports). A review of IEPs also indicated a lack in baseline performance information, vague descriptions of progress monitoring methods, and frequently did not indicate specific assessment measures that would be used or the frequency to which data would be collected. Moreover, data for SWDs are primarily managed by special education teachers and providers with limited engagement from general education teachers.
 - Few paraprofessionals reported using IEPs and PBSPs to support the students they serve. It is important to provide additional professional development and mentoring to ensure that paraprofessionals are well-informed and skilled to support SWDs.
- Focus group and survey data indicated a need for a more structured approach to support collaboration among general education and special education teachers. It should also be noted that more time for staff collaboration was identified as the number one priority for improvement efforts when ranking their top three choices of improvement efforts. More time for staff collaboration was ranked as a top choice by school administrators, general and special education teachers, related services professionals, and paraprofessionals.
- Staff reported using several different databases to access data, but also reported lacking access to particular databases when they had a need to know the data (e.g., special education teachers and behavior data). Minnetonka Public Schools' leadership is encouraged to identify a central, user-friendly data system that supports academic and SEL/behavior student data collection and allows access for all staff to review student data proactively.

Overall, the current evaluation of Minnetonka Public School District's MTSS framework identified many strengths and opportunities for improvement. Minnetonka Public Schools' effort to pursue and complete this implementation review is timely and vital given the impact the current COVID-19 pandemic has had on student learning and well-being. The findings and recommendations provided in this report situate the district well in proactively addressing student needs and refining the MTSS framework to continue promoting student success. A list of recommendations follows this summary of findings.

Recommendations

This section includes recommendations that were derived from the MTSS implementation review. Recommendations include those from the June report and current report. Recommendations that align with findings of the current report are highlighted in **red**.

Recommendations are based on the results of the implementation review and are summarized across the five MTSS essential components: (1) Assessment, (2) Data-Based Decision-Making, (3) Multilevel Instruction, (4) Infrastructure, and (5) Fidelity and Evaluation. Each recommendation identifies areas for improvement. We recommend that once an action plan is initiated, that it be reviewed on a designated timeline during each year and modified as needed.

Assessment

- Consideration of additional screening procedures are needed. Screening should continue to occur at least twice a year for secondary students. As such, the district should continue to administer MAP in the Spring for middle school students, and consider implementing an early warning system at the high school that uses engagement data, achievement data, credits, passing core courses, and behavior/discipline data.
- The district should consider supplementing the Teaching Strategies Gold with a direct, reliable and valid assessment tool. We recommend considering [Individual Growth and Development Indicators for Infants and Toddlers \(IGDIs\)](#) to promote screening procedures for early childhood students.
- In the area of SEL, it is recommended that the district not only implement SAEBRS as a behavior screening tool for K-5, but also consider implementing it for secondary students. At the high school level, the district may consider mental health screeners or climate surveys similar to Panorama or Child and Youth Resilience Measure.
- It is important to consider establishing clear communication around the district's assessment framework that includes expectations in assessment practices for general and special education programming.
 - The district should consider aligning progress monitoring processes with best practices (i.e., Tier 2- every other week to monthly; Tier 3- weekly). It is also recommended that the district reinstate progress monitoring at the secondary level using FAST assessments. Staff reports of FAST assessments being inappropriate for secondary students highlights a data literacy gap and professional development should be targeted to build competency in this area.
 - The district should consider providing professional development and ongoing coaching on Tier 3 progress monitoring practices.

Data-Based Decision-Making

- The district needs to develop a comprehensive MTSS process guide that provides: (a) clear definition of tiers, (b) decision-making rules for movement between tiers, (c) procedures for screening and progress monitoring in academic and social emotional domains, (d) procedures matching intervention to student need, (e) procedures for evaluating intervention effects, (f) procedures for assessing fidelity, and (g) procedures for documentation of problem solving efforts. This process should include all staff, administrators, general education teachers and specialized teachers and staff.

- The district uses the 40th percentile as a cut-score to identify students as meeting benchmark. In MN, students performing at the 72nd percentile on the MAP is predictive of meeting standards in math, and the 62nd percentile is predictive of meeting standards in reading. The current cut-score of the 40th percentile may be too low and may overlook the needs of students with moderate needs. These moderate needs may develop into severe needs when students are exited prematurely from interventions during Winter and Spring screening. This may be one reason why the large number of students meeting benchmark on the MAP in the Fall are not reflective of proficiency rates on the MCAs in the Spring. The district should consider using local norms to identify risk or raising the cut-score. Considerations should also be made on identifying three levels of risk (i.e., low, some and high risk) to more accurately identify students needing moderate or intense supports, and students needing advanced differentiation.
- The district may consider evaluating and streamlining data systems. Considerations should be made for a data warehouse that functions similar to Educlimber.
- Considerations should be made to implement a proactive data review process that does not rely heavily on teacher or parent referrals. A proactive review process should be implemented to systematically review district-wide, building-wide and progress monitoring data at timely intervals to evaluate the effectiveness of core instruction, identify students at risk of poor outcomes and evaluate students' responsiveness to interventions by all personnel, general education and specialized staff, alike.
- Consider implementing transition meetings district-wide. Transition meetings can serve several purposes including: 1) communicating students' schooling history, 2) reviewing their intervention history, and 3) specifically for students receiving interventions, facilitate developing support plans for the coming school year and grade. Transition meetings should take place when students move from one grade level to the next grade level, and specifically for transition grades when students move from early childhood to elementary, elementary to middle and middle to high school.
- Consider providing training in data-based decision making and the use of a data inquiry model. Data inquiry models such as problem solving model, PDSA (plan, do, study act), or Data Wise Improvement Process should be considered.

Multilevel Instruction

Core Instruction (Tier 1)

- MCA proficiency trends appear to corroborate a need to enhance Tier 1 reading instruction at the elementary level. The district may consider examining the current curriculum to identify gaps in reading instruction to ensure that the Science of Reading is thoroughly infused and effective instructional practices (e.g., explicit instruction) are implemented with high fidelity.
- SY21 achievement indicated that the COVID-19 pandemic had a significant impact on student learning and well-being. During the pandemic, several school districts across the country observed a decrease in achievement and increase in mental health needs among students. It is recommended that the district focus resources on strengthening Tier 1 instruction to more efficiently address the needs of large groups of students.
- It is recommended that Tier 1 strategies for academics and SEL/behavior be revisited across the district. Specifically, universal interventions should be identified and

implemented in a manner that empowers all educators, especially general education teachers, when working with students who are at risk and those with disabilities. Educators should be provided sufficient training and access to meaningful evidence-based strategies, resources, and skill sets to support and accommodate all students, especially those with special needs. An additional recommendation is that all staff accept shared ownership and responsibility for teaching all students, including those identified with behavioral and academic challenges.

- Achievement gaps are observed across student subgroups (e.g., gender, race/ethnicity, disability status, English Learner status, and eligible free or reduced price lunch status) in reading and math. It is important for the district to examine factors causing these disparities and identify ways to promote academic achievement across all student communities and close the achievement gaps, such as those recommendations included in this report.
- Due to the history of intelligence tests disproportionately and negatively affecting marginalized communities such as students of color, students with disabilities and students growing up in poverty, the district may consider examining enrollment data to ensure that the processes used to identify students for advanced programs (i.e., High Potential programs) do not disproportionately exclude students from marginalized communities. It will continue to benefit the district to utilize multiple data points when identifying high achieving students for participation in enrichment opportunities.
- The district may consider examining SEL needs more closely through a universal SEL/behavior screener and adopt a Tier 1 SEL curriculum focused on mental health promotion and bully prevention given the increasing and concerning trends observed on the MN Student Survey with students experiencing mental distress and bullying.
- Teams could more fluently articulate differentiation for students performing above grade level, and were less able to articulate differentiation for students at or below grade level. The district may consider adopting a common differentiation framework and provide job-embedded training and support around this framework. Using data to guide the decisions will also be critical in providing differentiation based on student needs.

Supplemental Interventions (Tier 2)

- The district should consider aligning Tier 2 instruction with best practices. Tier 2 interventions need to be standardized, delivered by staff trained in the intervention, and group size and dosage needs to be optimal for the age and needs of the students.
- Common evidence-based Tier 2 interventions need to be identified for math and behavior. These Standard Treatment Protocols should be used as a first line of intervention that can be immediately provided when needed.
- It is recommended that training be provided to help teams articulate and understand the alignment between interventions and core instruction, particularly at the secondary level. Understanding the connections between foundational skills and higher order skills is necessary to ensure that interventions accelerate learning to close achievement gaps.
- Re-evaluate staffing decisions and service delivery models to ensure sufficient allocations are made to support the implementation of Tier 2 interventions in reading, math and SEL, and that students receive support from staff who are trained in evidence-based strategies.
- Additionally, consistent SEL/behavioral supports and systems are recommended across the entire district for students of all grades and ages, at all tiers, including those identified

with intense emotional and behavioral needs. Implementing these interventions offers promise for improved student outcomes, as well as a more sustainable model for the retention of teachers and staff.

- Established research for struggling readers in language immersion programs is limited. In addition, given staff concerns regarding current practices in delaying early reading intervention supports in English for language immersion students, the district may consider consulting language development research and conducting research to inform reading intervention guidelines for language immersion students.

Intensive Interventions (Tier 3)

- The district should consider aligning Tier 3 instruction with best practices. Across all grade levels and in reading, math, and SEL, consideration needs to be given to intensive interventions. Tier 3 interventions need to be more intensive than Tier 2 interventions and adapted to address individual student needs through an iterative manner based on student data. It will be important to distinguish the difference between Tier 2 and 3 in terms of the data required for decision making, groups size and dosage, instructional delivery methods, and interventionist expertise.
- Tier 3 interventions need to be defined outside of special education. The district should consider establishing an intervention framework that allows intensifying intervention supports for general education students that is not special education services.
- Re-evaluate staffing decisions to ensure sufficient allocations are made to support the implementation of Tier 3 interventions.

Infrastructure

- Early childhood students would also benefit from a system-wide implementation of MTSS. The district should consider a PreK-12 aligned MTSS framework, which would entail the development of a multi-year implementation plan and consideration of aligning MTSS within the district strategic plan.
- Considerations should be made to develop an MTSS process guide to communicate the district's MTSS framework and promote consistent implementation across the district.
- Best practices in implementing and sustaining an effective MTSS framework relies on four core teams: district leadership team, building leadership team, teacher teams, and problem solving teams. The district may consider evaluating roles and responsibilities of current teams and use existing structures to align efforts with the implementation of MTSS. Specifically, examining team structures and practices would be recommended (e.g., communication protocols, purpose, meeting protocols, data review practices).
- The district should consider providing parent/family communication on the district's MTSS framework in a language and mode that is meaningful to families.
- Areas of focus include Tier 2 and 3 interventions in SEL, and training to promote staff capacity in this area.
- Professional development needs to be institutionalized and structured so that all teachers continually examine, reflect upon and improve instructional practice, data based decision-making, and delivery of interventions. The district should ensure that professional development is job-embedded, matched to district and building needs, and includes follow-up coaching and support.

- Consider expanding the roles and responsibilities of school psychologists to lead MTSS implementation at the building level, in addition to pre-referral intervention processes.
- The district is recommended to prioritize needs and make staff development mandatory for areas of highest need for all staff, including paraprofessionals. Areas in need of additional PD include:
 - MTSS core components and subcomponents
 - Tier 2 and 3 interventions
 - Data review process
 - SEL
 - Culturally and linguistically relevant and responsive instructional practices
 - MTSS as a prevention framework
 - Problem solving training for SSTs
 - Implementing effective Tier 1 strategies for students at risk and SWDs (e.g., accommodations, differentiated instruction)
- The district should consider conducting math and SEL intervention inventories across building and grade levels.

Fidelity and Evaluation

- Develop a system and measures to monitor the fidelity of implementation of core, supplemental, and intensive interventions.
- Develop district and building implementation plans to monitor short- and long-term district and building goals identified in an action plan.
- Develop routines for the use of screening data to evaluate the effectiveness of tiers of service that include disaggregation of data.
- Calculate risk ratios on a semi-annual basis for buildings to monitor progress in this area.
- Prior to out-of-school suspension (OSS) decisions for students with emotional and behavioral disorders (EBD), establish a process to ensure that IEP's and BIP's for the students are matched to student needs and implemented with fidelity.
- Conduct routine IEP, FBA and PBSP evaluations using the CIMP and TATE.

Glossary

TERM	DEFINITION
autism spectrum disorder (ASD)	A developmental disability that can result in significant delays and developmental differences in a number of areas, including communication, social interaction, and behavior.
positive behavioral support plan (PBSP)	An intervention plan outlining the set of strategies used to address the function of a student’s behavioral challenges that supports with developing replacement and/or prosocial behaviors. It oftentimes requires a functional behavioral assessment and an associated plan that describes individually determined procedures for both prevention and intervention.
continuum of services	An array of services to an individual’s needs for school-age students with disabilities that include: consultant teacher services (direct and/or indirect); resource room services. related services; integrated co-teaching services, and so forth.
differentiated instruction	An approach whereby teachers adjust their curriculum and instruction to maximize the learning of all students: average learners, English language learners, struggling students, student with learning disabilities, and gifted and talented students; not a single strategy but rather a framework that teachers can use to implement a variety of strategies, many of which are evidence-based.
early childhood special education (ECSE)	The provision of customized services crafted to meet the individual needs of young children with disabilities; generally used among children from birth to five years old.
emotional behavior disorder (EBD)	A condition of disruptive or inappropriate behaviors that interferes with a student’s learning, relationships with others, or personal satisfaction to such a degree that intervention is required.
explicit (direct) instruction	Instruction that consists of direct and systematic instruction, transparent teaching and logical sequencing of skills. Such practices include but are not limited to incorporating modeling, guided practice with immediate, specific corrective feedback, reinforcement of desired behaviors and independent practice.
explicit math instruction	Math instruction that consists of direct and systematic instruction, transparent teaching and logical sequencing of skills including the following principles: instructional design, a strong conceptual basis for procedures,

	opportunities for drill and practice, cumulative review, use of motivators and behavior and task persistence.
explicit reading instruction	Reading instruction that consists of direct and systematic instruction, transparent teaching and logical sequencing of skills that targets key areas in phonemic awareness, alphabetic principle/phonics, fluency, vocabulary, and reading comprehension.
explicit writing instruction	Writing instruction that consists of direct and systematic instruction, transparent teaching and logical sequencing of skills that targets key areas such as transcription, text generation and self-regulation.
functional behavior assessment (FBA)	A behavioral evaluation technique that determines the exact nature of problem behaviors, the reasons why they occur, and under what conditions the likelihood of their occurrence is reduced.
high incidence disabilities	High incidence disabilities are the most prevalent disabilities. This includes Autism Spectrum Disorder (ASD), specific learning disability (SLD), emotional/behavior disorder (EBD), other health disability (OHD), and speech/language impairment (SLI).
individualized education program (IEP)	A written plan used to delineate an individual student's current level of development and his or her learning goals, as well as to specify any accommodations, modifications, and related services that a student might need to attend school and maximize his or her learning.
least restrictive environment (LRE)	One of the principles outlined in the Individuals with Disabilities Education Act requiring that students with disabilities be educated with their non-disabled peers to the greatest appropriate extent.
multi-tiered systems or support (MTSS)	A decision-making framework that includes a coherent continuum of evidence based, system-wide practices to support a rapid response to academic and behavioral needs, with frequent data-based monitoring for instructional decision-making to empower every student to achieve to high standards.
paraprofessional (also known as a para-educator)	An individual trained to assist a professional.
progress monitoring	A type of formative assessment in which student learning is evaluated on a regular basis in order to provide useful feedback about performance to both learners and instructors. The resulting data can be graphed to observe change over time. Sometimes referred to as curriculum-based measurement (CBM) or general outcome measurement (GOM).

pull-out model	Educational program in which instruction and related services are delivered to students with disabilities outside the general education classroom.
push-in model	Educational program in which instruction and related services are delivered to student with disabilities within the general education classroom.
setting I	Special education outside regular class less than 21 percent of day.
setting II	Special education outside regular class at least 21 percent of day and no more than 60 percent of day.
setting III	Special education outside the regular classroom more than 60 percent of the day.
setting IV	Public separate facility
specific learning disability (SLD)	Any one of a variety of disorders characterized by a difficulty or delay in the development to the ability to learn or use information.
speech/language impairment (SLI)	A language or communication disorder that does not have an identifiable cause and is not the cause of another disability.
students with disabilities (SWDs)	Students identified with a disability and receive special education services via an individualized education program (IEP).

Note: Information for definitions was generally located on the IRIS Center website, Minnesota Department of Education, and Wikipedia.

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #2 a.

Title: MTSS 3-Year Action Plan Update

Date: May 19, 2022

EXECUTIVE SUMMARY

Minnetonka is committed to implementing a Multi-Tiered System of Supports (MTSS) Framework with fidelity across all programs. In striving for continuous school improvement, we understand that this will be an evolving process as we respond to the needs of our students, families, community members and staff.

MTSS is a framework focused on delivering high quality instruction in the area of academics, as well as social and emotional learning. It is a continuous-improvement process in which data-based problem solving and decision-making is practiced across all levels of the educational system to support students. The framework supports alignment and integration of various District operations and systems to facilitate efficiency and effectiveness in order to maximize student success. This is accomplished by planning and leveraging data to guide decision-making.

The most important aspect of an MTSS framework is an aligned system that ensures high quality core instruction for all students, which encompasses academics along with social and emotional development. Core instruction is the learning all students engage in through district curriculum and programs to achieve Minnetonka essential learnings, State standards and District goals.

This report addresses question eight of the MTSS evaluation plan below.

8. How will the results of the MTSS audit be organized into a 3-year implementation plan for the district and each building?

Utilizing the findings from Phase 1 and 2 of the MTSS evaluation, priorities for the District, and considering next steps for the initial 2021-2022 action plan, a 3-year implementation plan has been developed. The action plan for Year 1 contains a detailed plan based on priorities for the 2022-23 school year and Year 2 and Year 3 provides an outline for future steps. The plan will be updated and revised throughout the 3-year process to ensure we are responsive to our ongoing learning along with building and District needs.

The plan is organized by three key elements: Infrastructure and support, Assessment and Decision Making, and Multi-level Instruction. Within each element areas of need and action steps are outlined.

YEAR 1 PLAN	
Infrastructure and Support	
<p>Teams: The district needs four levels of MTSS teams including: (a) District MTSS team, (b) Building MTSS teams, (c) Grade Level Teams, and (d) Building Level Problem Solving Teams.</p>	<ul style="list-style-type: none"> ● District MTSS Team, Building Level MTSS Teams, Grade Level/Content area teams meet regularly ● Teams Implement a proactive data review process that does not rely heavily on teacher or parent referrals and instead relies on systematic review of universal screening data ● District and building teams implement a process for continuously disaggregating data by student groups and evaluate the extent to which gaps are closing ● CAREI will provide professional development and support for continued implementation
<p>MTSS Process Guide: The district needs to develop a comprehensive MTSS process guide that provides: (a) clear definition of tiers, (b) decision-making rules for movement between tiers, (c) procedures for screening and progress monitoring in academic and social emotional domains, (d) procedures matching intervention to student need, (e) procedures for evaluating intervention effects, (f) procedures for assessing fidelity, and (g) procedures for documentation of problem-solving efforts.</p>	<ul style="list-style-type: none"> ● Implement and support initial version of the process guide with building and teacher teams ● Continue development and revision of process guide sections ● Implement the decision-making model and standard treatment approach within building level teams
<p>Social and Emotional Learning (SEL): The district will examine SEL needs more closely and adopt a Tier 1 SEL curriculum focused on mental health promotion and bully prevention given the increasing and concerning trends observed on the MN Student Survey with students experiencing mental distress and bullying.</p>	<ul style="list-style-type: none"> ● Continue to identify and evaluate district level, instructional level, and content specific expertise to support teams ● Refine definition of SEL and why it matters for Minnetonka students and execute messaging for all stakeholder groups ● Need to identify current supports, resources, and tools for each level;

	<p>provide menu of supports; and identify curriculum connections</p> <ul style="list-style-type: none"> ● Identify infrastructure for time and place to deliver Tier 1 instruction and support at each instructional level ● Infrastructure for data collection and analysis ● Further analyze staffing
<p>Professional Learning (PD): Professional learning will be institutionalized and structured so that all teachers continually examine, reflect upon, and improve instructional practice, data-based decision-making, and delivery of instruction and interventions. The district will ensure that professional development is job-embedded, matched to district and building needs, and includes follow-up coaching and support.</p>	<ul style="list-style-type: none"> ● Identify key areas, staff presenters, scheduling, and scope and sequence for PD ● Continue to educate staff and deepen understanding about MTSS core components and subcomponents as prioritized by the District leadership team ● Ensure that PD is an agenda item on all district team meetings ● Educate staff on identified tools and resources ● Ensure all staff develop an understanding of data for data-based decision making
Assessment and Decision-Making	
<p>Tier 1 Assessment & Decision-Making: The district needs to (a) implement Universal SEL screening, (b) revise academic target scores to predict proficiency on MCA's, (c) calculate risk ratios for attendance and disciplinary infractions for student subgroups, and (d) consider evaluating and streamlining data systems.</p>	<ul style="list-style-type: none"> ● Implement and monitor Universal SEL Screening Tools ● Revise academic target scores to predict proficiency on MCA ● Determine how to prepare teachers on the change in target scores. ● Calculate risk ratios for attendance and disciplinary subgroups ● Evaluate current data systems and make recommendations to streamline. ● Identify and implement an Early Warning System utilizing data from multiple sources
<p>Tier 2/3 Assessment & Decision-Making: Align progress monitoring processes with best practices; improve data literacy</p>	<ul style="list-style-type: none"> ● Develop a consistent Tier 2 and Tier 3 progress monitoring system to align with best practice ● Continue to identify and implement supplemental instruments for SEL and Math

	<ul style="list-style-type: none"> ● Reinstate progress monitoring at the secondary level ● Develop a common understanding among special education teachers on reviewing and interpreting data to support IEPs and Positive Behavior Support Plans (PBSPs)
Multi-Level Instruction	
<p>Tier 1 Instruction: Reading: Reading Curriculum, Evidence-Based Instructional Strategies</p> <p>Social and Emotional Learning (SEL): Systematic Tier I social, emotional and mental health education to be incorporated into core instruction for students at each level</p>	<ul style="list-style-type: none"> ● Evaluate Tier I reading curriculum at the elementary level and alignment to the Science of Reading ● Develop a common differentiation framework ● Provide guidance to help teams articulate and understand the alignment between interventions and core instruction, particularly at the secondary level ● Help teams understanding the connections between foundational skills and higher order skills ensure that interventions accelerate learning to close achievement gaps ● Continue identification and implementation of Tier I curriculum, programs, and resources for Social, Emotional and Behavioral (SEB) instruction
<p>Tier 2 Instruction: Align Tier 2 instruction with best practices</p>	<ul style="list-style-type: none"> ● Conduct an intervention inventory across the district in areas of reading, math, SEB ● Evaluate whether current interventions are evidence-based ● Ensure that Tier 2 interventions need to be standardized, delivered by staff trained in the intervention, and group size and dosage needs to be optimal for the age and needs of the students (Fidelity) ● Identify math interventions. ● Identify SEB resources at the secondary level

	<ul style="list-style-type: none"> ● Evaluate reading intervention guidelines for language immersion students
Tier 3 Instruction: Social, Emotional, Behavioral	<ul style="list-style-type: none"> ● Ensure special education staff understand the systematic process to assess and match student needs to evidence based intervention ● Ensure paraprofessionals have tools and resources to use IEPs and Positive Behavior Support Plans (PBSPs) to support students

YEAR 2 PLAN	
Infrastructure and Support	
Teams: The district needs four levels of MTSS teams including: (a) District MTSS team, (b) Building MTSS teams, (c) Grade Level Teams, and (d) Building Level Problem Solving Teams.	<ul style="list-style-type: none"> ● Incorporate fidelity checks into team meeting structures ● Develop system and timelines for evaluating implementation plans ● Continue to review district-wide, building-wide and progress monitoring data at timely intervals to evaluate the effectiveness of core instruction, identify students at risk of poor outcomes and evaluate students' responsiveness to interventions
MTSS Process Guide	<ul style="list-style-type: none"> ● Implement updated process guide content following established timeline ● Provide ongoing updates to staff
Professional Learning (PD)	<ul style="list-style-type: none"> ● Continue to educate staff and deepen understanding about MTSS core components and subcomponents as prioritized by the District leadership team ● Identify an ongoing coaching structure to support professional growth in MTSS ● Engage teachers in Tier I explicit literacy instruction ● Provide learning and support on the differentiation framework

Assessment and Decision-Making	
<p>Assessment & Decision-Making: Improving identification for high potential programs; Examine 504 plan processes</p>	<ul style="list-style-type: none"> ● Examine enrollment data to ensure the process used to identify students for high potential programs do not exclude students ● Continue to identify high achieving students to participate in enrichment opportunities utilizing multiple data points ● Review and revision to District 504 procedures
<p>Tier 3 Decision-Making: Address exclusionary discipline for students with emotional and behavioral disorders (EBD), Identification of Specific Learning Disability</p>	<ul style="list-style-type: none"> ● Establish a process to ensure that IEPs and PBSPs for students are matched to student needs and implemented with fidelity prior to OSS decisions for students with emotional and behavioral disorders (EBD) ● Plan for the transition from the specific learning disability (SLD) IQ/ACH requirement
Multi-Level Instruction	
<p>Tier 1 Instruction: Math</p>	<ul style="list-style-type: none"> ● Evaluate Tier 1 math instruction and curriculum and its alignment to standards

YEAR 3 PLAN	
Infrastructure and Support	
<p>Teams: Transition meetings should take place when students move from one grade level to the next grade level, and specifically for transition grades when students move from early childhood to elementary, elementary to middle and middle to high school.</p>	<ul style="list-style-type: none"> ● Implement transition meetings to a) communicate students' educational history, b) review student intervention history, and c) develop support plans for the following school year for students receiving interventions
<p>Early Childhood MTSS: Early childhood students would also benefit from a system-wide implementation of MTSS.</p>	<ul style="list-style-type: none"> ● Develop a E-12 aligned MTSS framework to include early childhood and develop a multi-year implementation plan to support early learners

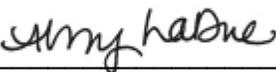
Professional Learning (PD)	<ul style="list-style-type: none"> Continue to educate staff and deepen understanding about MTSS core components and subcomponents as prioritized by the District leadership team
Assessment and Decision-Making	
Early Childhood Assessment & Decision-Making: The district should consider supplementing the TS Gold with a direct reliable and valid assessment tool.	<ul style="list-style-type: none"> Supplement TS Gold with a reliable and valid direct assessment measure
Tier 3: Data-Based Decision-Making	<ul style="list-style-type: none"> Transition away from SLD IQ/ACH discrepancy
Fidelity and Evaluation	
Fidelity and Evaluation	<ul style="list-style-type: none"> Ensure measures of fidelity exist for all implementation areas

We are excited for the opportunities that will be provided through this intentional process work and ongoing consistent implementation of a Districtwide MTSS framework. The District will continue to work with CAREI, who will provide continued support to the District and building leadership teams, during the coming school year in the implementation of Year 1 of the plan and the ongoing refinement of the overall 3-year plan.

RECOMMENDATION/FUTURE DIRECTION:

This report is submitted for the School Board’s information.

Submitted by: 
Christine Breen, Executive Director of Special Education

Submitted by: 
Amy LaDue, Assistant Superintendent for Instruction

Concurrence: 
Dennis Peterson, Superintendent

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #2 b.

Title: MTSS 2021-22 Action Plan Update

Date: May 19, 2022

EXECUTIVE SUMMARY

Following Phase 1 of the Multi-Tiered System of Supports (MTSS) evaluation conducted by the Center for Applied Research in Educational Improvement (CAREI), findings were utilized to establish priorities and develop an initial action plan. The purpose of this report is to update the School Board on the District's progress with the implementation of the MTSS 2021-2022 Action Plan.

District Priorities:

Following the initial CAREI evaluation a district team was convened to respond to the recommendations. Five areas were identified as priorities to deepen the implementation of the MTSS framework and processes currently in place in the District. These included the following:

- MTSS Teams
- MTSS Process Guide
- Social Emotional Learning
- Professional Development
- Implementation Fidelity

Each of the five identified priorities has an action plan and a sub-group led by the district leadership team members. These work teams meet monthly and report progress and garner feedback from the full district leadership team, building administrators, and building leadership teams.

Team Structure:

The first priority was to develop and implement four levels of teams and to define team structures and practices. These teams include a district team, a building team at each school, grade level teams, and a building student support team (SST). The District team is conducting monthly meetings to implement the 2021-2022 District action plan. Building teams were established and participated in professional learning focused on developing a common foundation for MTSS, initiative braiding and effective teaming practices.

Additionally, building teams provided feedback on District priorities, developed initial site goals and plans and have continued to provide feedback on sections of the process guide. Building teams will receive additional training in order to provide leadership in building-wide implementation during the coming school year.

Process Guide:

The second priority is development of a comprehensive MTSS process guide that provides clear processes and practices. This guide will include: a clear definition of each tier, decision making rules, procedures and tools for universal screening for academics and social emotional domains, procedures to identify interventions aligned to needs, procedures for evaluation effectiveness and fidelity, and procedures to document instructional practices and efforts.

This year a process guide committee completed work to address the CAREI recommendation to create a Minnetonka MTSS process guide. According to the CAREI MTSS Action Plan recommendations, *the District needs to develop a comprehensive MTSS process guide that provides:*

- (a) Clear definition of tiers*
- (b) Decision-making rules for movement between tiers*
- (c) Procedures for screening and progress monitoring in academic and social emotional domains*
- (d) Procedures matching intervention to student need*
- (e) Procedures for evaluating intervention effects*
- (f) Procedures for assessing fidelity*
- (g) Procedures for documentation of problem solving*

As a result of the CAREI recommendations, a process guide committee was formed facilitated by the Director of Assessment working alongside the Minnewashta principal, the Director of Curriculum, a CAREI representative, and a representative from Minnetonka's Student Support Services. The committee involved all principals and building MTSS teams in this collaborative process by sharing excerpts from the process guide for review and comment. Using feedback from principals and the building MTSS teams, the process guide committee met once per month to make updates to the guide and report the updates to the MTSS District Leadership Team at each monthly meeting.

A first draft process guide will be completed by June with a timeline to revise and add information to the guide over the next three years.

In its first year, the process guide will contain the following sections:

- Rationale
- Mission
- Beliefs
- Connection to State and Federal Law

- Professional Learning
- Infrastructure and Support Mechanisms
- Building Schedules
- Allocation and Alignment of Resources
- Excellence and Belonging
- Assessment and Screening
- Tier 1: Universal Instruction, Differentiation, and Accommodations
- Tier 2: Supplemental Instruction
- Tier 3: Individualized and Intensive Instruction

Additional sections will be added in the Fall of 2023 with on-going revisions in future years. The Process Guide Committee will work in collaboration with the Professional Learning Committee to ensure staff district-wide have a clear understanding of Minnetonka’s MTSS process and expectations.

Social and Emotional Learning (SEL):

The third priority is the examination of social and emotional needs (SEL), the implementation of a universal screener for all grade levels, and the subsequent implementation of Tier I social, emotional, and mental health education to be incorporated into core instruction for students at each level.

An SEL subcommittee was formed at the start of the 2021-2022 school year and has convened on a monthly basis to address recommendations. Led by the Director of Health Services, subcommittee members include school psychologists, school social workers, counselors, assistant principals, and Teaching and Learning directors. This year the subcommittee focused on the recommendations of the Dikel Report, the findings of the CAREI report, and School Board goals, which included establishing a common definition that focuses on social, emotional, behavioral, and academics.

Understanding that a universal screener is essential to identifying and responding to student needs, the subcommittee reviewed multiple screeners and surveyed other districts regarding effective tools, particularly at the secondary level. Screener considerations included the following:

- Alignment to research-based standards
- Alignment to effective screening practices
- Inclusion of behavioral and mental health concerns
- Teacher and student reporting features
- Alignment with current data management system

After a comprehensive review, the subcommittee identified SAEBRS and MySAEBRS as the most promising screening tools. SAEBRS is one of the only SEB universal screening tools built to align with a dual-factor model of student social and emotional functioning, which asserts that mental health should be defined by both the absence of problem behaviors and symptomatology (e.g., internalizing and externalizing behaviors) and the

presence of well-being and competencies (e.g., social and emotional skills). mySAEBRS (my Social, Academic, and Emotional Behavior Risk Screener) is a brief, norm-referenced tool for screening all students to identify those who are at risk for social-emotional behavior (SEB) problems. Currently SAEBRS is used at the elementary level, and teachers complete the screening.

This spring both SAEBRS and mySAEBRS were introduced as pilots at the middle school and high school levels. Results of the pilots will inform potential implementation in 2022-23, including professional development and SEL Tier I intervention. Although SEL Tier I essential learnings have been identified at every grade level as part of the health curriculum, additional interventions will be implemented based on screening results, as well as data such as attendance, behavior referrals, and academics.

This year the committee began the resource mapping process and the analysis of current staffing to determine existing infrastructure and supports. The resource mapping process identified existing programs, intervention models, schedules, staff members responsible for instruction and intervention, and the number of students served. The analysis of staffing identifies what is currently in place at each building, the function of each staff person, and potential staffing adjustments for the future.

The subcommittee will continue the work that began this year surrounding resource mapping, staffing analysis, and screening tools. Future work will include expanding use of the universal screener, introducing progress monitoring, and using the results to inform instruction and intervention at all Tier levels. The results will also inform the needs assessment for the health curriculum review, as well as the implementation of future instructional resources.

Professional Learning:

The next priority is to institutionalize and structure professional learning to develop a common foundation and shared understanding of MTSS that promotes continuous improvement of core instructional practice, data-based decision making, and delivery of intervention and enrichment. Professional learning should be job-embedded, aligned to identified needs, and should include follow-up coaching and support. Clear Springs Elementary Principal, Special Education Director, and Director of Teacher Development led this work. The team was charged with several action steps for 2021-2022:

- Identify and plan for professional learning for each recommendation
- Identify an ongoing coaching structure after the delivery of PD
- Identify key areas, staff presenters, scheduling, scope, and sequence of PD
- Identify creative solutions for delivering PD
- Ensure that PD is an agenda item on all District team meetings

The MTSS Professional Learning Team met monthly throughout the year to review progress made in the MTSS Process Guide and discuss how professional learning could support the next steps. They were intentional about waiting for the specific elements in

the process guide to be finalized. As the Process Guide is finalized, professional learning will be developed.

Using the backward design process that Minnetonka teachers use when developing their curriculum, the team began by identifying the MTSS essential learnings.

Administrators and teachers will understand and be able to explain:

- The difference between MTSS and RTI
- The difference between the MTSS team and SST
- Tier 1, Tier 2, and Tier 3
- The role of special education in MTSS
- Criteria used to move from one tier to the next

Administrators and teachers will be able to identify the purposes and appropriate use of assessment tools:

- Screening
- Diagnostic
- Progress Monitoring

To address these learnings, the team agreed that the professional learning experiences to be developed would need to be (1) consistent district-wide, (2) embedded into the workday when the vast majority of teachers are available, and (3) shorter and more frequent versus a single, longer session. Potential solutions to these parameters include synchronous virtual instruction (e.g., webinars), in-person seminars, self-paced, asynchronous online modules via Schoology, a video series to support learning at staff meetings, and early releases or late starts designated for professional learning.

Looking forward to 2022-2023, the team will likely leverage several of these solutions to support the MTSS work. The series of videos is likely the most viable solution for future learning. Depending on the nature of the video, it could be shared at the start of a staff meeting or within a PLC meeting. For example, a video articulating the difference between the different MTSS teams is most appropriate at a staff meeting. A video on progress monitoring of essential learnings would be appropriate within a PLC meeting. In-person more in-depth learning could occur during late starts or early releases. Currently, there are four early release/late starts designated for professional learning. Of the four, by contract, two must be teacher-directed. In 2021-2022, the district-directed/site-directed professional learning focused on Developmental Relationships as a part of the School Board goal on Excellence in Student Well-being and Belonging. Leveraging these two district/site-directed professional learning opportunities may be a possibility for future years.

A priority for the team was to identify who might be content experts in the various MTSS topics while the team would support with the process. For example, school psychologist Mandy Mattke would be an expert in MTSS and special education. Academic Strategist

Anelise Peterson might be an expert in progress monitoring. MHS math teacher Matt Breen could guide teachers in analyzing teacher and PLC level data and school psychologist Jonna Hirsch may provide insight in analyzing MTSS level data. The District may also continue to consult with CAREI facilitators for professional learning, particularly for principals. Ideally, the faces and voices of the video series will represent a wide range of educational professionals: school psychologists, general education teachers, special education teachers, social workers, and administrators.

The subcommittee shared progress at all MTSS District Leadership meetings. Additionally, the committee shared updates and requested input at every principal meeting. This purpose was to keep principals informed, hear their perspectives, identify their learning needs, and identify potential professional learning leaders.

As a pilot, Principal Carpenter, Ms. Laughlin, and Ms. White led a professional learning session at Clear Springs Elementary in early April. The focus was on understanding MTSS, how it relates to Response to Intervention (RtI), and the role of Professional Learning Communities (PLC) in the system. Feedback from the session was quite positive and productive. The questions that were asked as part of this feedback will guide the team in refining this session for the fall of 2022.

Fidelity:

The final priority is to develop a system and measures to monitor fidelity of implementation of core, supplemental and intensive interventions and extensions. Fidelity measures are being incorporated into all processes as they are developed and implemented.

RECOMMENDATION/FUTURE DIRECTION:

This report is submitted for the School Board's information.

Submitted by: Christine G. Breen
Christine Breen, Executive Director of Special Education

Submitted by: Amy LaDue
Amy LaDue, Assistant Superintendent for Instruction

Concurrence: Dennis L. Peterson
Dennis Peterson, Superintendent

School Board
Minnetonka I.S.D. # 276
5621 County Road 101
Minnetonka, Minnesota

Study Session Agenda Item #2 c.

Title: Communications Update

Date: May 19, 2022

OVERVIEW

Each year, the Minnetonka School Board establishes annual, actionable goals for District Administration that align with the vision and direction in which the Board wants to lead our district. These goals ensure continuation of a legacy of long-term excellence and educational success.

The 2021-22 School Board goals are Excellence in Student Well-being and Belonging and Excellence in Student Learning and Support. An aspect of the goals is to provide ongoing communications to and engagement opportunities for District constituents that reflect the goal work.

Executive Director of Communications, Dr. JacQui Getty, will present on the communications efforts and results in support of the School Board's desire to keep the community informed and involved. Additionally, she will present an overview of some of the District's broader communications and outreach projects from the past several months of the year and those yet to come.

RECOMMENDATION/FUTURE DIRECTION:

The information presented will update the School Board and community on communications and engagement efforts.

Submitted by: _____



JacQueline Getty, Executive Director of Communications

Concurrence: _____



Dennis Peterson, Superintendent

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #2 d.

Title: Update on the Wilson Reading Program

Date: May 19, 2022

EXECUTIVE SUMMARY

Minnetonka Public Schools is committed to ensuring that all students receive the academic support necessary to be successful in school. The District continues to expand its Multi-Tiered Systems of Support (MTSS), which currently provides reading intervention to students below the 40th percentile on NWEA Measures of Progress (MAP) test or who are below proficient on the Minnesota Comprehensive Assessment (MCA). FASTBridge Early Reading assessment, curriculum-based measures, and formative and summative assessments are all tools used to inform this intervention. Typically, groups of students receive intervention at the Tier I (Core Program/Early Intervention) Tier II (Advanced Intervention) or Tier III (Intensive Intervention) levels and receive targeted support based on their reading challenges.

Beginning in the 2016-17 school year, Minnetonka introduced the Wilson Reading System, which targeted students with characteristics of dyslexia or dysgraphia. Since that time, additional Wilson programs and professional learning opportunities have been introduced to support core reading instruction as well as intervention. The purpose of this report is to update the School Board on the status of Wilson reading programs in the District.

OVERVIEW OF WILSON PROGRAMS

Wilson provides research-based reading and spelling programs using a multisensory, structured curricula. Wilson Foundations supports prevention and early intervention for K-3 students, Wilson Just Words provides intervention for older students, and Wilson Reading System provides intensive intervention. The District has implemented all three of these programs over the past five years and continues to expand these resources to meet the needs of students.

Wilson Foundations

The Foundations reading program focuses on foundational reading, spelling and handwriting skills, and provides a systematic approach to literacy instruction. The program has been implemented at the Kindergarten and First Grade levels as a core instructional resource as a component of the district's comprehensive language arts

program. Students receive approximately 30 minutes of Foundations instruction each day within the 90-120 minute core (Tier I) literacy block at these grade levels. In addition, Foundations serves as an early intervention (Tier II) program for elementary students who need additional support beyond the core program. Reading interventionists typically deliver this supplemental instruction. Wilson provides a one-day training session for all teachers implementing the Foundations program.

Wilson Just Words

Just Words is an explicit multisensory decoding and spelling program designed for students in Grades 4-12 who have mild to moderate gaps in their decoding and spelling proficiency, but do not require intensive intervention. Reading specialists and special education teachers are using this program at every elementary and secondary school. At the elementary level, reading specialists build groups that may include a larger number of students, ranging from 3 to 15 students per group. At the secondary level, students who qualify for reading support are given a pull-out section that is scheduled into the student day. All Just Words teachers take part in one to two days of implementation training.

Wilson Reading System (Intensive)

The Wilson Reading System is designed for students in Grades 2-12 who require more intensive instruction due to a language-based learning disability, as well as those who are not making sufficient progress in intervention. This comprehensive intervention program provides multisensory, structured instruction in all five areas of reading (phonemic awareness, word structure/phonics, fluency, vocabulary, and comprehension) plus spelling. Reading specialists and special education teachers are using this program at every elementary school and secondary school. District Wilson Reading System teachers take part in a comprehensive certification program that included a year-long online course and a practicum experience with students throughout the year, equivalent to 60-90 hours of college level coursework.

WILSON IMPLEMENTATION

During the 2021-22 school year approximately 650 elementary school students received Tier Two or Tier Three intervention in the Wilson Reading System, Just Words, or Foundations programs. At the middle school level, 135 middle students received intervention. At the high school level, 14 students received intervention. In addition, approximately 935 students received Foundations Tier One instruction at the elementary level.

The District continues to hire and train staff in Wilson reading strategies and programs. As part of the American Rescue Plan (ARP)/Elementary and Secondary School Emergency Relief Fund (ESSER), the District applied for and received funding to further expand staffing to meet the reading intervention needs of students and to ensure sustained support for programming. From SY19-20 to SY20-21, the District increased reading intervention support by adding 0.47 FTE Reading Interventionist teachers, for a total of 21.09 FTEs in SY20-21. From SY20-21 to SY21-22, the District increased reading intervention support

by adding 3.29 FTE Reading Interventionist teachers, for a total of 24.38 FTEs in SY21-22.

Wilson Reading System Level I Certification

Throughout the 2021-22 school year, a cohort of eight Minnetonka teachers have taken part in the intensive Wilson Reading System Level I Certification. This certification requires participants to attend a three-day introductory workshop, complete 90 hours of online professional development and assessment, conduct over 65 lessons with a student, engage in five graded observations, and take part in five implementation meetings with a Wilson certified trainer.

This cohort has received comprehensive training and instruction from Wilson credentialed trainer Shari Barr and Minnetonka teacher Bart Meath, who is currently completing his Wilson training certification. Both trainers have expressed confidence in the cohort, highlighting the level of dedication and expertise exhibited by the teachers throughout the year. Once this cohort finalizes the certification process, thirty-five Minnetonka teachers will have completed Wilson Reading System Level I Certification.

Wilson Reading System Level II Certification

Wilson Reading System Level II Certification provides in-depth strategies to expand knowledge and practice of the Wilson Reading System and allows participants to earn the professional credential of Wilson Dyslexia Therapist. The Level II Certification requires participants to complete the Advanced Strategies for Multisensory Structured Language Group Instruction Course, the Group Mastery Practicum, the Advanced Word Study Online Course, and the Steps 7-12 Practicum. Participants engage in over 245 hours of coursework. During the 2021-22 school year a second Minnetonka teacher completed Level II Certification and two additional teachers began the process.

Wilson Reading System Trainer

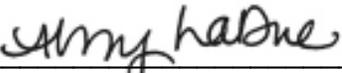
Although Wilson provides online and in-person training for interventionists, long-term sustainability relies on building teacher capacity within the District. Only Wilson Certified Trainers can conduct and certify staff in the Wilson Reading programs. Prospective Wilson trainers must have extensive instructional experience and must take part in intensive coursework, practicums, and observations. During the 2021-22 school year Minnetonka teacher Bart Meath engaged in the final phase of this process, supporting five teachers in this year's Level I cohort. He will complete this program and become a Wilson Reading System Certified Trainer this summer.

The addition of a Wilson Reading System Certified Trainer will allow Minnetonka Schools to provide future training locally and to sustain effective programming by providing ongoing support for teachers and students. The District will also continue to support Wilson certification to sustain future programming.

RECOMMENDATION/FUTURE DIRECTION:

This report is submitted for School Board review.

Submitted by: 
Steve Urbanski, Director of Curriculum

Submitted by: 
Amy LaDue, Assistant Superintendent for Instruction

Concurrence: 
Dennis Peterson, Superintendent

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #2 e.

Title: Update on Summer Learning Program

Date: May 19, 2022

EXECUTIVE SUMMARY:

During the summer of 2021 three district summer learning programs were offered to provide opportunities for academic and social emotional learning for students. These programs will again be offered for the summer of 2022. Summer learning programs are designed to provide additional learning opportunities for students who will significantly benefit from additional time and support. Students have been identified by a teacher or an IEP team recommendation along with district benchmark and common classroom assessment data.

The three summer learning programs included:

- Extended School Year (ESY) for students receiving special education
- English learner (EL) for students who would benefit from continued English Language exposure and development
- General education opportunities for rising first through eighth graders

Extended School Year (ESY)

Students participating in ESY are identified based on state criteria within three areas of eligibility: regression/recoupment, self-sufficiency, and unique need. Decisions around eligibility involved IEP teams reviewing individual student data collected during the school year in order to determine whether or not ESY services are necessary for a student to receive a Free Appropriate Public Education (FAPE). Historical numbers indicate Minnetonka traditionally serves roughly 75 students annually in ESY programming. Following the impact of the COVID-19 pandemic in the 2019-2020 and 2020-2021 school years, special education saw an increase in students qualifying for ESY services. Last summer, our program served 115 students from early childhood through 12th grade. This year, we will serve 172 students in ESY, the highest number we have ever seen. We are feverishly hiring to support these growing needs and feel grateful that our own Minnetonka teachers and paraprofessionals are wanting to work during the summer to support our students.

Early childhood programming will be held at Minnetonka Community Education Center, current kindergarteners through rising fifth grade will be held at Clear Springs Elementary,

rising sixth graders through current 8th graders will be held at Minnetonka Middle School East and rising ninth through twelfth grade students' ESY programming will be held at Minnetonka High School. New this year, students in our SAIL program will attend ESY at our SAIL building. If students are in a transition year, they will attend the building they will attend in the Fall. This is a change to past practice in order to ensure a smooth transition for the student in the Fall.

Students attending ESY range from federal setting I to federal setting III students with needs crossing all categories of eligibility. Students focused on academics, functional skills, social and emotional learning, independence and much more. If and when IEP teams determine a student requires services that look different than the traditional offering of 180 minutes three days a week for four weeks, unique and creative programming is designed to meet their individual needs. Decisions as to frequency and duration are determined on an individual basis by IEP teams.

In addition to traditional eligibility, districts were and continue to be charged with identifying students who might require recovery services due to learning loss during the COVID-19 pandemic. Minnetonka identified five students in need of recovery services and offered those services during our traditional ESY time period during the 2020-2021 school year. For this upcoming summer ESY program, Minnetonka has identified 4 students in need of recovery services. We have identified 38 additional students who were in need of recovery services, however, IEP teams were able to meet these needs during the school year.

English Learner (EL) Summer Learning Program

Minnetonka Public Schools serves roughly 200 English Learner (EL) students each year. EL students are identified for services through entrance criteria set forth by the State of Minnesota. Districts serving EL students receive Title III funding, which requires a portion of these grant monies to be spent on extended year programming.

Minnetonka spends roughly one third of its annual Title III budget on supporting this population of students throughout six weeks of the summer. In partnership with Excelsior PTA and Excelsior United Methodist Church, Minnetonka is able to offer a robust summer educational enrichment program for these students. This program is held off-site at Excelsior United Methodist Church due to proximity to many of our students and families given that transportation is not provided for this program. Students are able to attend up to six hours per day, three days a week, for six weeks in total. Students work on reading, writing, math and speaking the English language throughout. This summer, following review of student ACCESS, NWEA, and classroom data, students in kindergarten through third grade will be the focus of this program. This will include roughly 30 students whose needs are a fit for the summer programming.

In the Fall and Spring, NWEA, MCA, and ACCESS standardized assessment data are utilized to evaluate the effectiveness of this programming on students' progress toward

becoming proficient in the English language and exiting the EL program, following criteria set forth by the State.

Summer Learning Program

Minnetonka Public Schools will offer for the second year a Summer Learning Program for rising first through eighth grade students. The elementary program will provide opportunities for English, Spanish Immersion or Chinese Immersion programs. Middle school programs will focus on the English program. Last year this program served 171 elementary students and 43 middle school students. While we are continuing to enroll students, currently, we have 203 students registered for the elementary level and 16 students registered for the middle school level.

For this program, teachers identified students who would most benefit from additional time and support to develop essential skills to be ready for instruction at the next grade level. Students were identified using a combination of teacher recommendation and assessment results. Nearly 600 students were identified as potential participants.

The program is designed to focus on core academics, reading, writing and math, with additional opportunities for social and emotional learning, peer interaction and engagement in a variety of activities. This summer we are fortunate to have the program staffed primarily with Minnetonka teachers.

This in-person program will be offered 4-days per week over a five week period with students having an opportunity for 18 days of instruction. The Summer Learning Program school day will be three hours long. This is a districtwide program with all Elementary students attending Groveland Elementary and all Middle School students attending Minnetonka Middle School East. Transportation will be provided for any district resident student who requested it.

RECOMMENDATION/FUTURE DIRECTION:

This report is submitted for the School Board's information.

Submitted by: Christine G. Breen
Christine Breen, Executive Director of Special Education

Submitted by: Amy LaDue
Amy LaDue, Assistant Superintendent for Instruction

Concurrence: Dennis L. Peterson
Dennis Peterson, Superintendent

**School Board
Minnetonka I.S.D. #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #3

Title: STAMP 4Se 2021-22 Spring Update

Date: May 19, 2022

OVERVIEW

During March 2022, Third and Fifth Grade Chinese and Spanish Immersion students participated in the STAMP 4Se Test created by Avant Assessment. This is the second year Minnetonka has used the STAMP 4Se due to a need to shift from the AAPPL that had been administered from the Spring of 2014 to the Spring of 2020. Students were scheduled to take the STAMP 4Se in March 2020, however all standardized testing was cancelled due to pandemic circumstances. As a result, included in this report are the past two years of STAMP 4Se results from 2021 and 2022 as well as historical AAPPL results from 2017-2019. The AAPPL results are included only for historical purposes, however, because the AAPPL is a different test, it is recommended that the data are not to be used for direct comparison with the recent STAMP 4Se results.

Avant STAMP (STAndards-based Measurement of Proficiency) 4Se determines language proficiency in 4 domains (Reading, Writing, Listening and Speaking) for grades 2-6. This assessment is administered to Minnetonka Chinese and Spanish Immersion students in Grades 3 and 5, and students take the Reading, Listening, and Speaking tests only. Avant STAMP 4Se is web-based and computer-adaptive, with real-world questions on topics selected to be level-appropriate based on research into topics taught at each level. The questions engage learners, and because STAMP 4Se is adaptive, students can demonstrate their own actual proficiency level without any pre-set upper limits.

The STAMP 4Se is a proficiency test that provides students with a combination of unfamiliar passages and familiar passages based on what they learn in school. The STAMP 4Se measures students' ability to show what they know in a language that is closer to that of a person visiting a foreign country. The AAPPL Test will typically yield higher test results because it is a performance test, assessing students on mainly familiar topics practiced in school. This is also the reason the AAPPL and STAMP 4Se data should not be directly compared. The unfamiliarity of the STAMP 4Se and STAMP 4S Tests help ensure that students' proficiency is being measured, and the results show what the students know at any given time. Although it is likely that a proficiency test will yield lower test scores, the results can help students, teachers, and family members

understand the true level of proficiency students have reached at the time of the assessment.

Over the past 14 years, the Minnetonka Language Immersion program has experienced solid growth. During this time, the program has adapted in the areas of curriculum, instruction, and assessment. When making programming decisions, it is important to have reliable assessment data, and in 2018 and 2019, the Immersion program received unreliable data from the AAPPL Test for Chinese and Spanish Immersion students in Grades 3 and 5. In 2018, the AAPPL was unable to be administered effectively, despite the claims by Language Testing International (LTI) that the test was compatible with Chromebooks. During the Spring of 2019, the AAPPL version 2.0 was released. As a result, Minnetonka Reading and Listening student scores, which are automatically scored by the test software, dropped significantly, and only the Speaking Test results were able to be reported. The Speaking Test was the only test that needed to be scored by human raters. After the administration of the AAPPL Test, LTI, reported there was not a significant difference between the original AAPPL and the AAPPL 2.0. Despite this claim, the technical support staff sent adjusted scores for several students, indicating that the automatic scoring feature on the Reading and Listening Tests may have been inaccurately scoring the students' answers.

RATIONALE

Due to sub-standard student testing experiences the past two test administrations with the AAPPL Test, there was a need to migrate to a similar assessment that measures students' Reading, Listening, and Speaking proficiency levels using the ACTFL Proficiency Scale. The STAMP 4SE aligns to the ACTFL Proficiency Scale and has been proven nationally to be an effective means for assessing language learners. There are several reasons that making a change was imperative:

1. Minnetonka relies on data to make instructional decisions for students and academic programming. It is important to have reliable language performance data for current and future years.
2. The STAMP 4SE has a proven history for running successfully on Chromebooks and iPads.
3. The STAMP 4SE will provide assessment alignment from elementary through high school for students and staff.
4. The STAMP Test is recognized nationally as a valid and reliable assessment to be used for Bilingual Seal attainment.

As the Minnetonka Language Immersion continues, there is a need to measure all Immersion students with a common benchmark. The scale Minnetonka uses is based on the ACTFL Proficiency Guidelines. Minnetonka's Immersion teachers have used common vocabulary internally and will continue to use the ACTFL Proficiency Guidelines as they discuss student growth in target language proficiency. Teachers, students, and parents have become increasingly familiar with these proficiency guidelines and find it easier to track student progress under this system.

Proficiency levels are grouped by major levels (Novice, Intermediate, and Advanced). The STAMP 4Se Scoring Scale is derived from ACTFL’s Proficiency Guidelines. A description of the scoring ranges is listed in the following section.

Novice Range: Within the Novice level, the scores are 1, 2, and 3. A score of 1 reflects the abilities described as Novice Low in the ACTFL Proficiency Guidelines. A score of 2 reflects Novice-Mid abilities, with 3 being Novice-High. This means that a learner who receives the score of 3, in addition to performing all Novice level functions fully, also shows some successful performance at the Intermediate level, but does not do so consistently.

Intermediate Range: Within the Intermediate level, the scores are 4, 5, and 6. A score of 4 reflects the abilities described as Intermediate Low in the ACTFL Proficiency Guidelines. A score of 5 reflects Intermediate-Mid abilities, and a score of 6 is the equivalent of Intermediate-High. A learner who receives the score of 6, in addition to performing all Intermediate level functions fully, also shows some successful performance at Advanced-Low. Learners are presented with Advanced-Low tasks, so they are given the opportunity to provide evidence of performance at that range.

Advanced Range: The Advanced-High proficiency range represents the ceiling of this assessment. A score of 7 reflects successful performance at the Advanced Low proficiency range with a score of 8 and 9 representing Advanced-Mid and High, respectively.

Because it takes a great deal of time and practice for students to acquire the skills necessary to move from the Novice Level to the Intermediate Level, teachers will be able to track student progress within the sub-levels. At the elementary level, it is likely that students will spend much of their elementary career within the Intermediate range. In addition, ACTFL research indicates that students will show little growth within the proficiency levels during the same school year. Avant recommends assessing students with the STAMP 4Se a maximum of one time each year. It is important to note that the results of the STAMP 4Se should be considered as a baseline and not to be directly compared to the AAPPL results. The AAPPL Test uses an AAPPL rating and the STAMP 4Se uses a numbered scoring scale. The two scoring scales and tests, although similar, should not be directly compared. AAPPL results are displayed throughout this report for historical context.

STAMP 4Se Scoring Scale

Reading and Listening Level Key			Writing and Speaking Level Key		
Novice	Intermediate	Advanced	Novice	Intermediate	Advanced
1- Nov Low	4- Int Low	7- Adv Low	1- Nov Low	4- Int Low	7- Adv Low
2- Nov Mid	5- Int Mid	8- Adv Mid	2- Nov Mid	5- Int Mid	8-Adv Low/Hi
3- Nov Hi	6- Int Hi	9- Adv Hi	3- Nov Hi	6- Int Hi	NR- Not Ratable

It is important to note that Proficiency Guidelines are targets that are to be used to guide instruction. It is common for students to perform above and below the target level at any point in time. The STAMP 4Se is a snapshot in time to help gauge students' proficiency through their performance. With the implementation of the ACTFL Proficiency Guidelines into every-day instruction, teachers are more aware of the levels in which their students are achieving.

The purpose of this report is to provide the school board with an update of student performance on the STAMP 4Se Test during March of 2022.

There are strengths and areas for growth and those results are highlighted in the next section and throughout the report.

HIGHLIGHTS

- Chinese Immersion students saw **73.4 percent** reach the Intermediate-Mid and high levels on the Listening Test, well surpassing national targets by two sub-levels, with an additional **3.8 percent** (7 students) reach the Advanced-Low level for the first time.
- Spanish Immersion students saw **77.4 percent** reach the Intermediate-Mid and high levels on the Listening Test, surpassing national targets by two sub-levels with an additional 4.4 percent (25 students) reach the Advanced-Low level for the first time.
- On the Reading Test, Third and Fifth Graders at Excelsior experienced an increase in average score with Fifth Graders seeing a statistically significant increase of 0.4 points improving their proficiency level by one sub-level to Intermediate-Low.
- On the Listening Test, for the second year in a row, Minnetonka Spanish Immersion students well out-paced the national targets by two sub-levels reaching the Intermediate-High range by the end of Fifth Grade and the Intermediate-Mid range by the end of Third Grade.

This is the tenth year the guidelines have been used as a measure, however, with the STAMP 4Se assessment in its second year, it will be important to view the data with caution when compared to previous year's AAPPL results. The previous year's AAPPL results should only be used as a point of reference for this year.

The Proficiency Guidelines are expected to be utilized in a manner to evaluate what students "Can Do" on a consistent basis. Students may perform at higher levels or lower levels at times, and the guidelines will help teachers gauge their students' performance on an on-going basis. As teachers continue to implement the guidelines, they are encouraged and expected to use the model as a lens for planning. Being more intentional in the four areas of Reading, Listening, and Speaking as they plan, teachers can provide a well-rounded instructional experience for students on a consistent basis.

Nationally, according to the latest ACTFL research, students in full Chinese Immersion programs should be expected to reach the Intermediate-Low range in Speaking and Listening and the Novice-High range for Reading by the end of Fifth Grade. Spanish

Immersion students should be expected to reach the Intermediate-Low range in all three modes of communication assessed (See table below). The table below lists the national targets based on ACTFL’s proficiency scale and Immersion program research.

National K-12 Language Immersion Proficiency Targets

Grade Level	Spanish			Chinese		
	Speaking	Listening	Reading	Speaking	Listening	Reading
3	Novice High	Novice Mid				
5	Interm Low	Novice High				

Students who are performing at the Advanced-Low level prior taking the AP Spanish and Chinese language exams can expect to earn a score of 4 or 5, with 3 being a passing score on a five-point scale.

Data Summary: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Reading

STAMP 4Se Reading Test results indicate that Spanish Immersion students received scores ranging **4.6 points to 5.6 points** for Grades 3 and 5, placing Third Graders within the Intermediate-Mid range and Fifth Graders within the Intermediate-High range. Chinese Immersion students received scores between **3.0 points and 3.9 points** for the two grade levels resulting in proficiency levels within the Novice-High to Intermediate-Low ranges for Grades 3-5. The improvement among Fifth Graders is significant. It is common for Chinese Immersion students to reach a lower proficiency level compared to Spanish Immersion students on the Interpretive Reading Test, due to the logographic nature of the Chinese language. Logographic, or character based, languages such as Chinese, are more difficult languages to grasp for language learners. The lower targets are reflected in the *National K-12 Language Immersion Proficiency Targets* table above. Spanish Immersion Third and Fifth Graders scored two sub-levels beyond the national targets, and Chinese Immersion students performed one sub-level beyond the national targets on average.

ACTFL research asserts that students can grow one sub-level per year consistently until they reach the Intermediate-Mid levels. Once students reach the Intermediate-Mid levels, the data show that students may stay within this range longer before progressing to the Intermediate-High and Advanced levels. Typically, reading comprehension is a skill in which second language learners gain proficiency later in their development. According

to staff, if students are exposed to translated text alone, it might be more difficult for them to understand when exposed to the syntax and rich vocabulary that is found in authentic texts. For this reason, the selection of both authentic and translated texts has expanded over the past several years.

Based on language acquisition research, language production is a skill that is acquired later in the language learning process, and it is common for students to perform lower in this skill area compared to the other three areas. For Chinese Immersion students, reading is an area that needs to be targeted based on the predicted proficiency levels listed above. Elementary Chinese and Spanish Immersion teachers recently worked to create new essential learnings and end of year targets to help set clear benchmarks for all immersion students.

At the Novice-High range, Chinese Immersion Third Grade students can understand familiar words, phrases and sentences with short and simple texts related to everyday life. They can sometimes understand the main idea of what they have read. At the next proficiency level of Intermediate-Low, students can more consistently understand main ideas as well as the supporting details of a passage. In Third grade, Chinese Immersion students are learning language in three different ways. Students learn about Chinese characters, Pinyin, and this is the first year they receive English language instruction. Staff maintain that there is a lot of new information taught specific to Third Grade, and the results in the Interpretive Reading and Listening tests compared to Spanish can be explained by these factors. Students are learning about the characters and the meanings of each of those characters. In addition, they are also learning about the pronunciation of those characters through Pinyin instruction. Because of this, it may be typical for Third Graders to score lower on the comprehension tests but show improvement as they move through the levels and become more accustomed to this type of instruction. Logographic, or character based, languages such as Chinese, are more difficult languages to grasp for language learners. All language learners can learn the language, however, the time it takes to learn and show growth with a logographic language is lengthier than other types of languages such as Spanish. Chinese Immersion Third Graders are reaching proficiency levels like 2019, and Fifth Graders performed one sub-level beyond Fifth Graders in 2019 on the AAPPL Test.

There is a subtle yet important difference in Reading understanding for students at the Intermediate-Low level, compared to students at the Novice-High level. Students performing at the Intermediate-Low level can understand main ideas as well as the supporting details of a passage.

Spanish Immersion students performed at higher proficiency levels compared to Third and Fifth Graders in 2019 on the AAPPL Test, where they were reaching the Intermediate-Low range at both grade levels. Both Spanish and Chinese Immersion students were successful in their second year of the STAMP 4Se Test, especially as students across the country begin to return to a sense of normalcy in the classroom following strict COVID restrictions.

The goal is for Immersion students to reach at least the Intermediate-Mid levels of proficiency on the Interpretive Reading mode prior to taking the AP Language Exam as Ninth Graders. The measurement tool will change as students move to middle school, and students will be assessed on the STAMP 4S Test. As stated previously, the STAMP 4Se measures students' ability to show what they know in a language that is closer to that of a person visiting a foreign country. In previous years, the AAPPL yielded high test results, because it is a performance test, assessing students on mainly familiar topics practiced in school. The unfamiliarity of the STAMP 4Se and STAMP 4S Tests help ensure that students' proficiency is being measured, and the results show what the students know at any given time. Although it is likely that a proficiency test will yield lower test scores, the results can help students, teachers, and family members understand the true level of proficiency students have reached at the time of the assessment.

Recommendations: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Reading

Chinese Immersion students who performed at the Intermediate-Low range would benefit by using what the passage says about the topic to understand the main idea and look for some supporting facts. They will need to try to use different approaches to understanding such as looking and listening for clues such as pictures, titles, words, or parts of words that they recognize, such as words that are like words in their own language. Students should use what they already know about a topic for additional clues about the topic. They should be encouraged to go back and reread or re-listen and see what more they can understand. Teachers will need to help students understand what the passages are saying about a topic to help them understand the main idea and supporting facts. Teachers will need to try different approaches to understanding with students. For example, they can help students look and listen for picture clues such as pictures, titles, words, or parts of words that the students recognize. Activating background knowledge is essential. Once background knowledge is addressed, then the teacher will need to scaffold instruction to help lead the students logically through the new information. The teacher can help the students make connections to words that are in English as well. Teachers agree that students will need more opportunities to learn through both authentic texts and audio. The STAMP 4Se uses all authentic texts, and a lot of the Spanish and Chinese classroom texts in recent years are translated. The only non-translated texts in Spanish are from Mexico, which are provided by the District, in addition to books that are acquired by teachers while abroad. According to Spanish teachers, there are also authentic texts available in the United States.

Chinese and Spanish Immersion teachers can also help students who are performing at the Intermediate-Low and Mid- levels by helping students to practice reading and listening to longer passages and simple stories. Students can begin to compare what they listen to or read to what they already know. According to a Spanish Immersion teacher, these types of strategies should be taught before students begin using the actual texts.

There is a commitment to continue updating and expanding school book rooms. In addition to adding authentic texts and varieties of texts, District staff are also using digital texts. This will be an on-going process on the path to creating a long term solution to impact reading skills.

Teachers will need to continue to revise end of grade level expectations for both Chinese and Spanish immersion programs. This process should be on-going through Grade Five and Six teacher collaboration.

Spring 2022 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Reading

Chinese Immersion				Spanish Immersion			
2022				2022			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	94	3.0	Nov High	3	300	4.6	Int Mid
5	90	3.9	Int Low	5	271	5.6	Int High

Spring 2021 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Reading

Chinese Immersion				Spanish Immersion			
2021				2021			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	97	2.9	Nov High	3	297	4.7	Int Mid
5	107	3.6	Int Low	5	286	5.7	Int High

Spring 2017-2019 Grades 3 and 5 AAPPL Rating and Proficiency Levels for Chinese and Spanish Interpretive Reading

		Chinese Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	119	N4	Int. Low	I1	Int. Low	N4	Nov High
4		I1	Int. Low	I1	Int. Low		
5	81	I2	Int. Mid	I2	Int. Mid	N4	Nov High
		Spanish Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	300	I1	Int. Low	I1	Int. Low	I1	Int Low
4		I2	Int. Mid	I2	Int. Mid		
5	242	I3	Int. Mid	I3	Int. Mid	I1	Int Low

Data Summary: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpersonal Listening and Speaking

Chinese and Spanish Immersion results for the Interpersonal Speaking and Listening Test are like last year with a couple of exceptions regarding Third Grade Chinese Immersion and Fifth Grade Spanish Immersion performance. With an average score of 3.4 points, this placed Third Grade Chinese Immersion students in the Novice-High range. However, the drop of **0.2 points** compared to last year is not considered to be statistically significant. This performance placed Chinese Immersion Third Graders on par with their same grade level peers nationally. Spanish Immersion Fifth Graders reached the Intermediate-Low level, and they also dropped **0.2 points** compared to last year, placing them one sub-level below according to the proficiency scale. Spanish Immersion Third Graders reached the Intermediate-Mid level from 2017 to 2019 on the AAPPL Test, however, this year Grade 5 students performed at the Intermediate-Low level. Although it is difficult to compare the AAPPL and STAMP 4Se Test results, it appears that Chinese and Spanish Immersion students performed similarly to past years, with only the Grade 3 Chinese Immersion students and the Grade 5 Spanish Immersion students dropping one sub-level compared to their same grade counterparts. This will be an area for Third and Fifth Grade teachers to explore. Overall, Third and Fifth Grade students maintained solid performances for Interpersonal Listening and Speaking and much can be learned from this year's test results in conjunction with classroom assessments.

Students who are shifting toward the Intermediate-Mid level have shown that they can truly maintain a conversation about themselves and their lives. Rather than speaking in

phrases or short sentences within the Novice-High and Intermediate-Low level, students performing at this level have demonstrated that they can use more than one sentence at a time. They can both ask and answer questions and can do this in a way that a native speaker can understand them. At the higher levels, students can be expected to demonstrate that they can produce original thoughts with the language and would be able to confidently interact with those from native speaking countries.

The current results should be considered positive, as speaking is a relative strength among both programs. Typically, in an immersion classroom, it would be expected that the listening and speaking test would be the area that yields the strongest performances. As students and teachers become more familiar with the STAMP 4Se, typical trends in these performances should be expected.

Recommendations: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpersonal Listening and Speaking

Teachers can plan activities that allow students to interview each other and require them to listen and ask each other follow up questions. Students should be encouraged to “jump into” as many conversations as they can especially outside of class. Once they have answered a question, they can try to add something more; another fact, thought, or even another question. Students could also be placed in artificial situations that are unfamiliar to them and try to use their language to get what they need.

Students who reached the Intermediate-Mid range would benefit from the teacher giving them tasks that require them to use connecting words such as “but” and “because.” In addition, they need to be exposed to using a variety of question types to get information in different ways. If students at this level can make it a habit of always adding a new fact or detail, for example, their language will be more complete and clearer.

As Grade 3-5 teachers continue to work with the Integrated Performance Assessment (IPA) model, exposing students to these types of activities and opportunities will become second nature. This will allow students the opportunity to grow in a truly differentiated environment.

As leaders in the program review and potentially revise proficiency targets, research recommends beginning with the Interpersonal Speaking and Listening mode to set targets, followed by the Interpretive Reading mode. Experts agree that the focus for setting language targets is to begin with oral proficiency.

Spring 2022 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpersonal Listening and Speaking

Chinese Immersion				Spanish Immersion			
2022				2022			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	94	3.4	<i>Nov High</i>	3	300	3.5	Int Low
5	90	3.9	Int Low	5	271	4.3	<i>Int Low</i>

Spring 2021 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpersonal Listening and Speaking

Chinese Immersion				Spanish Immersion			
2021				2021			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	97	3.6	Int Low	3	297	3.6	Int Low
5	107	3.8	Int Low	5	286	4.5	Int Mid

Spring 2017-2019 Grades 3 and 5 AAPPL Rating and Proficiency Levels for Chinese and Spanish Interpersonal Listening and Speaking

		Chinese Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	119	I1	Int. Low	I1	Int. Low	I1	Int. Low
4		I2	Int. Mid	I2	Int. Mid		
5	81	I2	Int. Mid	I2	Int. Mid	I1	Int. Low
		Spanish Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	300	I2	Int. Mid	I2	Int. Mid	I2	Int Mid
4		I2	Int. Mid	I3	Int. Mid		
5	242	I3	Int. Mid	I3	Int. Mid	I3	Int Mid

Data Summary: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Listening

According to the Interpretive Listening results, students well-surpassed the national targets at their respective grade levels. Third Graders are expected to perform within the Novice-High range, while Fifth Graders are expected to reach the Intermediate-Low range on average. Minnetonka Chinese Immersion Third and Fifth Graders performed at the Intermediate-Mid level, while Spanish Immersion Third Graders reached the Intermediate-Mid level with Grade 5 students performing at the Intermediate-High level, reaching well beyond the national expected targets.

Students performing at the Intermediate-Mid and High levels can consistently listen to passages and understand the main idea. For example, on the STAMP 4Se, students may have listened to a radio announcement or a television advertisement. The students were able to demonstrate that they not only understood the main idea, but they were also able to show that they knew supporting details. Students who reached the Intermediate-High proficiency level demonstrated on a more consistent basis that they knew the main idea and details of the items they heard. Mostly, students answered the questions while making very few errors.

An important note to make is that Chinese and Spanish Immersion students in 2021 significantly out-performed their counterparts in 2019, which shifted the results back to similar levels seen in 2017 and 2018. Chinese Immersion students had a strong performance on the Listening Test. This is exciting news and is evidence of the increased focus on alignment of curriculum, instruction, and assessment over the past few years.

Again, as students reach the Intermediate-Mid ranges, it is not customary to see students continue to grow at the same pace by moving one sub-level per year, yet according to national research, it is expected that most immersion students will be reaching Intermediate-Mid to Intermediate-High levels by the time they complete Eighth Grade.

Recommendations: Spring 2017-2019 & 2021-22 Grades 3 and 5 AAPPL Rating, STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Listening

To take students to the next level from the Intermediate-Mid to High ranges, Spanish and Chinese Immersion teachers should have students frequently listen to longer passages or simple stories. Students can begin to learn about how the passages are organized and make connections to what they already know. Although the recommendation is similar for each of these levels, the teacher can differentiate for students by adjusting the level of difficulty of the material. Teachers can encourage students to share new insight on the learning they are doing and pause frequently to check for understanding. In addition, students reaching the Intermediate-Mid level can also be exposed to activities that are more authentic to the target language's culture. At this level, students would benefit from text that could be read by native speakers from the native country.

Spanish and Chinese teachers have shared that they have been incorporating authentic texts on a regular basis, and the results have shown that this has been occurring. Teachers have implemented performance assessments, and much of the discussions among the grade levels has been about best practices occurring in each of their classrooms. The sharing of ideas around the topic of authentic learning experiences among both Spanish and Chinese Immersion teachers has enabled all k-5 teachers to grow, and all grades have benefited through the sharing of ideas in Schoology and during immersion committee meetings. Best practices need to continue to be shared across both grade levels and programs to help ensure alignment between both the taught and written curriculum.

Spring 2022 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Listening

Chinese Immersion				Spanish Immersion			
2022				2022			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	94	4.9	Int Mid	3	300	5.0	Int Mid
5	90	5.4	Int Mid	5	271	5.6	Int High

Spring 2021 Grades 3 and 5 STAMP 4Se Mean Score and Proficiency Levels for Chinese and Spanish Interpretive Listening

Chinese Immersion				Spanish Immersion			
2021				2021			
Grade	N	STAMP 4Se Score	Prof. Level	Grade	N	STAMP 4Se Score	Prof. Level
3	97	5.0	Int Mid	3	297	5.0	Int Mid
5	107	5.4	Int Mid	5	286	5.7	Int High

Spring 2017-2019 Grades 3 and 5 AAPPL Rating and Proficiency Levels for Chinese and Spanish Interpretive Listening

		Chinese Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	119	I1	Int. Low	I2	Int. Mid	N4	Nov High
4		I2	Int. Mid	I3	Int. Mid		
5	81	I2	Int. Mid	I3	Int. Mid	I1	Int Low
		Spanish Immersion					
		2017		2018		2019	
Grade	N	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level	AAPPL Mean Rating	Prof. Level
3	300	I2	Int. Mid	I2	Int. Mid	N4	Nov High
4		I2	Int. Mid	I3	Int. Mid		
5	242	I3	Int. Mid	I3	Int. Mid	I1	Int Low

AAPPL AND STAMP 4Se PERFORMANCE LEVEL RESULTS FOR CHINESE AND SPANISH IMMERSION

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpretive Reading Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

When analyzing the data by proficiency level, it is clear as to where the increases and decreases occurred among both Chinese and Spanish Immersion students. A characteristic of exemplar language acquisition is to increase by at least one sub-level each year up to the Intermediate-Mid level. At this level, it is likely that students will remain for more than one year. Although there is a difference in performance between the two programs, it is typical for Chinese Immersion students to perform at their current levels in the Interpretive Reading mode. Although there was a percentage increase in students performing at the Novice-Low level, there were also percentage increases for students reaching the Intermediate-Low and Intermediate-Mid ranges. In fact, there was a **7.2 percent** increase in students reaching these two ranges. In addition, this is the first time students scored within the Advanced-Low range (2 students). Reading comprehension development in this character-based language is something that is slower to develop compared to Listening and Speaking. Students are truly at the beginning stages of learning a new challenging language and comprehending the language at the current levels is developmentally appropriate. It is encouraging to see Chinese Immersion students significantly increase the number of students reaching the Intermediate-Mid and High levels and Spanish Immersion students making significant gains at the Intermediate-High range on what is the most challenging test within the STAMP 4Se Test. For Chinese Immersion Third Graders, the national target for Interpretive Reading is Novice-Mid, and for Spanish Immersion students, the target is

Novice-High. Among Fifth Graders, the national target for Chinese Immersion students is Novice-High, and for Spanish Immersion, the target for Fifth Grade students is Intermediate-Low. Most of the students are reaching well beyond the national targets. One area of note for Chinese Immersion teachers to analyze is the number and percentage of student increase within the Novice-Low range. There was a **5.6 percent** increase within this proficiency level compared to 2021, even though there were solid increases and a shift for many students toward the Intermediate-Low and Mid ranges. Among Spanish Immersion students, this was the first time students reached the Advanced-Low range (27 students). There was a clear shift in students moving from the Intermediate-High range to the Advanced-Low range among Spanish Immersion students. This is three sub-levels beyond the national targets and incredibly positive news for Spanish Immersion students as they transition to the middle school program.

Spanish Immersion teachers have been able to move to the next level of comprehension with their students. The incorporation of authentic texts into the curriculum along with students having a firmer understanding of comprehension strategies, such as main idea and details, inferences, and drawing conclusions, has allowed students to significantly improve their performance, resulting in significant movement toward the Intermediate-High range. Comprehension at the Intermediate-Mid to High levels is exhibited by students who can identify the main idea of a passage and have the consistent ability to identify supporting details. Most Chinese Immersion students are at or approaching these levels, and with an increased variety in texts through the language arts review, a positive impact on reading comprehension should result.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpretive Reading Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

To move to the next level, students should be encouraged to frequently read longer passages or simple stories. To deepen their understanding, students should start to look at how the passage is organized and compare what they read to what they already know and to what they expected to find out.

In addition, students would benefit from more opportunities to learn about Chinese or Spanish culture in a more authentic manner. Reading across content areas will help improve students' reading comprehension levels. Studying social studies, science, math, and health themes will help students make real world connections and increase their vocabulary in the target language. According to Immersion staff, it would be beneficial to continue to revise materials to make updates or changes to the translated texts. Also, students will be successful if they can engage in book discussions with partners or in small groups. It will be beneficial to implement more electronic authentic texts over the current translated textbooks. Any opportunities where students are expected to use their target language skills in a variety of settings will allow them to gain proficiency. If students could experience texts that are unfamiliar and lengthier, then they will see gains in reading due to increased stamina and vocabulary exposure.

**Spring 2022 STAMP 4Se Interpretive Reading Performance
Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2022	
	N	Percent
Nov Low	32	17.4
Nov Mid	29	15.8
Nov High	12	6.5
Int Low	60	32.6
Int Mid	39	21.2
Int High	10	5.4
Adv Low	2	1.1
ACTFL Proficiency Level	Spanish Immersion	
	2022	
	N	Percent
Nov Low	3	0.5
Nov Mid	19	3.3
Nov High	31	5.4
Int Low	109	19.1
Int Mid	129	22.6
Int High	251	44.0
Adv Low	27	4.7

**Spring 2021 STAMP 4Se Interpretive Reading Performance
Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2021	
	N	Percent
Nov Low	24	11.8
Nov Mid	55	27.0
Nov High	20	9.8
Int Low	61	29.9
Int Mid	34	16.7
Int High	10	4.9
ACTFL Proficiency Level	Spanish Immersion	
	2021	
	N	Percent
Nov Low	4	0.7
Nov Mid	11	1.9
Nov High	33	5.7
Int Low	101	17.3
Int Mid	112	19.2
Int High	321	55.1

**Spring 2017-2019 AAPPL Interpretive Reading Performance
Chinese and Spanish Number of Students and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	3	1.1	7	2.5	3	1.5
Nov Mid	4	1.4	22	7.9	66	33.7
Nov High	60	21.4	103	36.8	61	31.1
Int Low	97	34.8	97	34.6	54	27.6
Int Mid	85	30.2	46	16.4	12	6.1
Int High	31	11.1	5	1.8	0	0.0
ACTFL Proficiency Level	Spanish Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	2	0.3	1	0.1	1	0.2
Nov Mid	4	0.5	1	0.1	99	18.0
Nov High	49	6.4	99	12.7	130	23.7
Int Low	114	15.0	411	52.8	172	31.3
Int Mid	374	49.1	232	29.8	147	26.8
Int High	218	28.7	34	4.4	0	0.0

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpersonal Listening and Speaking Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

With most Chinese and Spanish Immersion students performing at the Intermediate-Low range and beyond, Immersion students are mainly meeting or surpassing national targets. Among Chinese Immersion Third and Fifth Grade students, **90.2 percent** are meeting or surpassing the target range of Novice-High for Third Grade and Intermediate-Low for Fifth Grade. Among Spanish Immersion students, **90.0 percent** of Third and Fifth Graders are meeting or surpassing these targets. Overall, Chinese and Spanish Immersion students performed similarly to last year. Intermediate-Low to Mid speakers tend to function reactively, for example, by responding to direct questions, requests, or information. However, they can ask a variety of questions, when necessary, to obtain simple information to satisfy basic needs, such as directions, prices, and services. The data indicate that students excel at responding to questions directed toward them and can give accurate responses. A more student-centered approach will help improve students' interpersonal skills.

The results among both the Chinese and Spanish Immersion programs indicate a continued trend of solid performance as seen in 2017 and 2018 on the AAPPL Test. The 2019 school year yielded inconsistent results on the AAPPL Test, making a comparison difficult. However, based on trend performances, Chinese Immersion students have mainly seen results reach the Intermediate-Low range, and Spanish Immersion students have scored mainly at the Intermediate-Low and Mid ranges, marking a solid and consistent trend of successful performances over time. This is a result of Minnetonka

Immersion students having a great deal of experience working on their presentational skills. The students at the upper Intermediate levels can be called upon to perform at the Advanced-level, and they will be able to provide some information. However, they will have difficulty linking ideas and speaking in the correct tense. These students can consistently obtain simple information to help them satisfy basic needs. Intermediate speaking level students can be true conversation partners and have a discussion using simple/original questions and not rely on memorized language. Students performing at this level can truly create with the language to express their own thoughts by stringing together multiple sentences using appropriate sentence connectors as they transition from one thought to the next. Students can also move from remaining in the present tense and begin discussion past and future. This is a key indicator for teachers measuring student performance as students begin to move through the Intermediate levels on their way to being Advanced level speakers.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpersonal Listening and Speaking Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

To move toward the next levels of proficiency, students will need to be exposed to more authentic speaking experiences. Students can present in front of their peers or engage in group conversations. Group discussions in the target language will enable teachers to not only assess students in an authentic manner but also assess them more efficiently. With this approach to authentic assessments, students will be more engaged, and teachers will gain valuable knowledge about their students' oral proficiency levels.

To improve upon their skills, students will need to be given opportunities to not only work on their speaking skills but combine those types of presentational performances with presentational writing. The use of rubrics will help teachers to target their instruction after determining the specific areas of need using carefully developed rubrics that help to measure student performance in an authentic way.

Also, students can be given the opportunity to take part in conversations about themselves on a variety of topics, such as personal interests and daily routines. Students can be encouraged to have these conversations both during and outside of class. Students can continually challenge themselves to apply their listening skills by continually adding follow-up questions or connect what they are hearing to their lives. To improve speaking performance, students can continue to share more details about themselves and go beyond their initial responses. Adding more details will demonstrate a stronger command of the language, ultimately showing more consistency and allowing the student to move toward the next proficiency level.

**Spring 2022 STAMP 4Se Interpersonal Listening and Speaking
Performance Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2022	
	N	Percent
Nov Low	5	2.7
Nov Mid	13	7.1
Nov High	39	21.2
Int Low	112	60.9
Int Mid	11	6.0
Int High	4	2.2
ACTFL Proficiency Level	Spanish Immersion	
	2022	
	N	Percent
Nov Low	21	3.7
Nov Mid	36	6.3
Nov High	111	19.4
Int Low	224	39.2
Int Mid	110	19.3
Int High	47	8.2
Adv Low	1	0.2

**Spring 2021 STAMP 4Se Interpersonal Listening and Speaking
Performance Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2021	
	N	Percent
Nov Low	2	1.0
Nov Mid	8	3.9
Nov High	54	26.5
Int Low	117	57.4
Int Mid	16	7.8
Int High	2	1.0
ACTFL Proficiency Level	Spanish Immersion	
	2021	
	N	Percent
Nov Low	15	2.6
Nov Mid	38	6.5
Nov High	108	18.5
Int Low	204	35.0
Int Mid	158	27.1
Int High	39	6.7

**Spring 2017-2019 AAPPL Interpersonal Listening and Speaking Performance
Chinese and Spanish Number of Students and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	0	0.0	0	0.0	2	1.0
Nov Mid	0	0.0	1	0.4	38	19.2
Nov High	8	2.9	10	3.6	52	26.3
Int Low	159	56.7	173	61.8	69	34.8
Int Mid	73	26.2	80	28.6	37	18.7
Int High	40	14.2	16	5.7	0	0.0
ACTFL Proficiency Level	Spanish Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	0	0.0	2	0.3	8	1.5
Nov Mid	0	0.0	4	0.5	14	2.6
Nov High	13	1.7	13	1.7	55	10.0
Int Low	300	39.4	252	32.4	127	23.2
Int Mid	233	30.6	251	32.3	344	62.8
Int High	215	28.2	254	32.6	0	0.0

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpretive Listening Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

Both Chinese and Spanish Immersion students experienced solid performances. In fact, both student groups saw students reach the Advanced-Low proficiency level, with Chinese Immersion having **7** students reach this mark, while **25** Spanish Immersion students met this level. Most students in both groups performed at the Intermediate-Mid and High levels with Chinese Immersion students showing a slight increase of **8** students performing at the Intermediate-Low level.

Overall, the results also show that most students can understand main ideas and supporting details from both familiar and unfamiliar topics. Comprehension can be understood at a level of some Advanced-level listeners. Research indicates that students could benefit from a variety of ways to listen to the language, such as engaging in conversations with their peers. This shift indicates that most students fully understand main ideas and supporting facts when listening to short passages, simple narratives, and descriptive passages on familiar topics.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Interpretive Listening Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

Students can understand speech dealing with areas of practical need such as highly standardized messages, phrases, or instructions, if the vocabulary has been learned.

According to the data, students may need to hear complex passages more than once. They may also need help with context clues or prior knowledge may help them understand what they hear. To improve results in Interpretive Listening, students should be given opportunities to listen to authentic texts and audio such as radio announcements, book discussions, and speeches in the target language. This type of real world experience will help students move toward proficiency as they are exposed to authentic sources created in the target language and not necessarily translated into the target language from English. Translation can be effective if it is done consistently and without loss of meaning. As stated previously, a new plan for translating texts continues to enhance the translation process. Listening opportunities need to come from a variety of sources that supplement the teacher’s instruction.

All Immersion students would also benefit from listening to their peers and carrying on conversations in small groups. In addition, interpretive listening can be strengthened if students are required to listen for special meaning in an audio presentation or from student presentations.

**Spring 2022 STAMP 4Se Interpretive Listening Performance
Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2022	
	N	Percent
Nov Low	0	0.0
Nov Mid	1	0.5
Nov High	9	4.9
Int Low	32	17.4
Int Mid	55	29.9
Int High	80	43.5
Adv Low	7	3.8
ACTFL Proficiency Level	Spanish Immersion	
	2022	
	N	Percent
Nov Low	1	0.2
Nov Mid	0	0.0
Nov High	19	3.3
Int Low	84	14.7
Int Mid	175	30.6
Int High	267	46.8
Adv Low	25	4.4

**Spring 2021 STAMP 4Se Interpretive Listening Performance
Chinese and Spanish Number of Students
and Percent (Grades 3 and 5)**

ACTFL Proficiency Level	Chinese Immersion	
	2021	
	N	Percent
Nov Low	0	0.0
Nov Mid	1	0.5
Nov High	6	2.9
Int Low	24	11.8
Int Mid	83	40.7
Int High	89	43.6
ACTFL Proficiency Level	Spanish Immersion	
	2021	
	N	Percent
Nov Low	0	0.0
Nov Mid	2	0.3
Nov High	16	2.7
Int Low	79	13.6
Int Mid	152	26.1
Int High	334	57.3

Spring 2017-2019 AAPPL Interpretive Listening Performance Chinese and Spanish Number of Students and Percent (Grades 3 and 5)

ACTFL Proficiency Level	Chinese Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	0	0.0	0	0.0	0	0.0
Nov Mid	0	0.0	0	0.0	53	26.5
Nov High	3	1.0	7	2.5	63	31.5
Int Low	38	13.5	34	12.1	63	31.5
Int Mid	143	51.1	89	31.8	21	10.5
Int High	96	34.4	150	53.6	0	0.0
ACTFL Proficiency Level	Spanish Immersion					
	2017		2018		2019	
	N	Percent	N	Percent	N	Percent
Nov Low	0	0.0	6	0.8	0	0.0
Nov Mid	0	0.0	0	0.0	107	19.5
Nov High	10	1.3	30	3.9	141	25.6
Int Low	70	9.2	243	31.2	195	35.5
Int Mid	470	61.7	333	42.8	107	19.5
Int High	212	27.8	166	21.3	0	0.0

Data Summary: Spring 2017-2019 & 2021-22 ALL AAPPL and STAMP 4Se Sub-Tests Chinese and Spanish Immersion Gender Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels (Grades 3 and 5)

Data indicate that Females out-performed Males in five of six areas measure with the most significant differences occurring on the Interpretive Reading Test for both Spanish and Chinese Immersion students. This is consistent with previous years and within the English program as well. There were two increases of significance among the populations, and both were observed within the Spanish Immersion program among Males on the Interpretive Listening and Interpersonal Listening and Speaking Tests. With increases of **0.3 points** on both tests, the increases are significant. All other decreases for both student groups were between **0.1** and **0.2 points** and are not considered to be statistically significant. Data indicate that students are performing typically compared to those years, showing that students continue to reach high proficiency levels regardless the Pandemic. Teachers and students should be commended for their efforts.

Recommendations: Spring 2017-2019 & 2021-22 ALL AAPPL and STAMP 4Se Sub-Tests Chinese and Spanish Immersion Gender Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels (Grades 3 and 5)

To continue to grow, both Spanish and Chinese Immersion students would benefit from activities that promote Interpretive Listening and Reading development. Students could listen to plays, speeches, or advertisements. Teachers could assess students' knowledge of what they heard or interpreted from the listening experience. Both Spanish and Chinese Immersion students will benefit from teachers utilizing an integrated performance assessment model. At this time, Kindergarten through Eighth Grade teachers have implemented this model. Integrated Performance Assessment (IPA) provides teachers with the knowledge they need of student performance in all four skill areas: *Reading, Writing, Listening and Speaking*. This model also helps inform teachers for them to provide a more balanced approach to instruction utilizing each of the three modes: *Interpersonal, Interpretive, and Presentational*. K-8 immersion teachers have continually worked to revise their IPAs to align more closely with assessments. Additional revisions may be warranted as elementary Immersion teachers become more familiar with the STAMP 4Se Test. This allows the IPA to provide teachers the formative information throughout the school year to make informed decisions and provide balanced instruction.

In addition to balanced instruction, students would benefit from participating in small group dialogue to improve their interpersonal speaking and listening skills, and with more exposure to more challenging read aloud and silent reading opportunities, students will be able to strengthen their comprehension skills for both Interpretive Reading and Interpretive Listening.

Spring 2022 ALL STAMP 4Se Sub-Tests Chinese and Spanish Immersion Gender Comparison by STAMP 4Se Mean Score and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Males (N=92) (50%)		Females (N=92) (50%)		Males (N=264) (46.2%)		Females (N=307) (53.8%)	
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Interpretive Reading	3.2	Nov High	3.7	Int Low	4.9	Int Mid	5.3	Int Mid
Interpersonal Listening/Speaking	3.5	Int Low	3.8	Int Low	4.1	Int Low	4.2	Int Low
Interpretive Listening	5.1	Int Mid	5.3	Int Mid	5.6	Int High	5.4	Int Mid

Spring 2021 ALL STAMP 4Se Sub-Tests Chinese and Spanish Immersion Gender Comparison by STAMP 4Se Mean Score and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Males (N=89) (43.6%)		Females (N=115) (56.4%)		Males (N=281) (48.2%)		Females (N=302) (51.8%)	
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Interpretive Reading	3.0	Nov High	3.5	Int Low	5.1	Int Mid	5.4	Int Mid
Interpersonal Listening/Speaking	3.6	Int Low	3.8	Int Low	3.8	Int Low	4.3	Int Low
Interpretive Listening	5.2	Int Mid	5.3	Int Mid	5.3	Int Mid	5.5	Int High

Spring 2019 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Gender Comparison by AAPPL Rating and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Males (N=94) (47%)		Females (N=106) (53%)		Males (N=271) (49%)		Females (N=279) (51%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	N4	Nov. High	N4	Nov. High	I1	Int. Low	I1	Int. Low
Interpersonal Listening/Speaking	N4	Nov. High	I1	Int. Low	I2	Int. Mid	I3	Int. Mid
Interpretive Listening	N4	Nov. High	I1	Int. Low	I1	Int. Low	I1	Int. Low

Spring 2018 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Gender Comparison by AAPPL Rating and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Males (N=126) (45%)		Females (N=154) (55%)		Males (N=383) (49%)		Females (N=395) (51%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	N4	Int. Low	N4	Int. Low	11	Int. Low	11	Int. Low
Interpersonal Listening/Speaking	11	Int. Low	11	Int. Low	12	Int. Mid	13	Int. Mid
Interpretive Listening	13	Int. Mid	13	Int. Mid	12	Int. Mid	12	Int. Mid

Spring 2017 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Gender Comparison by AAPPL Rating and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Males (N=130) (46%)		Females (N=150) (54%)		Males (N=375) (49%)		Females (N=386) (51%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	11	Int. Low	11	Int. Low	12	Int. Mid	13	Int. Mid
Interpersonal Listening/Speaking	11	Int. Low	12	Int. Mid	12	Int. Mid	13	Int. Mid
Interpretive Listening	12	Int. Mid	13	Int. Mid	13	Int. Mid	13	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 ALL AAPPL and STAMP 4Se Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels (Grades 3 and 5)

Data indicate that there is virtually no difference in performance between Open-Enrolled and Resident students on the STAMP 4Se. In fact, there has not been a significant difference in student performances for the past several years. Neither of the two student groups contributed significantly more or less to the overall average performances of their respective grade levels or language program.

Recommendations: Spring 2017-2019 & 2021-22 ALL AAPPL and STAMP 4Se Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels (Grades 3 and 5)

To move students to the next levels of proficiency, Chinese and Spanish Immersion students will need to be exposed to a wider variety of texts to help increase their vocabulary. Chinese Immersion students need to focus on Interpersonal Speaking through presentations and group activities that involve conversations among peers in the target language. These expectations can be set for informal settings by encouraging students to speak in the target language at times outside of the class period where it is formally required.

For Interpretive Reading improvement, students will need more time to read silently at their independent level and listen to the teacher read passages at their instructional level. This will help build fluency and vocabulary, which are pre-requisites to increasing comprehension. Ultimately, improvement across all levels will take a more balanced approach to instruction and formative assessment to ensure that all students are participating in experiences that address Reading, Listening, and Speaking skills.

Spring 2022 ALL STAMP 4Se Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by STAMP 4Se Mean Score and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Open-Enrolled (N=85) (46.2%)		Resident (N=99) (53.8%)		Open-Enrolled (N=198) (34.7%)		Resident (N=373) (65.3%)	
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Interpretive Reading	3.4	Nov High	3.4	Nov High	5.1	Int Mid	5.1	Int Mid
Interpersonal Listening/Speaking	3.7	Int Low	3.7	Int Low	3.9	Int Low	3.9	Int Low
Interpretive Listening	5.1	Int Mid	5.3	Int Mid	5.2	Int Mid	5.3	Int Mid

Spring 2021 ALL STAMP 4Se Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by STAMP 4Se Mean Score and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Open-Enrolled (N=105) (51.5%)		Resident (N=99) (48.5%)		Open-Enrolled (N=191) (32.8%)		Resident (N=392) (67.2%)	
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Interpretive Reading	3.2	Nov High	3.4	Nov Mid	5.2	Int Mid	5.2	Int Mid
Interpersonal Listening/Speaking	3.8	Int Low	3.7	Int Low	4.0	Int Low	4.0	Int Low
Interpretive Listening	5.2	Int Mid	5.3	Int Mid	5.4	Int Mid	5.4	Int Mid

Spring 2019 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by AAPPL Rating and Proficiency Levels (Grades 3 and 5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Open-Enrolled (N=94) (47%)		Resident (N=106) (53%)		Open-Enrolled (N=182) (33%)		Resident (N=368) (67%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	N4	Nov. High	N4	Nov. High	I1	Int. Low	I1	Int. Low
Interpersonal Listening/Speaking	I1	Int. Low	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Interpretive Listening	N4	Nov. High	N4	Nov. High	I1	Int. Low	I1	Int. Low

Spring 2018 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by AAPPL Rating and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Open-Enrolled (N=128) (46%)		Resident (N=152) (54%)		Open-Enrolled (N=259) (33%)		Resident (N=519) (67%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	N4	Int. Low	N4	Int. Low	I1	Int. Low	I1	Int. Low
Interpersonal Listening/Speaking	I1	Int. Low	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Interpretive Listening	I3	Int. Mid	I3	Int. Mid	I2	Int. Mid	I2	Int. Mid

Spring 2017 ALL AAPPL Sub-Tests Chinese and Spanish Immersion Open-Enrollment and Resident Comparison by AAPPL Rating and Proficiency Levels (Grades 3-5)

Mode of Communication	Chinese Immersion				Spanish Immersion			
	Open-Enrolled (N=131) (47%)		Resident (N=149) (53%)		Open-Enrolled (N=242) (32%)		Resident (N=519) (68%)	
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Interpretive Reading	I1	Int. Low	I3	Int. Mid	I2	Int. Mid	I2	Int. Mid
Interpersonal Listening/Speaking	I2	Int. Mid	I2	Int. Mid	I2	Int. Mid	I3	Int. Mid
Interpretive Listening	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid

STAMP 4Se and AAPPL BUILDING LEVEL RESULTS FOR CHINESE AND SPANISH IMMERSION

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

Data show that Scenic Heights Third and Fifth Grade Chinese Immersion students performed solidly on the Interpretive Reading Test. In addition, it is important to note that Fifth Graders from Excelsior are now reaching the Intermediate-Low level and have significantly closed the gap between the two schools at both Third and Fifth Grades. Excelsior students showed an increase in average score performance for both grade levels with a statistically significant increase experienced among Fifth Graders, increasing from **3.3 points** to **3.7 points**. It is difficult to compare results from one year to the next during this Pandemic, and it is also difficult to compare results from two different tests, as stated previously. It is encouraging to see that on average, both sites saw strong results this year. The Interpretive Reading mode is typically the most challenging of the three assessed areas and is typically an area of focus, however, during the Pandemic Interpersonal Listening and Speaking skills has been more challenging compared to typical years for Immersion students as noted in the next section.

According to ACTFL research, the greatest factor in distinguishing between Novice-High performance and Intermediate-Low performance is consistency. In addition, results of this assessment are a snapshot of student performance at the time of testing. Staffing and collaboration among staff play a key role in the continued improvement of the Chinese Immersion program, and it will be important for staff to collaborate closely on instruction and assessment strategies.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

For students to improve upon their consistency in performance within the Interpretive Reading mode, students will need more activities focused on requiring them to identify supporting details. This can be done in their reading and writing. A balanced literacy approach to Language Arts instruction will help the students make connections between what they read and what they write. Students can also be given opportunities to re-read text that is familiar to them, but during the second or third time of reading the text, they can be given a different purpose for reading. Students can identify picture cues in the story or focus on identifying details that support the main idea. The use of graphic organizers can also help to develop this skill, this helping them to strengthen their level of performance.

Nationally, according to the latest research, students in Immersion programs should be expected to reach the Novice-High range for Interpretive Reading by the end of Fifth

Grade, and students at both Chinese Immersion sites have performed well within this range.

Spring 2022 STAMP 4Se Chinese Immersion Building Comparison by STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

School	Chinese Interpretive Reading			
	Grade 3		Grade 5	
	<i>EX</i> (N=44)	<i>SH</i> (N=50)	<i>EX</i> (N=31)	<i>SH</i> (N=55)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=75)	2.9	Nov High	3.7	Int Low
Scenic Heights (N=105)	3.0	Nov High	4.0	Int Low

Spring 2021 STAMP 4Se Chinese Immersion Building Comparison by STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

School	Chinese Interpretive Reading			
	Grade 3		Grade 5	
	<i>EX</i> (N=42)	<i>SH</i> (N=55)	<i>EX</i> (N=50)	<i>SH</i> (N=57)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=92)	2.7	Nov High	3.3	Nov High
Scenic Heights (N=112)	3.1	Nov High	3.8	Int Low

Spring 2019 AAPPL Chinese Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpretive Reading

School	Chinese Interpretive Reading			
	Grade 3		Grade 5	
	<i>EX</i> (N=53)	<i>SH</i> (N=66)	<i>EX</i> (N=38)	<i>SH</i> (N=43)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=91)	N4	Nov. High	N4	Nov. High
Scenic Heights (N=109)	N4	Nov. High	I1	Int. Low

**Spring 2018 AAPPL Chinese Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpretive Reading**

School	Chinese Interpretive Reading					
	Grade 3		Grade 4		Grade 5	
	<i>EX (N=45)</i>	<i>SH (N=50)</i>	<i>EX (N=39)</i>	<i>SH (N=47)</i>	<i>EX (N=41)</i>	<i>SH (N=58)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=125)	N3	Nov. High	N4	Nov. High	N4	Nov. High
Scenic Heights (N=155)	N4	Int. Low	I1	Int. Low	I1	Int. Low

**Spring 2017 AAPPL Chinese Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpretive Reading**

School	Chinese Interpretive Reading					
	Grade 3		Grade 4		Grade 5	
	<i>EX (N=38)</i>	<i>SH (N=50)</i>	<i>EX (N=45)</i>	<i>SH (N=59)</i>	<i>EX (N=40)</i>	<i>SH (N=47)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=123)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Scenic Heights (N=156)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpersonal Listening and Speaking

Both Excelsior and Scenic Heights students experienced similar performances on the Interpersonal Listening and Speaking Test compared to last year, with Scenic Heights dropping in average score by 0.2 points among Third Graders. This drop placed Third Graders at Scenic Heights on sub-level lower than previous years, not placing them at the Novice-High Level. Novice-High is the national target and most students performed beyond this level of proficiency. It is difficult to understand how the COVID restrictions over most of the past two years have impacted performances, however students have kept up with national targets despite the different learning environments, new test, and other restrictions. In fact, Third Graders at Excelsior, on average surpassed national targets by one sub-level by reaching the Intermediate-Low range. Nationally, it should be

expected that by the time students reach the end of Fifth Grade, they should reach the Intermediate-Low level. Excelsior and Scenic Heights Fifth Graders maintained the same level of proficiency at Intermediate-Low. Again, students reaching the Intermediate-Low range indicates a strong performance compared to national targets, which is exceptional considering what students have endured much of the past two school years

Students performing at the Intermediate level can handle basic uncomplicated language needed to take care of daily situations. They do better with people who are accustomed to non-native speakers of the language. Typically, Intermediate speakers speak mainly in the present tense, and they can add some language using the past and future tenses. Although their grammar may be flawed, there is sufficient accuracy when communicating at the sentence level.

With the STAMP 4Se Test, Interpersonal Listening and Speaking is expected to be an area of strength for students in immersion programs, because they spend most of their day using the target language. It is expected that Interpersonal Listening and Speaking performances will trend upward in future years with the distancing and mask requirements being lifted.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpersonal Listening and Speaking

For students to reach the upper Intermediate ranges, students will need to be able to add more detail to the thoughts they share about themselves. In addition, when they ask questions, they need to be able to ask follow-up questions depending on what the speaker shares. Carrying on a conversation at the Intermediate-High and Advanced-Low levels will require students to carry on a true two-way conversation with an equal amount of give and take during the conversations. Students can practice this by adding thoughtful comments and showing an interest in what a speaker is sharing with them. Many of these conversations can occur during informal times throughout the school day. Encouragement by teachers for students to carry on conversations in the target language during informal times throughout the school day such as lunch and recess is one step toward making the Immersion experience more real for students. Experts share that some teachers provide incentives for students who use the target language outside of the classroom. Like other behaviors, students can be encouraged and positively reinforced for actions that teachers would like to see them exhibit to aid them in their growth in a particular area. In addition, teachers can manufacture scenarios in class for students to have book discussions or reflection opportunities with each other tied to what they are learning across all subject areas. This will take an effort from teachers to continue in the development of a student centered classroom. According to the research, providing opportunities for students to practice speaking the language will foster their metalinguistic growth. As metalinguistic awareness grows, children begin to recognize that statements may have a literal meaning and an implied meaning. They begin to make more frequent and sophisticated use of metaphors. According to research from San Diego State University, between the ages of six and eight in their native language, most children begin

to expand upon their metalinguistic awareness and start to recognize literary elements such as irony and sarcasm.

**Spring 2022 STAMP 4Se Chinese Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for
Interpersonal Listening and Speaking**

School	Chinese Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
	<i>EX</i> (N=44)	<i>SH</i> (N=50)	<i>EX</i> (N=31)	<i>SH</i> (N=55)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=75)	3.5	Int Low	3.6	Int Low
Scenic Heights (N=105)	3.4	<i>Nov High</i>	4.0	Int Low

**Spring 2021 STAMP 4Se Chinese Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for
Interpersonal Listening and Speaking**

School	Chinese Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
	<i>EX</i> (N=42)	<i>SH</i> (N=55)	<i>EX</i> (N=50)	<i>SH</i> (N=57)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=92)	3.5	Int Low	3.7	Int Low
Scenic Heights (N=112)	3.6	Int Low	4.0	Int Low

**Spring 2019 AAPPL Chinese Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpersonal Listening and Speaking**

School	Chinese Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
	<i>EX</i> (N=53)	<i>SH</i> (N=66)	<i>EX</i> (N=38)	<i>SH</i> (N=43)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=91)	N4	Nov. High	I1	Int. Low
Scenic Heights (N=109)	I1	Int. Low	I2	Int. Mid

**Spring 2018 AAPPL Chinese Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpersonal Listening and Speaking**

	Chinese Interpersonal Listening and Speaking					
	Grade 3		Grade 4		Grade 5	
School	<i>EX (N=45)</i>	<i>SH (N=50)</i>	<i>EX (N=39)</i>	<i>SH (N=47)</i>	<i>EX (N=41)</i>	<i>SH (N=58)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=125)	N4	Int. Low	I1	Int. Low	I1	Int. Low
Scenic Heights (N=155)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid

**Spring 2017 AAPPL Chinese Immersion Building Comparison by AAPPL Rating
and Proficiency Levels for Interpersonal Listening and Speaking**

	Chinese Interpersonal Listening and Speaking					
	Grade 3		Grade 4		Grade 5	
School	<i>EX (N=38)</i>	<i>SH (N=50)</i>	<i>EX (N=45)</i>	<i>SH (N=59)</i>	<i>EX (N=40)</i>	<i>SH (N=47)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=123)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Scenic Heights (N=156)	I1	Int. Low	I2	Int. Mid	I3	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

According to national targets, students in Chinese Immersion programs should be expected to reach the Novice-High range by the end of Third Grade and the Intermediate-Low range for Interpretive Listening by the end of Fifth Grade. Third Graders at Excelsior and Scenic Heights both reached the Intermediate-Mid range, surpassing national targets for end of Fifth Grade. Fifth Graders at Excelsior performed at the Intermediate-Mid level as well, with Grade 5 students at Scenic Heights reaching the Intermediate-High level. As stated previously, it is common for students to score within the Intermediate-Mid range for multiple years. Both groups of students performed remarkably well, and like middle school student performance on the STAMP 4S Test, and the strong two year results

should serve as solid predictors of future performances of elementary and middle school students.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Chinese Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

A key factor in strengthening Interpretive Listening skills comes from the teacher. It is more likely that a teacher-centered classroom will yield positive results for students in Interpretive-Listening. Other ways to strengthen this skill can come from outside sources. Teachers could bring guest speakers into their classroom, have students listen to audio of advertisements, speeches, or books on tape. Teachers have access to many different types of technology to help enhance Interpretive Listening skills. Teachers can utilize online resources to provide authentic Interpretive Listening opportunities for students. Using online resources as well as print resources, students can strengthen their skills in this area by being provided activities that require them to listen and interpret meaning from a certain topic of study. By using the read aloud approach, students can participate in thoughtful note-taking exercises to show that they can interpret meaning from the topic. For example, students can identify main characters in a story, or they can identify the setting. They can describe how the author uses transition words or explain the author’s voice or purpose. What teachers use to help students strengthen their Interpretive Reading skills can also be modified to improve Interpretive Listening skills.

Spring 2022 STAMP 4Se Chinese Immersion Building Comparison by STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

School	Chinese Interpretive Listening			
	Grade 3		Grade 5	
	<i>EX</i> (N=44)	<i>SH</i> (N=50)	<i>EX</i> (N=31)	<i>SH</i> (N=55)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=75)	4.9	Int Mid	5.1	Int Mid
Scenic Heights (N=105)	5.0	Int Mid	5.6	Int High

**Spring 2021 STAMP 4Se Chinese Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening**

School	Chinese Interpretive Listening			
	Grade 3		Grade 5	
	<i>EX</i> (N=42)	<i>SH</i> (N=55)	<i>EX</i> (N=50)	<i>SH</i> (N=57)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Excelsior (N=92)	4.9	Int Mid	5.3	Int Mid
Scenic Heights (N=112)	5.1	Int Mid	5.6	Int High

**Spring 2019 AAPPL Chinese Immersion Building Comparison by AAPPL Rating
and Proficiency Levels for Interpretive Listening**

School	Chinese Interpretive Listening			
	Grade 3		Grade 5	
	<i>EX</i> (N=53)	<i>SH</i> (N=66)	<i>EX</i> (N=38)	<i>SH</i> (N=43)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=91)	N4	Nov. High	N4	Nov. High
Scenic Heights (N=109)	N4	Nov. High	I1	Int. Low

**Spring 2018 AAPPL Chinese Immersion Building Comparison by AAPPL Rating
and Proficiency Levels for Interpretive Listening**

School	Chinese Interpretive Listening					
	Grade 3		Grade 4		Grade 5	
	<i>EX</i> (N=45)	<i>SH</i> (N=50)	<i>EX</i> (N=39)	<i>SH</i> (N=47)	<i>EX</i> (N=41)	<i>SH</i> (N=58)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=125)	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid
Scenic Heights (N=155)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid

Spring 2017 AAPPL Chinese Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpretive Listening

	Chinese Interpretive Listening					
	Grade 3		Grade 4		Grade 5	
School	<i>EX (N=38)</i>	<i>SH (N=50)</i>	<i>EX (N=45)</i>	<i>SH (N=59)</i>	<i>EX (N=40)</i>	<i>SH (N=47)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Excelsior (N=123)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid
Scenic Heights (N=156)	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

Nationally, students in Spanish Immersion programs should be expected to reach the Intermediate-Low range for Interpretive Listening, Interpretive Reading, and for Interpersonal Speaking and Listening by the end of Fifth Grade. Students in Minnetonka’s Spanish Immersion program are performing beyond these expectations by the end of Fifth Grade according to STAMP 4Se results.

Interpretive Reading results show that Spanish Immersion students are performing at or beyond their same grade counterparts from a year ago, with a few exceptions. Deephaven Third and Fifth Graders each experienced a decrease of **0.3 points**, which is considered statistically significant dropping by one sub-level for Third and Fifth Grades. In addition, Clear Springs Third Grade students saw a drop of **0.3 points** as well, yet maintaining the proficiency level of Intermediate-Mid.

All other areas either maintained or experienced fluctuations in results that were not statistically significant. Overall performances indicate that all grades and student populations on average performed beyond national expectations for their respective grade levels.

At Grades 3-5, students receive rich language experiences provided by an experienced staff. Staff try to incorporate as many authentic texts as possible, however, they plan to use more as additional materials become available.

In addition, Spanish teachers have worked hard to ensure that students are inferring and interpreting meaning from the text just as best practices in reading instruction would suggest. Because of this, students are performing at high levels with their reading comprehension.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

For students to reach the upper levels of the Intermediate range with consistency on the STAMP 4Se, students will need to earn a score of 6. Students at this level fully understand main ideas and supporting facts in short passages, simple narratives, and descriptive passages on familiar topics. STAMP 4Se assesses students on both familiar and unfamiliar topics that they may be exposed to at school or outside of school. Students will need to read more complex passages and frequently read longer passages, stories, and news reports in the target language to increase their level of consistency for comprehension. Teachers can check for higher level thinking and challenge students to add new insights to what they are reading.

As students move to Sixth Grade, they will need to take the STAMP 4S practice test to familiarize themselves with the different assessment. The STAMP 4S is adaptive, proficiency test in that students will be assessed mainly unfamiliar topics resulting in a *Proficiency* rating that is also aligned to the ratings of the STAMP 4Se.

Teachers need more opportunities to use authentic texts and will be given more access to materials as needed.

Spring 2022 STAMP 4Se Spanish Immersion Building Comparison by STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading

School	Spanish Interpretive Reading			
	Grade 3		Grade 5	
	CS (N=82)	DH (N=53)	CS (N=84)	DH (N=55)
	GR (N=76)	MW (N=89)	GR (N=52)	MW (N=77)
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=166)	4.5	Int Mid	5.5	Int High
Deephaven (N=108)	4.2	Int Low	5.4	Int Mid
Groveland (N=128)	4.6	Int Mid	5.6	Int High
Minnewashta (N=166)	4.8	Int Mid	5.7	Int High

**Spring 2021 STAMP 4Se Spanish Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for Interpretive Reading**

School	Spanish Interpretive Reading			
	Grade 3		Grade 5	
	<i>CS (N=80)</i>	<i>DH (N=64)</i>	<i>CS (N=70)</i>	<i>DH (N=58)</i>
	<i>GR (N=66)</i>	<i>MW (N=75)</i>	<i>GR (N=74)</i>	<i>MW (N=80)</i>
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=150)	4.8	Int Mid	5.4	Int Mid
Deephaven (N=122)	4.5	Int Mid	5.7	Int High
Groveland (N=140)	4.4	Int Low	5.7	Int High
Minnewashta (N=155)	4.9	Int Mid	5.9	Int High

**Spring 2019 AAPPL Spanish Immersion Building Comparison by AAPPL Rating
and Proficiency Levels for Interpretive Reading**

School	Spanish Interpretive Reading			
	Grade 3		Grade 5	
	<i>CS (N=72)</i>	<i>DH (N=65)</i>	<i>CS (N=47)</i>	<i>DH (N=60)</i>
	<i>GR (N=77)</i>	<i>MW (N=86)</i>	<i>GR (N=62)</i>	<i>MW (N=73)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=119)	N4	Nov. High	I1	Int. Low
Deephaven (N=125)	I1	Int. Low	I1	Int. Low
Groveland (N=139)	N4	Nov. High	I1	Int. Low
Minnewashta (N=159)	I1	Int. Low	I2	Int. Mid

Spring 2018 AAPPL Spanish Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpretive Reading

School	Spanish Interpretive Reading					
	Grade 3		Grade 4		Grade 5	
	<i>CS</i> (N=74)	<i>DH</i> (N=49)	<i>CS</i> (N=49)	<i>DH</i> (N=59)	<i>CS</i> (N=63)	<i>DH</i> (N=59)
	<i>GR</i> (N=64)	<i>MW</i> (N=77)	<i>GR</i> (N=62)	<i>MW</i> (N=72)	<i>GR</i> (N=65)	<i>MW</i> (N=63)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=186)	I1	Int. Low	I1	Int. Low	I1	Int. Low
Deephaven (N=167)	N4	Int. Low	I1	Int. Low	I1	Int. Low
Groveland (N=191)	I1	Int. Low	I1	Int. Low	I2	Int. Mid
Minnewashta (N=212)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid

Spring 2017 AAPPL Spanish Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpretive Reading

School	Spanish Interpretive Reading					
	Grade 3		Grade 4		Grade 5	
	<i>CS</i> (N=50)	<i>DH</i> (N=62)	<i>CS</i> (N=65)	<i>DH</i> (N=59)	<i>CS</i> (N=50)	<i>DH</i> (N=57)
	<i>GR</i> (N=63)	<i>MW</i> (N=74)	<i>GR</i> (N=66)	<i>MW</i> (N=67)	<i>GR</i> (N=56)	<i>MW</i> (N=65)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=165)	I1	Int. Low	I2	Int. Mid	I3	Int. Mid
Deephaven (N=178)	I1	Int. Low	I2	Int. Mid	I3	Int. Mid
Groveland (N=185)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid
Minnewashta (N=206)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpersonal Listening and Speaking

Typically, students earn higher scores on the Interpersonal Listening and Speaking Test, and the results may have been impacted by the Pandemic, in that students' speaking experiences were limited based on COVID protocols. Minnetonka Third and Fifth Graders met the national targets at their respective grade levels, yet some scores dipped in some areas compared to previous years.

At Clear Springs, Third Graders experienced a statistically significant drop in average score, declining by 0.6 points compared to Third Graders from a year ago. The only other statistically significant drop in average score was experienced among Fifth Graders at Deephaven, decreasing from 4.3 points last year to 4.0 points this year. However, Deephaven Third Graders saw a statistically significant increase of 0.3 points compared to last year. Overall performances for each of the three schools was solid and somewhat predictable due to what was observed last year in similar learning conditions. Interpersonal Listening and Speaking scores are expected to improve as historically, this is a strong skill for students in the Minnetonka Immersion program.

Staff work diligently to provide experiences for students to negotiate the meaning of what they are trying to communicate. Teachers encourage students to use the language as much as possible to gather the information they need. Teachers work hard to help students not have fossilization errors, in that they reinforce good language habits among students, rather than allowing the same errors to occur over time, which reinforces common misuse of the language.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpersonal Listening and Speaking

To move students from the lower Intermediate ranges to the upper ranges, teachers need to have students take advantage of every chance to participate in conversations on a variety of topics about themselves, their conversation partner, and anything related to their daily routine or interests. If students can do this both in class and outside of class, they will maximize their experience in the target language. To stretch students further, teachers can expect students to add transition words such as "because," "but," and "when" since this will give students the opportunity to elaborate more on certain topics. In addition, students can practice adding words to be more specific in describing things such as using quality, quantity, and size or to accomplish what they need using when or in what order. Students should be encouraged to think about how events unfold in a story and try to tell it. They should use words like "then," "so," "afterwards," and "finally" and ask more specific questions to get more detailed information.

This is a simple and effective way to increase the rigor toward reaching the upper levels of oral proficiency for students.

**Spring 2022 STAMP 4Se Spanish Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for
Interpersonal Listening and Speaking**

	Spanish Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
School	<i>CS (N=82)</i>	<i>DH (N=53)</i>	<i>CS (N=84)</i>	<i>DH (N=55)</i>
	<i>GR (N=76)</i>	<i>MW (N=89)</i>	<i>GR (N=52)</i>	<i>MW (N=77)</i>
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=166)	3.2	<i>Nov High</i>	4.1	Int Low
Deephaven (N=108)	3.5	Int Low	4.0	Int Low
Groveland (N=128)	3.5	Int Low	4.7	Int Mid
Minnewashta (N=166)	3.8	Int Low	4.5	Int Mid

**Spring 2021 STAMP 4Se Spanish Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for
Interpersonal Listening and Speaking**

	Spanish Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
School	<i>CS (N=80)</i>	<i>DH (N=64)</i>	<i>CS (N=70)</i>	<i>DH (N=58)</i>
	<i>GR (N=66)</i>	<i>MW (N=75)</i>	<i>GR (N=74)</i>	<i>MW (N=80)</i>
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=150)	3.8	Int Low	4.2	Int Low
Deephaven (N=122)	3.2	Nov High	4.3	Int Low
Groveland (N=140)	3.5	Int Low	4.8	Int Mid
Minnewashta (N=155)	3.8	Int Low	4.4	Int Low

Spring 2019 AAPPL Spanish Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpersonal Listening and Speaking

School	Spanish Interpersonal Listening and Speaking			
	Grade 3		Grade 5	
	<i>CS (N=72)</i>	<i>DH (N=65)</i>	<i>CS (N=47)</i>	<i>DH (N=60)</i>
	<i>GR (N=77)</i>	<i>MW (N=86)</i>	<i>GR (N=62)</i>	<i>MW (N=73)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=119)	13	Int. Mid	13	Int. Mid
Deephaven (N=125)	12	Int. Mid	12	Int. Mid
Groveland (N=139)	12	Int. Mid	13	Int. Mid
Minnewashta (N=159)	12	Int. Mid	13	Int. Mid

Spring 2018 AAPPL Spanish Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpersonal Listening and Speaking

School	Spanish Interpersonal Listening and Speaking					
	Grade 3		Grade 4		Grade 5	
	<i>CS (N=74)</i>	<i>DH (N=49)</i>	<i>CS (N=49)</i>	<i>DH (N=59)</i>	<i>CS (N=63)</i>	<i>DH (N=59)</i>
	<i>GR (N=64)</i>	<i>MW (N=77)</i>	<i>GR (N=62)</i>	<i>MW (N=72)</i>	<i>GR (N=65)</i>	<i>MW (N=63)</i>
	Mean AAPPL Rating	Prof. Level	Mean AAPPL Rating	Prof. Level	Mean AAPPL Rating	Prof. Level
Clear Springs (N=186)	12	Int. Mid	13	Int. Mid	13	Int. Mid
Deephaven (N=167)	12	Int. Mid	12	Int. Mid	13	Int. Mid
Groveland (N=191)	12	Int. Mid	12	Int. Mid	12	Int. Mid
Minnewashta (N=212)	12	Int. Mid	13	Int. Mid	13	Int. Mid

Spring 2017 AAPPL Spanish Immersion Building Comparison by AAPPL Rating and Proficiency Levels for Interpersonal Listening and Speaking

School	Spanish Interpersonal Listening and Speaking					
	Grade 3		Grade 4		Grade 5	
	<i>CS (N=50)</i>	<i>DH (N=62)</i>	<i>CS (N=65)</i>	<i>DH (N=59)</i>	<i>CS (N=50)</i>	<i>DH (N=57)</i>
<i>GR (N=63)</i>	<i>MW (N=74)</i>	<i>GR (N=66)</i>	<i>MW (N=67)</i>	<i>GR (N=56)</i>	<i>MW (N=65)</i>	
	Mean AAPPL Rating	Prof. Level	Mean AAPPL Rating	Prof. Level	Mean AAPPL Rating	Prof. Level
Clear Springs (N=164)	12	Int. Mid	13	Int. Mid	12	Int. Mid
Deephaven (N=151)	11	Int. Low	13	Int. Mid	12	Int. Mid
Groveland (N=147)	11	Int. Low	12	Int. Mid	13	Int. Mid
Minnewashta (N=197)	12	Int. Mid	12	Int. Mid	13	Int. Mid

Data Summary: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

Minnetonka Spanish Immersion students well out-paced the national targets by two sub-levels now reaching the Intermediate-High range by the end of Fifth Grade and the Intermediate-Mid range by the end of Third Grade. Third Graders out-paced Third Graders from 2019 by two sub-levels at three of the four sites. Groveland Third Graders surpassed their same grade counterparts by **0.2 points**, with all four sites' Third Graders reaching the Intermediate-Mid level. There were no statistically significant increases or decreases across the sites and grade levels with one exception. The only exception was among Deephaven Fifth Graders dropped by **0.3 points**; however, this group of students still maintained a proficiency level of Intermediate-High, which is two sub-levels beyond the national target of Intermediate-Low.

At the Intermediate-Mid range, students are ready to move toward more complex passages and shift toward the upper Intermediate proficiency levels. With more complex passages, students may need to draw on prior knowledge or use context clues to understand the full meaning of the text. To move beyond the Intermediate-High range, students need to maintain consistency with the skills demonstrated at the Intermediate-High range. Minnetonka Spanish Immersion students are performing well beyond the national targets, surpassing them by two sub-levels. This is consistent with the results seen on the STAMP 4S, in that students excelled on the Listening Test during the Pandemic. The consistency in performance among students at all four sites is encouraging and a sign that the immersion program is strong districtwide. Although the overall ratings show consistency, there is a lot that school staff can learn from the individual data of students. When analyzing individual student results, staff will be able

to make decisions about instruction and provide either small group or individual instruction targeting students' needs.

Recommendations: Spring 2017-2019 & 2021-22 AAPPL and STAMP 4Se Spanish Immersion Building Comparison by AAPPL Rating/STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

For students to reach the upper levels of the Intermediate range and beyond, teachers can provide read aloud experiences that contain longer passages and stories. The complexity of the text is important, because the more complex the text is, then the teacher and students will be able to ask more complex questions and give more complex answers. Students will need to frequently listen to longer passages, stories, and even news reports. This is an opportunity for teachers to weave in more authentic text to the lesson, either from print or online resources. Students should be given time to compare what they learn from their listening experience to their current lives and be able to respond in a way that is detailed either through their speech or in their writing. Adding the writing component to what students hear, will help take them to the next proficiency level and prepare them for the next grade level's expectations.

Spring 2022 STAMP 4Se Spanish Immersion Building Comparison by STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening

School	Spanish Interpretive Listening			
	Grade 3		Grade 5	
	<i>CS (N=82)</i>	<i>DH (N=53)</i>	<i>CS (N=84)</i>	<i>DH (N=55)</i>
	<i>GR (N=76)</i>	<i>MW (N=89)</i>	<i>GR (N=52)</i>	<i>MW (N=77)</i>
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=166)	4.9	Int Mid	5.6	Int High
Deephaven (N=108)	4.8	Int Mid	5.5	Int High
Groveland (N=128)	5.0	Int Mid	5.6	Int High
Minnewashta (N=166)	5.1	Int Mid	5.7	Int High

**Spring 2021 STAMP 4Se Spanish Immersion Building Comparison by
STAMP 4Se Mean Score and Proficiency Levels for Interpretive Listening**

School	Spanish Interpretive Listening			
	Grade 3		Grade 5	
	<i>CS (N=80)</i>	<i>DH (N=64)</i>	<i>CS (N=70)</i>	<i>DH (N=58)</i>
	<i>GR (N=66)</i>	<i>MW (N=75)</i>	<i>GR (N=74)</i>	<i>MW (N=80)</i>
	STAMP 4Se Score	Prof. Level	STAMP 4Se Score	Prof. Level
Clear Springs (N=150)	5.1	Int Mid	5.6	Int High
Deephaven (N=122)	4.9	Int Mid	5.8	Int High
Groveland (N=140)	4.9	Int Mid	5.8	Int High
Minnewashta (N=155)	5.1	Int Mid	5.8	Int High

**Spring 2019 AAPPL Spanish Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpretive Listening**

School	Spanish Interpretive Listening			
	Grade 3		Grade 5	
	<i>CS (N=72)</i>	<i>DH (N=65)</i>	<i>CS (N=47)</i>	<i>DH (N=60)</i>
	<i>GR (N=77)</i>	<i>MW (N=86)</i>	<i>GR (N=62)</i>	<i>MW (N=73)</i>
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=119)	N4	Nov. High	I1	Int. Low
Deephaven (N=125)	N4	Nov. High	I1	Int. Low
Groveland (N=139)	N4	Nov. High	I1	Int. Low
Minnewashta (N=159)	I1	Int. Low	I1	Int. Low

**Spring 2018 AAPPL Spanish Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpretive Listening**

School	Spanish Interpretive Listening					
	Grade 3		Grade 4		Grade 5	
	CS (N=74)	DH (N=49)	CS (N=49)	DH (N=59)	CS (N=63)	DH (N=59)
	GR (N=64)	MW (N=77)	GR (N=62)	MW (N=72)	GR (N=65)	MW (N=63)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=186)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Deephaven (N=167)	I1	Int. Low	I2	Int. Mid	I2	Int. Mid
Groveland (N=191)	I3	Int. Mid	I2	Int. Mid	I3	Int. Mid
Minnewashta (N=212)	I2	Int. Mid	I2	Int. Mid	I3	Int. Mid

**Spring 2017 AAPPL Spanish Immersion Building Comparison by
AAPPL Rating and Proficiency Levels for Interpretive Listening**

School	Spanish Interpretive Listening					
	Grade 3		Grade 4		Grade 5	
	CS (N=50)	DH (N=62)	CS (N=65)	DH (N=59)	CS (N=50)	DH (N=57)
	GR (N=63)	MW (N=74)	GR (N=66)	MW (N=67)	GR (N=56)	MW (N=65)
	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level	AAPPL Rating	Prof. Level
Clear Springs (N=164)	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid
Deephaven (N=151)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid
Groveland (N=147)	I3	Int. Mid	I3	Int. Mid	I3	Int. Mid
Minnewashta (N=197)	I2	Int. Mid	I3	Int. Mid	I3	Int. Mid

CONCLUSIONS

It is important to note that Proficiency Guidelines are targets that are to be used to guide instruction. It is common for students to perform above and below the target level at any point in time. The STAMP 4Se is a snapshot in time to help gauge student proficiency. With the implementation of the ACTFL Proficiency Guidelines into everyday instruction, teachers are more aware of the levels in which their students are achieving.

The Proficiency Guidelines are expected to be utilized in a manner to evaluate what students “Can Do” on a consistent basis. Students may perform at higher levels or lower levels at times, and the guidelines will help teachers gauge their students’ performance on an on-going basis. Teachers are encouraged and expected to use the model as a lens for planning. Being more intentional in the three areas of Reading, Listening, and Speaking as they plan, teachers can provide a well-rounded instructional experience for students on a consistent basis.

Results indicate that Spanish students mainly performed within the Intermediate-Low to Mid ranges for the three skill areas, while reaching the High range on the Listening Test among Fifth Graders across all sites. Chinese Immersion students also performed within the Intermediate-Low to Mid-ranges, and overall, both programs have students meeting or exceeding language immersion national proficiency expectations in all three modes of communication on the STAMP 4Se Test by the end of Fifth Grade.

Based on language acquisition research, language production is a skill that is acquired later in the language learning process, and it is common for students to perform lower in this skill area compared to the other three areas. For Chinese Immersion students, Interpersonal Listening and Speaking more than the other areas, while both Chinese and Spanish Immersion students would benefit from more authentic Interpretive Reading experiences.

Overall, students appear to be approaching the initial end of year Fifth Grade target for each of the three modes of Interpretive Reading, Interpersonal Listening and Speaking and Interpretive Listening. Focusing on a balanced approach to instruction in these areas will be an effective means for ensuring growth.

RECOMMENDATIONS

Chinese Immersion Recommendations for Reading

For students to improve upon their consistency in performance within the Interpretive Reading mode, students will need more activities focused on requiring them to identify supporting details. This can be done in their reading and writing. A balanced literacy approach to Language Arts instruction will help the students make connections between what they read and what they write. Students can also be given opportunities to re-read text that is familiar to them, but during the second or third time of reading the text, they can be given a different purpose for reading. Students can identify picture cues in the story or focus on identifying details that support the main idea. The use of graphic organizers can also help to develop this skill, thus helping them to strengthen their level of performance.

Chinese Immersion Recommendations for Listening

A key factor in strengthening Interpretive Listening skills comes from the teacher. It is more likely that a teacher-centered classroom will yield positive results for students around Interpretive Listening. Other ways to strengthen this skill can come from outside sources. Teachers could bring guest speakers into their classroom, have students listen to audio of advertisements, speeches, or books on tape. Teachers have access to many different types of technology to help enhance Interpretive Listening skills. Teachers can utilize online resources to provide authentic Interpretive Listening opportunities for students. With online resources as well as print resources, students can strengthen their skills in this area by being provided activities that require them to listen and interpret meaning from a certain topic of study. By using the read aloud approach, students can participate in thoughtful note-taking exercises to show that they can interpret meaning from the topic. For example, students can identify main characters in a story, or they can identify the setting. They can describe how the author uses transition words or explain the author's voice or purpose. What teachers use to help students strengthen their Interpretive Reading skills can also be modified to improve Interpretive Listening skills.

Chinese Immersion Recommendations for Speaking

For students to reach the upper Intermediate ranges, students will need to be able to add more detail to the thoughts they share about themselves. In addition, when they ask questions, they need to be able to ask follow-up questions depending on what the speaker shares. Carrying on a conversation at the Intermediate-High and Advanced-Low levels will require students to carry on a true two-way conversation with an equal amount of give and take during the conversations. Students can practice this by adding thoughtful comments and showing an interest in what a speaker is sharing with them. Many of these conversations can occur during informal times throughout the school day. Encouragement by teachers for students to carry on conversations in the target language during informal times throughout the school day such as lunch and recess is one step toward making the Immersion experience more real for students. Experts share that

some teachers provide incentives for students who use the target language outside of the classroom. Like other behaviors, students can be encouraged and positively reinforced for actions that teachers would like to see them exhibit to aid them in their growth in a particular area. In addition, teachers can manufacture scenarios in class for students to have book discussions or reflection opportunities with each other tied to what they are learning across all subject areas. This will take an effort from teachers to continue in the development of a student centered classroom. According to the research, providing opportunities for students to practice speaking the language will foster their metalinguistic growth. As metalinguistic awareness grows, children begin to recognize that statements may have a literal meaning and an implied meaning. They begin to make more frequent and sophisticated use of metaphors. According to research from San Diego State University, between the ages of six and eight in their native language, most children begin to expand upon their metalinguistic awareness and start to recognize literary elements such as irony and sarcasm.

Spanish Immersion Recommendations for Reading

For students to reach the Intermediate-High range on the STAMP 4Se, students will need to earn a score of 6. Students at this level fully understand main ideas and supporting facts in short passages, simple narratives, and descriptive passages on familiar topics. Students will need to read more complex passages and frequently read longer passages, stories, and news reports in the target language to increase their level of consistency for comprehension. Teachers can check for higher level thinking and challenge students to add new insights to what they are reading.

Teachers need more opportunities to use authentic texts and will be given more access to materials as needed.

Spanish Immersion Recommendations for Listening

For students to reach the upper levels of the Intermediate range and beyond, teachers can provide read aloud experiences that contain longer passages and stories. The complexity of the text is important, because the more complex the text is, then the teacher and students will be able to ask more complex questions and give more complex answers. Students will need to frequently listen to longer passages, stories, and even news reports. This is an opportunity for teachers to weave in more authentic text to the lesson, either from print or online resources. Students should be given time to compare what they learn from their listening experience to their current lives and be able to respond in a way that is detailed either through their speech or in their writing. Adding the writing component to what students hear, will help take them to the next proficiency level and prepare them for the next grade level's expectations.

Spanish Immersion Recommendations for Speaking

For students to move from the lower Intermediate ranges to the upper ranges, teachers need to have students take advantage of every chance to participate in conversations on a variety of topics about themselves, their conversation partner, and anything related to

their daily routine or interests. If students can do this both in class and outside of class, they will maximize their experience in the target language. To stretch students further, teachers can expect students to add transition words such as “because,” “but,” and “when” since this will give students the opportunity to elaborate more on certain topics. In addition, students can practice adding words to be more specific in describing things such as using quality, quantity, and size or to accomplish what they need using when or in what order. Students should be encouraged to think about how events unfold in a story and try to tell it. They should use words like “then,” “so,” “afterwards,” and “finally” and ask more specific questions to get more detailed information.

Spanish and Chinese Immersion Students Overall

Both Spanish and Chinese Immersion students will benefit from teachers continuing to utilize an integrated performance assessment model. Integrated Performance Assessment (IPA) provides teachers with the knowledge they need of student performance in all four skill areas: *Reading, Writing, Listening and Speaking*. This model also helps inform teachers and provide a more balanced approach to instruction utilizing each of the three modes: *Interpersonal, Interpretive, and Presentational*.

Chinese and Spanish Immersion students would benefit from continued exposure to more authentic texts to improve Interpretive Reading and Listening performance. The STAMP 4Se provides questions that are both familiar and unfamiliar to students, so the expectation is that students will have had similar learning experiences in school such as having students read an advertisement or match pictures to newspaper headlines. Students need more opportunities to read for meaning using authentic texts written in the target language. Spanish and Chinese students would benefit from activities that promote Interpretive Reading development. Students could read plays, advertisements, and more complex fictional stories. Teachers could assess students’ knowledge of what they read or interpreted from the reading experience.

With teachers having several years of experience delivering the IPAs, it is recommended that the assessments are revised to ensure that the experience is truly integrated into what students are learning in the classroom. Originally, a committee of teachers created the IPA to be administered using consistent content and assessment, however, with the knowledge and experience teachers have accrued over the past several years, a more differentiated approach to this assessment is recommended. It is recommended that teachers develop IPAs that meet the specific needs of their students’ pace of learning. This could be accomplished through independent or collaborate work among teachers. The purpose of the IPA is to be a formative tool to measure language acquisition by giving students the opportunity for substantial practice with learning checkpoints throughout. There will be additional discussion and planning as this model evolves in the coming years.

RECOMMENDATION/FUTURE DIRECTION:

The information provided in this report is designed to update the School Board on the results of the Spring 2022 administration of the STAMP 4Se assessment.

Submitted by: 
Matt Rega, Director of Assessment

Concurrence: 
Dennis Peterson, Superintendent

**School Board
Minnetonka I.S.D #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #4

Title: Review of Proposed Fiscal Year 2023 Budget

Date: May 19, 2022

EXECUTIVE SUMMARY:

Minnetonka Independent School District 276 is required by statute to adopt a budget for each fiscal year prior to July 1 of that fiscal year. District administration has been working with staff on the development of the Fiscal Year 2022 Budget. Attached for School Board review are the summary pages for Fiscal Year 2022 budgets for the various funds of the District.

The General Fund Operating Fund that includes Transportation and Activities is projected to operate at a surplus of \$414,024 of ongoing revenues to ongoing expenses.

An increase in the Basic Revenue Formula of \$135 per Adjusted Pupil Unit from the State of Minnesota is the major component of increased revenue per pupil projected for FY2023. This amount equates to a 2.00% increase in the Basic Formula.

Targeted enrollment includes 11,100 students K-12 plus the 272 students that were enrolled in Tonka Online Comprehensive in FY2022. Those 272 students are assumed to be continuing in enrollment either in Tonka Online Comprehensive or as in-person students. Maintaining the enrollment from FY2022 results in a General Fund Budget that is just slightly over being balanced. The Unassigned Fund Balance at the end of FY2023 is projected to be \$24,141,930 which is 16.3% of projected FY2023 expenditures.

The combination of tightly monitored expense controls plus the additional revenue provided from enrollment growth in past years has allowed the District to continue to maintain very stable finances while maintaining and selectively expanding opportunities for students. Additional Operating Referendum Revenue, which is in place through the 2024 Pay 2025 levy to fund Fiscal Year 2026, gives the District a stable base of revenue from which to maintain the high quality programs that are being delivered to students.

Summary pages of each fund of the District are attached, along with the major assumptions for revenues and expenses used to formulate the General Fund Budget.

ATTACHMENTS:

FY2023 General Fund Budget and FY24-FY28 Updated Projection
Projected FY23-FY28 General Fund Budget Assumptions
Summary of Budgets – All Governmental Fund Types

RECOMMENDATION/FUTURE DIRECTION:

The FY2023 Draft Adopted Budget is being presented for the School Board's review.

Submitted by: 
Paul Bourgeois, Executive Director of Finance & Operations

Concurrence: 
Dennis Peterson, Superintendent

**MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET AND PROJECTION FOR FY2024 THROUGH FY2028**

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	0	0	0	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,372	11,372	11,372	11,372	11,372
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$53,771,169	\$54,720,212	\$55,812,525	\$56,928,782	\$58,068,958	\$59,233,051	\$60,421,063
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$31,088,155	\$31,709,922	\$32,345,011	\$32,993,423	\$33,655,158
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,248,343	24,862,580	25,497,520	26,118,490	26,681,715
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	117,331,647	119,713,053	122,152,693	124,615,897	127,058,895
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,070,780	24,491,997	25,118,662	25,779,077	26,460,164
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,317,214	5,280,326	5,280,326	5,280,326	5,280,326
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,654,315	3,628,215	3,628,215	3,628,215	3,628,215
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$150,373,957	\$153,113,591	\$156,179,896	\$159,303,515	\$162,427,600
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$102,974,882	\$106,649,596	\$110,452,779	\$114,388,804	\$118,462,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	32,559,736	33,608,085	34,667,014	35,772,160	36,939,370
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,296,825	4,343,447	4,385,682	4,428,339	4,471,422
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$151,882,829	\$156,955,749	\$162,197,051	\$167,634,813	\$173,259,496
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$1,508,873)	(\$3,842,158)	(\$6,017,155)	(\$8,331,298)	(\$10,831,895)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$23,543,057	\$19,700,899	\$13,683,744	\$5,352,446
	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$1,508,873)	(\$3,842,158)	(\$6,017,155)	(\$8,331,298)	(\$10,831,895)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	23,543,057	19,700,899	13,683,744	5,352,446	(5,479,449)
RECON. OF ENDING FUND BALANCE:	Assigned Fund Balance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Op Cap Deferred Use	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
	Restricted Fund Balance	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
	Non Spendable Fd Bal	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$22,633,057	\$18,790,899	\$12,773,744	\$4,442,446	-\$6,389,449
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	15.5%	12.6%	8.4%	3.2%	-3.2%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	14.9%	12.0%	7.9%	2.7%	-3.7%

Draft Adopted Budget Six-Year Projection Assumptions
FY23-FY28
May 19, 2022

Projected FY23-FY28 Major Budget Assumptions
Under Current Statutes through FY22 Legislature

The following major assumptions and factors are included in the Draft Adopted Budget Projected FY23 through FY28 Budget Projections:

- Enrollment
 - FY23 through FY28 K-12 students set at 11,372 K-12 based on 11,100 FY23 In-Person enrollment target plus 272 enrolled FY22 enrolled Tonka On-line Comprehensive continuing as Tonka On-Line Comprehensive or In-Person students in FY23
- Total Revenues for FY23 of \$148,099,474 which is a \$3,963,904 increase over FY22 Amended Budget Revenues of \$144,135,570
- General Education Formula Per Pupil FY23 – assumes 2.0% increase of \$135 to \$6,863 based on state statute
 - General Education Formula Per Pupil FY24 – assumes 2.0% increase of \$137 to \$7,000 based on conservative estimate from historical averages
 - General Education Formula Per Pupil FY25 – assumes 2.0% increase of \$140 to \$7,140 based on conservative estimate from historical averages
 - General Education Formula Per Pupil FY26 – assumes 2.0% increase of \$143 to \$7,283 based on conservative estimate from historical averages
 - General Education Formula Per Pupil FY27 – assumes 2.0% increase of \$146 to \$7,429 based on conservative estimate from historical averages
 - General Education Formula Per Pupil FY28 – assumes 2.0% increase of \$149 to \$7,578 based on conservative estimate from historical averages
- Local Option Revenue Tier 1 for FY23 and later remains at \$424 per Adjusted Pupil Unit which generates \$5,163,642 in FY23 – this is local levy so additional students above the estimate generate revenue in a subsequent year with a make-up levy
- Local Option Revenue Tier 2 for FY23 at \$300 and adjusted for inflation through FY28 at Operating Referendum Inflation Rate – generates \$3,489,811 in FY22
- Categorical Programs revenue (Q-Comp, Equity, etc.) FY23– remain at current funding levels per pupil
- FY23 Federal Revenue (as well as offsetting expenditures) set at estimated grant levels per grant letters including estimated carryover revenue from FY22
 - Does not carry forward any prior-year budgeted federal COVID-19 relief funds as all are assumed to be fully utilized in FY22 to offset COVID-19 expenditures
 - New COVID Relief funds from ARP-5% of ESSER III funds (FIN 169 = \$1,187,692) to be used towards learning recovery / lost instructional time

and ARP-Homeless II funds (FIN 159 = \$8,864) to be used towards HHM Transportation

- Operating Referendum Revenue – \$1,881.81 per Adjusted Pupil Unit levied for FY23
 - Subsequent years increased by inflation factors per September 2021 inflation factor update calculation from MDE
 - \$1,881.81 per Adjusted Pupil Unit in FY23
 - \$1,920.07 per Adjusted Pupil Unit in FY24
 - \$1,966.66 per Adjusted Pupil Unit in FY25
 - \$2,016.98 per Adjusted Pupil Unit in FY26
 - \$2,070.01 per Adjusted Pupil Unit in FY27
 - \$2,124.70 per Adjusted Pupil Unit in FY28
 - District is at the Operating Referendum Cap starting in FY20 and future years – only annual increase is for inflation as approved by the voters of the District

- Miscellaneous Revenue - Includes \$340,000 in Tonka On-Line gross revenue from increased participation in additional course offerings and interest earnings of approximately \$900,000 based on expected rising interest rates

- Total Expenditures for FY23 of \$147,685,450, which is a \$2,443,058 increase over FY22 Amended Budget Expenditures of \$145,242,392

- Salaries – Salaries are 67.4% of the General Fund Budget – together with Benefits at 20.8%, they make up 88.2% of the General Fund Budget
 - Teachers (Fund 01)
 - FY23 Adopted Budget K-12 teaching staff at 809.25 FTE through the 04/18/22 staffing document from Human Resources. From the FY22 Amended Budget, 6.76 FTE In-Person teachers have been added compared to the FY22 Amended Budget. The 19.41 FTE eLearning Comprehensive Tonka Online program teachers which were added at the FY22 Amended Budget have now been removed.
 - FY24-FY28 assumes no teacher growth over FY23
 - Salary and benefit package increases per MTA contract for FY23, and 3.0% salary and benefit package increases assumed each year FY24-28 for Minnetonka Teachers Association

 - Other Staff
 - Assumes a 4% increase in contract amounts from FY22 for all unsettled bargaining unit contracts and other unsettled contracts
 - Actual salary and benefit agreements for FY23 Board approved contracts
 - 1.99 non-teaching staff FTE increase from FY22 Amended Budget to FY23 Adopted Budget

- Assumes 3.0% future salary increases for FY24-FY28
- Benefits – Benefits inclusive of the OPEB Retirement Benefits transfer reduction are 20.8% of the General Fund Budget – together with Salaries they make up 88.2% of the General Fund Budget
 - Actual fringe benefit contribution increases for FY23 are included for MTA with a 3.0% on-going salary and benefit package increase for FY24 through FY28
 - Teachers Retirement Association (TRA) pension contributions at 8.55% in FY23 and 8.75% in FY24 and thereafter
 - 2018 Pension Bill increased the TRA contribution rate in future years but State Aid revenue will be provided to offset the increase
 - Public Employees Retirement Association pension contributions at 7.50% in FY23 through FY28
 - OPEB Trust transfer of \$768,720 is calculated by CBIZ actuaries and reduces benefit expenditures in the General Fund
- Total Salaries and Benefits of \$130,263,696 are 88.2% of Total General Fund Expenditures of \$147,685,450
- Purchased Services
 - From FY22 Amended Budget, line items increased by 1% for all cost center budgets unless an additional increase was approved by the Superintendent for FY23 Adopted Budget, then increased by 1% inflation for FY24-FY28 for all cost center budgets
 - Federal COVID relief funds for COVID-19 Testing services have been removed from the FY23 Adopted Budget as this grant funds will expire on 6/30/22 (\$595,879)
- Purchased Services are 4.4% of General Fund Budget
 - Includes line items such as utility costs (electricity, etc.), snow removal, repair and preventive maintenance costs of building systems, property insurance, legal counsel, Special Education tuition at various care facilities, and professional consultants
- Supplies
 - From FY22 Amended Budget, line items increased by 1% for all cost center budgets unless an additional increase was approved by the Superintendent for FY23 Adopted Budget, then increased by 1% inflation for FY24-FY28 for all cost centers budgets
- Supplies are 3.1% of General Fund Budget
 - Includes line items such as instructional, restroom and cleaning supplies, maintenance repair supplies such as HVAC system filters, and grounds supplies such as fuel for the maintenance vehicles and replacement parts for the lawnmowers

- Transportation
 - Increase of 2.75% from FY22 Amended Budget to FY23 Adopted Budget for final year of four-year contract with First Student, then assumes a new contract scheduled for FY24-FY25 and later projected at an increase of 3.0%
 - Bus routes in FY23 are at the same number as in FY22
- Transportation is 3.9% of the General Fund Budget
- Transfers – This is the transfer to the Arts Center operations budget in the amount of \$581,445 to fund the operating expenditures of the Arts Center that are not paid for out of play ticket receipts and facility rental revenue. Additionally, beginning in FY21, the FY23 Adopted Budget includes a transfer to the Community Education Fund 04 (PRG 583) in the amount of \$52,841 to pay for expenditures over revenues related to pre-school screening. UFARS accounting changes now considers pre-school screening to be a General Fund cost.
- Transfers are 0.4% of the General Fund Budget

MINNETONKA SCHOOL DISTRICT

Capital Expenditures Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Category

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 3,730,337	\$ 3,509,851	\$ 3,769,283	\$ 4,052,427	\$ 4,207,302
Other Local and County Revenues	204,318	398,141	262,553	73,365	13,766
Interest on Investments	9,881	3,356	104	-	-
State of Minnesota	1,821,327	1,809,399	1,742,405	1,772,250	1,660,668
Federal Government	-	-	-	-	-
Transfer from Operating Capital to H&S	124,450	373,663	3,198	-	-
Total Revenues and Other Sources	5,890,313	6,094,411	5,777,543	5,898,042	5,881,736
Expenditures and Other Uses:					
Equipment	523,321	655,961	551,165	610,000	375,000
Facilities	2,766,701	3,504,433	4,977,675	2,483,287	2,766,084
Health and Safety	488,892	501,835	579,442	467,097	590,000
Instructional Lease Levy	2,471,479	1,963,641	2,201,689	2,514,197	2,439,991
Total Expenditures and Other Uses	6,250,393	6,625,870	8,309,971	6,074,581	6,171,075
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	(360,080)	(531,460)	(2,532,428)	(176,539)	(289,339)
Other Changes in Reserved and Designated					
Fund Balances	578,369	219,483	-	-	-
One-Time Transfer from Comm Ed - MCEC Additio	3,300,000				
Fund Balance at the Beginning of Year	375,225	3,893,514	3,581,537	1,049,110	872,571
Fund Balance at End of Year	\$ 3,893,514	\$ 3,581,537	\$ 1,049,110	\$ 872,571	\$ 583,232

Allocation of Fund Balance:

Reserved Fund Balance	2018-19	2019-20	2020-21	2021-22	2022-23
Operating Capital	3,829,839	3,102,872	546,375	396,535	113,430
Cell Tower Revenue Reserve	58,590	55,138	68,179	41,480	35,246
Lease Levy	5,085	423,527	434,556	434,556	434,556
Health & Safety	-	-	-	-	-
Total Reserved Fund Balance	\$ 3,893,514	\$ 3,581,537	\$ 1,049,110	\$ 872,571	\$ 583,232

MINNETONKA SCHOOL DISTRICT

Athletic Equipment Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Site

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	229,606	163,492	215,846	382,534	230,000
Interest on Investments	-	-	-	-	-
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	-	-	-	-	-
Total Revenues and Other Sources	<u>229,606</u>	<u>163,492</u>	<u>215,846</u>	<u>382,534</u>	<u>230,000</u>
Expenditures and Other Uses:					
Minnetonka Middle School East	8,783	1,640	2,855	106,935	55,000
Minnetonka Middle School West	(633)	22,466	3,396	49,018	55,000
Minnetonka High School	173,611	197,057	157,845	226,581	110,000
Total Expenditures and Other Uses	<u>181,760</u>	<u>221,163</u>	<u>164,096</u>	<u>382,534</u>	<u>220,000</u>
Excess of Revenues and Other Sources					
Over (Under) Expenditures and Other Uses	47,846	(57,672)	51,751	-	10,000
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	<u>340,604</u>	<u>388,449</u>	<u>330,777</u>	<u>382,527</u>	<u>382,527</u>
Fund Balance at End of Year	<u>\$ 388,449</u>	<u>\$ 330,777</u>	<u>\$ 382,527</u>	<u>\$ 382,527</u>	<u>\$ 392,527</u>

MINNETONKA SCHOOL DISTRICT

Arts Center on 7 Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	409,509	331,271	168,238	377,600	377,600
Interest on Investments	-	-	-	-	-
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Transfer from General Fund	501,931	510,256	521,339	552,211	581,445
Total Revenues and Other Sources	911,441	841,527	689,577	929,811	959,045
Expenditures and Other Uses:					
Salaries	410,306	410,745	397,939	395,700	414,179
Employee Benefits	135,797	138,866	141,129	147,248	158,003
Purchased Services	306,828	213,878	137,409	367,250	367,250
Supplies and Materials	17,578	7,152	400	3,865	3,865
Equipment	13,170	18,040	53,430	15,398	15,398
Miscellaneous	27,761	52,846	(40,730)	350	350
Total Expenditures and Other Uses	911,441	841,527	689,577	929,811	959,045
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	-	-	-	-	-
Other Changes in Reserved and Designated Fund Balances	-	-	-	-	-
Fund Balance at the Beginning of Year	-	-	-	-	-
Fund Balance at End of Year	\$ -	\$ -	\$ -	\$ -	\$ -

Note: Net Profit/Loss in Plays Will Be Transferred to Trust Account

Art Center Trust Account					
Beginning Balance	65,379	158,333	184,557	131,199	131,199
Plays Profit (Loss)	92,954	26,224	(53,358)	-	-
Ending Balance	\$ 158,333	\$ 184,557	\$ 131,199	\$ 131,199	\$ 131,199

MINNETONKA SCHOOL DISTRICT

Dome Operations Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Rental Revenue	\$ 324,042	\$ 300,774	\$ 253,320	\$ 325,813	\$ 326,888
Annual Pledges	-	-	-	-	-
Interest on Investments	-	-	-	-	-
Transfer (to)/from Trust	\$ (10,729)	\$ 127,805	\$ 36,696	\$ (68)	\$ -
Transfer from General Fund	\$ -	\$ -	\$ 24,293	\$ -	\$ -
Total Revenues and Other Sources	313,312	428,579	314,310	325,745	326,888
Expenditures and Other Uses:					
Salaries/Benefits	64,425	65,913	78,779	68,036	72,000
Management Services	-	-	-	-	-
Postage	-	-	-	-	-
Advertising	-	-	-	300	300
Repairs & Maintenance	-	-	-	700	700
Utilities	99,694	95,693	84,961	100,812	100,811
Custodial Supplies	-	-	-	1,000	1,000
Equipment Purchased	-	103,000	-	-	-
Miscellaneous	-	11,440	229	2,000	2,000
Total Expenditures and Other Uses	164,119	276,046	163,968	172,848	176,811
Excess of Revenues and Other Sources					
Over (Under) Expenditures and Other Uses	149,194	152,533	150,341	152,897	150,077
Annual Debt Payment	(149,194)	(152,533)	(150,341)	(152,897)	(150,077)
Fund Balance at the Beginning of Year					
	-	-	-	-	-
Fund Balance at End of Year					
	\$ -	\$ -	\$ -	\$ -	\$ -

Turf and Dome Trust Account	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Balance	153,773	164,502	36,696	0	68
Pledges and Donations	-	-	-	-	-
Transfer (from)/to Operating Budget	10,729	(127,805)	(36,696)	68	-
Ending Balance	\$ 164,502	\$ 36,697	\$ 0	\$ 68	\$ 68

Debt Outstanding Balance 2016K	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Debt Outstanding Balance	1,500,000	1,390,000	1,280,000	1,165,000	1,045,000
Less Principal Payment	(110,000)	(110,000)	(115,000)	(120,000)	(120,000)
Ending Debt Outstanding Balance	\$ 1,390,000	\$ 1,280,000	\$ 1,165,000	\$ 1,045,000	\$ 925,000

MINNETONKA SCHOOL DISTRICT

Page Center Operations Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 568,445	\$ 433,806	\$ 522,249	\$ 484,878	\$ 532,048
Rental Revenue	100,000	100,000	100,000	100,000	100,000
Miscellaneous Revenue	-	-	-	-	-
Total Revenues and Other Sources	668,445	533,806	622,249	584,878	632,048
Expenditures and Other Uses:					
Salaries	132,483	167,823	201,005	188,379	206,069
Employee Benefits	44,404	53,534	63,574	60,300	62,962
Purchased Services	421,618	339,067	304,298	313,227	316,082
Supplies and Materials	28,078	24,454	58,395	52,537	52,537
Equipment	-	-	17,865	4,000	4,000
Miscellaneous	-	-	-	-	-
Total Expenditures and Other Uses	626,582	584,878	645,137	618,443	641,650
Excess of Revenues and Other Sources					
Over (Under) Expenditures and Other Uses	41,863	(51,073)	(22,888)	(33,565)	(9,602)
Fund Balance at the Beginning of Year	(1,008,431)	(966,568)	(1,017,641)	(1,040,529)	(1,074,094)
Fund Balance at End of Year	\$ (966,568)	\$ (1,017,641)	\$ (1,040,529)	\$ (1,074,094)	\$ (1,083,696)

Debt Outstanding Balance 2016L	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Debt Outstanding Balance	1,965,000	1,885,000	1,805,000	1,725,000	1,640,000
Less Principal Payment	(80,000)	(80,000)	(80,000)	(85,000)	(85,000)
Ending Debt Outstanding Balance	\$ 1,885,000	\$ 1,805,000	\$ 1,725,000	\$ 1,640,000	\$ 1,555,000

MINNETONKA SCHOOL DISTRICT
Long-Term Facilities Maintenance (LTFM) Budget
For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22
Fund Expenditures by Project

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	-	-	-	-	-
Interest on Investments	-	-	-	-	-
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	1,993,754	4,922,961	7,202,963	6,472,727	6,245,000
Total Revenues and Other Sources	<u>1,993,754</u>	<u>4,922,961</u>	<u>7,202,963</u>	<u>6,472,727</u>	<u>6,245,000</u>
Expenditures and Other Uses:					
Alternative Facilities	1,320,688	6,255,901	3,546,790	5,327,727	6,245,000
Total Expenditures and Other Uses	<u>1,320,688</u>	<u>6,255,901</u>	<u>3,546,790</u>	<u>5,327,727</u>	<u>6,245,000</u>
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	673,066	(1,332,940)	3,656,174	1,145,000	-
Other Changes in Reserved and Designated Fund Balances-Reclass Construction					
Fund Balance at the Beginning of Year	1,596,098	2,269,164	936,224	4,592,398	5,737,398
Fund Balance at End of Year	<u>\$ 2,269,164</u>	<u>\$ 936,224</u>	<u>\$ 4,592,398</u>	<u>\$ 5,737,398</u>	<u>\$ 5,737,398</u>

Note: New for FY23 and beyond, Fund 46 LTFM has been moved from UFARS Fund 06 Building Construction Fund to UFARS Fund 01 General Fund

MINNETONKA SCHOOL DISTRICT

Fiduciary Funds Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Donations	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous Revenue	1,632,115	1,439,774	552,807	1,541,364	1,585,303
Total Revenues and Other Sources	<u>1,632,115</u>	<u>1,439,774</u>	<u>552,807</u>	<u>1,541,364</u>	<u>1,585,303</u>
Expenditures and Other Uses:					
Salaries	-	-	-	-	-
Employee Benefits	-	-	-	-	-
Purchased Services	-	-	-	-	-
Supplies and Materials	-	-	-	-	-
Equipment	-	-	-	-	-
Miscellaneous	1,541,995	1,389,420	636,490	1,541,364	1,515,688
Total Expenditures and Other Uses	<u>1,541,995</u>	<u>1,389,420</u>	<u>636,490</u>	<u>1,541,364</u>	<u>1,515,688</u>
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	90,121	50,354	(83,683)	-	69,615
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	<u>1,476,281</u>	<u>1,566,401</u>	<u>1,616,755</u>	<u>1,533,072</u>	<u>1,533,072</u>
Fund Balance at End of Year	<u>\$ 1,566,401</u>	<u>\$ 1,616,755</u>	<u>\$ 1,533,072</u>	<u>\$ 1,533,072</u>	<u>\$ 1,602,687</u>

MINNETONKA SCHOOL DISTRICT
Capital Projects (Technology) Budget
For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22
Fund Expenditures by Project

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 5,878,035	\$ 6,217,092	\$ 6,586,282	\$ 6,916,127	\$ 7,275,915
Other Local and County Revenues	223,140	171,686	224,186	158,000	158,000
Interest on Investments	-	-	-	-	-
State of Minnesota	205,492	53,539	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	93,455	547,000	215,901	968,407	-
Rebates	-	-	-	-	-
Total Revenues and Other Sources	6,400,123	6,989,316	7,026,369	8,042,534	7,433,915
Expenditures and Other Uses:					
Continuing Commitments	2,458,796	2,432,782	2,690,083	2,667,693	2,774,499
Hardware Rotation	12,684	61,815	24,947	50,000	50,000
Hardware-Immersion	264,387	196,829	333,214	380,000	300,000
Hardware-iPad Project	1,125,891	1,372,879	1,002,118	1,051,923	1,051,923
Classroom Equipment	488,313	205,839	194,803	655,930	556,065
Textbooks	200,000	463,912	770,664	600,000	735,000
Instructional Staff Development	711,286	734,447	774,480	845,522	879,343
Instructional Staff Development iPad K-3	-	-	-	147,236	151,645
Software iPad K-3	-	-	-	392,015	392,015
Hardware-Network	149,338	-	-	120,000	200,000
Infrastructure-Network	233,111	118,291	699,891	205,000	205,000
Infrastructure-Telecom	(58)	-	410	29,185	30,061
Rebates	-	-	-	-	-
Software	276,665	450,933	470,765	550,000	500,000
Infrastructure-Security Barriers	657,089	274,439	143,543	150,000	100,000
SAN Loan Payment	-	-	116,153	123,376	119,383
Total Expenditures and Other Uses	6,577,500	6,312,167	7,221,070	7,967,881	8,044,934
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	(177,377)	677,150	(194,701)	74,653	(611,019)
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	545,141	367,764	1,044,913	850,212	924,865
Fund Balance at End of Year	\$ 367,764	\$ 1,044,913	\$ 850,212	\$ 924,865	\$ 313,846

MINNETONKA SCHOOL DISTRICT

Food Service Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	5,136,774	3,707,819	440,048	964,251	4,801,612
Interest on Investments	32,923	33,993	14,630	8,500	5,000
State of Minnesota	133,077	104,728	-	65,000	146,130
Federal Government	910,236	918,101	2,929,869	4,159,145	1,120,505
Sales and Other Conversion of Assets	-	-	-	-	-
Total Revenues and Other Sources	6,213,009	4,764,641	3,384,546	5,196,896	6,073,247
Expenditures and Other Uses:					
Salaries	1,419,298	1,458,730	961,635	1,285,019	1,424,312
Employee Benefits	430,628	456,875	366,654	408,872	469,464
Purchased Services	462,595	409,705	329,058	445,820	460,383
Supplies and Materials	2,776,438	2,173,625	1,465,726	2,844,945	3,559,724
Equipment	81,903	226,655	126,705	117,000	270,000
Miscellaneous	402,084	379,240	256,900	284,573	409,471
Total Expenditures and Other Uses	5,572,946	5,104,829	3,506,678	5,386,229	6,593,354
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	640,062	(340,188)	(122,132)	(189,333)	(520,107)
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	1,256,042	1,896,103	1,555,915	1,433,784	1,244,451
Fund Balance at End of Year	\$ 1,896,103	\$ 1,555,915	\$ 1,433,784	\$ 1,244,451	\$ 724,344

MINNETONKA SCHOOL DISTRICT

Community Education Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Program

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 925,002	\$ 942,001	\$ 923,222	\$ 964,493	\$ 980,049
Other Local and County Revenues	10,509,848	8,825,107	6,434,585	10,030,649	9,963,639
Interest on Investments	120,071	55,655	16,060	40,000	44,444
State of Minnesota	480,384	519,006	547,428	551,827	477,497
Federal Government	-	-	224,505	137,550	-
Sales and Other Conversion of Assets	-	-	8,849	46,254	52,841
Total Revenues and Other Sources	12,035,306	10,341,768	8,154,649	11,770,773	11,518,470
Expenditures and Other Uses:					
Administration	1,015,115	1,124,668	829,976	1,172,623	1,366,061
Community Involvement	325,112	290,872	248,852	262,478	250,167
Youth Programs	7,836,510	7,862,306	5,584,561	8,273,099	8,235,152
Family Education	1,688,386	1,718,394	1,618,146	1,831,815	1,902,202
Total Expenditures and Other Uses	10,865,122	10,996,239	8,281,535	11,540,015	11,753,582
Excess of Revenues and Other Sources					
Over (Under) Expenditures and Other Uses	1,170,183	(654,470)	(126,886)	230,758	(235,112)
Other Changes in Reserved and Designated					
Fund Balances					
One-Time Transfer to Operating Cap - MCEC Add	(3,300,000)	-	-		
Fund Balance at the Beginning of Year	4,164,115	2,034,299	1,379,829	1,252,943	1,483,701
Fund Balance at End of Year	\$ 2,034,299	\$ 1,379,829	\$ 1,252,943	\$ 1,483,701	\$ 1,248,589

Note: \$150,000 one-time expenditure for playground equipment included in 2022-23 Budget under PRG 561 MCEC Building

MINNETONKA SCHOOL DISTRICT

Aquatics Program Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Fees From Patrons	\$ 839,980	\$ 622,637	\$ 648,393	\$ 850,520	\$ 828,500
Rental Revenue	6,995	6,600	4,097	5,000	5,000
Gifts & Donations				-	-
Miscellaneous Income	383,162	247,101	173,948	274,200	324,200
Total Revenues and Other Sources	<u>1,230,137</u>	<u>876,338</u>	<u>826,437</u>	<u>1,129,720</u>	<u>1,157,700</u>
Operating Expenditures and Other Uses:					
Salaries	604,833	607,570	601,698	584,183	602,382
Employee Benefits	128,043	131,771	132,275	144,213	155,614
Purchased Services	232,544	133,995	88,089	276,185	278,935
Supplies and Materials	39,060	32,501	31,441	36,750	35,750
Equipment	8,741	2,736	5,129	3,000	3,000
Miscellaneous	97,372	74,091	68,416	85,389	82,019
Total Operating Expenditures and Other Uses	<u>1,110,592</u>	<u>982,663</u>	<u>927,046</u>	<u>1,129,720</u>	<u>1,157,700</u>
Excess of Revenues and Other Sources					
Over (Under) Operating Expenditures and Other Uses	119,545	(106,325)	(100,609)	-	-
Chargeback (To) From General Fund					
For Partial Contribution to Bond Payment	(119,545)	(134,885)	-	-	-
Fund Balance at the Beginning of Year	<u>-</u>	<u>0</u>	<u>(241,210)</u>	<u>(341,819)</u>	<u>(341,819)</u>
Fund Balance at End of Year	<u>\$ 0</u>	<u>\$ (241,210)</u>	<u>\$ (341,819)</u>	<u>\$ (341,819)</u>	<u>\$ (341,819)</u>

Note: Fund Balance at End of Year Will Be Transferred to Trust Account

Aquatics Trust Account	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Balance	2,437	2,437	-	-	-
Transfer (from)/to Operating Budget	-	(2,437)	-	-	-
Ending Balance	<u>\$ 2,437</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

Debt Outstanding Balance 2016C	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Debt Outstanding Balance	1,940,000	1,870,000	1,795,000	1,720,000	1,645,000
Less Principal Payment	(70,000)	(75,000)	(75,000)	(75,000)	(80,000)
Ending Debt Outstanding Balance	<u>\$ 1,870,000</u>	<u>\$ 1,795,000</u>	<u>\$ 1,720,000</u>	<u>\$ 1,645,000</u>	<u>\$ 1,565,000</u>

MINNETONKA SCHOOL DISTRICT
Capital Projects (Construction) Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Project

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	532,400	37,500	20,000	-	-
Interest on Investments	64,028	9,940	70	-	-
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	5,558,705	1,312,542	3,672,193	9,840,761	-
Total Revenues and Other Sources	6,155,133	1,359,982	3,692,263	9,840,761	-
Expenditures and Other Uses:					
Elementary Classroom Additions	256,941	-	-	-	-
MHS North Parking Lot	-	-	-	-	-
MHS Science Lab	-	-	-	-	-
TSP Building Purchase	-	-	-	-	-
Groveland Gym Addition	1,865	-	-	-	-
Groveland Classroom	31,215	-	-	-	-
Groveland KDGN Classroom Addition	-	-	-	-	-
Groveland Parking Lot	-	-	-	-	-
Groveland Purchase	-	-	-	-	-
CS Gym Addition	2,749,005	58,332	-	-	-
SH Gym Addition	2,808,071	476,924	-	-	-
MHS Loft	613,346	(442,485)	-	-	-
Elementary Classroom Additions	-	-	-	-	-
Upper South Synthetic Turf	9,000	643,158	-	-	-
Vantage/Momentum Land & Construction	-	990,242	70,879	1,017,143	10,000,000
Momentum	-	-	847,178	3,284,317	-
Shorewood Education Center	-	-	2,089,708	365,000	-
Total Expenditures and Other Uses	6,469,442	1,726,171	3,007,766	4,666,460	10,000,000
Excess of Revenues and Other Sources					
Over (Under) Expenditures and Other Uses	(314,309)	(366,189)	684,497	5,174,301	(10,000,000)
Other Changes in Reserved and Designated					
One-time transfer In from General Fund	-	-	-	7,000,000	-
Fund Balance at the Beginning of Year	1,054,192	739,882	373,694	1,058,190	13,232,491
Fund Balance at End of Year	\$ 739,882	\$ 373,694	\$ 1,058,190	\$ 13,232,491	\$ 3,232,491

MINNETONKA SCHOOL DISTRICT

Debt Service Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 7,116,710	\$ 6,738,497	\$ 6,779,748	\$ 7,299,459	\$ 7,882,500
Other Local and County Revenues	201,023	4,500	263,231	-	-
Interest on Investments	83,460	39,446	13,837	25,000	27,775
State of Minnesota	387,167	578,661	654,549	650,482	758,225
Federal Government	74,577	-	-	-	-
Sales and Other Conversion of Assets	21,666,835	14,970,809	6,708,629	43,272,797	-
Total Revenues and Other Sources	29,529,772	22,331,913	14,419,995	51,247,738	8,668,500
Expenditures and Other Uses:					
Capital Lease Interest	-	-	-	-	-
Redemption of Bond Principal	24,884,462	19,360,026	11,638,838	48,425,729	6,010,000
Interest on Bonds	3,056,015	2,881,701	2,970,971	2,853,237	3,013,967
Redemption of Loans	-	-	-	-	-
Interest on Loans	-	-	-	-	-
Other Debt Service	499,023	397,727	243,084	630,890	-
Permanent Transfers	9,339	373,663	3,198	9,276	-
Miscellaneous Fees	-	-	-	-	-
Total Expenditures and Other Uses	28,448,838	23,013,117	14,856,091	51,919,132	9,023,967
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	1,080,933	(681,204)	(436,096)	(671,394)	(355,467)
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	1,782,095	2,863,028	2,181,824	1,745,730	1,074,336
Fund Balance at End of Year	\$ 2,863,028	\$ 2,181,824	\$ 1,745,730	\$ 1,074,336	\$ 718,869

Allocation of Fund Balance:					
	2018-19	2019-20	2020-21	2021-22	2022-23
Escrow Account 2008A	-	-	-	-	-
Escrow Account 2008D	-	-	-	-	-
Escrow Account 2012D	-	-	-	-	-
Escrow Account 2017C	-	-	-	-	-
Restricted	2,863,028	2,181,824	1,745,730	1,074,336	718,869
Total Reserved Fund Balance	\$ 2,863,028	\$ 2,181,824	\$ 1,745,730	\$ 1,074,336	\$ 718,869

MINNETONKA SCHOOL DISTRICT
Internal Service (Self Insurance) Budget

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	14,892,032	16,045,825	16,824,429	16,760,415	16,861,309
Interest on Investments	169,185	138,436	122,599	91,957	190,663
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	-	-	-	-	-
Total Revenues and Other Sources	15,061,217	16,184,261	16,947,029	16,852,372	17,051,972
Expenditures and Other Uses:					
Salaries	66,152	71,352	78,508	84,495	90,537
Employee Benefits	25,077	33,007	35,355	34,653	38,239
Claims Paid	13,540,273	11,054,172	12,766,907	13,949,183	14,494,323
Claims Contingency	89,200	(29,600)	71,400	-	-
Administrative Fee	1,059,529	814,453	894,489	949,568	945,571
Reinsurance	-	-	-	-	-
Consulting Fee	44,298	45,720	47,626	47,600	47,600
IBNR	89,200	(29,600)	339,866	-	-
VEBA Contribution	895,420	1,074,754	1,225,802	1,253,586	1,261,677
Wellness	39,030	40,830	42,060	42,060	43,322
VEBA Fee	-	-	-	-	-
Transitional Reinsurance Fees	-	-	-	-	-
PCOR Fees	4,561	5,387	13,115	7,053	7,089
Miscellaneous	3,339	3,929	3,577	1,999	2,059
Total Expenditures and Other Uses	15,856,076	13,084,406	15,518,704	16,370,197	16,930,417
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	(794,859)	3,099,856	1,428,325	482,175	121,555
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	6,000,554	5,205,695	8,305,551	9,733,876	10,216,051
Fund Balance at End of Year	\$ 5,205,695	\$ 8,305,551	\$ 9,733,876	\$ 10,216,051	\$ 10,337,606

**MINNETONKA SCHOOL DISTRICT
Internal Service (OPEB) Budget**

For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22

Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ -	\$ -	\$ -	\$ -	\$ -
Other Local and County Revenues	-	-	-	-	-
Interest on Investments	1,279,068	1,066,763	4,750,962	1,500,000	450,000
State of Minnesota	-	-	-	-	-
Federal Government	-	-	-	-	-
Sales and Other Conversion of Assets	-	-	-	-	-
Total Revenues and Other Sources	<u>1,279,068</u>	<u>1,066,763</u>	<u>4,750,962</u>	<u>1,500,000</u>	<u>450,000</u>
Expenditures and Other Uses:					
Employee Benefits	707,637	794,338	750,607	760,927	760,720
Purchased Services	-	-	-	8,000	8,000
Transfer to OPEB Debt Service	-	-	-	7,000,000	-
Total Expenditures and Other Uses	<u>707,637</u>	<u>794,338</u>	<u>750,607</u>	<u>7,768,927</u>	<u>768,720</u>
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	571,431	272,425	4,000,355	(6,268,927)	(318,720)
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	<u>22,456,562</u>	<u>23,027,993</u>	<u>23,300,418</u>	<u>27,300,773</u>	<u>21,031,846</u>
Fund Balance at End of Year	<u>\$ 23,027,993</u>	<u>\$ 23,300,418</u>	<u>\$ 27,300,773</u>	<u>\$ 21,031,846</u>	<u>\$ 20,713,126</u>

MINNETONKA SCHOOL DISTRICT
Debt Service - OPEB Bonds Budget
For Fiscal Year 2022-23, with Comparative Information for Years 2018-19 Through 2021-22
Fund Expenditures by Object

	2018-19 Actual	2019-20 Actual	2020-21 Actual	2021-22 Amended Budget	2022-23 Budget
Revenues and Other Sources:					
Local Property Tax Levies	\$ 1,630,262	\$ 1,583,702	\$ 1,632,825	\$ 1,688,315	\$ 1,551,342
Other Local and County Revenues	46,616	1,022	60,883	-	-
Interest on Investments	-	-	-	-	-
State of Minnesota	3	2	10	-	-
Federal Government	-	-	-	-	-
Transfer from OPEB Internal Service Fund	-	-	20,233,609	-	-
Total Revenues and Other Sources	<u>1,676,880</u>	<u>1,584,726</u>	<u>21,927,327</u>	<u>1,688,315</u>	<u>1,551,342</u>
Expenditures and Other Uses:					
Redemption of Bond Principal	950,000	965,000	985,000	1,255,000	1,120,000
Interest on Bonds	657,610	643,660	610,524	351,660	355,746
Miscellaneous Fees	495	495	271,180	-	-
Bond Refunding Payment	-	-	19,960,540	-	-
Total Expenditures and Other Uses	<u>1,608,105</u>	<u>1,609,155</u>	<u>21,827,244</u>	<u>1,606,660</u>	<u>1,475,746</u>
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	68,775	(24,429)	100,084	81,655	75,596
Other Changes in Reserved and Designated Fund Balances					
Fund Balance at the Beginning of Year	<u>269,818</u>	<u>338,593</u>	<u>314,164</u>	<u>414,247</u>	<u>495,902</u>
Fund Balance at End of Year	<u>\$ 338,593</u>	<u>\$ 314,164</u>	<u>\$ 414,247</u>	<u>\$ 495,902</u>	<u>\$ 571,498</u>

Allocation of Fund Balance:

	2018-19	2019-20	2020-21	2021-22	2022-23
Escrow Account 2013E	-	-	-	-	-
Escrow Account 2016J	-	-	-	-	-
Unreserved	338,593	314,164	414,247	495,902	571,498
Total Reserved Fund Balance	<u>\$ 338,593</u>	<u>\$ 314,164</u>	<u>\$ 414,247</u>	<u>\$ 495,902</u>	<u>\$ 571,498</u>

Debt Outstanding Balance 2013E, 2016J, 2021A (refunded 2013E in 20-21)

	2018-19	2019-20	2020-21	2021-22	2022-23
Beginning Debt Outstanding Balance	23,405,000	22,455,000	21,490,000	20,975,000	19,720,000
2021A Refunded 2013E	-	-	470,000	-	-
Less Principal Payment	(950,000)	(965,000)	(985,000)	(1,255,000)	(1,120,000)
Ending Debt Outstanding Balance	<u>\$ 22,455,000</u>	<u>\$ 21,490,000</u>	<u>\$ 20,975,000</u>	<u>\$ 19,720,000</u>	<u>\$ 18,600,000</u>

MINNETONKA SCHOOL DISTRICT
Summary of Budgets - All Governmental Fund Types (UFARS)
 Fiscal Year 2022-23 Budget

	General Fund	Food Service Fund	Community Service Fund	Aquatics Program	Capital Projects Construction Fund	Debt Service Fund	Internal Service Self-Insurance Fund	Internal Service OPEB Fund	Debt Service OPEB Fund	Total All Governmental Funds
Revenues:										
Local Property Tax Levies	\$ 46,001,145	\$ -	\$ 980,049	\$ -	\$ -	\$ 7,882,500	\$ -	\$ -	\$ 1,551,342	\$ 56,415,036
Other Local and County Revenues	5,496,134	4,801,612	9,963,639	1,157,700	-	-	16,861,309	-	-	38,280,394
Interest on Investments	900,000	5,000	44,444	-	-	27,775	190,663	450,000	-	1,617,882
State of Minnesota	107,629,699	146,130	477,497	-	-	758,225	-	-	-	109,011,551
Federal Government	4,539,986	1,120,505	-	-	-	-	-	-	-	5,660,491
Sales and Other Conversion of Assets	6,826,445	-	52,841	-	-	-	-	-	-	6,879,286
Rebates	-	-	-	-	-	-	-	-	-	-
Total Revenues	171,393,409	6,073,247	11,518,470	1,157,700	-	8,668,500	17,051,972	450,000	1,551,342	217,864,640
Expenditures:										
District and School Administration	6,979,896	-	-	-	-	-	-	-	-	6,979,896
District Support Services	5,962,392	-	-	-	-	-	-	-	-	5,962,392
Regular Instruction	81,070,610	-	-	-	-	-	-	-	-	81,070,610
Extra-Curricular	3,320,386	-	-	-	-	-	-	-	-	3,320,386
Vocational Instruction	1,355,641	-	-	-	-	-	-	-	-	1,355,641
Special Education Instruction	24,742,160	-	-	-	-	-	-	-	-	24,742,160
Community Education and Services	-	-	11,753,582	1,157,700	-	-	-	-	-	12,911,282
Instructional Support Services	6,321,959	-	-	-	-	-	-	-	-	6,321,959
Pupil Support Services	5,333,326	-	-	-	-	-	-	-	-	5,333,326
Site, Building, and Equipment	7,913,165	-	-	-	-	-	-	-	-	7,913,165
Fiscal and Other Fixed Cost Programs	2,525,305	6,593,354	-	-	-	9,023,967	16,930,417	768,720	1,475,746	37,317,509
Transportation	5,823,881	-	-	-	-	-	-	-	-	5,823,881
Technology	8,044,934	-	-	-	-	-	-	-	-	8,044,934
Construction	6,245,000	-	-	-	10,000,000	-	-	-	-	16,245,000
Capital	6,171,075	-	-	-	-	-	-	-	-	6,171,075
Total Expenditures	171,809,730	6,593,354	11,753,582	1,157,700	10,000,000	9,023,967	16,930,417	768,720	1,475,746	229,513,216
Other Financing Sources (Uses):										
Operating Transfers In	-	-	-	-	-	-	-	-	-	-
Operating Transfers Out	-	-	-	-	-	-	-	-	-	-
Total Other Financing Sources (Uses):	-	-	-	-	-	-	-	-	-	-
Excess of Revenues and Other Sources Over (Under) Expenditures and Other Uses	(416,321)	(520,107)	(235,112)	-	(10,000,000)	(355,467)	121,555	(318,720)	75,596	(11,648,576)
Fund Balance at the Beginning of Year	33,014,245	1,244,451	1,483,701	(341,819)	13,232,491	1,074,336	10,216,051	21,031,846	495,902	81,451,205
Fund Balance at End of Year	\$ 32,597,924	\$ 724,344	\$ 1,248,589	\$ (341,819)	\$ 3,232,491	\$ 718,869	\$ 10,337,606	\$ 20,713,126	\$ 571,498	\$ 69,802,629

Note: New for FY23 and beyond, Fund 46 Long-Term Facilities Maintenance (LTFM) has been moved from UFARS Fund 06 Building Construction Fund to UFARS Fund 01 General Fund

MINNETONKA SCHOOL DISTRICT
Summary of Budget - General Fund (UFARS)
 Fiscal Year 2022-23 Budget

	Funds 01, 03, 11 Operating	Fund 05 Operating Capital	Fund 05 Lease Levy	Fund 12 Athletic Equipment	Fund 40 Arts Center	Fund 41 Dome Operations	Fund 43 Pagel Center Operations	Fund 46 LTFM Fund	Fund 09 Fiduciary Funds	Fund 66 Technology Fund	Total General Fund
Revenues and Other Sources:											
Local Property Tax Levies	\$ 34,517,928	\$ 1,767,311	\$ 2,439,991	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,275,915	\$ 46,001,145
Other Local and County Revenues	2,172,529	13,766	-	230,000	377,600	326,888	632,048	-	1,585,303	158,000	5,486,134
Interest on Investments	900,000	-	-	-	-	-	-	-	-	-	900,000
State of Minnesota	105,969,031	1,660,668	-	-	-	-	-	-	-	-	107,629,699
Federal Government	4,539,986	-	-	-	-	-	-	-	-	-	4,539,986
Sales and Other Conversion of Assets	-	-	-	-	581,445	-	-	6,245,000	-	-	6,826,445
Rebates	-	-	-	-	-	-	-	-	-	-	-
Total Revenues and Other Sources	148,099,474	3,441,745	2,439,991	230,000	959,045	326,888	632,048	6,245,000	1,585,303	7,433,915	171,393,409
Expenditures:											
District and School Administration	6,020,851	-	-	-	959,045	-	-	-	-	-	6,979,896
District Support Services	4,446,704	-	-	-	-	-	-	-	1,515,688	-	5,962,392
Regular Instruction	80,208,960	-	-	220,000	-	-	641,650	-	-	-	81,070,610
Extra-Curricular	3,320,386	-	-	-	-	-	-	-	-	-	3,320,386
Vocational Instruction	1,355,641	-	-	-	-	-	-	-	-	-	1,355,641
Special Education Instruction	24,742,160	-	-	-	-	-	-	-	-	-	24,742,160
Instructional Support Services	6,321,959	-	-	-	-	-	-	-	-	-	6,321,959
Pupil Support Services	5,333,326	-	-	-	-	-	-	-	-	-	5,333,326
Site, Building, and Equipment	7,586,277	-	-	-	-	326,888	-	-	-	-	7,913,165
Fiscal and Other Fixed Cost Programs	2,525,305	-	-	-	-	-	-	-	-	-	2,525,305
Construction	-	-	-	-	-	-	-	6,245,000	-	-	6,245,000
Capital Purchases	-	3,731,084	2,439,991	-	-	-	-	-	-	8,044,934	14,216,009
Transportation	5,823,881	-	-	-	-	-	-	-	-	-	5,823,881
Total Expenditures	147,685,450	3,731,084	2,439,991	220,000	959,045	326,888	641,650	6,245,000	1,515,688	8,044,934	171,809,730
Excess of Revenues and Other Sources Over (Under) Expenditures	414,024	(289,339)	-	10,000	-	-	(9,602)	-	69,615	(611,019)	(416,321)
Other Financing Sources:											
Operating Transfers In	-	-	-	-	-	-	-	-	-	-	-
Operating Transfers Out	-	-	-	-	-	-	-	-	-	-	-
Fund Balance at the Beginning of Year	24,637,906	345,337	527,234	382,527	-	-	(1,074,094)	5,737,398	1,533,072	924,865	33,014,245
Fund Balance at End of Year	\$ 25,051,930	\$ 55,998	\$ 527,234	\$ 392,527	\$ -	\$ -	\$ (1,083,696)	\$ 5,737,398	\$ 1,602,687	\$ 313,846	\$ 32,597,924

Note: New for FY23 and beyond, Fund 46 Long-Term Facilities Maintenance (LTFM) has been moved from UFARS Fund 06 Building Construction Fund to UFARS Fund 01 General Fund

**School Board
Minnetonka I.S.D #276
5621 County Road 101
Minnetonka, Minnesota**

Study Session Agenda Item #5

Title: Review of Long-Term Financial Projections

Date: May 19, 2022

EXECUTIVE SUMMARY:

It is prudent for the School Board to periodically review and discuss long-term financial projections as part of the process of maintaining a stable financial condition for the District.

Attached are five long-term projection scenarios that look at different ways to adjust the General Fund Budget going into the future. There are many scenarios and permutations of scenarios that can be developed. These five scenarios are intended to be an initial effort to see how various changes will impact future years. The five scenarios all use the FY23 Proposed Adopted Budget as the base and then have the following factor changes:

- \$1.5 Million Expenditure Reductions in FY24, FY25 and FY26
- \$1.0 Million Expenditure Reductions in FY24, FY25, FY26, FY27 and FY28
- 100 Additional K-12 Students in FY24, FY25 and FY26
- 200 Additional K-12 Students in FY24
- 200 Additional 9-12 Students in FY24 after the VANTAGE MOMENTUM building opens

Looking forward, the District has three years left on the current voter-approved authority for both the Operating Referendum Revenue and Capital Projects (Technology) Revenue. It will be prudent to hold a referendum to renew both of those revenue sources something in the next 3 years prior to their expiration.

The District currently is at the Operating Referendum Revenue State Cap Per Pupil, so absent any change in State statutes that would increase the cap per pupil, a future Operating Referendum will only be able to request an extension for 10 years plus an annual inflation factor on the amount.

The Capital Projects (Technology) Revenue does not have a set cap, so it would be possible to request both an extension and an increase in the annual amount at a future referendum if that is in place.

These projections take those two factors into account

Strategically, it will be important for the District continue to work with Legislators to try to get the Operating Referendum cap increased, preferably prior to a future referendum for extension and renewal.

It will also be beneficial for the District to continue to work with Legislators to try to get an increase in the Lease Levy, which has been fixed at \$212 per pupil since July 1, 2015. Since that date, construction prices have escalated considerably. Additional Lease Levy capacity may help the District respond to any future demand for Four-Year-Old Kindergarten should that materialize and considerable purchasing power has been lost.

ATTACHMENTS:

\$1.5 Million Expenditure Reductions in FY24, FY25 and FY26
\$1.0 Million Expenditure Reductions in FY24, FY25, FY26, FY27 and FY28
100 Additional K-12 Students in FY24, FY25 and FY26
200 Additional K-12 Students in FY24
200 Additional 9-12 Students in FY24 after the VANTAGE MOMENTUM building opens

RECOMMENDATION/FUTURE DIRECTION:

The Long-Term Financial Projections are being presented for the School Board's review and discussion.

Submitted by: 
Paul Bourgeois, Executive Director of Finance & Operations

Concurrence: 
Dennis Peterson, Superintendent

MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET AND \$1.5 MM REDUCTIONS FY24 FY25 FY26

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	0	0	0	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,372	11,372	11,372	11,372	11,372
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$59,771,169	\$54,720,212	\$55,812,525	\$56,928,782	\$58,068,958	\$59,233,051	\$60,421,063
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$31,088,155	\$31,709,922	\$32,345,011	\$32,993,423	\$33,655,158
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,248,343	24,862,580	25,497,520	26,118,490	26,681,715
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	117,331,647	119,713,053	122,152,693	124,615,897	127,058,895
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,070,780	24,491,997	25,118,662	25,779,077	26,460,164
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,317,214	5,280,326	5,280,326	5,280,326	5,280,326
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,654,315	3,628,215	3,628,215	3,628,215	3,628,215
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$150,373,957	\$153,113,591	\$156,179,896	\$159,303,515	\$162,427,600
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$101,824,882	\$104,349,596	\$107,002,779	\$110,938,804	\$115,012,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	31,854,633	32,198,831	32,554,037	33,659,063	34,826,103
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,296,825	4,343,447	4,385,682	4,428,339	4,471,422
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$150,027,727	\$153,246,495	\$156,634,075	\$162,071,716	\$167,896,228
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	\$346,230	(\$132,904)	(\$454,179)	(\$2,768,202)	(\$5,268,628)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$25,398,160	\$25,265,256	\$24,811,077	\$22,042,875
	Ongoing Revenue Over (Under) Expenditures	4,500,677	(1,654,204)	1,733,469	(1,106,822)	414,024	346,230	(132,904)	(454,179)	(2,768,202)	(5,268,628)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	25,398,160	25,265,256	24,811,077	22,042,875	16,774,247
RECON. OF ENDING FUND BALANCE:											
Assigned Fund Balance	Op Cap Deferred Use	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Assigned Fund Balance	Q-Comp	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
Restricted Fund Balance	3rd Party Billing	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
Non Spendable Fd Bal	Prepays & Inventories	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$24,488,160	\$24,355,256	\$23,901,077	\$21,132,875	\$15,864,247
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	16.9%	16.5%	15.8%	13.6%	10.0%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	16.3%	15.9%	15.3%	13.0%	9.5%

MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET AND \$1.0 MM REDUCTIONS FY24 FY25 FY26 FY27 FY28

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	0	0	0	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,372	11,372	11,372	11,372	11,372
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$53,771,169	\$54,720,212	\$55,812,525	\$56,928,782	\$58,068,958	\$59,233,051	\$60,421,063
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$31,088,155	\$31,709,922	\$32,345,011	\$32,993,423	\$33,655,158
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,248,343	24,862,580	25,497,520	26,118,490	26,681,715
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	117,331,647	119,713,053	122,152,693	124,615,897	127,058,895
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,070,780	24,491,997	25,118,662	25,779,077	26,460,164
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,317,214	5,280,326	5,280,326	5,280,326	5,280,326
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,654,315	3,628,215	3,628,215	3,628,215	3,628,215
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$150,373,957	\$153,113,591	\$156,179,896	\$159,303,515	\$162,427,600
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$102,204,882	\$105,109,596	\$108,142,779	\$111,308,804	\$114,612,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	32,091,972	32,673,191	33,265,275	33,903,842	34,604,719
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,296,825	4,343,447	4,385,682	4,428,339	4,471,422
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$150,645,065	\$154,480,855	\$158,485,313	\$162,686,495	\$167,074,845
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$271,108)	(\$1,367,264)	(\$2,305,417)	(\$3,382,980)	(\$4,647,244)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$24,780,822	\$23,413,558	\$21,108,141	\$17,725,161
	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$271,108)	(\$1,367,264)	(\$2,305,417)	(\$3,382,980)	(\$4,647,244)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	24,780,822	23,413,558	21,108,141	17,725,161	13,077,917
RECON. OF ENDING FUND BALANCE:	Assigned Fund Balance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Op Cap Deferred Use										
	Q-Comp	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
	3rd Party Billing	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
	Prepays & Inventories	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$23,870,822	\$22,503,558	\$20,198,141	\$16,815,161	\$12,167,917
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	16.4%	15.2%	13.3%	10.9%	7.8%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	15.8%	14.6%	12.7%	10.3%	7.3%

MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET PLUS 100 STUDENTS FY24 FY25 FY26

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	100	100	100	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,472	11,572	11,672	11,672	11,672
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$53,771,169	\$54,720,212	\$55,816,333	\$56,936,484	\$58,080,642	\$59,244,969	\$60,433,220
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$31,851,547	\$33,267,308	\$34,727,977	\$35,424,161	\$36,134,647
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,261,992	24,915,879	25,590,468	26,237,437	26,800,663
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	118,112,497	121,331,440	124,640,291	127,177,499	129,669,489
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,281,219	24,923,089	25,781,845	26,459,696	27,158,765
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,363,685	5,373,267	5,419,738	5,419,738	5,419,738
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,687,195	3,693,975	3,726,855	3,726,855	3,726,855
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$151,444,596	\$155,321,771	\$159,568,728	\$162,783,788	\$165,974,847
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$102,974,882	\$106,649,596	\$110,452,779	\$114,388,804	\$118,462,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	32,559,736	33,608,085	34,667,014	35,772,160	36,939,370
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,302,915	4,355,748	4,404,318	4,447,161	4,490,433
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$151,888,919	\$156,968,050	\$162,215,688	\$167,653,635	\$173,278,506
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$444,323)	(\$1,646,279)	(\$2,646,959)	(\$4,869,848)	(\$7,303,659)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$24,607,607	\$22,961,328	\$20,314,369	\$15,444,521
	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	(\$444,323)	(\$1,646,279)	(\$2,646,959)	(\$4,869,848)	(\$7,303,659)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	24,607,607	22,961,328	20,314,369	15,444,521	8,140,862
RECON. OF ENDING FUND BALANCE:											
	Assigned Fund Balance Op Cap Deferred Use	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Assigned Fund Balance Q-Comp	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
	Restricted Fund Balance 3rd Party Billing	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
	Non Spendable Fd Bal Prepays & Inventories	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$23,697,607	\$22,051,328	\$19,404,369	\$14,534,521	\$7,230,862
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	16.2%	14.6%	12.5%	9.2%	4.7%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	15.6%	14.0%	12.0%	8.7%	4.2%

MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET PLUS 200 STUDENTS FY24

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	200	0	0	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,572	11,572	11,572	11,572	11,572
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$53,771,169	\$54,720,212	\$55,820,076	\$56,936,484	\$58,076,814	\$59,241,065	\$60,429,237
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$32,615,004	\$33,267,308	\$33,933,588	\$34,613,846	\$35,308,081
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,275,642	24,941,879	25,576,819	26,197,789	26,761,013
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	118,893,346	121,357,440	123,828,425	126,323,633	128,799,291
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,491,659	24,923,089	25,560,784	26,232,823	26,925,898
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,410,155	5,373,267	5,373,267	5,373,267	5,373,267
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,720,075	3,693,975	3,693,975	3,693,975	3,693,975
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$152,515,236	\$155,347,771	\$158,456,452	\$161,623,697	\$164,792,431
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$102,974,882	\$106,649,596	\$110,452,779	\$114,388,804	\$118,462,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	32,559,736	33,608,085	34,667,014	35,772,160	36,939,370
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,309,004	4,355,748	4,398,106	4,440,887	4,484,096
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$151,895,009	\$156,968,050	\$162,209,476	\$167,647,361	\$173,272,169
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	\$620,227	(\$1,620,279)	(\$3,753,024)	(\$6,023,664)	(\$8,479,738)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$25,672,157	\$24,051,878	\$20,298,854	\$14,275,190
	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	\$620,227	(\$1,620,279)	(\$3,753,024)	(\$6,023,664)	(\$8,479,738)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	25,672,157	24,051,878	20,298,854	14,275,190	5,795,452
RECON. OF ENDING FUND BALANCE:											
Assigned Fund Balance	Op Cap Deferred Use	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Q-Comp	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
Restricted Fund Balance	3rd Party Billing	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
Non Spendable Fd Bal	Prepays & Inventories	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$24,762,157	\$23,141,878	\$19,388,854	\$13,365,190	\$4,885,452
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	16.9%	15.3%	12.5%	8.5%	3.3%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	16.3%	14.7%	12.0%	8.0%	2.8%

MINNETONKA INDEPENDENT SCHOOL DISTRICT 276
FY2023 ADOPTED GENERAL FUND BUDGET PLUS 300 STUDENTS 9-12 ONLY FY24 FOR VANTAGE MOMENTUM CAPACITY

General (01), Transportation (03), & Extra Curricular (11) Funds		+26.19 Tchr FTE	+36.86 Tchr FTE	-36.75 Tchr FTE +4.91 Tchr FTE	+2.59 Tchr FTE*	+6.76 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE	+0 Tchr FTE
K-12 Student Growth Oct Target Numbers (Actuals Thru FY22)		165	3	46	87	185	300	0	0	0	0
October 1 K-12 Enrollment Target (Actuals Thru FY22)		11,047	11,050	11,100	11,187	11,372	11,672	11,672	11,672	11,672	11,672
Definitions		Actual 2019-2020	Actual 2020-2021	Adopted 2021-2022	Amended 2021-2022	Adopted 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027	Projected 2027-2028
SOURCES OF REVENUE:	Gen Ed Rev - Resident	\$51,590,101	\$52,510,901	\$53,555,270	\$53,771,169	\$54,720,212	\$55,960,432	\$57,079,648	\$58,222,844	\$59,390,023	\$60,581,182
	Gen Ed Rev - Open Enroll	\$26,491,644	27,301,085	\$27,844,066	\$28,594,353	\$30,479,725	\$33,460,248	\$34,129,456	\$34,813,005	\$35,510,891	\$36,223,119
	Categorical	20,917,804	21,521,800	22,582,995	22,332,456	23,424,543	24,293,176	24,985,414	25,620,354	26,241,323	26,804,549
	Miscellaneous	3,430,970	2,586,547	3,102,558	3,386,417	3,308,277	3,268,277	3,268,277	3,268,277	3,268,277	3,268,277
	Federal	2,197,098	5,147,599	2,857,215	4,857,954	4,539,986	2,914,348	2,943,491	2,972,926	3,002,656	3,032,682
	Revenue Before Ref.	104,627,616	109,067,932	109,942,104	112,942,349	116,472,743	119,896,481	122,406,286	124,897,406	127,413,170	129,909,808
	Total Voter Approved Referendum Rev	24,688,506	22,694,451	22,410,647	22,410,647	22,917,435	24,762,005	25,199,995	25,844,775	26,524,280	27,225,056
	Local Option Revenue Tier 1	5,143,658	5,129,722	5,292,763	5,292,763	5,163,642	5,469,854	5,432,966	5,432,966	5,432,966	5,432,966
	Local Option Revenue Tier 2		3,553,519	3,489,811	3,489,811	3,545,655	3,762,315	3,736,215	3,736,215	3,736,215	3,736,215
	Total Revenue	\$134,459,781	\$140,445,624	\$141,135,325	\$144,135,570	\$148,099,474	\$153,890,655	\$156,775,462	\$159,911,362	\$163,106,632	\$166,304,046
USES OF REVENUE:	Salaries & Wages	\$88,163,875	\$95,528,645	\$93,984,172	\$97,493,217	\$99,624,034	\$102,974,882	\$106,649,596	\$110,452,779	\$114,388,804	\$118,462,189
	Benefits	27,249,643	29,942,724	29,883,835	30,395,950	31,408,382	32,559,736	33,608,085	34,667,014	35,772,160	36,939,370
	Purchased Serv.	5,144,867	5,986,769	6,078,241	6,971,720	6,458,067	6,212,837	6,297,193	6,382,603	6,469,090	6,556,678
	Supplies	4,302,381	5,620,744	3,989,729	4,876,058	4,505,520	4,315,094	4,361,899	4,404,318	4,447,161	4,490,433
	Transportation	5,382,420	5,217,071	5,672,096	5,638,055	5,823,881	5,998,646	6,174,095	6,354,742	6,540,743	6,732,256
	Transfers	510,256	554,482	552,211	598,465	634,286	653,315	672,914	693,101	713,894	735,311
	Transfer from OPEB Trust	(794,338)	(750,607)	(758,428)	(731,073)	(768,720)	(813,412)	(789,582)	(738,870)	(678,217)	(637,732)
	Total Expenses	\$129,959,104	\$142,099,827	\$139,401,856	\$145,242,392	\$147,685,450	\$151,901,098	\$156,974,200	\$162,215,688	\$167,653,635	\$173,278,506
BOTTOM LINE:	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	\$1,989,557	(\$198,738)	(\$2,304,325)	(\$4,547,004)	(\$6,974,460)
FUND BALANCE:	Beginning	\$23,117,738	\$27,398,932	\$21,045,155	\$25,744,728	\$24,637,906	\$25,051,930	\$27,041,487	\$26,842,749	\$24,538,424	\$19,991,420
	Ongoing Revenue Over (Under) Expenditures	\$4,500,677	(\$1,654,204)	\$1,733,469	(\$1,106,822)	\$414,024	\$1,989,557	(\$198,738)	(\$2,304,325)	(\$4,547,004)	(\$6,974,460)
	One-Time Transfer from OPEB Fund (VANTAGE/MOMENTUM)	\$0	\$0	\$0	\$7,000,000	\$0	\$0	\$0	\$0	\$0	\$0
	One-Time Transfer to Operating Capital/Construction Fund	(\$219,483)	\$0	\$0	(\$7,000,000)	\$0	\$0	\$0	\$0	\$0	\$0
	Ending	27,398,932	25,744,728	22,778,624	24,637,906	25,051,930	27,041,487	26,842,749	24,538,424	19,991,420	13,016,960
RECON. OF ENDING FUND BALANCE:	Assigned Fund Balance Op Cap Deferred Use	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Assigned Fund Balance Q-Comp	\$263,376	\$296,986	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
	Restricted Fund Balance 3rd Party Billing	\$100,000	\$135,058	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
	Non Spendable Fd Bal Prepays & Inventories	\$535,203	\$1,225,989	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000	\$550,000
	Total Assigned, Non Spendable or Restricted Fd Bal	\$898,579	\$1,658,033	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000	\$910,000
	Total Unassigned Fund Balance	\$26,500,354	\$24,086,696	\$21,868,624	\$23,727,906	\$24,141,930	\$26,131,487	\$25,932,749	\$23,628,424	\$19,081,420	\$12,106,960
	Total Fund Balance as % of Expenditures	21.1%	18.1%	16.3%	17.0%	17.0%	17.8%	17.1%	15.1%	11.9%	7.5%
	Unassigned as a % of Expenditures	20.4%	17.0%	15.7%	16.3%	16.3%	17.2%	16.5%	14.6%	11.4%	7.0%