



ISD #277
Westonka Public Schools

2023 Referendum Projects

REVIEW AND COMMENT SUBMITTAL

Presented to:

**Minnesota Department of
Education**

June 30, 2023



An Innovative District Delivering Educational Excellence

June 30, 2023

Willie Jett, Commissioner
Minnesota Department of Education
400 NE Stinson Blvd
Minneapolis, MN 55413

Re: Independent School District #277
Westonka Public Schools
November 7, 2023 Referendum

Dear Commissioner Jett,

In accordance with M.S. 123B.71, Independent School District #277 is submitting this Review and Comment document for review for the proposed referendum projects. The School Board has approved this Review and Comment submission at their Board Meeting on June 5, 2023.

The School District will seek voter approval of two ballot questions on Tuesday, November 7, 2023. The first ballot question would authorize a renewal of the school district's existing capital project levy authorization of 3.400% times the net tax capacity of the school district, which is scheduled to expire after taxes payable 2024. The second ballot question would authorize the issuance of up to \$93,400,000 in school building bonds.

The capital project levy would continue to provide funds for classroom and building technology, digital curriculum, technology infrastructure and network improvements, technical staff support, device replacement, and testing. Additionally, the district has increased technology needs in the areas of safety and security that will be addressed by the capital project levy and is expanding the scope to include print curriculum.

The school building bonds would provide financing for District wide safety and security improvements, major additions and renovations at Mound Westonka High School, and site improvements at the high school campus. These items were identified and developed through a thorough multi-year process facilitated by District administration, the Facilities Committee of the School Board, and involved discussion and input with district wide staff and stakeholders and multiple community meetings. The proposed referendum is November 7, 2023.

The proposed ballot language will read:

School District Question 1
Renewal of Expiring Capital Project Levy Authorization

The school board of Independent School District No. 277 (Westonka Public Schools) has proposed to renew the school district's existing capital project levy authorization of 3.400% times the net tax capacity of the school district, which is

Independent School District 277

scheduled to expire after taxes payable in 2024. The money raised from the capital project levy authorization will provide funds for classroom and building technology, digital and print curriculum, technology to enhance safety and security, technology infrastructure and network improvements, technical staff support, device replacement, and testing. The proposed capital project levy authorization will raise approximately \$2,575,178 for taxes payable in 2025, the first year it is to be levied, and would be authorized for ten years. The estimated total cost of the projects to be funded over that time period is approximately \$25,751,780. The projects to be funded have received a positive Review and Comment from the Commissioner of Education.

Shall the capital project levy authorization proposed by the school board of Independent School District No. 277 be approved?

School District Question 2

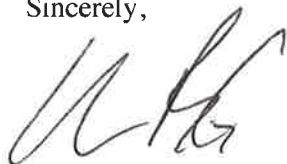
Approval of School District Bond Issue

Shall the school board of Independent School District No. 277 (Westonka Public Schools) be authorized to issue its general obligation school building bonds in an amount not to exceed \$93,400,000 to provide funds for the acquisition and betterment of school sites and facilities, including the construction of secure entrances and other safety and security improvements at all school sites and facilities; districtwide deferred maintenance projects, including replacement of boilers, piping and electrical systems; the redesign, renovation and equipping of academic and activity spaces at the Mound Westonka High School site and facility; and the reconstruction and repair of athletic fields, tennis courts and track?

Additional specific details involving the need for these projects is furnished in this report. We appreciate your review and subsequent comments on this important proposal and look forward to your reply.

Our district will need a response from the Commissioner of Education by September 5, 2023 to ensure we meet the publication deadline in accordance with M.S. 123B.71.

Sincerely,



Kevin Borg, Superintendent

cc: ISD #277 School Board
Kathy Miller, Finance Director
Paul Aplikowski, Wold Architects and Engineers
Jason Peterson, Kraus Anderson Construction
Matthew Hammer, Ehlers

Independent School District 277



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In accordance with Minnesota Statute 123B.71, the School Board of Independent School District #277 Westonka Public Schools submits the following proposal for Review and Comment.

In accordance with Minnesota Statute 123B.71 (2000), the School Board submits the following proposal for Review and Comment which includes a renewal of the district's existing capital project levy and educational facility project. The capital project levy renewal will continue to fund ongoing technology needs while also providing additional funds to meet the district's needs in the areas safety and security and print curriculum. The facilities projects presented are the result of extensive District review of facility conditions, capacity of buildings compared to enrollment projections, and program initiatives and equity within the District. The specific information is as follows:

KEY INFORMATION:

- Address: **Independent School District #277
Westonka Public Schools**
5901 Sunnyfield Road East
Minnetrista, MN 55364
Contact: Kevin Borg, Superintendent of Schools
borgk@westonka.k12.mn.us
Phone: (952) 491-8001
- School Board: Gary Wollner, Chair
Heidi Marty, Vice Chair
Loren Davis, Clerk
Ralph Harrison, Treasurer
Kelle Bowe, Director
Brian Carlson, Director
Brian Roath, Director
- Financing: **Renewal of Capital Project Levy and \$93,400,000 G.O. Bonds**
- Referendum: **November 7, 2023**
- Architect/Engineer: **Wold Architects and Engineers**
332 Minnesota Street
Suite W2000
St. Paul, MN 55101
Contact: Paul Aplikowski, AIA, LEED AP, CEFPI
paplikowski@woldae.com
Phone: (651) 227-7773
- Construction Manager: **Kraus Anderson Construction Company**
501 S 8th Street
Minneapolis, MN 55404
Phone: (612) 332-7281
- Fiscal Consultant: **Ehlers, Inc.**
3060 Centerpoint Drive
Roseville, MN 55113
Contact: Mathew Hammer
Phone: (651) 697-8592
- Bond Consultant: **Kennedy & Graven**
150 South Fifth Street
Suite 700
Minneapolis, MN 55402
Contact: Peter Martin
Phone: (612) 337-9220



INTRODUCTION

Independent School District #277 is proposing a November 7, 2023 Election. The election will ask voters to renew the district's existing capital project levy, which is set to expire after taxes payable 2024, and approve a \$93,400,000 in school building bonds. With the renewed capital project levy funding, the District intends to maintain a strong technology system and provide continued access to up-to-date curriculum, both print and digital. With the bond funding, the District intends to complete District wide safety and security improvements, deferred maintenance at all district school buildings, as well as extensive deferred maintenance with additions and renovations to Mound Westonka High School. These improvements will enhance student safety, improve program offerings and perform maintenance of District assets.

Bond Project Summary

The District is requesting funding to maintain technology and further its facilities Master Plan. The plan includes program improvements that the District and its community have identified to meet their facility needs for the immediate future. Extensive participatory design process will be used following a successful referendum. Final scope may change slightly based on stakeholder and community input. The preliminary scope of projects includes the following.

Districtwide Security

- New offices at both the east and north entries to the High School.
- Relocate the Grandview Middle School office adjacent to the front door.
- Provide additional security technology at all school sites, including centralized lockdown functionality, lockdown notification lights, hardened glass and door alerts.

Districtwide Deferred Maintenance/Improvements

- Hilltop Primary School
 - Replace deteriorated galvanized piping
 - Add high efficiency boiler
 - Replace some outdated and deteriorated ventilation equipment
 - Add dehumidification to gym
 - Replace the electrical service and many panels throughout building
 - Resurface the playground
 - Pavement maintenance
 - Window replacement
 - Replace interior doors & hardware
 - Update worn and deteriorated finishes
- Shirley Hills Primary School
 - Replace deteriorated galvanized piping
 - Replace deteriorated underground piping
 - Replace some outdated and deteriorated ventilation equipment
 - Replace interior doors & hardware
 - Repair exterior facade



- Grandview Middle School
 - Replace deteriorated galvanized piping
 - Replace outdated and deteriorated ventilation equipment
 - Remodel media center and former main office area
 - Replace corridor lockers
 - Replace interior doors & hardware
 - Remodel small gym
 - Remodel entrance canopy and exterior ramp at main entry
 - Replace display cases at classrooms
 - Replace domestic water softener
- Mound Westonka High School
 - Replace outdated steam plant with new high efficiency heating plant
 - Replace deteriorated air handling equipment
 - Replace deteriorated galvanized piping
 - Replace deteriorated sewer piping
 - Replace remaining deteriorated electrical system panels and feeders
 - Gym roof replacement
 - Replace interior doors & hardware
 - Replace main gym bleachers, sound system, and some finishes
 - Add dehumidification to pool air handler
 - Replace pool boiler with high efficiency boiler to serve pool and WAC
- Bus Garage
 - Tuckpointing exterior as necessary
 - Site lighting
 - Electrical panel replacement
- High School Campus Maintenance
 - Reconstruct tennis courts in new location
 - Replace track and update Field #12 to function as a stadium
 - Regrading and upgrades to JV baseball field

High School Redesign

- Classroom additions and renovations
- Remodel vocational education spaces
- Add on to accommodate new nursing and emergency medical technician (EMT) labs
- Remodel and add on for special education spaces
- Weight and fitness area addition
- Remodel and expand cafeteria
- Create storm shelter to comply with MN State Building Code

Budget Summary

Bond Projects:

Safety and Security	\$ 7,360,000
Maintenance Projects	\$ 37,023,000
High School Redesign	\$ 47,117,000
Bond Issuance Costs	\$ 1,900,000
Total Projects	\$93,400,000



The Geographic Area and Population to be Served

- a. Preschool Through Grade 12 Student Enrollments for the Past Five Years,**
- b. Current Year Student Enrollment and Student Enrollment Projections for the Next Five Years.**

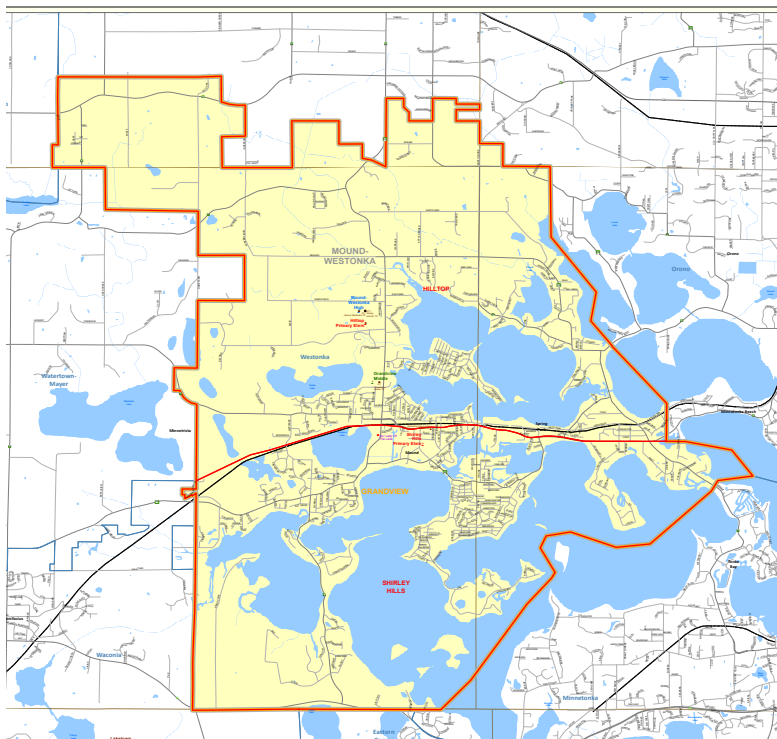
I. The Geographic Area and Population to be Served

- a. Preschool Through Grade 12 Student Enrollments for the Past Five Years,**
- b. Current Year Student Enrollment and Student Enrollment Projections for the Next Five Years.**

Geographic Area to be Served:

The District, with an estimated population of 20,175 and comprising area of 29 square miles, is located approximately 20 miles west of the City of Minneapolis. The District is located on the western shores of Lake Minnetonka, and encompasses all or a portion of the Cities of Independence, Lyndale, Mound, Navarre, Orono, Shorewood, and Spring Park.

Map of ISD #277

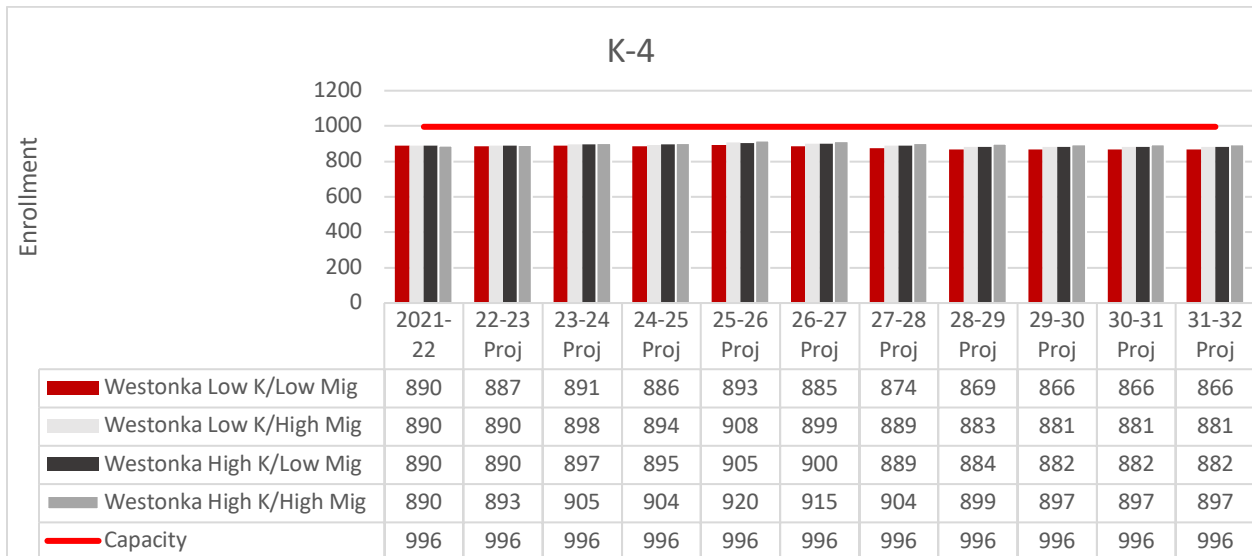
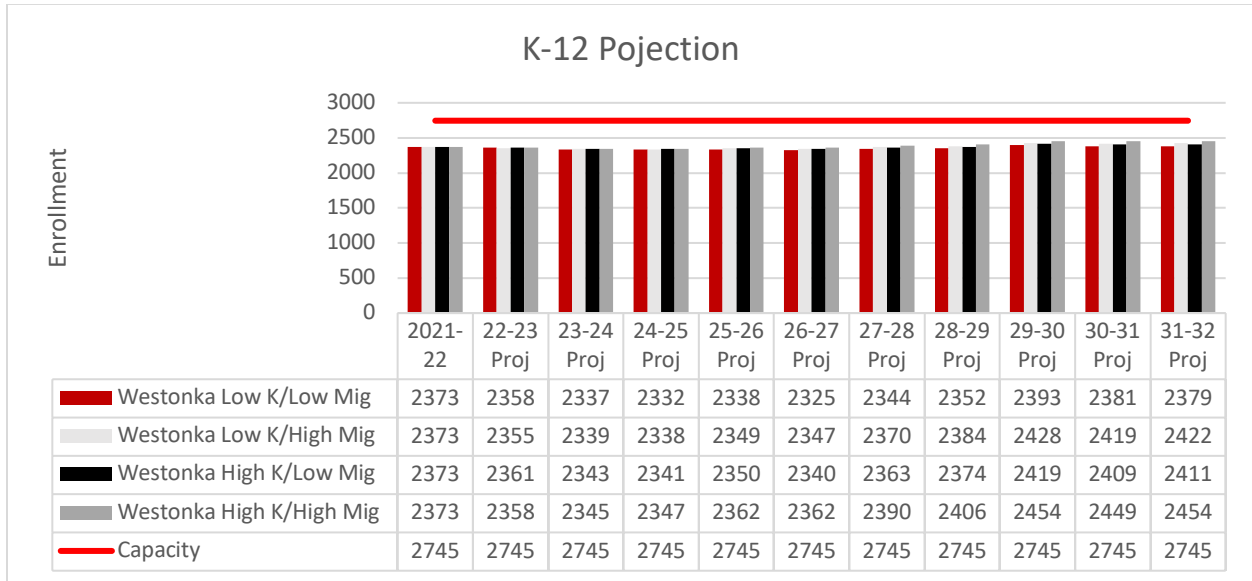


- Neighboring School Districts with contiguous borders include:
 - ISD # 278 Orono
 - ISD # 276 Minnetonka
 - ISD # 112 Eastern Carver County
 - ISD # 110 Waconia
 - ISD # 111 Watertown Mayer
 - ISD # 879 Delano



I. The Geographic Area and Population to be Served (Continued):

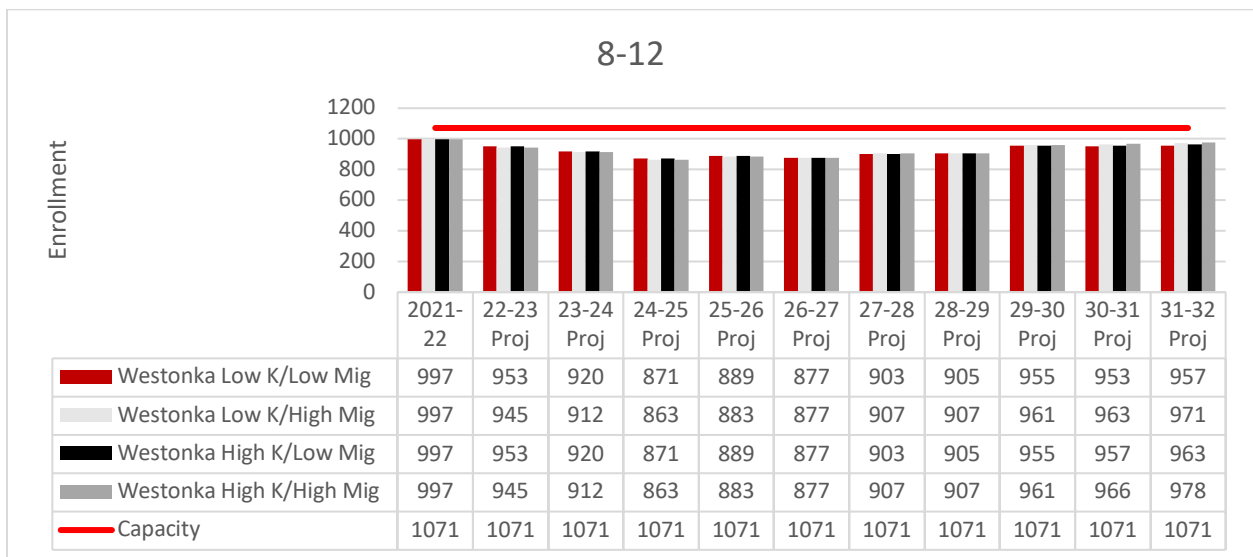
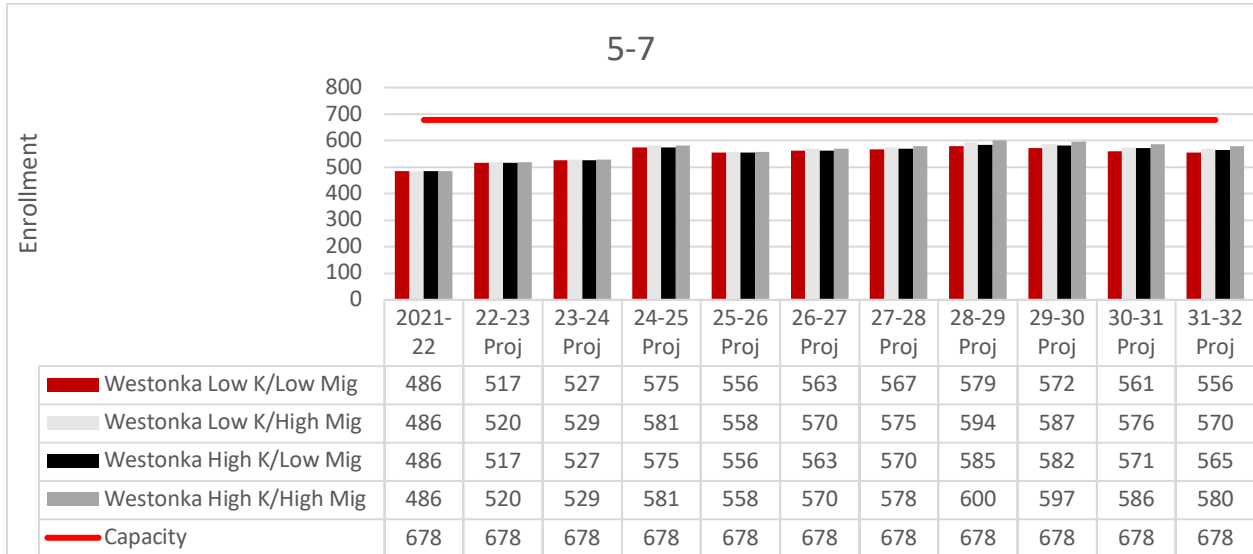
The District is projecting relatively flat to slightly increasing enrollment through the 2031-32 school year. The proposed projects do not include increases for the purposes of capacity at any of the facilities. The District will monitor enrollment yearly and accommodate any unexpected increases in enrollment with programmatic shifts as necessary.





Westonka Public Schools - ISD #277

2023 Review and Comment



**2. A List of Existing School Facilities**

- a. by year constructed,**
- b. their uses, and**
- c. an assessment of the extent to which alternate facilities are available within the school district boundaries and in adjacent school districts.**

Description of Existing Facilities/Utilization

The District currently owns and operates the following schools and support facilities:

EXISTING SCHOOL BUILDINGS	SQ. FT.	YEAR BUILT
Shirley Hills Primary School	65,560	1951 Building
2450 Wilshire Boulevard	3,740	1995 Addition
Mound, Minnesota 55364		
	69,300	
Hilltop Primary School	46,150	1964 Building
5700 Game Farm Road	13,175	1995 Addition
Minnetrista, Minnesota 55364	9,862	2017 Addition (Early Learning)
	69,187	
Grandview Middle School	92,470	1958 Building
1881 Commerce Boulevard	10,000	1978 Addition
Mound, Minnesota 55364		
	102,470	
Mound Westonka High School	188,580	1971 Building
5905 Sunnyfield Road East	77,800	2018 Addition
Minnetrista, Minnesota 55364		
	266,380	
Educational Service Center	18,000	2002 Building
5901 Sunnyfield Road East		
Minnetrista, Minnesota 55364		
	18,000	



2. A List of Existing School Facilities (Continued)

EXISTING SCHOOL BUILDINGS	SQ. FT.	YEAR BUILT
Transportation Building 5950 Sunnyfield Road East Minnetrista, Minnesota 55364	7,200	1970 Building
7,200		

All of the functions and features proposed in this referendum are integral to school operations. Alternative facilities for security, upgrading existing systems and modernizing the HS learning environment would not be applicable to alternate facilities.



3. A List of the Specific Deficiencies of the Facilities

- a. Demonstrating Need
- b. Process Used to Determine Deficiencies
- c. List of How Deficiencies will be Addressed
- d. Specific Benefits to Students, Teachers and Community

Question #1: Capital Project Levy

Westonka Public Schools' capital project levy currently provides funds for classroom and building technology, digital curriculum, technology infrastructure and network improvements, technical staff support, device replacement, and testing. Additionally, the district has increased technology needs in the areas of safety and security that will be addressed by the capital project levy and is expanding the scope to include print curriculum.

The annual replacement cycles and maintenance of digital and print curriculum materials and technology is attainable through the existing capital project levy. Current state, federal and local funding is not sufficient to meet the needs in these areas. Without this funding, the district would not be able to maintain the 1:1 device initiative for students K-12, the educational subscriptions vital to student learning and district cyber security, the replacement cycle for staff technology, or the associated staff training.

The district's teaching and learning department has developed a curriculum review and replacement cycle that ensures we are meeting state standards; this is attainable through the capital project levy. Additionally, instructional equipment that is essential to provide a well-rounded education for our students has been implemented through the capital project levy and requires a cyclical replacement to ensure equipment doesn't become obsolete or beyond repair and sufficient equipment is available to ensure that all students have the opportunity to participate. The capital project levy will also allow the district to stay up-to-date on technology to enhance safety and security in order for schools to operate securely and without interruption.

Question #2: Bond Projects

Westonka Public Schools has a strong tradition of constantly studying and evaluating their facilities functional and maintenance needs. The District has worked with Wold Architects and Engineers continually since 2011. This partnership has led to extensive study and knowledge about the facilities. The District also has a Facility Committee of the School Board that meets monthly to evaluate and guide facility decisions.



Major Steps Leading to Fall 2023 Referendum

The District annually evaluates and maintains their Long Term Facilities Maintenance 10 year plan. Each year significant projects have been done leading to improvements of facilities. Due to the limitations of this funding any significant projects and any projects that require renovation of space have to be put off each year. This backlog has been tracked for several years. A copy of the current deferred maintenance report can be found in Appendix B.

In 2019 the District updated their capacity analysis of the District. This report documents room use, average student utilization and calculates the capacity of each building. A copy of the capacity analysis can be found in Appendix A.

By the 2021-22 school year the list of facilities needs was growing. The District, through their Facilities Committee of the Board, began a year long review and prioritization of those needs. Some topics reviewed by the District include:

- Grade reconfiguration
- Early Childhood Expansion Needs
- Enrollment Growth Update
- Maintenance Needs
- Activities and Athletic Needs
- Learning space modernization at all grade levels
- Security Review

Spring 2022 Demographic Study: The District has commissioned enrollment projection studies from Hazel Reinhardt every few years. In the spring of 2022 Reinhardt again analyzed the District to project enrollment over the next 10 years. The full report of her study can be found in Appendix C. Westonka schools is in a developing part of the metro area and has seen relatively slow and steady growth. The report from Reinhardt indicates that this slow steady growth will continue. Based on this analysis in combination with a capacity study of the District, it is clear that capacity in the District is satisfactory for the near future. Therefore changes in grade configuration, or additional facilities for capacity increases are not warranted at this time. The District will need to continue to monitor enrollment projections in the future.

August 2022, with the clarity provided by the enrollment study, the District commissioned a scientific public opinion survey to ascertain the likelihood of support for their facilities proposal. The District utilized Morris Leatherman to conduct this study. The full report can be found in Appendix D of this Review and Comment. The report helped clarify acceptable tax impacts and the communities support for various parts of the facilities plan.

In the Fall of 2022 the District conducted extensive focus groups with staff and administration at each site. These meetings were held to share the findings of the facility study so far and gather input. This input was vital in the decision making process. It helped solidify the plan and know that support from within the District was present to move forward with the selected scope.



In the winter of 2022/2023 the Facility Committee again considered all the information gathered and determined the highest priorities and attempted to find a balance with the community's support. This prioritization then began to set the scope for what would be eventually asked of the voters. This also solidified the intent to put the question to the public in November 2023.

In the late winter and spring of 2023 the District again embarked on a communication and input program. Community meetings were held, stakeholders were again consulted and the Facilities Plan was further refined based on the input gathered.

At the conclusion of this work in April/May of 2023 Morris Leatherman was again asked to conduct a scientific survey of the community. This time the questions were more defined and focused on the refined plan. That survey report can be found in Appendix E. The results indicate a strong level of support for the scope being proposed and the tax impact that would result.

Finally, in May/June of 2023 the School Board took action to move forward with the proposed referendum to the Voters in November 2023 and authorized the submission of this Review and Comment. On June 5, 2023 the School Board voted to submit the Review & Comment, with the Board vote to bring the referendum to their community on July 10, 2023.

**4. A Description of the Project including:****Question #1: Capital Project Levy**

The following is a summary of the estimated annual budget for the renewed capital project levy.

Fiscal Year	Technology	Curriculum/Testing	Total
2025-26	2,111,948	463,230	2,575,178
2026-27	2,111,948	463,230	2,575,178
2027-28	2,111,948	463,230	2,575,178
2028-29	2,111,948	463,230	2,575,178
2029-30	2,111,948	463,230	2,575,178
2030-31	2,111,948	463,230	2,575,178
2031-32	2,111,948	463,230	2,575,178
2032-33	2,111,948	463,230	2,575,178
2033-34	2,111,948	463,230	2,575,178
2034-35	2,111,948	463,230	2,575,178

As part of the District's ongoing strategic planning process the district continually updates its short and long-term capital plans. The district intends to annually review the need for capital expenditures and make adjustments to the proposed project budget as needed.



Question #2: Bond Projects

- a. Site and Outdoor Acreage
- b. Square Footage Allocations
- c. Estimated Expenditures
- d. Schedule

a. Sites and Outdoor Acreage

EXISTING SCHOOL BUILDINGS	SITE ACRES
Shirley Hills Primary School 2450 Wilshire Boulevard Mound, Minnesota 55364	14.8
Grandview Middle School 1881 Commerce Boulevard Mound, Minnesota 55364	12
High School / Hilltop / ESC / Transportation Campus*	101.5
Mound Westonka High School 5905 Sunnyfield Road East Minnetrista, Minnesota 55364	
Hilltop Primary School 5700 Game Farm Road Minnetrista, Minnesota 55364	
Educational Service Center 5901 Sunnyfield Road East Minnetrista, Minnesota 55364	
Transportation Building 5950 Sunnyfield Road East Minnetrista, Minnesota 55364	

*District is currently in negotiations to purchase an additional 6.8 acres of land adjacent to the campus. This land is being purchased with other funding and is not part of the referendum proposal.



4. A Description of the Project (Continued)

b. Square Footage Allocations

Renovations/Maintenance

The District is proposing renovations only at Hilltop, Shirley Hills, Grandview, and the district bus garage. All work will be performed within existing square footage

Additions

Additions are being proposed at Mound Westonka High School. The additions will support re-configuration of space, right sizing of classrooms, creating specialty labs to support science and career education, add fitness and weight room space and remodel and expand the cafeteria, as well as reconfigure and improve special education facilities. The additions are also being used as a key part of the security improvements. A new student services office at the north entry includes a small addition that will allow for a secure vestibule and direct supervision of that entry. At the east (main) entry the new additions will be configured to add a secured entrance and close off the courtyard area from the outside of the building thus blocking easy outside access and visibility to the existing main office area, the cafeteria, student commons and locker areas.

Addition Square Foot Allocations

ML Addition (14,800 sf)

Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)

Vocational Space (Machining, Manufacturing)

Cafeteria

Secured Entrance Courtyard

Storage

LL Addition (18,250 sf)

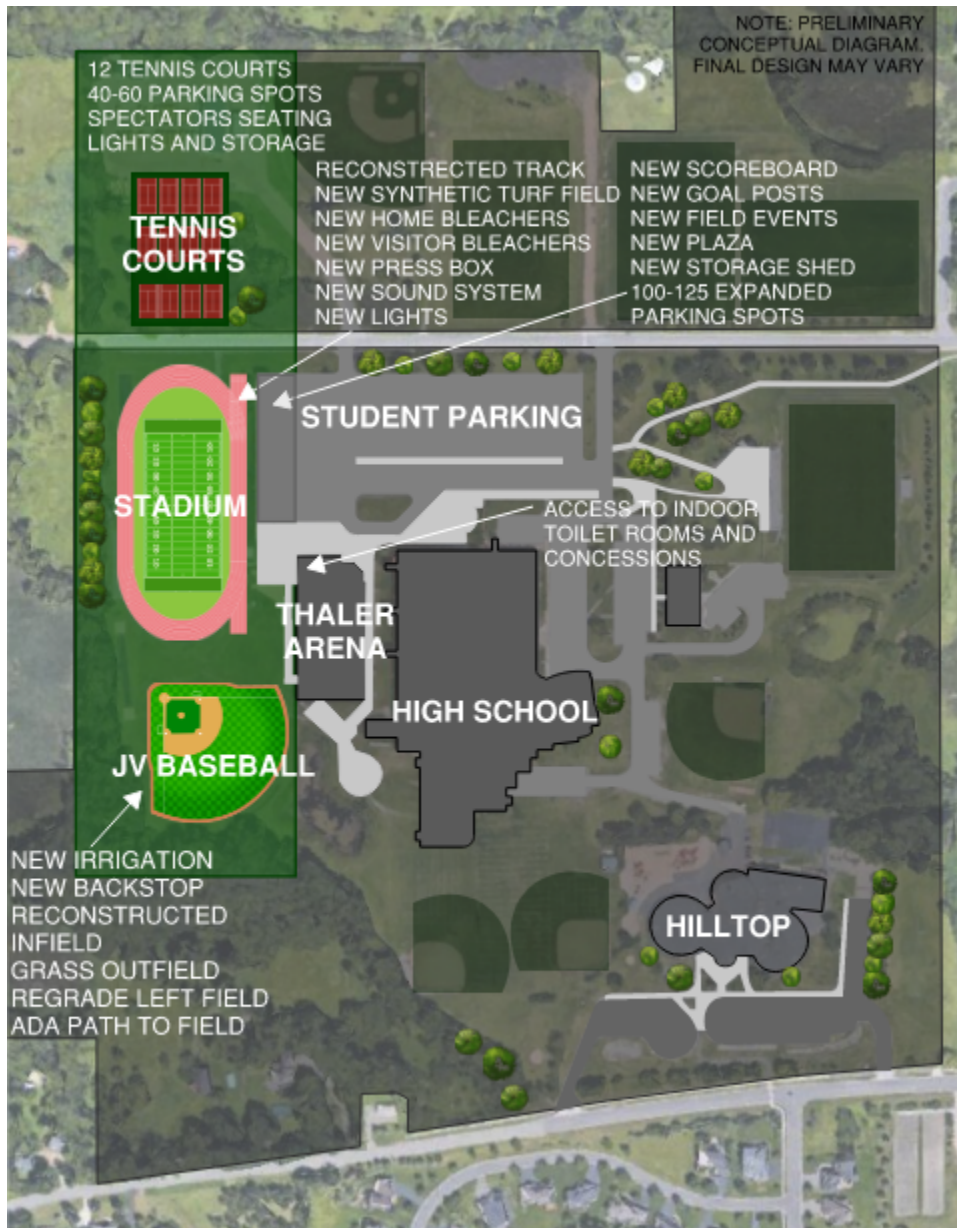
Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)

Vocational Space (Nursing, EMT)

Fitness/Athletic Storage/Circulation

Storage

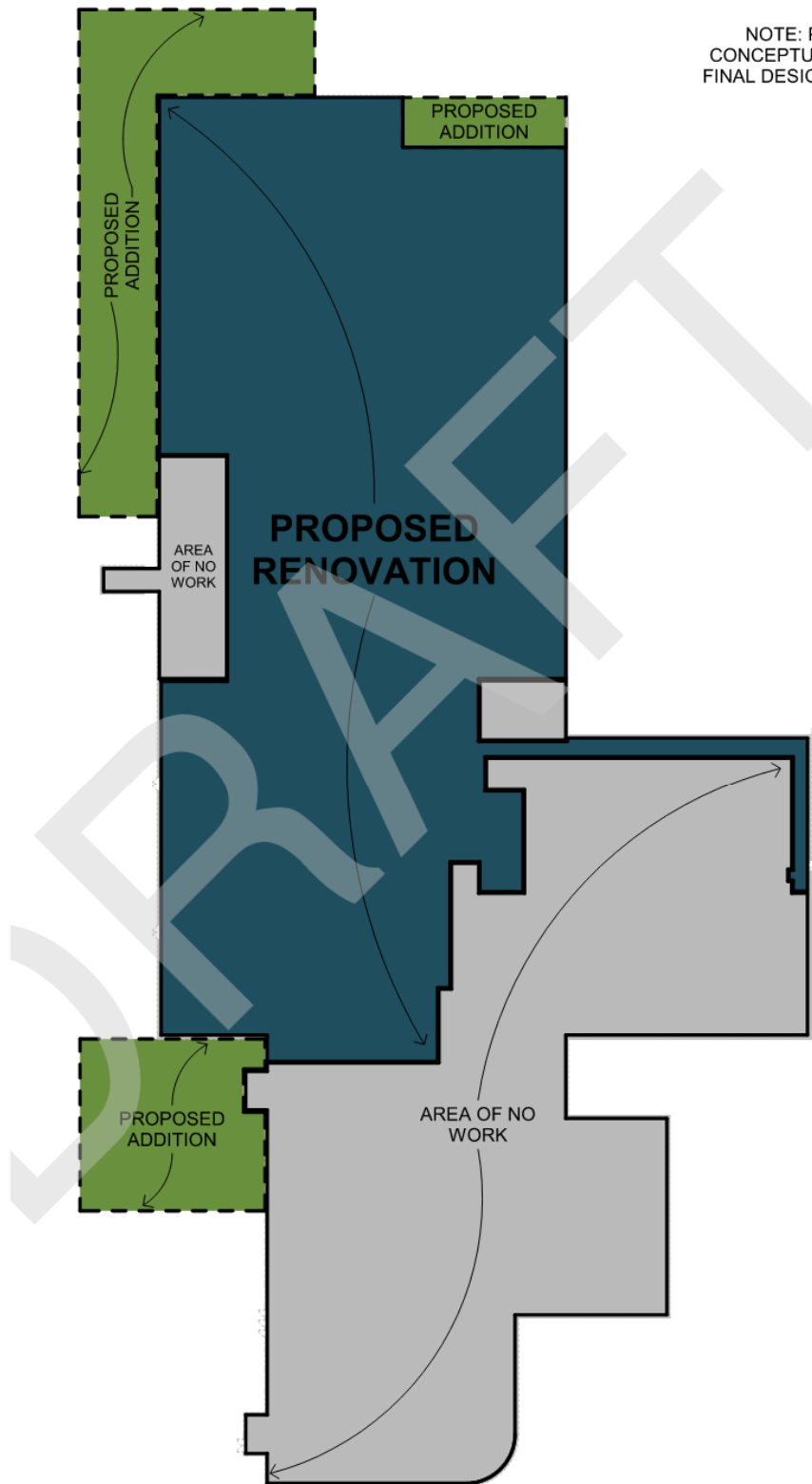
Mound Westonka High School Site Diagram





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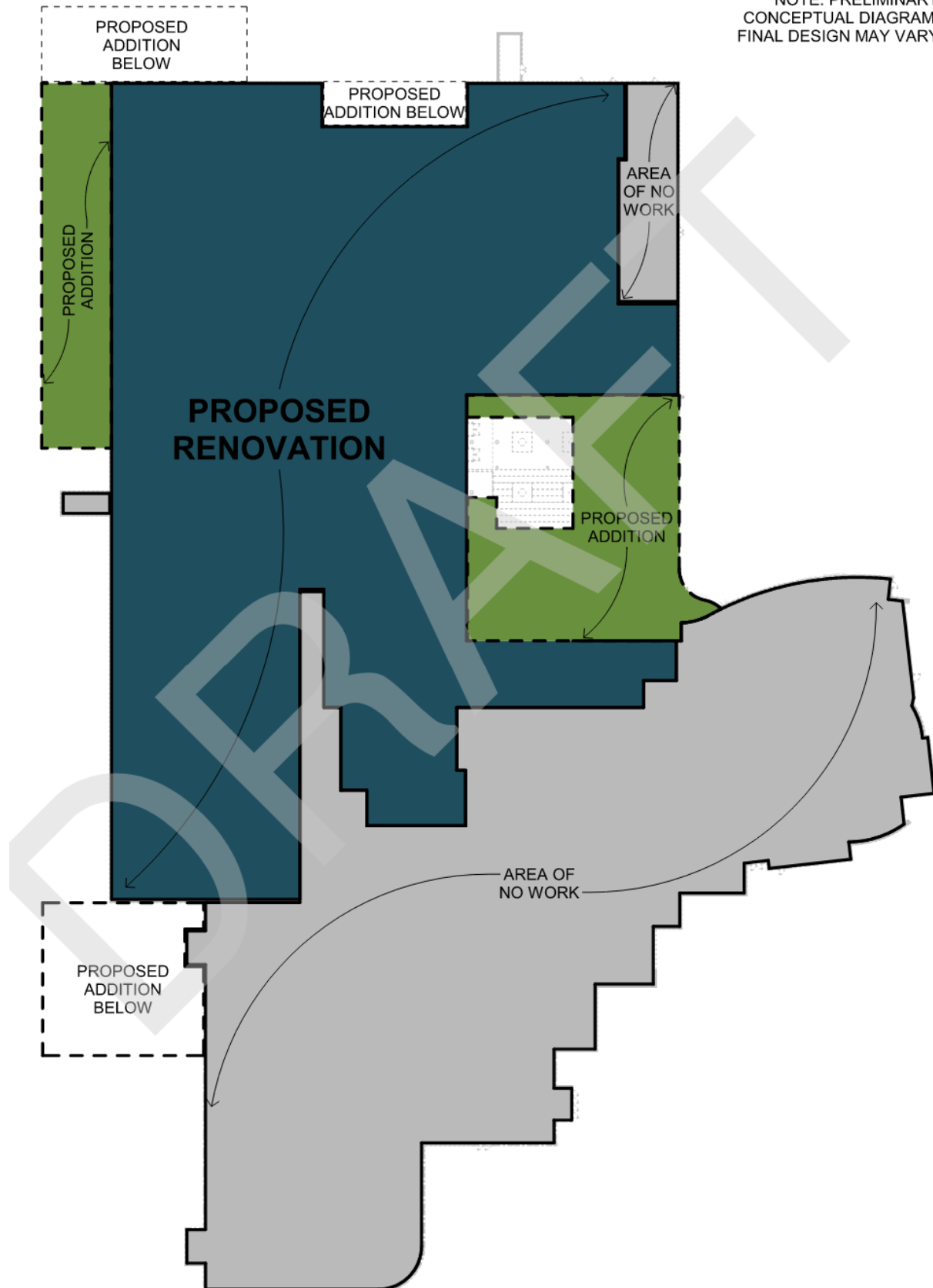
NOTE: PRELIMINARY
CONCEPTUAL DIAGRAM.
FINAL DESIGN MAY VARY



LOWER LEVEL DIAGRAM

DRAFT

NOTE: PRELIMINARY
CONCEPTUAL DIAGRAM.
FINAL DESIGN MAY VARY





4. A Description of the Project (Continued)

c. Estimated Expenditures



ISD #277 - Westonka Public Schools

Pre-Referendum Planning budgets

Note: This report is a budget[®] estimating tool for bond work. Budgets are developed based on conceptual scope and preliminary planning. This worksheet represents the intended scope of work and estimated budgets for the included items. Final project scope will vary based on design solutions developed after the referendum. All recommended amounts include contingencies and a projection for inflationary escalation. Individual line items are considered estimates and final costs may vary based on the construction market at the time of public bidding. Work will be awarded via sealed bids to lowest responsible bidder per the Mn State Statute 471.

	<u>Subtotal Budget</u>	<u>Category Budget</u>
EDUCATIONAL SPACE		
SECURITY		\$7,360,000
Early Childhood	\$84,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Hilltop	\$249,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Shirley Hills	\$238,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Grandview	\$2,542,000	
Secure Entry		
Door monitor		
Hardening Glass		
Zone Separation		
Visual Alert Strobe		
High School	\$4,247,000	
Secure Entry (East and North)		
Door monitor		
Security Glass Upgrade		
Security Glass		
Security Film		
Zone Separation		
Alert Strobe		



MAINTENANCE

\$37,023,000

Hilltop Maintenance

\$4,338,000

Areas to be addressed include:

Mill & Overlay North Shared Parking Lot

Replace Remaining Original Building Windows

Replace Carpet in Various Rooms not replaced in 2011

Replace Interior Doors & Hardware Throughout

Replace Existing Galvanized Steel Domestic Water Distribution Systems with New Copper Piping

Boiler Plant Piping Modifications & Labeling

Replace Existing Primary Boiler Plant with High Efficiency Condensing Boilers

Replace AHU-1

Replace AHU-2

Replace AHU-3

Replace MAU-1

Replace Remaining Transfer Fans and Exhaust Fans Past Usable Life

Add Dehumidification to Gym

Replace Electrical Service

Replace Electrical Panels (14 panels)

Resurface Hard Surface by Playground

Shirley Hills Maintenance

\$2,058,000

Areas to be addressed include:

Replace Interior Doors & Hardware Throughout

Exterior Façade Repairs

Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping

Replace Underground Piping

Replace MAU-1

Replace CRAC Unit Serving Elevator Equip Room

Grandview Maintenance

\$3,775,000

Areas to be addressed include:

Replace Lockers Throughout

Replace Interior Doors & Hardware Throughout

Replace Small Gym Flooring

Entry Canopy & ADA Ramp Rebuild

Small Gym Renovations

Replace Display Cases with Cork Board

Replace Domestic Water Softener

Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping

Provide AHU to Ventilate Kitchen

Remodel Media Center

Media Center and Flex Area Furniture

**High School Maintenance Priorities****\$16,067,000**

Areas to be addressed include:

Gym Roof Replacement

Replace Interior Doors & Hardware Throughout

Replace Gym Bleachers, Curtains, Sound System & Add School Pride, Repaint

Provide Cooling Coil for Dehumidification in AHU S-1 (Pool Unit)

Replace Insulation on Outside Air Duct for AHU S-1 (Pool Unit)

Replace the Steam Plant with New High Efficiency Hot Water Plant

Replace Galvanized Domestic Hot and Cold Water Distribution with New Copper Piping in 1970 building

Replace All Aging Mechanical Equip Past Usable Life (Exhaust Fans, Transfer Fans, etc)

Replace AHU S-4 with Constant Volume Unit

Replace AHU-1

Replace AHU S-6

Replace AHU S-7

Replace AHU S-8

Replace AHU S-10

Replace AHU S-11

Replace AHU S-12

Replace AHU S-13

Replace Sewer Piping

Pool & WAC/PAC Condensing Boiler

Replace Final Phase of Electrical Upgrades (Panelboards and Feeders)

Bus Garage Maintenance**\$218,000**

Areas to be addressed include:

Miscellaneous Tuckpointing

Bus Garage Site Lighting

Electrical Panel Replacement

Campus Maintenance**Tennis Court Rebuild****\$2,568,000****Update Field #12 to Stadium****\$6,715,000**

Thaler Modifications

\$709,000**JV Baseball Field Upgrades****\$575,000***Note: See campus diagram for areas of renovation*



High School Redesign

\$47,117,000

High School Remodel

\$47,117,000

ML Addition (14,800 sf)

Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)

Vocational Space (Machining, Manufacturing)

Cafeteria

Secured Entrance Courtyard

Storage

LL Addition (18,250 sf)

Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)

Vocational Space (Nursing, EMT)

Fitness/Athletic Storage/Circulation

Storage

ML Renovation (86,200 sf)

LL Renovation (63,500 sf)

Note: See diagram for areas of renovation

Bond Issuance

\$1,900,000

Grand Total:

\$93,400,000

Notes:

1 Soft costs including FF&E, Fees, Permits, and Contingency are included in the budget amounts noted above.

2 Budget amount for Storm Shelter includes costs for architectural, structural, mechanical, and electrical requirements to be implemented in conjunction with portions of the total addition square footage noted above.

Note: It is anticipated by the School Board that any surplus from the above noted projects (if any) will be used for yet unidentified capital expenditures as the need may arise.



4. A Description of the Project (Continued)

d. Operational Expenditures:

The District does not anticipate adding additional administrative positions as a result of the expansions. The District does anticipate the addition of one teaching position to support the new nursing/EMT program and a 0.5 custodial position. The additional costs will be covered by the general fund. The size and distribution of the additions at the high school will allow existing maintenance staff to cover the new square footage.

The anticipated increase in the gross square footage for the additions are approximately 33,000 SF.

To estimate the additional operational costs a study was done to baseline against existing district costs and resource allocations for custodial, utilities, and general maintenance costs.

Increased custodial, cleaning Estimates:

Total cost of additional Teaching Position	\$121,831 annually
Total cost of 0.5 custodial position	\$35,413 annually

Increased Utility Estimates:

Utility Rate:	\$	1.00	/sf
	x	33,000	sf
	\$	33,000	annually

e. Schedule

Review and Comment Submittal to MDE	June 2023
Review and Comment MDE Review	July – August 2023
Publish Review and Comment	September – October 2023
Project Design & CD Preparation	January 2024 – November 2024
Project Construction Documents Issue	December 2024-25
● Estimated Project Completion Milestones Mound Westonka High School building and site improvements (phased)	Fall 2026
● Grandview Middle School	Fall 2026
● District Wide Maintenance (phased)	Fall 2025
● District Wide Security Improvements (Phase I)	Fall 2024
● District Wide Security Improvements (Phase II)	Fall 2026



5. A Specification of the Source of Project Financing including:

- a. Applicable Statutory Citations
- b. Scheduled Date and Required Notice
- c. Schedule of Bond Payments
- d. Property Tax Impact

Westonka Public Schools ISD #277 proposes to obtain financing from the sale of General Obligation Bonds, pursuant to Minnesota Statutes Chapter 475. The School District will seek voter approval of two ballot questions on Tuesday, November 7, 2023. The first ballot question would authorize a renewal of the school district's existing capital project levy authorization of 3.400% times the net tax capacity of the school district, which is scheduled to expire after taxes payable 2024. The second ballot question would authorize the issuance of up to \$93,400,000 in school building bonds. Underwriter's discount, capitalized interest, and cost of issuance are estimated at \$2,779,188. The difference between the amount requested to be authorized by the voters, plus the estimated interest earnings in the construction fund of \$879,188 and less estimated costs of issuing this debt equals \$91,500,000, the amount the District expects to need for construction projects.

Ehlers has prepared the following schedules:

- 1) Estimated sources and uses of funds for the proposed bond issue
- 2) Estimated debt payment structure for the anticipated bond issue and estimated annual debt service property tax levies after accounting for the 105% levy requirement and (the district does not qualify for debt service equalization aid)
- 3) An analysis of the estimated tax impact on various values of residential, commercial, and apartments/residential non-homestead properties for the proposed capital project levy renewal and school building bond issue



5. A Specification of the Source of Project Financing (*Continued*)

1) *Estimated sources and uses of funds for the proposed bond issue*

Westonka Public Schools, ISD 277

June 6, 2023

Estimated Sources and Uses of Funds

General Obligation School Building Bonds - Potential November 2023 Election

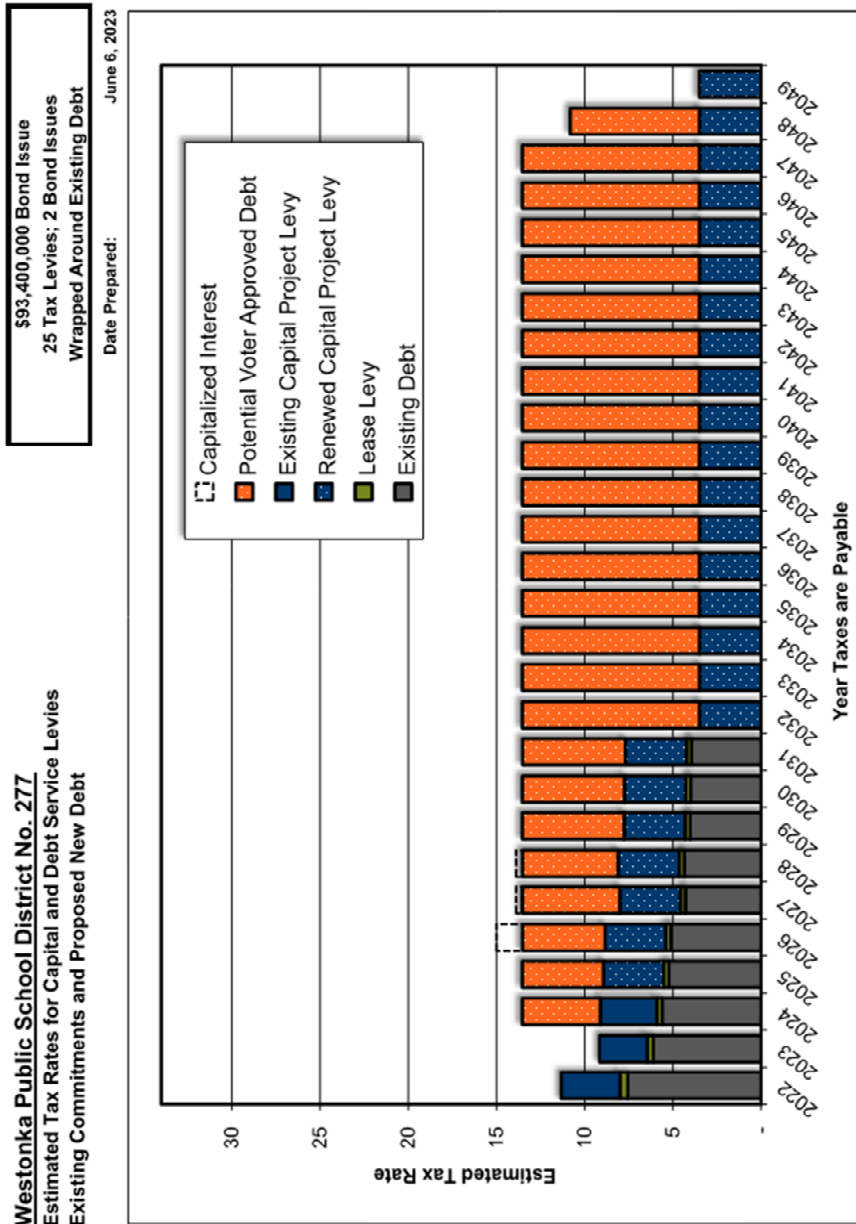
	Bond Issue 1	Bond Issue 2	Total
Bond Amount	\$43,100,000	\$50,300,000	\$93,400,000
Tax Levies			25
Closing Date	2/1/2024	2/1/2026	
Sources of Funds			
Par Amount	\$43,100,000	\$50,300,000	\$93,400,000
Investment Earnings ¹	639,126	240,062	879,188
Total Sources	\$43,739,126	\$50,540,062	\$94,279,188
Uses of Funds			
Allowance for Discount Bidding ²	\$323,250	\$377,250	\$700,500
Capitalized Interest ³	0	1,700,000	1,700,000
Legal and Fiscal Costs ⁴	168,383	210,305	378,688
Net Available for Project Costs	43,247,493	48,252,507	91,500,000
Total Uses	\$43,739,126	\$50,540,062	\$94,279,188
Deposit to Construction Fund	\$42,608,367	\$48,012,445	\$90,620,812

- 1 Estimated investment earnings are based on an average interest rate of 1.0%, and an average life of 18 months on first bond issue and an average life of 6 months on the second bond issue.
- 2 The allowance for discount bidding is an estimate of the compensation taken by the underwriter who provides the lowest true interest cost as part of the competitive bidding process and purchases the bonds. Ehlers provides independent municipal advisory services as part of the bond sale process and is not an underwriting firm.
- 3 To maintain a level tax rate, a portion of the interest payments due during fiscal years 2027, 2028, and 2029 would be made from bond proceeds.
- 4 Includes fees for municipal advisor, bond counsel, rating agency, paying agent and county certificates.



5. A Specification of the Source of Project Financing (*Continued*)

- 2) *Estimated* debt payment structure for the anticipated bond issue and estimated annual debt service property tax levies after accounting for the 105% levy requirement and debt equalization aid.





Westonka Public Schools - ISD #277

2023 Review and Comment

Westonka Public School District No. 277 Analysis of Possible Structure for Capital and Debt Levies

\$93,400,000 Bond Issue
25 Tax Levies; 2 Bond Issues
Wrapped Around Existing Debt

June 6, 2023

Type of Bond		Principal Amount	Dated	Interest Rate
Voter-Approved Building		\$43,100,000	02/01/24	5.00%
Voter-Approved Building		\$50,300,000	02/01/26	5.00%

Levy Year	Fiscal Year	Tax Capacity Value ¹	Existing Commitments			Other Levies		Proposed New School Building Bonds				Combined Totals		
			Building Bonds ²	Abatement Bonds ²	Est. Debt Excess ³	Levy	Project Levy ⁴	Principal	Interest	Advt. Debt Excess ³	Net Levy	Initial Debt Levy	State Aid	Net Levy
2022	2023	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	6,184,538	-	6,184,538
2023	2024	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	935,000	2,155,000	-	3,244,500	8,144,538	-	9,079,538
2024	2025	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	1,190,000	2,108,250	-	3,443,150	9,562,688	-	10,755,838
2025	2026	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	10,204,438	-	10,204,438
2026	2027	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	10,407,167	-	10,407,167
2027	2028	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	10,617,506	-	10,617,506
2028	2029	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	10,829,933	-	10,829,933
2029	2030	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	11,043,469	-	11,043,469
2030	2031	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	11,258,005	-	11,258,005
2031	2032	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	11,473,541	-	11,473,541
2032	2033	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	11,689,077	-	11,689,077
2033	2034	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	11,904,613	-	11,904,613
2034	2035	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	12,120,149	-	12,120,149
2035	2036	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	12,335,685	-	12,335,685
2036	2037	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	12,551,221	-	12,551,221
2037	2038	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	12,766,757	-	12,766,757
2038	2039	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	12,982,293	-	12,982,293
2039	2040	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	13,197,829	-	13,197,829
2040	2041	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	13,413,365	-	13,413,365
2041	2042	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	13,628,901	-	13,628,901
2042	2043	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	13,844,437	-	13,844,437
2043	2044	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	14,059,973	-	14,059,973
2044	2045	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	14,275,509	-	14,275,509
2045	2046	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	14,491,045	-	14,491,045
2046	2047	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	14,706,581	-	14,706,581
2047	2048	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	14,922,117	-	14,922,117
2048	2049	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	15,137,653	-	15,137,653
2049	2050	\$1,850	3,881,745	235,335	(197,683)	224,998	1,727,671	-	-	-	-	15,353,189	-	15,353,189
Totals			38,267,001	1,676,010	(1,381,767)	2,249,998	76,418,770	93,400,000	77,138,000	(7,227,072)	170,052,838	285,282,801	-	285,282,801

- 1 Tax capacity value for taxes payable in 2022 and 2023 are actual values. The estimate for taxes payable 2024 is based on preliminary assessment data from Hennepin County. Estimates for future years are based on the percentage changes as shown above.
- 2 Initial debt service levies (prior to subtracting debt equalization aid) are set at 105 percent of the principal and interest payments during the first fiscal year.
- 3 Debt excess adjustment for taxes payable in 2022 and 2023 are the actual amounts. For taxes payable 2024 debt excess will be estimated at 4.5% of the prior year's initial debt service levy.
- 4 Assumes that the existing capital project levy would be renewed at the same tax rate prior to expiring.
- 5 To maintain a level tax rate, a portion of the interest payments due during fiscal years 2027, 2028, and 2029 would be made from bond proceeds. Those payments are estimated at \$1,700,000.



5. A Specification of the Source of Project Financing (*continued*)

An analysis of the estimated tax impact on various values of residential, commercial, agricultural, and seasonal recreational properties for the proposed bond issue.

	Question 1	Question 2
	Capital Project Levy Renewal	Building Bond
	2025 10 \$2,575,178	\$93,400,000 \$91,500,000 2024 25
Authorized Bond Amount		
Project Costs		
First Year Taxes Payable		
Tax Levies		
Annual Revenue		

Type of Property	Estimated Market Value	Estimated Impact on Annual Taxes*	
Residential Homestead	\$100,000	\$0	\$32
	200,000	0	80
	300,000	0	128
	350,000	0	152
	400,000	0	176
	450,000	0	198
	500,000	0	220
	550,000	0	248
	600,000	0	275
	750,000	0	358
	1,000,000	0	496
Commercial/ Industrial #	\$200,000	\$0	\$98
	500,000	0	280
	750,000	0	432
	1,000,000	0	583
	2,000,000	0	1,189
Apartments & Residential Non-Homestead (2 or more units)	\$150,000	\$0	\$83
	300,000	0	165
	500,000	0	275
	1,000,000	0	551
	2,000,000	0	1,101

* Estimated tax impact includes principal and interest payments on the new bonds and capital project levies only, and do not include tax levies for other purposes. Tax increases shown above are gross increases, not including the impact of the homeowner's Homestead Credit Refund ("Circuit Breaker") program. Owners of homestead property may qualify for a refund, based on their income and total property taxes. This will decrease the net effect of the proposed bond issue for qualifying property owners.

For commercial-industrial property, the estimates above are for property in the City of Mound. The tax impact for commercial-industrial property in other municipalities in the school district may be slightly different, due to the varying impact of the Fiscal Disparities program.

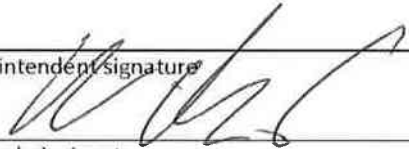
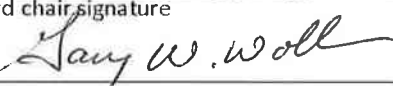



Attachment 1
Review and Comment
Section #6 Documentation
(as amended by the 2014 Legislature)

Documentation obligating the school district and contractors to comply with items (i) to (vii) in planning and executing the project:

- (i) The school district will be in compliance with Minnesota Statutes, section 471.345, governing municipal contracts issued for this project.
- (ii) The school district and the architects will include elements of sustainable design for this project.
- (iii) If the project installs or modifies facility mechanical systems, the school district, architect/engineers and contractors will be in compliance with school facility commissioning under Minnesota Statutes, section 123B.72, certifying the plans and designs for the heating, ventilating, air conditioning and air filtration for an extensively renovated or new facility meet or exceed current code standards, including the ASHRAE air filtration standard 52.1.
- (iv) If the project creates or modifies interior spaces, the district, architects/engineers and relevant contractors have considered the *American National Standards Institute Acoustical Performance Criteria, Design Requirements and Guidelines for Schools* on maximum background noise level and reverberation times.
- (v) The project will be in compliance with Minnesota State Fire Code.
- (vi) The project will be in compliance with Minnesota Statutes, chapter 326B, governing building codes.
- (vii) The school district and the architects/engineers have been in consultation with affected government units about the impact of the project on utilities, roads, sewers, sidewalks, retention ponds, school bus and automobile traffic, access to mass transit and safe access for pedestrians and cyclists.

The school district and architect/engineers will maintain documentation showing compliance with these items upon, and subsequent to, project completion.

Superintendent signature 	Date June 30, 2023
Board chair signature 	Date June 30, 2023
Architect/engineer signature 	Date June 30, 2023



Westonka Public Schools - ISD #277
2023 Review and Comment

Appendix A: Capacity Study



Commission No. 9999

Capacity Analysis:

Westonka Public Schools

Independent School District #277

5901 Sunnyfield Road East

Minnetrista, Minnesota 55364

October 15, 2019

Wold Architects and Engineers
332 Minnesota Street, Suite W2000
Saint Paul, MN 55101
woldae.com | 651 227 7773

**PLANNERS
ARCHITECTS
ENGINEERS**



Independent School District #277 – Westonka Public Schools

Capacity Analysis

October 15, 2019

<u>Table of Contents</u>	<u>Page</u>
Introduction	1
List of Facilities	2
Building Capacity Defined	3-6
District Wide Capacity Summary	7
Capacity Diagrams	8



On behalf of Wold Architects and Engineers we would like to thank the Administration for the opportunity to provide this study. Our appreciation also goes to the School Administrators and staff who have given us their time and knowledge to allow us to complete this study.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Aplikowski", written over a horizontal line.

Paul Aplikowski
Partner



District Owned Facilities

Elementary School

Hilltop Primary School

5700 Game Farm Road
Minnetrista, Minnesota 55364

Shirley Hills Primary School

2450 Wilshire Boulevard
Mound, Minnesota 55364

Middle School

Grandview Middle School

1881 Commerce Boulevard
Mound, Minnesota 55364

High School

Mound Westonka High School

5905 Sunnyfield Road East
Minnetrista, Minnesota 55364



DEFINING BUILDING CAPACITY



CAPACITY OVERVIEW

Contrary to popular opinion, school buildings do not have a fixed capacity. In fact, they have a capacity based upon how an organization chooses to allocate use of space. As you allocate space for computer labs, special education or other support functions, this technically reduces the number of spaces (classrooms) available for capacity.

Typical practice for School districts is to assign use of space in preparation for each upcoming school year. Therefore each year we can calculate capacity, and each year the capacity may change. This allocation of space dictates what spaces are available to provide capacity.

What follows is a methodology for determining capacities for your Elementary, Middle School and High School buildings.

- The Actual capacity diagrams are included in this Report. Each school has a 2019/20 capacity and also a “potential capacity.”
- The following pages describe the capacity calculation methodology, and assumptions as developed with your administrators.



CAPACITY CALCULATION: SAMPLE EXERCISE

KINDERGARTEN K	KINDERGARTEN K
---------------------------------	---------------------------------

KINDERGARTEN FULL DAY CAPACITY

2 Classrooms x 20 Students/Classroom = 40 Student Capacity

ART	MUSIC	CLASSROOM ●	CLASSROOM ●
------------	--------------	-----------------------	-----------------------

ELEMENTARY SCHOOL CAPACITY

2 Classrooms x 24 Students/Classroom = 48 Student Capacity



CAPACITY CALCULATION: SAMPLE EXERCISE

ART ●	MUSIC ●	CLASSROOM ●	CLASSROOM ●
-----------------	-------------------	-----------------------	-----------------------

MIDDLE SCHOOL CAPACITY

4 Classrooms x 28 Students/Teaching Station = 112 Students

x 85% Efficiency Factor = 90 Student Capacity

ART ●	MUSIC ●	CLASSROOM ●	CLASSROOM ●
-----------------	-------------------	-----------------------	-----------------------

HIGH SCHOOL CAPACITY

4 Classrooms x 30 Students/Teaching Station= 120 Students

x 85% Efficiency Factor = 102 Student Capacity

Note:

1. Typically cannot count more than (1) gym station per 500 students.
2. Typically cannot count more I.T. spaces than there are instructors.
3. Careful counting each: food, sewing, music, art.
4. Count only computer labs scheduled (business ed. and sometimes Language Arts).

**ELEMENTARY SCHOOL CAPACITY**

		Current Capacity	Potential Rooms	Potential Capacity	2019 Enrollment
Hilltop	K-5	460	3	532	464
Shirley Hills	K-5	440	1	464	430
Total		900	4	996	894

Excess Capacity: $996 - 894 = 102$

MIDDLE SCHOOL CAPACITY

		Current Capacity	Potential Rooms	Potential Capacity	2019 Enrollment
Grandview	6-8	630	2	678	554
Total		630	2	678	554

Excess Capacity: $678 - 554 = 124$

HIGH SCHOOL CAPACITY

		Current Capacity	Potential Rooms	Potential Capacity	2019 Enrollment
Westonka Mound	9-12	1,071	0	1,071	1,004
Total		1,071	0	1,071	1,004

Excess Capacity: $1,071 - 1,004 = 67$

District Wide Excess Capacity: 293



CAPACITY DIAGRAMS



Independent School District #277

2019-20 Long Range Planning
October, 2019

2019 CAPACITY

Kindergarten
5 * 20 = 100
● Classroom
15 * 24 = 372
TOTAL = 460 Students

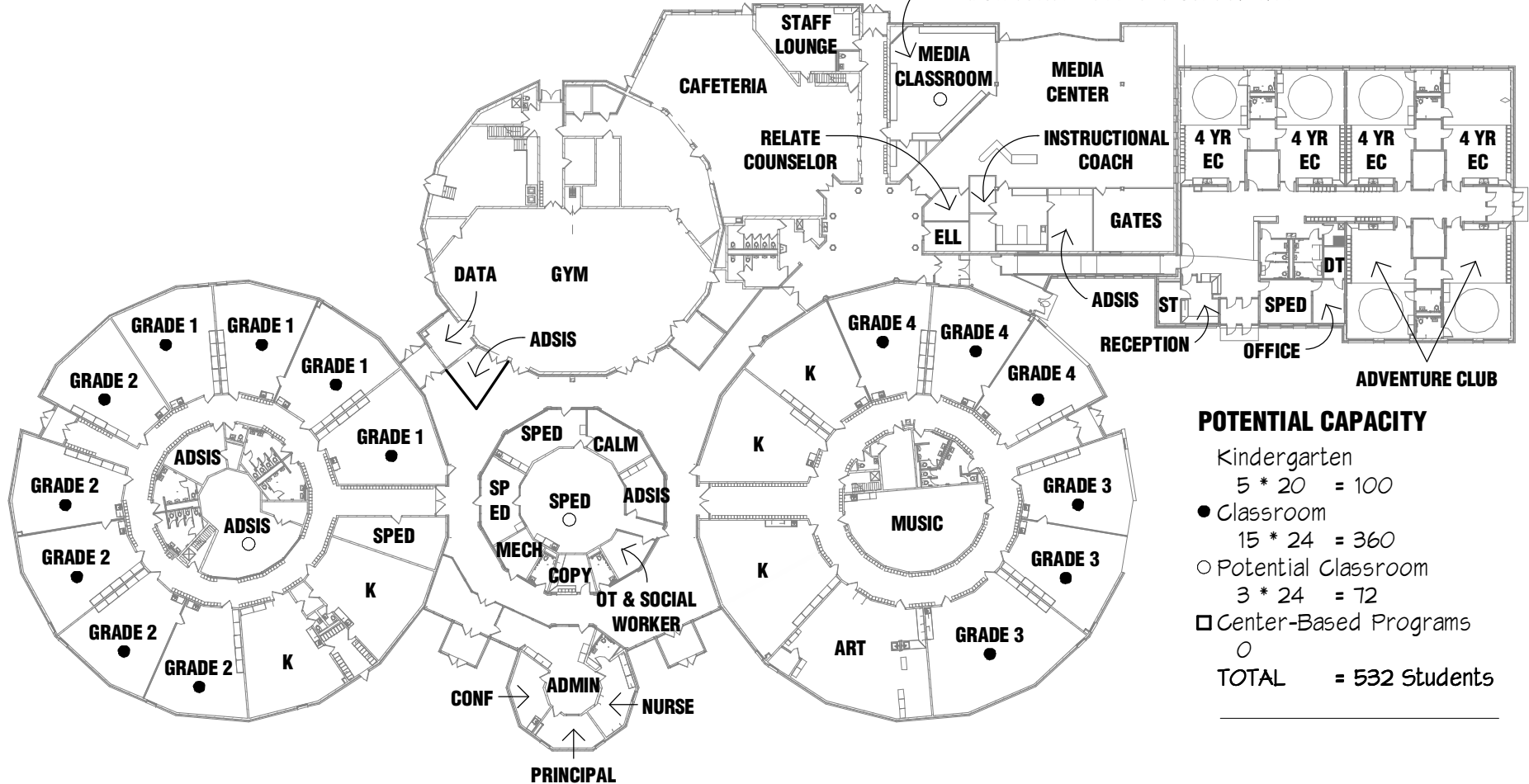
CORE CAPACITY

Cafeteria: 2,900 sf
15 sf/Student
193 Students

CORE DEFICIENCIES

- OFFICE SPACE
- EC MOTOR SPACE
- EC CAFETERIA SPACE
- FUTURE ADVENTURE CLUB SPACE

NOTE: USED 1/2 TIME FOR CORE CLASSROOM INSTRUCTION 2019/2020 SCHOOL YEAR



POTENTIAL CAPACITY

Kindergarten
5 * 20 = 100
● Classroom
15 * 24 = 360
○ Potential Classroom
3 * 24 = 72
□ Center-Based Programs
0
TOTAL = 532 Students

1 HILLTOP: Main Level Capacity Plan
1" = 50'-0"

0 37'-6" 75'



2019 CAPACITY

Kindergarten

$$4 * 20 = 80$$

- Classroom

$$15 * 24 = 360$$

$$\text{TOTAL} = 440 \text{ Students}$$

CORE DEFICIENCIES

- SENSORY/MOTOR SPACE
-SWING

CORE CAPACITY

Cafeteria: 3,580 sf

$$15 \text{ sf/Student}$$

$$238 \text{ Students}$$

POTENTIAL CAPACITY

Kindergarten

$$4 * 20 = 80$$

- Classroom

$$15 * 24 = 360$$

- Potential Classroom

$$1 * 24 = 24$$

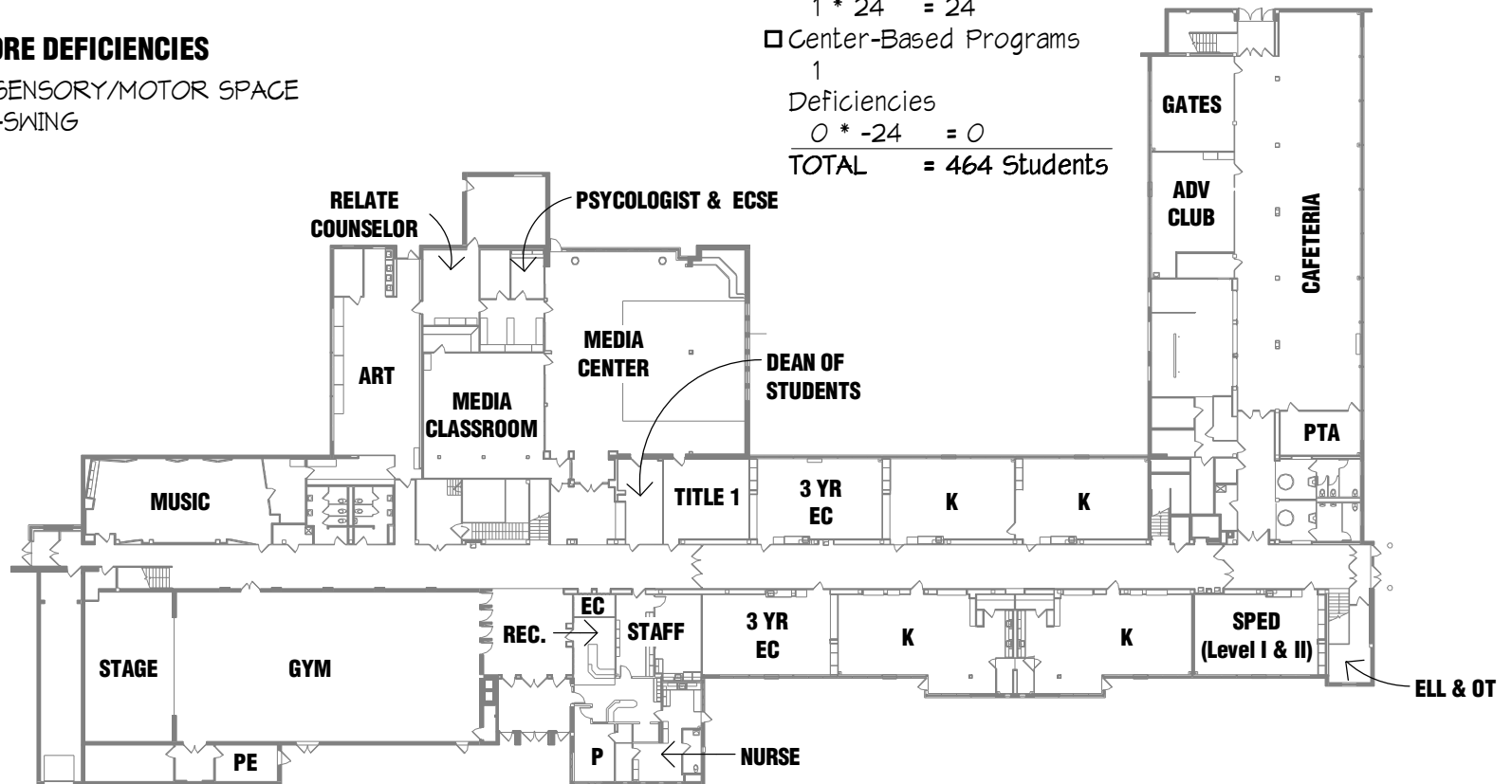
- Center-Based Programs

1

Deficiencies

$$0 * -24 = 0$$

$$\text{TOTAL} = 464 \text{ Students}$$



1 SHIRLEY HILLS: Main Level

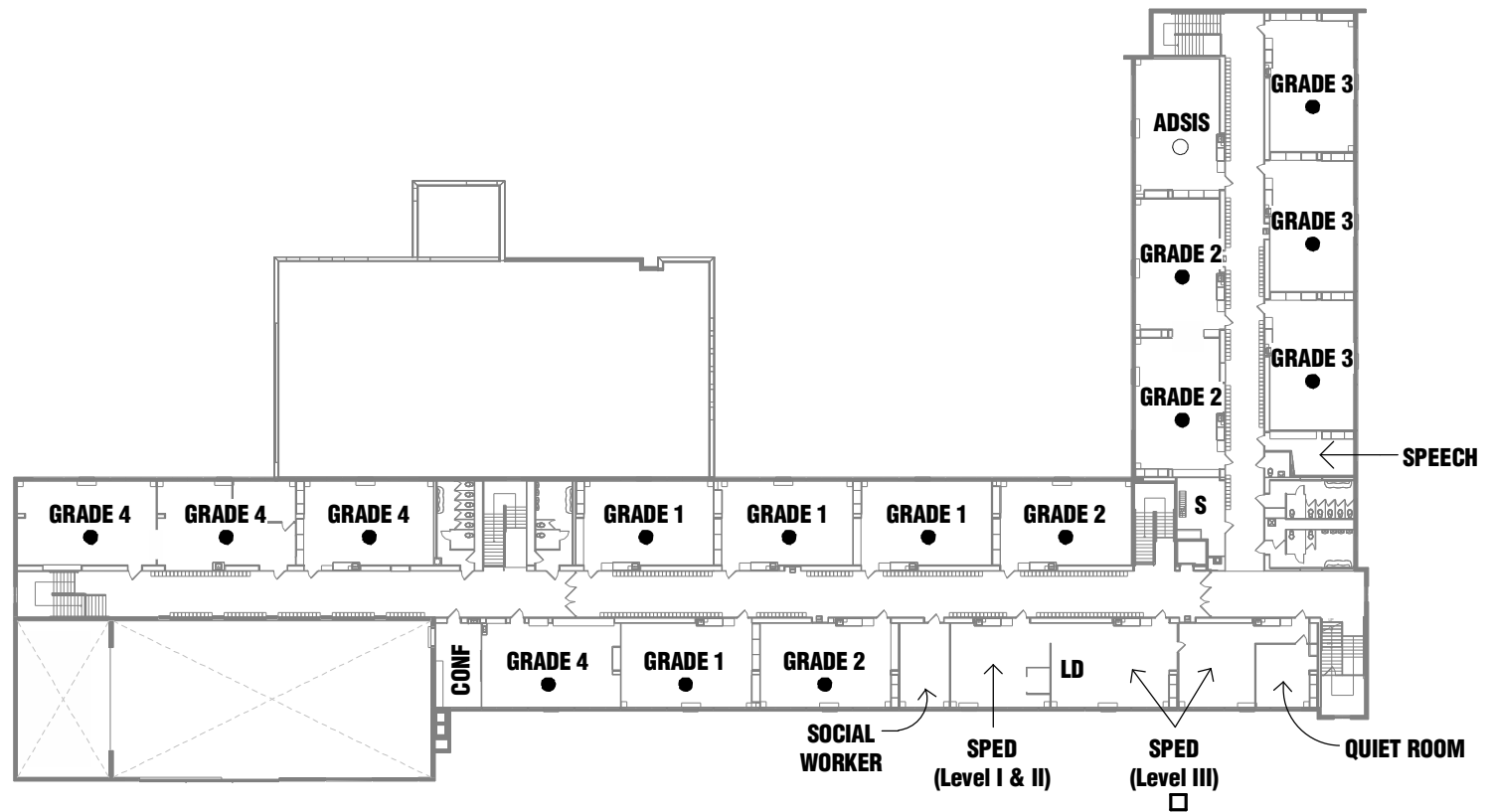
1" = 50'-0"

0 37'-6" 75'



Independent School District #277

2019-20 Long Range Planning
October, 2019



1 SHIRLEY HILLS: Upper Level
1" = 50'-0"
0 31'-6" 75'



Independent School District #277

2019-20 Long Range Planning
October, 2019

2019 CAPACITY

● Classrooms
 $26.5 * 28 * .85 = 630$
TOTAL = 630 Students

CORE CAPACITY

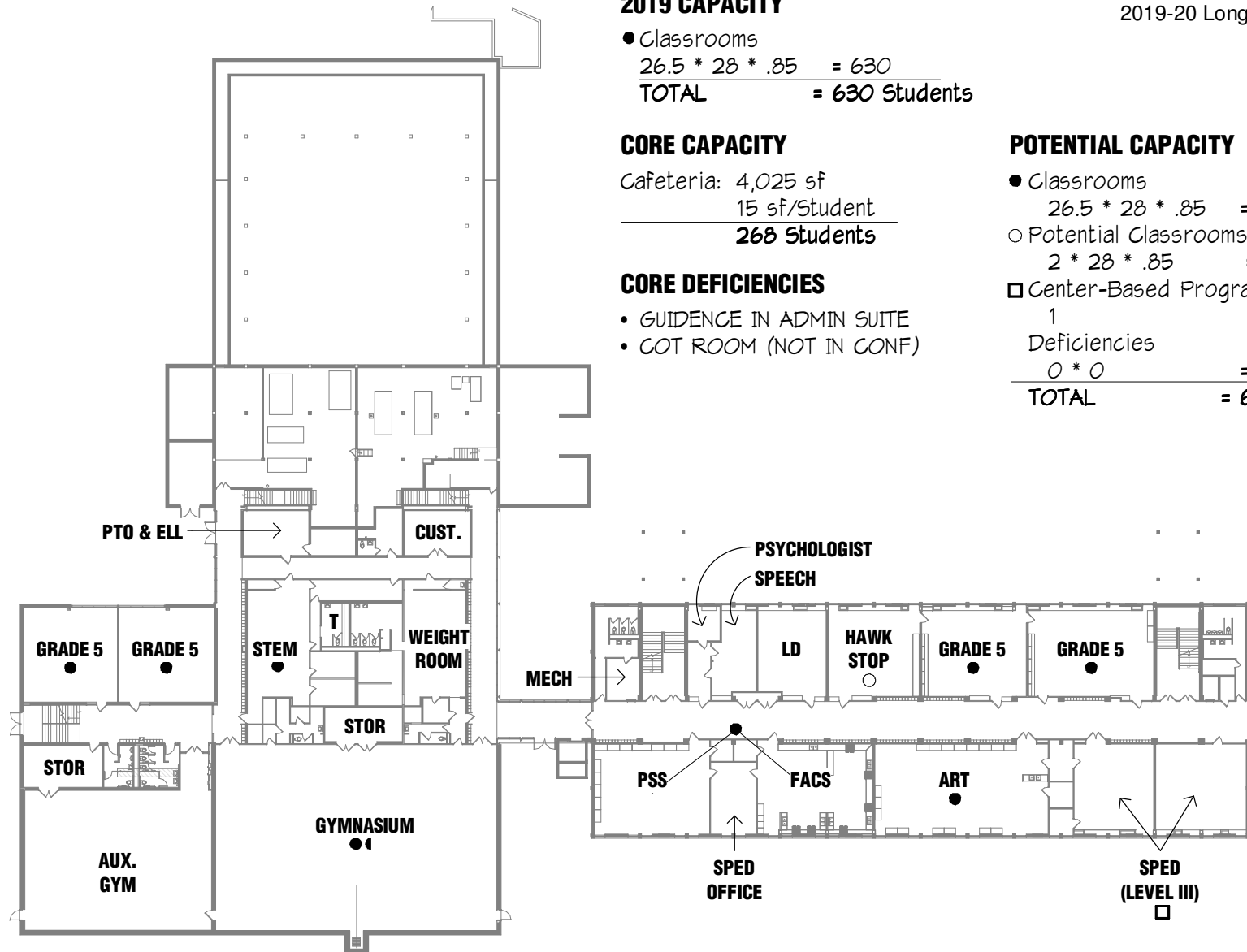
Cafeteria: 4,025 sf
15 sf/Student
268 Students

CORE DEFICIENCIES

- GUIDENCE IN ADMIN SUITE
- COT ROOM (NOT IN CONF)

POTENTIAL CAPACITY

● Classrooms
 $26.5 * 28 * .85 = 630$
○ Potential Classrooms
 $2 * 28 * .85 = 48$
□ Center-Based Programs
1
Deficiencies
 $0 * 0 = -20$
TOTAL = 678 Students

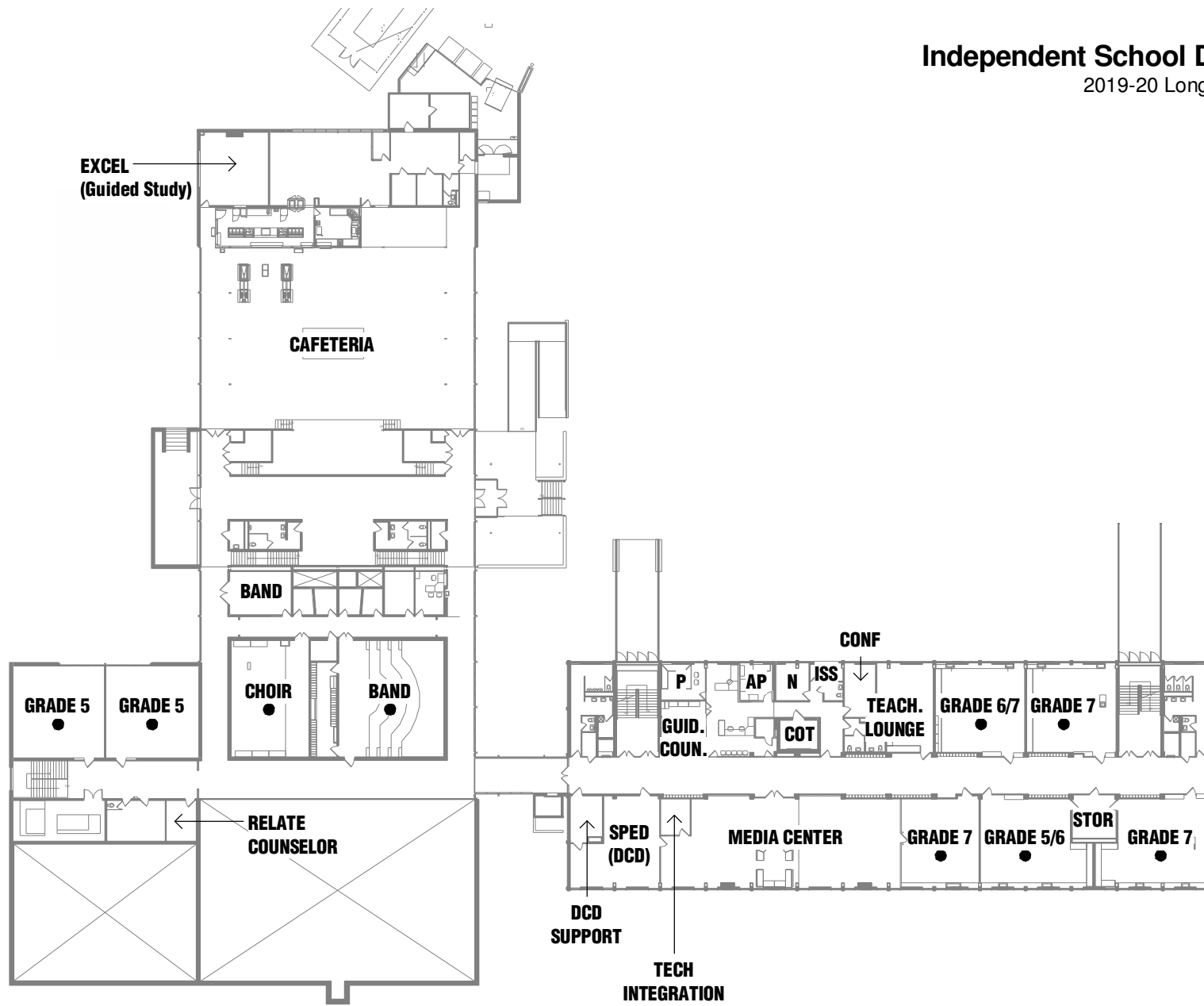


1 GRANDVIEW: Lower Level
1" = 50'-0"
0 37'-6" 75'



Independent School District #277

2019-20 Long Range Planning
October, 2019

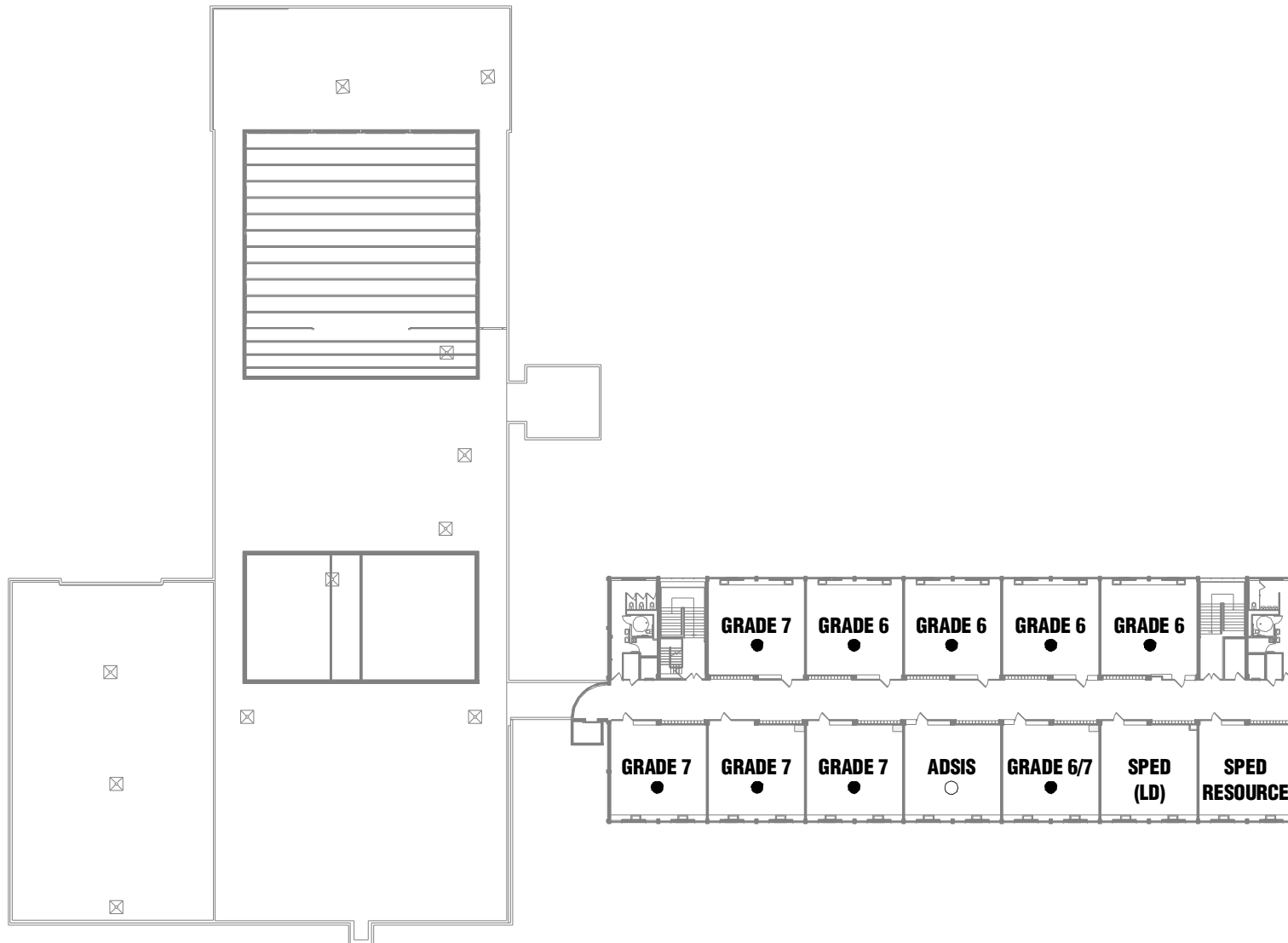


1 **GRANDVIEW: Main Level**
1" = 50'-0"
0 37'-6" 75'



Independent School District #277

2019-20 Long Range Planning
October, 2019

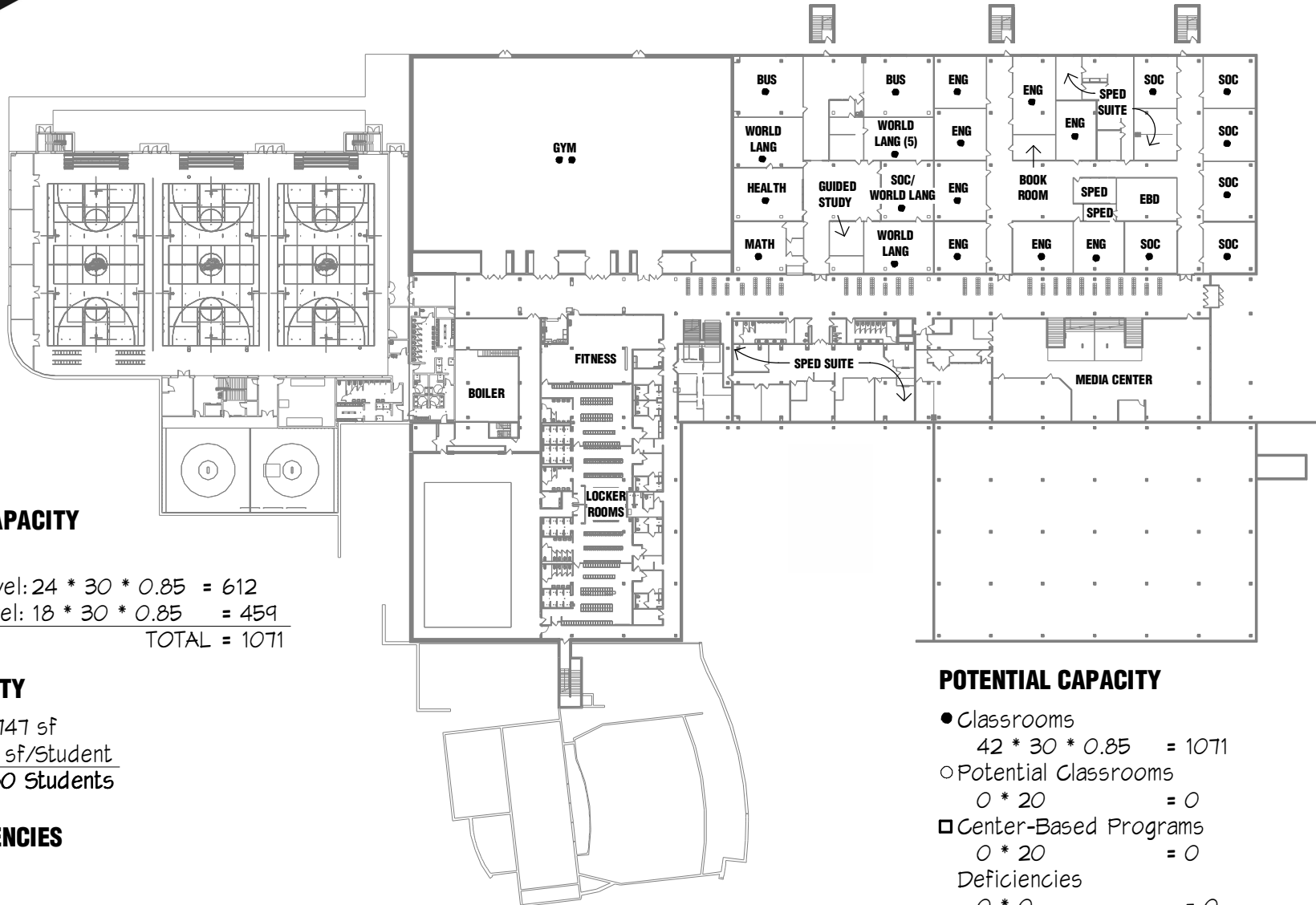


1 **GRANDVIEW: Upper Level**
1" = 50'-0"
0 37'-6" 75'



Independent School District #277

2019-20 Long Range Planning
October, 2019



2017/2018 CAPACITY

- Classrooms
Lower Level: $24 * 30 * 0.85 = 612$
Upper Level: $18 * 30 * 0.85 = 459$
TOTAL = 1071

CORE CAPACITY

Cafeteria: 3,747 sf
15 sf/Student
250 Students

CORE DEFICIENCIES

- None

POTENTIAL CAPACITY

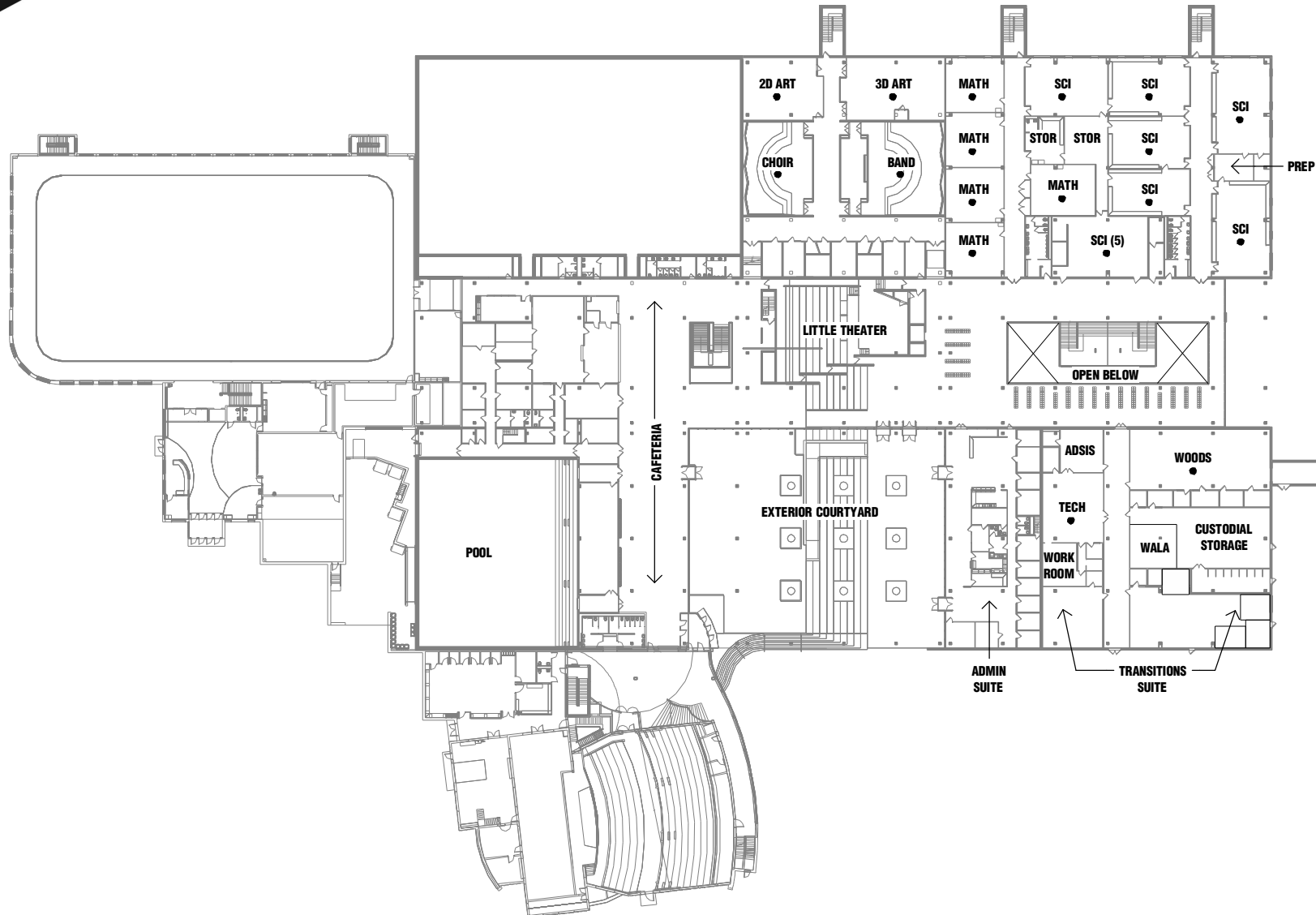
- Classrooms
 $42 * 30 * 0.85 = 1071$
- Potential Classrooms
 $0 * 20 = 0$
- Center-Based Programs
 $0 * 20 = 0$
- Deficiencies
 $0 * 0 = 0$
- TOTAL = 1071 Students

1 HIGH SCHOOL: Lower Level
1" = 80'-0"
0 60' 120'



Independent School District #277

2019-20 Long Range Planning
October, 2019



1 HIGH SCHOOL: Main Level
1" = 80'-0"
0 60' 120'



Westonka Public Schools - ISD #277
2023 Review and Comment

Appendix B: Deferred Maintenance Study



Maintenancs Project List - District Wide

Mound Westonka High School
Grandview Middle School
Shirley Hills Primary School
Hilltop Primary School
Bus Garage



Maintenance List - High School

Civil	OS: Outdoor Space
Architectural	A: Air
Mechanical / Plumbing	W: Water
Electrical / Technology	OT: Other

Maintenance Item	
OT	Gym Roof Replacement
OT	Replace Interior Doors & Hardware Throughout
OT	Replace Gym Bleachers, Curtains, Sound System & Add School Pride, Repaint
A	Provide Cooling Coil for Dehumidification in AHU S-1 (Pool Unit)
A	Replace Insulation on Outside Air Duct for AHU S-1 (Pool Unit)
W	Replace the Steam Plant with New High Efficiency Hot Water Plant
W	Replace Galvanized Domestic Hot and Cold Water Distribution with New Copper Piping in 1970 building
A	Replace All Aging Equip Past Usable Life (Exhaust Fans, Transfer Fans, etc)
A	Replace AHU S-4 with Constant Volume Unit
A	Replace AHU-1
A	Replace AHU S-6
A	Replace AHU S-7
A	Replace AHU S-8
A	Replace AHU S-10
A	Replace AHU S-11
A	Replace AHU S-12
A	Replace AHU S-13
W	Replace Sewer Piping
A	Pool & WAC/PAC Condensing Boiler
OT	Replace Final Phase of Electrical Upgrades (Panelboards and Feeders)
OS	Haddorff Field Turf
OS	Tennis Court Replacement



Maintenance List - Grandview Middle School

Civil	OS: Outdoor Space
Architectural	A: Air
Mechanical / Plumbing	W: Water
Electrical / Technology	OT: Other

Maintenance Item	
OT	Replace Lockers Throughout
OT	Replace Interior Doors & Hardware Throughout
OT	Replace Gym Flooring
OT	Entry Canopy & ADA Ramp Rebuild
OT	Small Gym Renovations
OT	Replace Display Cases with Cork Board
W	Replace Domestic Water Softener
W	Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping
A	Provide AHU to Ventilate Kitchen
A	Provide AHU to Ventilate Kitchen
A	Provide AHU to Ventilate Kitchen



Maintenance List - Shirley Hills Primary

Civil	OS: Outdoor Space
Architectural	A: Air
Mechanical / Plumbing	W: Water
Electrical / Technology	OT: Other

Maintenance Item	
OT	Replace Interior Doors & Hardware Throughout
OT	Exterior Façade Repairs
W	Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping
W	Replace Underground Piping
A	Replace MAU-1
A	Replace CRAC Unit Serving Elevator Equip Room



Maintenance List - Hilltop Primary

Civil	OS: Outdoor Space
Architectural	A: Air
Mechanical / Plumbing	W: Water
Electrical / Technology	OT: Other

Maintenance Item	
OT	Mill & Overlay North Shared Parking Lot
OT	Replace Original Building Windows
OT	Replace Carpet in Various Rooms not replaced in 2011
OT	Replace Interior Doors & Hardware Throughout
W	Replace Existing Galvanized Steel Domestic Water Distribution Systems with New Copper Piping
A	Boiler Plant Piping Modifications & Labeling
A	Replace Existing Primary Boiler Plant with High Efficiency Condensing Boilers
A	Replace AHU-1
A	Replace AHU-2
A	Replace AHU-3
A	Replace MAU-1
A	Replace Remaining Transfer Fans and Exhaust Fans Past Usable Life
A	Add Dehumidification to Gym
OT	Replace Electrical Service
OT	Replace Electrical Panels (14 panels)
OS	Resurface Hard Surface by Playground



Maintenance List - Bus Garage

Civil	OS: Outdoor Space
Architectural	A: Air
Mechanical / Plumbing	W: Water
Electrical / Technology	OT: Other

Maintenance Item	
OT	Miscellaneous Tuckpointing
OT	Bus Garage Site Lighting
OT	Electrical Panel Replacement



Westonka Public Schools - ISD #277
2023 Review and Comment

Appendix C: Enrollment Report

WESTONKA PUBLIC SCHOOLS ISD#277

ENROLLMENT PROJECTIONS

Hazel H. Reinhardt

7/4/2022

WESTONKA PUBLIC SCHOOLS ENROLLMENT PROJECTIONS

Executive Summary

Since 2011-12

- Westonka Public Schools' enrollment (excluding Early Childhood) increased by 169 students or 7.7 percent. Growth very uneven from year to year
- Resident enrollment (excluding Early Childhood) increased by 53 students or 2.7 percent
 - The district's school age population increased by 265 students or 9.4 percent with the Westonka Public Schools capturing only 20 percent of that increase
- Nonresidents make up 16.5 percent of total enrollment in 2021-22
 - The Westonka Public Schools had a net loss of 310 students to other public options in 2021-22
- The market share of the Westonka Public Schools is 64.2 percent

In ten years, that is, in 2031-32

- Westonka Public Schools' enrollment (excluding Early Childhood) is projected to increase ranging from 2,379 to 2,454 or 0.3 percent to 3.4 percent more than the 2021-22 enrollment of 2,373 students
- Kindergarten is projected to be smaller than the previous year's Grade 12, a continuation of the pattern of the past two years
- Net migration is projected to continue at about the same rate as the four years prior to the most recent year. Although the number of single-family detached housing units has increased steadily, net in migration varied from year to year

In five years, that is, in 2026-27

- K-4 enrollment projected to be 5 students smaller to 25 students larger than in 2021-22
- Middle school enrollment is 77 to 84 students higher than today
- High school enrollment projected to decrease by 120 students between 2021-22 and 2026-27

What could occur to make these projections too high or too low

- Too high
 - Projected kindergarten is too high
 - More students chose other education options
- Too low
 - Projected kindergarten is too low
 - More students open enroll into the district
 - Residential development brings more school age children who will attend the Westonka Public Schools than in the past

COVID-19 AFFECTS

Minnesota public school enrollment in 2020-21 was affected by the COVID-19 Pandemic. Kindergarten classes were smaller and elementary students, in general, were lost to home schools and or private schools. Middle school and high school enrollment was less affected by the Pandemic.

The COVID-19 Pandemic had only a minimal effect on Westonka Public Schools' 2020-21 enrollment.

- The 2020-21 kindergarten was smaller than its “expected” size; however, the 2021-22 kindergarten class is back to its “expected” size
- There was no net out migration from 2019-20 to 2020-21; however, there was net out migration from 2020-21 to 2021-22
- The Pandemic seems to have affected 2021-22 enrollment more than 2020-21 enrollment
 - Students shifted to other educational options
 - Nonpublic enrollment increased dramatically between 2019-20 and 2021-22
 - Home school enrollment increased in 2020-21 but decreased in 2021-22

ENROLLMENT PROJECTIONS

Introduction

Attending school is compulsory; therefore, the number of enrolled students is a demographic phenomenon. Public school enrollment is affected by the size of a school district's school age population and the education choices available to district residents. A district's school age population is closely related to other population characteristics of the district, especially the age of the district's population. For example, the age of adults, especially the number of women of prime childbearing age, effects the number of births, which translates into kindergarten classes five to six years later. The age of adults also effects population mobility because older people move less frequently than younger people. The movement of families with children under 18 years also effects enrollment and in a mobile society, enrollment changes throughout the school year as families with children move. While most population trends find expression in school districts, there is also change that is unpredictable and sometimes very local.

While population changes affect the total number of school age children residing in a school district, Minnesota students and their families have education choices. These choices also effect enrollment in a district's schools. Therefore, when analyzing public school enrollment, choice must be considered as well as population dynamics. Choice includes nonpublic schools, home schools, and the public options of open enrollment, charter schools and alternative schools. Two other choices exist: a) dropping out of high school, and b) delaying starting kindergarten (academic redshirting).

Enrollment Trends

Enrollment in the Westonka Public Schools

Current Enrollment/Past Trends

Enrollment trends play out over extended periods of time. Total enrollment and resident enrollment both increased since 2011-12. In the past ten years, total enrollment increased by 169 students or 7.7 percent while resident enrollment increased by 53 students or 2.7 percent. The Pandemic did not affect enrollment immediately but appears to have affected 2021-22 enrollment. Total enrollment increased more than resident enrollment because nonresident enrollment increased from 275 to 391 students. In 2021-22, nonresidents make up 16.5 percent of total enrollment. The percentage of nonresidents was 12.5 percent in 2011-12.

ENROLLMENT										
2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
2,204	2,226	2,170	2,177	2,249	2,297	2,327	2,395	2,449	2,434	2,373

Source: Westonka School District, Fall Enrollment. Excludes Early Childhood

RESIDENT ENROLLMENT										
2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
1,929	1,917	1,840	1,832	1,872	1,911	1,950	2,001	2,047	2,045	1,982

Resident enrollment is total enrollment less open enrollment in and tuition enrollment in (see page 6)

Source: Westonka School District, Fall Enrollment. Excludes Early Childhood

Like all population change, school enrollment changes result from two different phenomena—natural increase/decrease and net migration. The difference between the size of the incoming Kindergarten class and the previous year's Grade 12, called natural increase or decrease, measures the change in past birth numbers or cohort change. For example, the Baby Boom (1946-1964) and the Baby Bust (1965-1976) set in motion cycles of rising and falling enrollment that are reflected as natural increase/decrease. As the next table shows, since 2011-12, six of the past ten years saw Westonka Public Schools' Kindergarten classes smaller than the previous year's Grade 12. Since 2011-12, natural decrease cost the Westonka Public Schools 38 students.

COMPONENTS OF ENROLLMENT CHANGE				
October To October	Total		Natural Increase/ Decrease	Net Migration
	#	%		
2011 to 2012	22	1.0%	0	22
2012 to 2013	-56	-2.5%	-37	-19
2013 to 2014	7	0.3%	-15	22
2014 to 2015	72	3.3%	-11	83
2015 to 2016	48	2.1%	-26	74
2016 to 2017	30	1.3%	25	5
2017 to 2018	68	2.9%	44	24
2018 to 2019	54	2.3%	21	33
2019 to 2020	-15	-0.6%	-16	1
2020 to 2021	-61	-2.5%	-23	-38
Total	169	---	-38	207

The other phenomenon affecting school enrollment is migration, an indirectly derived estimate. Migration is the term used when people move across a boundary or border, in this case, the school district's boundaries. Net migration is calculated by the progression from grade-to-grade of public-school students. For example, public school Kindergarten students are moved to Grade 1 in the following year, Grade 1 students to Grade 2, etc. Because the probability of death is exceptionally low among children, the same number of students is expected in the next higher grade the following year. Therefore, if the number of students changes, migration is assumed to have occurred. A positive number indicates a net flow into the public schools and a negative number reflects a net flow out of the public schools.

This method for estimating migration does not distinguish between physical movement across the district's boundaries and education choices, such as transferring from a nonpublic school to a public school, transferring to a charter school or open enrolling in a public school outside the district. Further,

students who move into or out of a school district but never enroll in the district's public schools are not reflected in the migration numbers in this report.

Based on the described methodology, net migration added 207 students to the Westonka Public Schools since 2011-12. Net in migration occurred in eight of the past ten years while net out migration occurred in only two years including this past year. The combination of net migration and natural increase/decrease is the change in enrollment.

Student Choices in the Westonka School District

The number of education options available affects enrollment in a district's public schools. Nonpublic schools have been an option for many years. More recently, home schools became another option. Since their inception, public school options are attracting more students every year. Open enrollment allows residents of one district to attend the public schools in another district. Charter schools are another public option. All these choices mean competition for students.

Nonpublic Enrollment and Home Schools

Today, nonpublic enrollment falls into two categories—traditional nonpublic schools and home schools. Most traditional nonpublic schools are associated with religious institutions and many home school curriculums are faith based as well.

In Minnesota, 6.8 percent of all enrolled students were enrolled in traditional nonpublic schools and 3.2 percent of enrolled students were homeschooled in 2020-21. In the Westonka School District, 6.3 percent of students attended a traditional nonpublic school. Homeschooled students accounted for 4.0 percent of all enrolled students.

NONPUBLIC SETTINGS			
Year	Traditional Nonpublic Schools	Home Schools	Total
2011-12	281	31	312
2012-13	266	40	306
2013-14	239	47	286
2014-15	232	52	284
2015-16	206	49	255
2016-17	191	66	257
2017-18	174	83	257
2018-19	181	88	269
2019-20	167	83	250
2020-21	192	123	315
2021-22	284	95	379

Source: Westonka School District

The proportion of ISD #277 residents in nonpublic settings is like the statewide percentage. Combining home school students and nonpublic students, 10.3 percent of Westonka School District

residents were in nonpublic settings. In Minnesota, 10.0 percent of all students were enrolled in nonpublic settings. In the past ten years, traditional nonpublic enrollment decreased statewide while homeschooled children increased. The number of students in traditional nonpublic schools decreased for several years in the Westonka School District but increased in 2020-21. In 2021-22 traditional enrollment increased dramatically bringing it to a level like that of 2011-12. This is a remarkable turnaround. The number of homeschooled children increased in the Westonka School District as well peaking in 2020-21 but returning to a more typical number in 2021-22.

Public Options

Open Enrollment. Open enrollment allows Minnesota students to attend public schools outside their district of residence. The application to open enroll is made by the student and his/her parents and families generally provide their own school transportation. No tuition is charged.

Some students attend public schools outside their home district because their home district enters into an agreement with another district, usually to provide specialized services. This is called a tuition agreement, but this arrangement is not technically a student choice.

Since its beginning, open enrollment has attracted ever more students statewide and in the Westonka School District. In 2020-21, 389 nonresident students open enrolled in the Westonka Public Schools while 647 district residents open enrolled to public schools elsewhere. In 2021-22, 391 nonresidents enrolled in the Westonka Public Schools while 665 residents attend a public school elsewhere through open enrollment.

PUBLIC OPTIONS						
Year	In		Out			Net
	Open Enrollment	Tuition Agreements	Open Enrollment	Tuition Agreements	Charter Schools	
2011-12	275		538	16	27	-290
2012-13	309		556	23	24	-271
2013-14	330		563	29	28	-261
2014-15	345		556	29	30	-241
2015-16	377		549	25	19	-191
2016-17	386		555	23	21	-190
2017-18	377		586	18	23	-232
2018-19	394		600	19	31	-237
2019-20	402		620	26	26	-244
2020-21	389		647	22	23	-281
2021-22	391		665	25	36	-310

Tuition agreements excluded from net

Source: Westonka School District

Nonresident students who open enrolled in the Westonka Public Schools accounted for 16.0 percent of Westonka's total enrollment in 2020-21. Students leaving the district to attend public schools elsewhere represented 21.2 percent of the district's school age residents. In 2020-21, 9.0 percent of Minnesota students chose open enrollment.

Charter Schools. Charter schools are another public education option. While 6.8 percent of Minnesota students attended charter schools in 2020-21, 0.8 percent of Westonka School District residents attended a charter school.

As the education choice data show, in 2021-22, the district has a net loss of 310 students to other public options. Open enrollment both in and out increased in the past ten years and is a large factor in Westonka's enrollment.

K-12 Market Share of District School Age Residents

Estimating market share requires an estimate of a school district's school age population. The best estimate results from adding Westonka Public Schools' resident students to the district residents attending traditional nonpublic schools, being homeschooled, and opting for open enrollment out, charter schools and other public options.

Based on 2011-12 and 2021-22, the estimated resident school age population increased from 2,822 to 3,087 students, an increase of 265 students or 9.4 percent. Resident enrollment in the Westonka Public Schools (excluding Early Childhood) increased by 53 students or 2.7 percent during the same period. These numbers show that the Westonka Public Schools captured only 20 percent of the district's growth in school age population. Based on the estimated 2021-22 enrolled population of 3,087, the Westonka Public Schools (excluding Early Childhood) captured 64.2 percent of the district's school age population. In 2011-12, market share was 68.4 percent. A decline in market share is typical in Minnesota.

WESTONKA SCHOOL DISTRICT ESTIMATED RESIDENT SCHOOL AGE POPULATION					
Year	Westonka Public Schools Resident Enrollment	Nonpublic Settings	Public Options	Other	Total
2011-12	1,929	312	581	---	2,822
2012-13	1,917	306	603	---	2,826
2013-14	1,840	286	620	---	2,746
2014-15	1,832	284	615	---	2,731
2015-16	1,872	255	593	---	2,720
2016-17	1,911	257	599	---	2,767
2017-18	1,950	257	627	---	2,834
2018-19	2,001	269	650	---	2,920
2019-20	2,047	250	672	---	2,969
2020-21	2,045	315	692	---	3,052
2021-22	1,982	379	726	---	3,087

History of Enrollment by Grade

The history of enrollment contains patterns with implications for future enrollment. First, the kindergarten class's size fluctuated from year to year as did the birth years that correspond to the

kindergarten classes. The 2021-22 kindergarten class is at its “expected” size; however, the 2020-21 kindergarten class was negatively affected by the Pandemic.

The number of students per grade varies in the Westonka Public Schools. A way of expressing the differences by grade is to look at the “average” number of students per grade. For example, in 2021-22, the average elementary grade (K-4) has 178 students. The average middle school (5-7) has 162 students per grade while high school (8-12) has 199 students per grade. There is no consistent net inflow of students at the beginning of middle school or high school. Thus, the difference in average grade size between K-4 and Grades 8-12 points to continued enrollment decreases.

Minnesota's largest graduating high school class since 1978 graduated in 2009. Statewide, graduating classes will be getting smaller. Based on Westonka’s enrollment history, its largest recent senior class will graduate in 2022 or 2023.

ENROLLMENT											
Grade	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
K	173	171	152	145	159	137	176	175	188	167	176
1	175	171	174	152	153	163	149	182	172	185	160
2	173	176	168	174	159	160	165	146	195	183	183
3	181	182	177	176	178	172	166	168	145	191	176
4	167	194	177	175	180	191	184	165	177	151	195
5	160	165	193	183	189	195	190	194	169	176	143
6	153	173	170	194	204	198	197	187	194	170	177
7	155	152	165	181	197	215	201	200	188	193	166
8	179	161	154	173	186	205	220	211	201	188	199
9	170	165	158	139	183	190	190	223	218	197	181
10	168	167	160	154	132	176	182	191	221	218	193
11	179	160	162	161	166	144	176	186	198	216	213
12	171	189	160	170	163	151	131	167	183	199	211
Total	2,204	2,226	2,170	2,177	2,249	2,297	2,327	2,395	2,449	2,434	2,373

Source: Westonka School District, Fall Enrollment. Excludes Early Childhood Education

Enrollment Projections

Projection Background

Some factors affecting future school enrollment are known. However, other crucial factors are less clear. The difficulty in quantifying the effect of these factors is a challenge. First, the trends around which there is confidence.

Trends Where Confidence is High

- Aging. The population in the U.S. and Minnesota is aging. By 2020, 16-17 percent of Minnesota’s population will be 65 years old or older. In 2010, the elderly made up 12.9 percent of the population. Around 2020, for the first time in history, Minnesota’s 65+ population is expected to exceed the 5-17 population (K-12 population). There is no historical precedent for

this high proportion of older population; therefore, society is entering uncharted waters as to the effects of this change. However, we know that aging will affect the housing market and reduce geographic mobility because older people move less frequently than younger people. Further, the percentage of households with school age children will decline.

- Fertility. Today, completed fertility (1.73) is below replacement level and there is little reason to think this will change soon. Completed fertility refers to the number of children born per woman throughout her childbearing years. In Minnesota, White non-Hispanic women have below replacement fertility. (Replacement is 2.11 children per female at the end of childbearing.) Fertility rates for Asian and Hispanic women are now near replacement. Black women (African American and African-born) have the highest fertility level, just below 3, that is, just less than 3 children per woman at the end of childbearing.

Unknowns

The unknowns reflect changes in the housing market, the economy and in international immigration.

- Near term and long-term effects of the COVID-19 Pandemic and economic shutdown. Unknown; however, births have fallen, the workforce has shrunk, unemployment is low, and several economic sectors have been hit hard.
- The housing markets. The district has seen growth in housing units, especially single-family detached units. A robust housing market results in more mobility and this can influence enrollment.
- Immigration. Both the economy and public policy affect international immigration. Future students from international migration are impossible to predict.
- Delay/postponement of childbearing. The Millennials delayed marriage, childbearing, and home ownership. More recently, a higher percentage of 18–49-year-olds report that it is not likely they will have children or have additional children.
- Competition. The establishment of charter schools is hard to predict, and open enrollment continues to increase.

Cohort Survival Method

The most common and most robust model for projecting school enrollment is the cohort survival method. The first step in the cohort survival method is aging the population. In a standard cohort survival model, aging the population involves estimating the number of deaths expected in an age group before it reaches the next older age group. When the cohort survival method is used to project school enrollment, the first step is to move a grade to the next higher grade. Because mortality is so low in the school age population, the entire grade is assumed to “survive” to the next higher grade in the following year.

After aging the current enrollment, two key assumptions must be made. These assumptions concern the size of future kindergarten classes and the number of students who will move in or out of the district's schools. Some of these students may physically move in or out of the district. Other students may transfer between the Westonka Public Schools and other education options available to them. Both these phenomena effect the "survival rates."

Once a grade or cohort has been "aged" to the next higher grade, net migration is added to or subtracted from that grade. Using survival rates accomplishes both "aging" and migration in a single step. Over time, the size of a cohort will increase or decrease because of migration as its progresses through the grades. For example, the 2011-12 kindergarten class had 173 members. This same cohort had 193 members in Grade 10 in 2021-22.

The future size of kindergarten classes is especially important in long-term enrollment projections because these students will be in school over the life of the projections. If a school census exists, it is a resource for short-term kindergarten projections, i.e., a couple of years. However, school censuses are notoriously inaccurate for children less than four years of age, in part, because the preschool population is more mobile than the school age population.

To project kindergarten, the best theoretical approach, but the least practical, is to project births based on the age of the female population. These birth projections then must be survived to age five and then adjusted for migration to yield kindergarten projections. Determining the age of females in a school district is the first challenge, and then many assumptions must be made, making this approach impractical.

A simpler approach is to use resident births as a proxy for kindergarten five to six years later. Of course, not every child born in the district will enter the district's kindergarten classes five to six years later. However, some "district born" children who move out before enrolling in kindergarten will be replaced by children born elsewhere who move in before entering kindergarten. If the number of "ins" and "outs" are equal, the net effect is zero and the kindergarten class would be 100 percent of resident births. However, no public-school system captures all the potential students. Some kindergarten students attend private schools or are homeschooled. Others may attend a charter school or open enroll at another district. Therefore, a public school's kindergarten to birth ratio is expected to be less than 100 percent. If the ratio is 100 percent or higher, more preschool children are moving into the district or open enrolling into the district (in migration) than leaving (out migration).

If births are used as a kindergarten proxy, kindergarten projections are available for only a few years into the future. To extend kindergarten projections another five years, Westonka Public Schools' kindergarten will be projected based on the Minnesota State Demography Center's projections of Minnesota 0-year-olds.

Kindergarten Assumptions

After 1990, births fell in the U.S. and in Minnesota; however, from 2003 through 2007, births increased and in 2007, U.S. births were higher than at any time since 1964. Then from 2008 through 2011, births fell in the U.S. and Minnesota. These declines are attributed to the poor economy (Great Recession). Beginning in 2012, Minnesota resident births began to increase but did not return to their 2007 level. Then, births began to decline again. From 2015 through 2019 Minnesota resident births were lower than births in 2014.

As the history of resident births shows, in 2019, Minnesota resident births were 4,917 births or -6.9 percent lower than in 2005. Hennepin County resident births were 918 births or -5.6 percent lower fifteen years later. Suburban Hennepin County births were 193 or -1.9 percent lower.

About one-third (33 percent) of births occur between September 1 and December 31 every year. Therefore, about two-thirds of those eligible for kindergarten were born 5 years earlier and one-third were born 6 years earlier. Adjusting resident births to fit the kindergarten age requirement will be referred to as the kindergarten pool.

RESIDENT LIVE BIRTHS			
Year	Minnesota	Hennepin County	Suburban Hennepin County
2005	70,950	16,348	10,101
2006	73,515	16,780	10,223
2007	73,675	16,848	10,532
2008	72,382	16,566	10,212
2009	70,617	16,334	10,017
2010	68,407	15,955	9,854
2011	68,416	15,943	9,894
2012	68,783	16,345	10,294
2013	69,183	16,584	10,468
2014	69,916	16,770	10,536
2015	69,835	16,829	10,626
2016	69,746	16,485	10,400
2017	68,603	16,333	10,451
2018	67,348	15,844	10,152
2019	66,033	15,430	9,908
2020	n.a.	n.a.	n.a.

Suburban Hennepin County is Hennepin County minus Minneapolis City

Source: Minnesota Department of Health

The next table shows the suburban Hennepin County kindergarten pool along with Westonka Public Schools' kindergarten class's percentage of that pool. Like many other percentages, the ratio of kindergarten students to the pool fluctuates. Typically, a more stable trend appears when rates are averaged. (Calculating an average of the kindergarten to birth ratio for two or more years smooth out annual fluctuations and produces a more "typical" ratio for that period.)

Except for 2020-21, although fluctuating from year to year, Westonka's share of the kindergarten pool remained within a narrower range beginning in 2017-18. The past five years (excluding 2020-21) averaged 1.72 percent of suburban Hennepin County resident births. The past five years (including 2020-21) averaged 1.69 percent. Prior to 2017-18 the percentages ranged more widely. Therefore, the average of the past five years, 1.69 percent, will be used for the low kindergarten assumption and the average of the past five years omitting 2020-21 (1.72 percent) will be used for the high kindergarten assumption. While these percentages are not particularly different, they will make a small difference in projected kindergarten class size.

WESTONKA'S KINDERGARTEN AS A PERCENT OF THE SUBURBAN HENNEPIN COUNTY KINDERGARTEN POOL			
Birth Years	Suburban Hennepin County Pool	Percentage	Kindergarten Year
2005; 2006	10,182	1.70%	2011-12
2006; 2007	10,430	1.64%	2012-13
2007; 2008	10,318	1.47%	2013-14
2008; 2009	10,081	1.44%	2014-15
2009; 2010	9,908	1.60%	2015-16
2010; 2011	9,881	1.39%	2016-17
2011; 2012	10,162	1.73%	2017-18
2012; 2013	10,411	1.68%	2018-19
2013; 2014	10,513	1.79%	2019-20
2014; 2015	10,596	1.58%	2020-21
2015; 2016	10,475	1.68%	2021-22
2016; 2017	10,534		2022-23
2017; 2018	10,251		2023-24
2018; 2019	10,037		2024-25

PROJECTED MINNESOTA 0-YEAR OLDS		
Year	Projected Number	Adjusted Number
2017 Actual	68,603	
2017	70,312	
2018 Actual	67,348	
2018	70,395	
2019 Actual	66,033	
2019	70,373	
2020	70,325	65,965
2021	70,274	65,917
2022	70,227	65,873
2023	70,191	65,814
2024	70,164	65,811
2025	70,161	65,811
2026	70,161	65,811

Source: Minnesota Demographic Center

To extend kindergarten projections beyond 2024-25, projected Minnesota 0-year-olds will be used as a guide. In 2019, resident births were 4,340 births lower than the projected 2019 0-year-olds or 93.8 percent of the projected number. There is no reason to believe that births will increase to equal the projections of 0-year-olds. Therefore, the projected number of 0-year-olds will be adjusted to be 93.8 percent of the projection. Note that the projections of Minnesota 0-year-olds are essentially flat between 2019 and 2026. Even these projections may be too high. Most demographers predict the

global pandemic will depress births in the United States and worldwide for several years, although U.S. births were up by one percent in 2021.

In the past fifteen years, Suburban Hennepin County resident births increased from 14.53 percent of Minnesota births to 15.00 percent of Minnesota births in 2019. During this period, the percentages ranged from a low of 13.91 in 2006 to a high of 15.23 in 2017. The average of the past three years is 15.10 percent. If Suburban Hennepin County resident births are 15.10 percent of Minnesota's 0-year-olds for the next several years, the kindergarten pool would be as shown above. Although the projections show how "flat" these numbers are likely to be, these numbers are sensitive to minor changes in the assumptions. Note, however, that the difference between 2024-25, based on actual births, and the years beyond, based on projected births, do not result in significantly different kindergarten projections.

SUBURBAN HENNEPIN COUNTY KINDERGARTEN POOL	
2021-22	10,475
2022-23	10,534
2023-24	10,251
2024-25	10,037
2025-26	9,964
2026-27	9,956
2027-28	9,949
2028-29	9,943
2029-30	9,939
2030-31	9,938
2031-32	9,938

Pool based on actual births bolded

KINDERGARTEN PROJECTIONS		
	@1.69%	@1.72%
2021-22	176	176
2022-23	178	181
2023-24	173	176
2024-25	170	173
2025-26	168	171
2026-27	168	171
2027-28	168	171
2028-29	168	171
2029-30	168	171
2030-31	168	171
2031-32	168	171
Total	1,697	1,727

When the kindergarten to birth ratio is applied to the kindergarten pool, kindergarten projections result. Through 2024-25, the kindergarten projections are based on actual births. The lowest kindergarten projection (based on the 1.69 percent ratio) results in 1,697 kindergarten students over ten years while the highest kindergarten projection (1.72 percent ratio) yields 1,727 kindergarten students over ten years. In the past ten years there were 1,646 kindergarten students. These projections reflect an increase in kindergarten students.

Net Migration Assumptions

The method for calculating migration was explained earlier in this report. However, the limitations of the methodology are worth repeating. The method of calculating migration does not distinguish between physical movement across a district's boundaries and education choices, such as transferring from a nonpublic school to a public school, transferring to a charter school or open enrolling in another district's public schools. Further, students who move into or out of a school district but never enroll in the district's public schools are not reflected in the migration numbers in this report.

The next two tables show net migration in raw numbers. As these numbers show, net migration has been positive for eight of the past ten years.

The next table shows net migration for every grade transition. Net out migration, which touched nearly every grade transition, occurred this past year while the Pandemic year showed a net in migration as had the previous six years. This is unusual. In the past, net migration was positive between Kindergarten and Grade 1 but not in the past three years. The other elementary grades usually experienced net in migration. There is no consistent net inflow of students at the beginning of middle school or at the beginning of high school.

NET MIGRATION YEAR TO YEAR										
	11 to 12	12 to 13	13 to 14	14 to 15	15 to 16	16 to 17	17 to 18	18 to 19	19 to 20	20 to 21
K to 1	-2	3	0	8	4	12	6	-3	-3	-7
1 to 2	1	-3	0	7	7	2	-3	13	11	-2
2 to 3	9	1	8	4	13	6	3	-1	-4	-7
3 to 4	13	-5	-2	4	13	12	-1	9	6	4
4 to 5	-2	-1	6	14	15	-1	10	4	-1	-8
5 to 6	13	5	1	21	9	2	-3	0	1	1
6 to 7	-1	-8	11	3	11	3	3	1	-1	-4
7 to 8	6	2	8	5	8	5	10	1	0	6
8 to 9	-14	-3	-15	10	4	-15	3	7	-4	-7
9 to 10	-3	-5	-4	-7	-7	-8	1	-2	0	-4
10 to 11	-8	-5	1	12	12	0	4	7	-5	-5
11 to 12	10	0	8	2	-15	-13	-9	-3	1	-5
Total	22	-19	22	83	74	5	24	33	1	-38
Percent	1.0	-0.8	1.0	3.8	3.3	0.2	1.0	1.4	---	-1.6

The next table summarizes net migration by aggregating net migration by the elementary grades (K-4), the middle school grades (5-7) and the high school grades (8-12). Net migration was negative at all levels this past year. Previous years saw net in migration at K-4 and 5-7. The pattern at 8-12 is more mixed.

NET MIGRATION YEAR TO YEAR										
	11 to 12	12 to 13	13 to 14	14 to 15	15 to 16	16 to 17	17 to 18	18 to 19	19 to 20	20 to 21
K-4	21	-4	6	23	37	32	5	18	10	-12
5-7	10	-4	18	38	35	4	10	5	-1	-11
8-12	-9	-11	-2	22	2	-31	9	10	-8	-15
Total	22	-19	22	83	74	5	24	33	1	-38

Net migration numbers when compared to the number of students in a grade result in the percent of students retained, that is, survival rates. Survival rates are an effective way to analyze the number of students retained, added, or lost each year at each grade. For example, 1.000 indicates no change or 100 percent of the grade progressed to the next highest grade. Any number over 1.000 reflects the percentage increase while a number below 1.000 reflects the percentage decrease. For example, 0.98 indicates a 2 percent decrease.

SURVIVAL RATES YEAR TO YEAR										
	11 to 12	12 to 13	13 to 14	14 to 15	15 to 16	16 to 17	17 to 18	18 to 19	19 to 20	20 to 21
K to 1	0.988	1.018	1.000	1.055	1.025	1.088	1.034	0.983	0.984	0.958
1 to 2	1.006	0.982	1.000	1.046	1.046	1.012	0.980	1.071	1.064	0.989
2 to 3	1.052	1.006	1.048	1.023	1.082	1.038	1.018	0.993	0.979	0.962
3 to 4	1.072	0.973	0.989	1.023	1.073	1.070	0.994	1.054	1.041	1.021
4 to 5	0.988	0.995	1.034	1.080	1.083	0.995	1.054	1.024	0.994	0.947
5 to 6	1.081	1.030	1.005	1.115	1.048	1.010	0.984	1.000	1.006	1.006
6 to 7	0.993	0.954	1.065	1.015	1.054	1.015	1.015	1.005	0.995	0.976
7 to 8	1.039	1.013	1.048	1.028	1.041	1.023	1.050	1.005	1.000	1.031
8 to 9	0.922	0.981	0.903	1.058	1.022	0.927	1.014	1.033	0.980	0.963
9 to 10	0.982	0.970	0.975	0.950	0.962	0.958	1.005	0.991	1.000	0.980
10 to 11	0.952	0.970	1.006	1.078	1.091	1.000	1.022	1.037	0.977	0.977
11 to 12	1.056	1.000	1.049	1.012	0.910	0.910	0.949	0.984	1.005	0.977

In the past five years, Westonka Public Schools' survival rates were often above 1.000. However, like many other enrollment measures, survival rates fluctuate from year to year. Calculating an average of two or more years is a way to smooth out these annual fluctuations.

Normally, calculating survival rates for projections should avoid the Pandemic year; however, for the Westonka Public Schools the Pandemic year was not a net out migration year. This past year is more likely to be an anomaly than the Pandemic year. Focusing on the four years prior to the most recent

year offers one reasonable option. Looking at the two years prior to the past year is another option as is the seven years prior to the past year, although net migration mid-decade may be too high for projecting the future. These three options are shown below.

PROJECTED SURVIVAL RATES			
Grade	Seven Years Prior to Past Year	Four Years Prior to Past Year	Two Years Prior to Past Year
K to 1	1.024	1.022	0.984
1 to 2	1.031	1.032	1.068
2 to 3	1.026	1.007	0.986
3 to 4	1.035	1.040	1.048
4 to 5	1.038	1.017	1.009
5 to 6	1.024	1.000	1.003
6 to 7	1.023	1.008	1.000
7 to 8	1.028	1.020	1.003
8 to 9	0.991	0.989	1.007
9 to 10	0.977	0.989	0.996
10 to 11	1.030	1.009	1.007
11 to 12	0.974	0.962	0.995

The differences between these survival rates can be seen in the projections below. By using the low kindergarten assumption, the number of kindergarten students is the same in all three projections, so the differences are solely the result of the survival rates.

There is a 169-student difference among the three migration assumptions. The difference at K-4 is small, only 22 students, but the difference grows to 47 students at Grades 5-7 and to 101 students at Grades 8-12. The differences in the survival rates are greatest in Grades 4 to 5 through Grades 6 to 7. Larger middle school grades roll into larger high school grades over time.

SUMMARY OF EFFECTS OF SURVIVAL RATES IN TEN YEARS WITH LOW KINDERGARTEN ASSUMPTION				
Survival Rates	Total	K-4	5-7	8-12
Two years prior to the past year	2,379	866	556	957
Four years prior to the past year	2,422	881	570	971
Seven years prior to the past year	2,548	888	603	1,058

Because the reasonable options are so limited, and the seven years prior to the past year may reflect too much net in migration, the four years prior to the past year and the two years prior to the past year will be used for the projections.

PROJECTED SURVIVAL RATES		
Grade	Low (2 Years Prior)*	High (4 Years Prior)*
K to 1	0.984	1.022
1 to 2	1.068	1.032
2 to 3	0.986	1.007
3 to 4	1.048	1.040
4 to 5	1.009	1.017
5 to 6	1.003	1.000
6 to 7	1.000	1.008
7 to 8	1.003	1.020
8 to 9	1.007	0.989
9 to 10	0.996	0.989
10 to 11	1.007	1.009
11 to 12	0.995	0.962

*Prior to the past year

Projection Results

The kindergarten and net migration assumptions are trend lines, which remove annual fluctuations. However, the future, like the past, will be characterized by annual fluctuation, sometimes large. Because there is no reasonable way to forecast when fluctuations around trend lines will occur, it is arbitrary to project them. Furthermore, long-term projections are designed to approximate a future point in time not to yield the best projection for each intervening year between the present and the projection end date. For this reason, long-term projections should not be used for annual budgeting purposes. The district should continue to use its version of the cohort survival methodology for annual enrollment projections.

Four cohort projections are shown in the next table. In ten years, there is a 75-student difference between the lowest projection and the highest projection. The kindergarten assumptions account for a 32-student difference in the ten years while the migration assumptions account for a 43-student difference in ten years. These numbers show that the migration assumptions account for more of the difference among the four projections than the kindergarten assumptions. This means selecting the “best” projection rests on decisions about the migration assumptions.

All four projections show enrollment declining initially but then rebounding about the time that the small 2021-22 Grade 5 graduates from high school.

The lowest projection is based on the low kindergarten and low migration assumptions. In this projection, enrollment increases by 6 students or 0.3 percent by 2031-32. In five years, enrollment is 48 students or -2.0 percent lower than today.

The highest projection, based on the high kindergarten and high migration assumptions, shows enrollment increasing by 81 students or 3.4 percent between 2021-22 and 2031-32. In five years, enrollment decreases by 11 students or -0.5 percent.

In between the highest and lowest projections are two other projections. In 2031-32, these two projections differ by 11 students. As a group, the four projections reflect a range of possibilities with all

four projections showing enrollment eventually increasing. With no growth in kindergarten and modest net in migration, enrollment is rather flat.

ENROLLMENT PROJECTIONS				
Year	Low K Low Mig	High K Low Mig	Low K High Mig	High K High Mig
2021-22	2,373	2,373	2,373	2,373
2022-23	2,358	2,361	2,355	2,358
2023-24	2,337	2,343	2,339	2,345
2024-25	2,332	2,341	2,338	2,347
2025-26	2,338	2,350	2,349	2,362
2026-27	2,325	2,340	2,347	2,362
2027-28	2,344	2,363	2,370	2,390
2028-29	2,352	2,374	2,384	2,406
2029-30	2,393	2,419	2,428	2,454
2030-31	2,381	2,409	2,419	2,449
2031-32	2,379	2,411	2,422	2,454

Excludes Early Childhood

The projections from 2021-22 to 2031-32 reflect the following components of enrollment change. The Westonka Public Schools will experience **natural decrease** as it has off and on in the past ten years. Natural decrease results from the incoming Kindergarten classes being smaller than the previous years' Grade 12. In the past two years natural decrease averaged 20 students per year. In the next ten years, natural decrease averages 12 to 18 students per year in the low kindergarten projections and 9 to 15 per year in the high kindergarten projections. **Natural decrease is projected to be smaller than in the recent past.**

COMPONENTS OF PROJECTED ENROLLMENT CHANGE				
Oct. to Oct.	Total		Natural Increase/ Decrease	Net Migration
2021 to 2031	#	%		
Low K/Low Mig	6	0.3%	-177	183
High K/Low Mig	38	1.6%	-147	185
Low K/High Mig	49	2.1%	-119	168
High K/High Mig	81	3.4%	-89	170

Excludes Early Childhood

Net in migration continues. The low migration assumption averages 18 to 19 students per year. The high migration assumption averages 17 students per year. Excluding the most recent year, net migration averaged 17 students per year in the two prior years and 16 students in the four prior years. **Projected net in migration is about the same as the past five years when the most recent year is excluded.**

ENROLLMENT PROJECTIONS				
	K-4	5-7	8-12	Total
2021-22	890	486	997	2,373
2026-27				
Low K/Low Mig	885	563	877	2,325
High K/Low Mig	900	563	877	2,340
Low K/High Mig	899	570	877	2,347
High K/High Mig	915	570	877	2,362
2031-32				
Low K/Low Mig	866	556	957	2,379
High K/Low Mig	882	565	963	2,411
Low K/High Mig	881	570	971	2,422
High K/High Mig	897	580	978	2,454

Excludes Early Childhood

Looking at the projections based on the elementary, middle school and high school grades is instructive. In the first five projection years, K-4 enrollment is from 5 students lower to 25 students higher than today. In ten years, K-4 enrollment ranges from 24 students lower to 7 students higher than today. For the first five projection years, the kindergarten students have already been born.

In the first five projection years, middle school enrollment is 77 to 84 students higher than today. In the second five projection years, middle school enrollment ranges from 70 to 94 more students than today. In the second five projection years, the kindergarten assumptions effect the middle school projections but in the first five years only the current grade size and the migration assumptions are affecting the size of the middle school grades.

High school (Grades 8-12) enrollment is projected to decrease by 120 students in the first five projection years and then rebound being only 19 to 40 students lower than today in 2031-32. Grades 8-12 projections are almost totally a result of the migration assumptions because the kindergarten assumptions have only a small effect on the high school projections.

In 2031-32, the 2021-22 kindergarten class will be in Grade 10, which means that all the grades below Grade 10 are products of the projection assumptions.

Housing Unit Method

The housing unit method provides another way of projecting population and school enrollment. While the number of dwelling units (housing units) is related to the number of school age children, dwelling units alone do not determine the number of school age children. The number of school age children per unit is also a key variable in the projection equation.

The main reason to use the housing unit method is to understand the effect of additional housing units on enrollment. It could be said that housing stock is like DNA. It determines the size and characteristics of the resident school age population.

After dwelling unit type, year built and market value emerge as the most important housing characteristics. Year built reflects how families lived in that era and is a proxy for square feet and characteristics such as number of bedrooms, number of bathrooms and number of garage spaces. The presence of a master suite, walk-in closets, etc. can also be inferred from year built. Value implies some of these same characteristics plus lot size, location, and interior amenities such as kitchen and bathroom appointments and finishes.

The relationship between housing unit characteristics and enrollment has been established by findings based on school districts in four states (Minnesota, Wisconsin, Illinois, and Colorado). These findings are in italics.

- *Dwelling unit type affects the school age child per unit yield. Single-family detached units have the highest school age child per unit yield. Single-family attached, such as townhouses, have significantly fewer children per unit than single-family detached units, while apartment units have even fewer school age children per unit, although there are some local exceptions.*
- *Newer single-family detached units yield more students per unit than older single-family detached units.*
- *As single-family detached units sell (turnover), student yield usually increases in the newer units. In older units, yield is likely to decrease.*
- *The market value of single-family detached units affects the school age child per unit yield. Moderately priced to higher priced units yield more school age children than the lowest priced units.*
- *As the population ages, more dwelling units are being built for mature adults (55+ years) and for seniors. These units will have zero school age children per unit.*

Projecting school enrollment from housing units has many limitations. The housing unit method produces reasonably reliable results for school districts when enrollment is stable or increasing. (The housing unit performs best when hay fields, corn fields or wheat fields are converted into residential units in a rapidly growing district.) The method's greatest weakness is in its inability to detect trends that signal enrollment decline. Housing stock does not provide many clues about the age of the inhabitants, which is vital to school enrollment projections. Further, the housing unit method does not reflect existing differences in grade size or how these differences will affect future enrollment. Projected smaller kindergarten classes are not reflected either. When either of these characteristics is present, the housing unit method cannot detect them because yield per unit remains at today's level throughout the projection period. This makes the method "static" and often results in over projecting enrollment especially when natural decrease is present.

Another problem with the housing unit method is the assumption surrounding new units. It is usually assumed that new units mean new residents to the district. Sometimes this is true, but not always. People move within a school district as well. Even if the occupants of new housing units are "new" to the district and have school age children, these children do not necessarily translate into additional public-school enrollment because the population in existing units may be changing as well.

The number of housing units, especially single-family detached units increased steadily in the Westonka School District and will continue to increase. Where growth occurs will affect the number of students who enroll in the Westonka Public Schools.

When thinking about the student population in new housing units, it is vital to remember that the K-12 yield for single-family detached units varies by school district and by attendance area within school districts. However, the yield of 0.22 students per townhome is very consistent across all school districts across states. Multi-family units (apartments) have a typical yield of 0.11 to a maximum yield of 0.15, which is consistent across all school districts across states.



Westonka Public Schools - ISD #277
2023 Review and Comment

Appendix D: Community Survey #1 Results

Westonka School District

2022 Residential Study

The Morris Leatheman Company

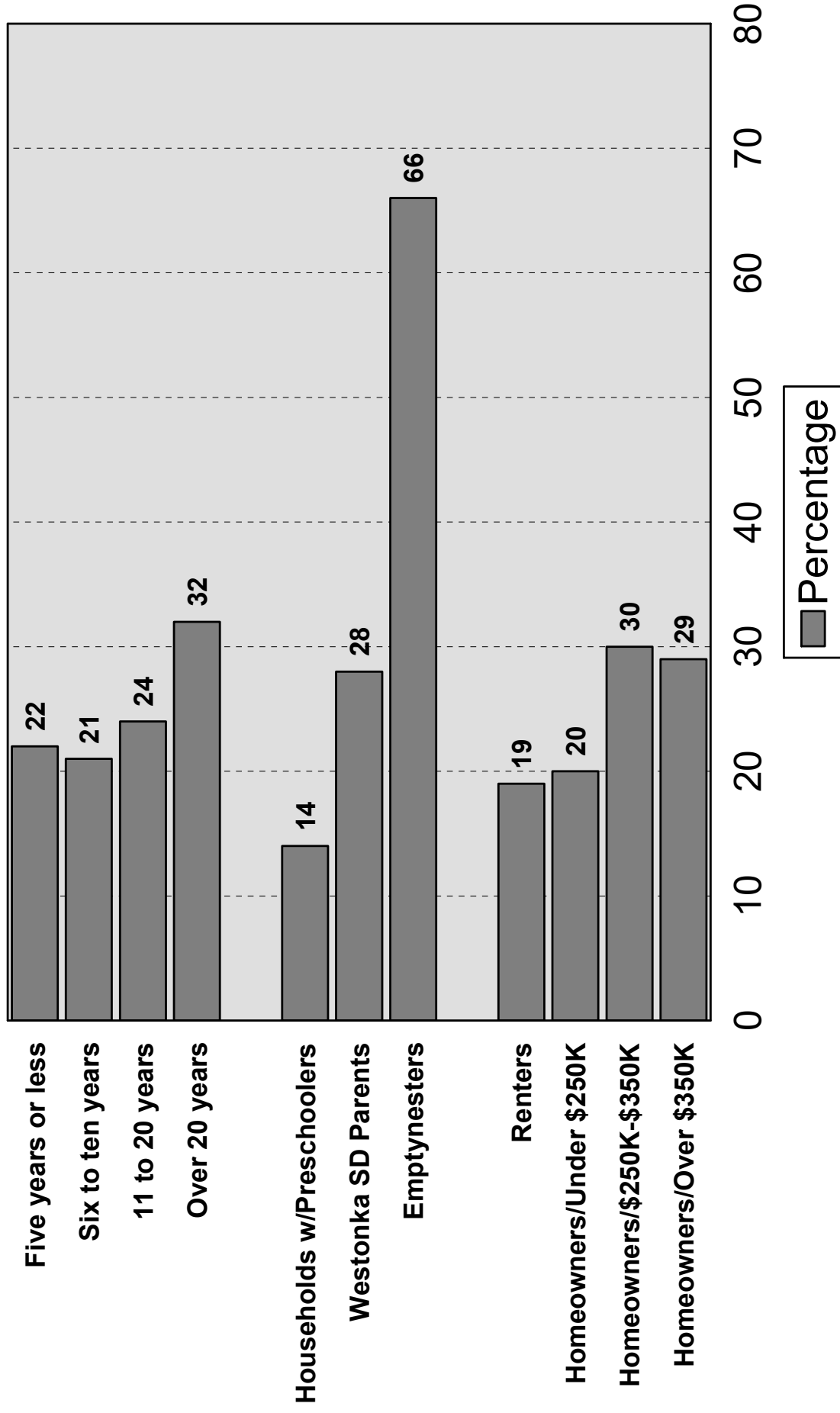
Survey Methodology

2022 Westonka School District Study

- ❗ 400 random household sample of School District residents
- ❗ Telephone interviews conducted between August 9th and 23rd, 2022
- ❗ Average interview time of 12 minutes
- ❗ Non-response level of 5.5%
- ❗ Projectable within +/- 5.0% in 95 out of 100 cases
- ❗ Cellphone Only Households: 53%
- ❗ Landline Only Households: 11%
- ❗ Both Landline and Cellphone Households: 36%

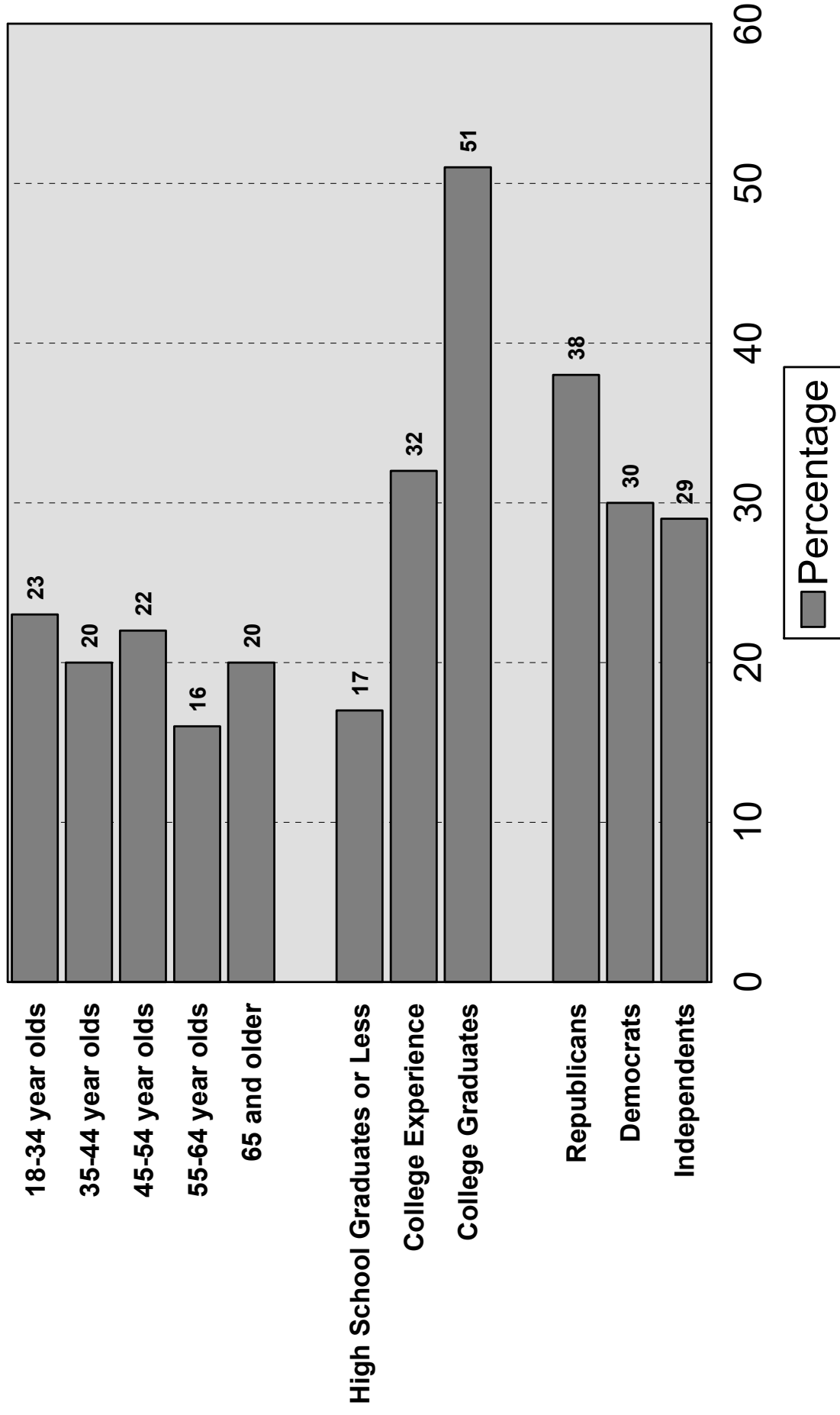
Demographics I

2022 Westonka School District Study



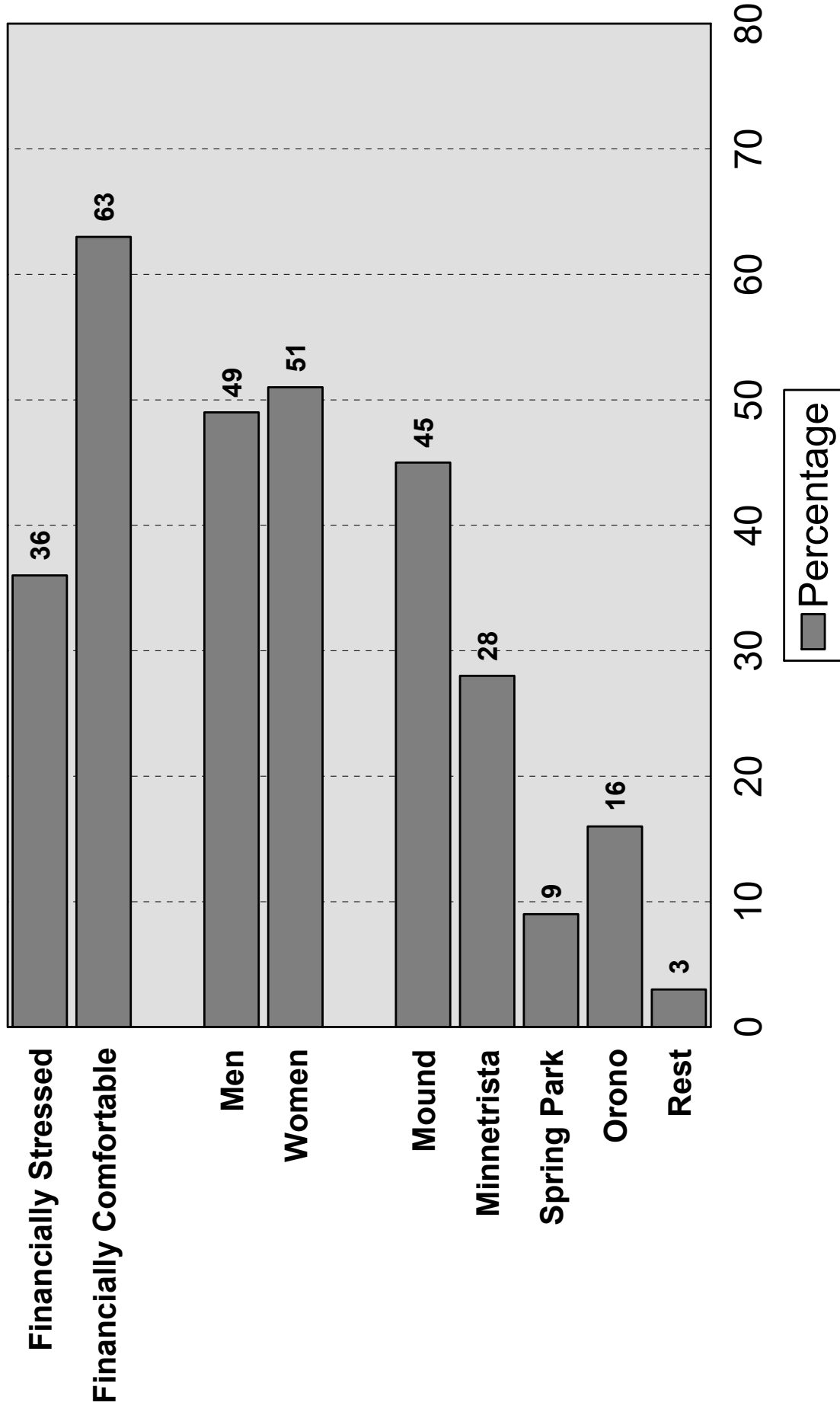
Demographics II

2022 Westonka School District Study



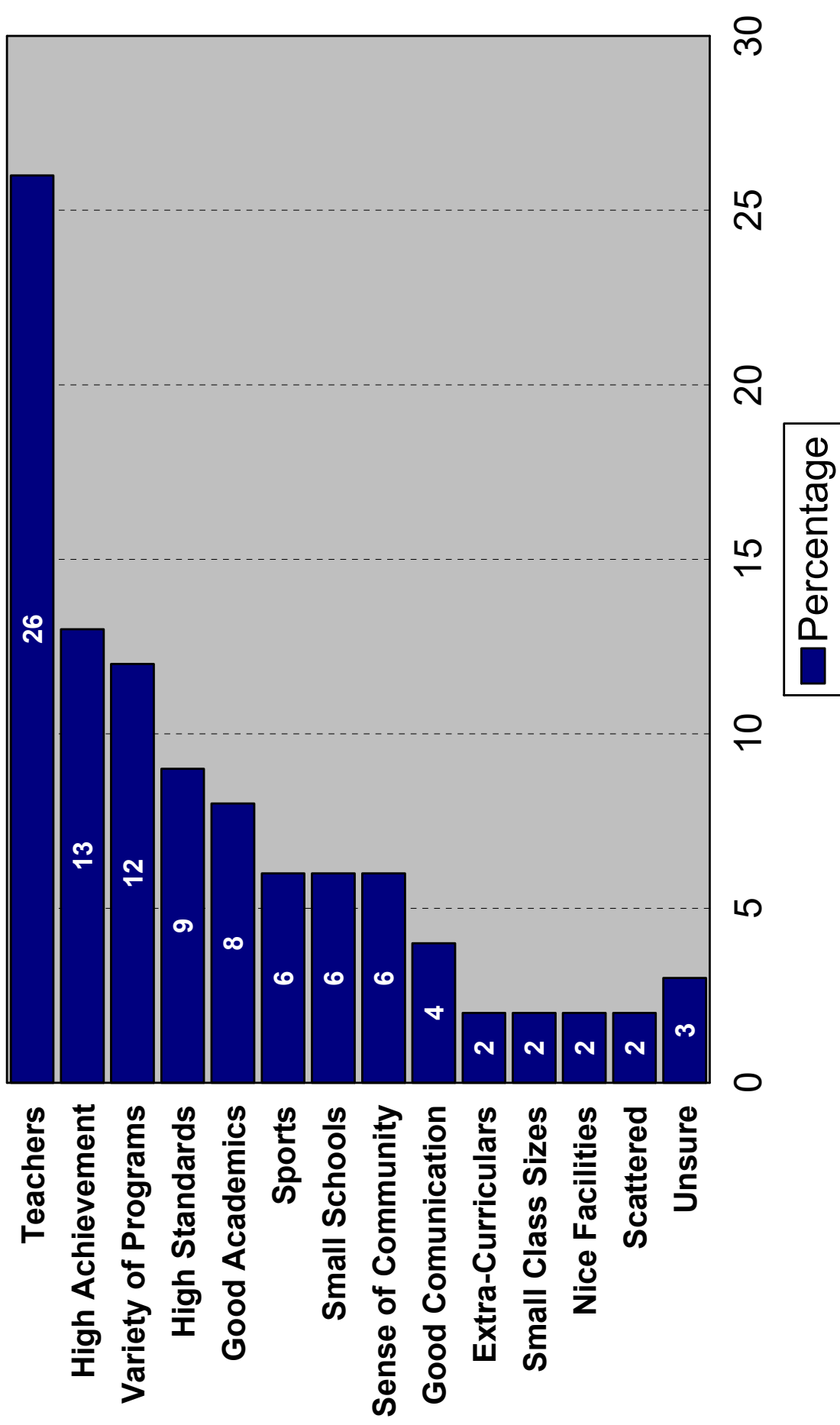
Demographics III

2022 Westonka School District Study



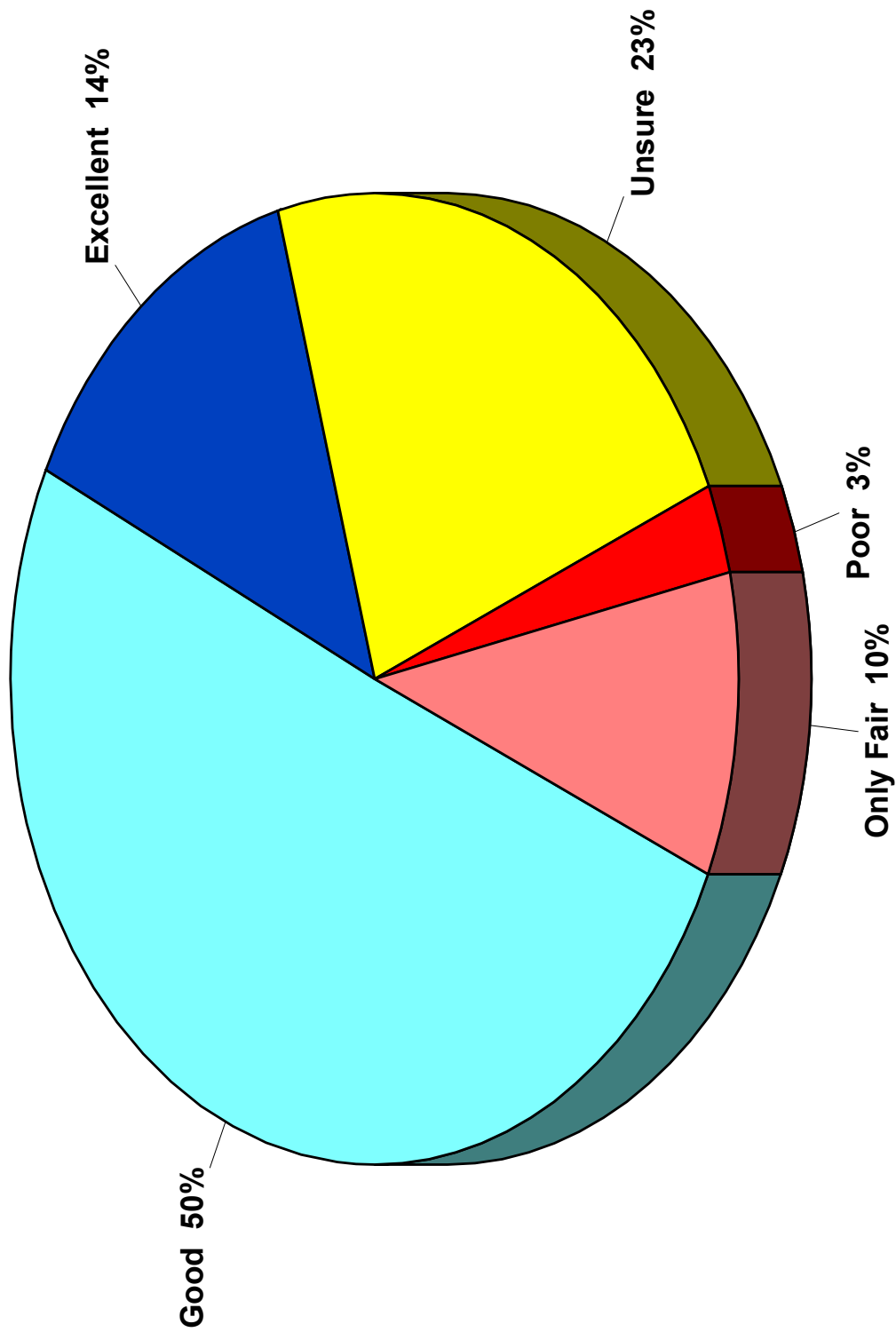
Like Most

2022 Westonka School District Study



Handling the Pandemic

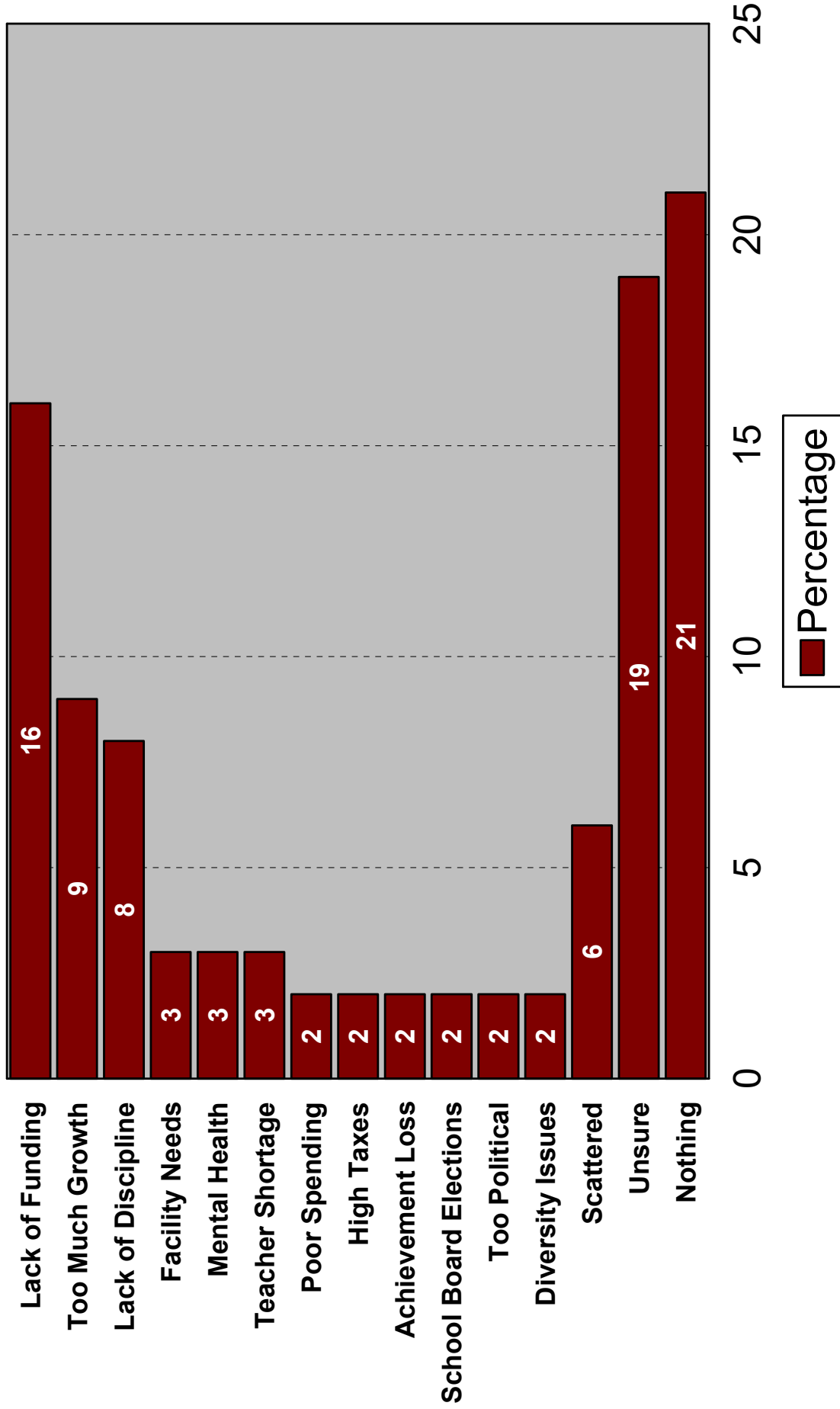
2022 Westonka School District Study



The Morris Leatherman Company

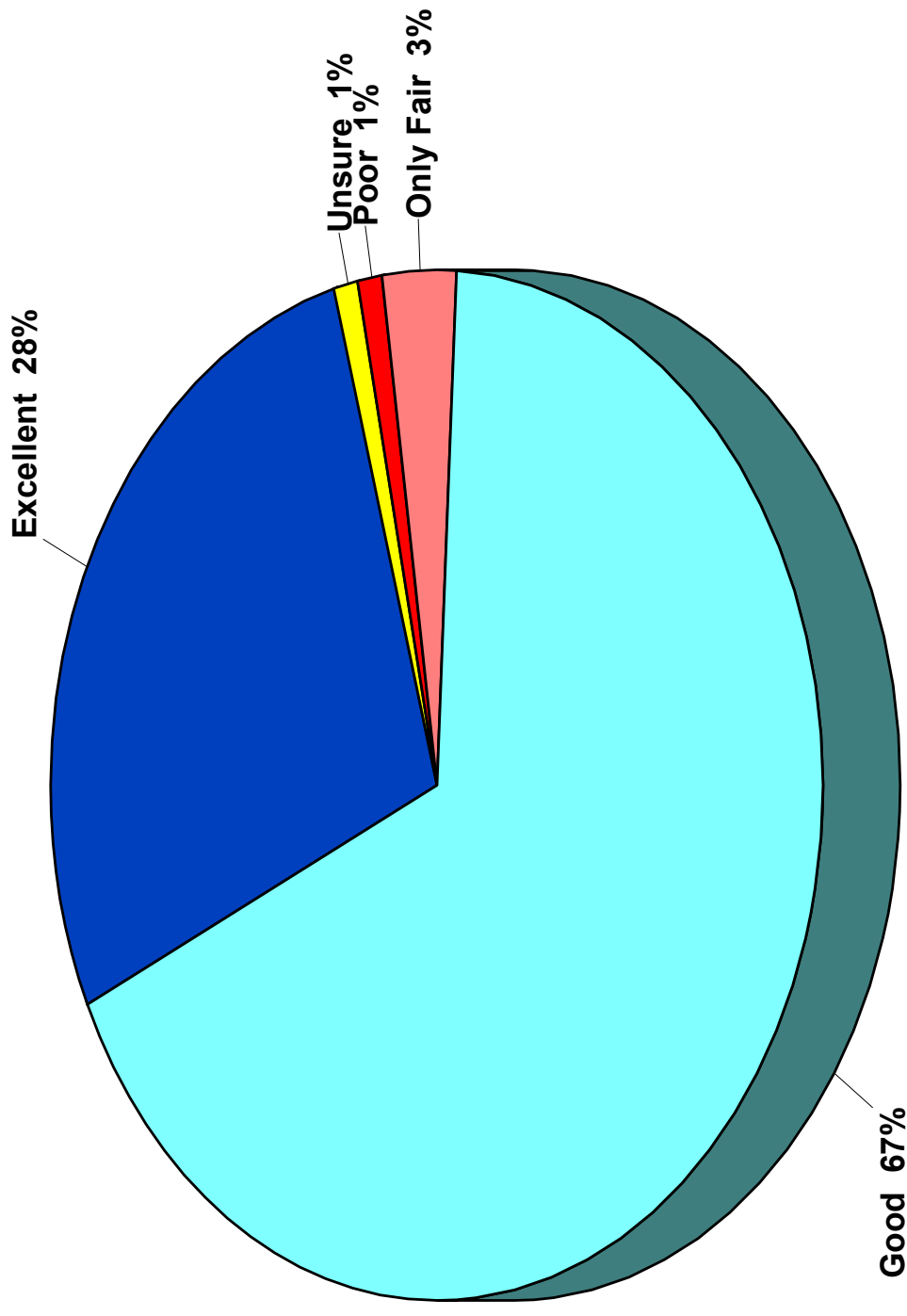
Most Serious Issue

2022 Westonka School District Study



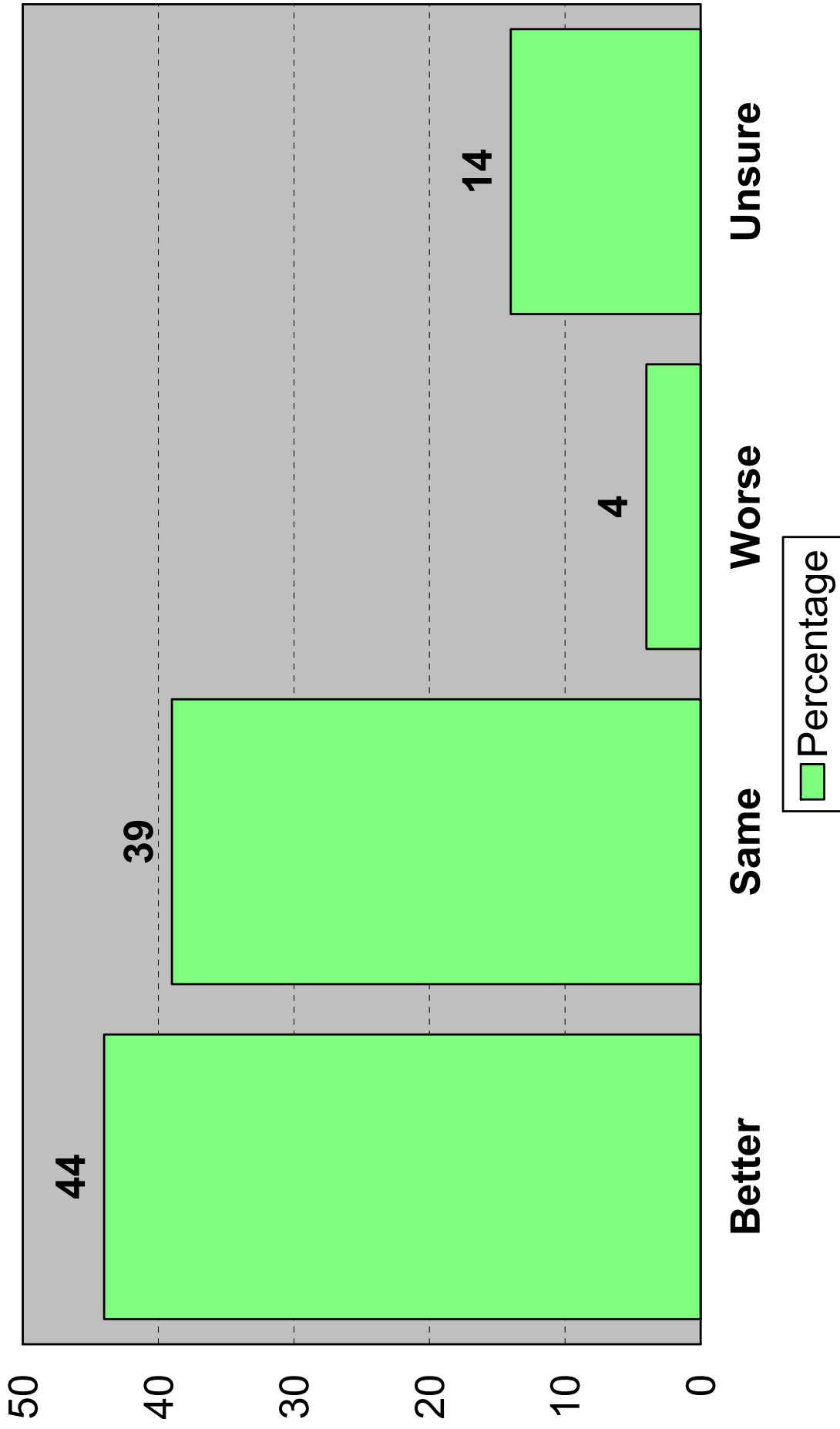
Quality of Education

2022 Westonka School District Study



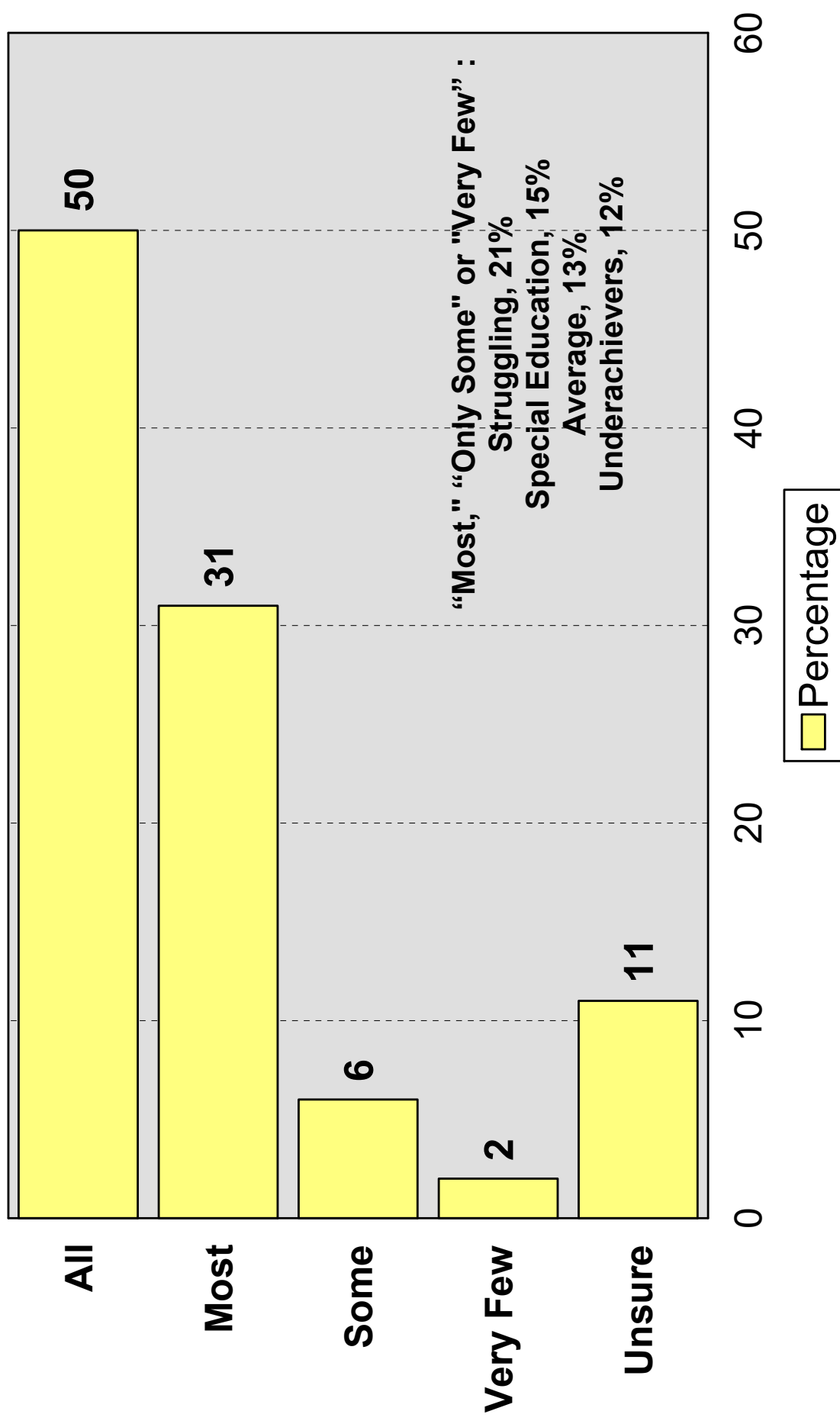
Quality Compared to Three Years Ago....

2022 Westonka School District Study



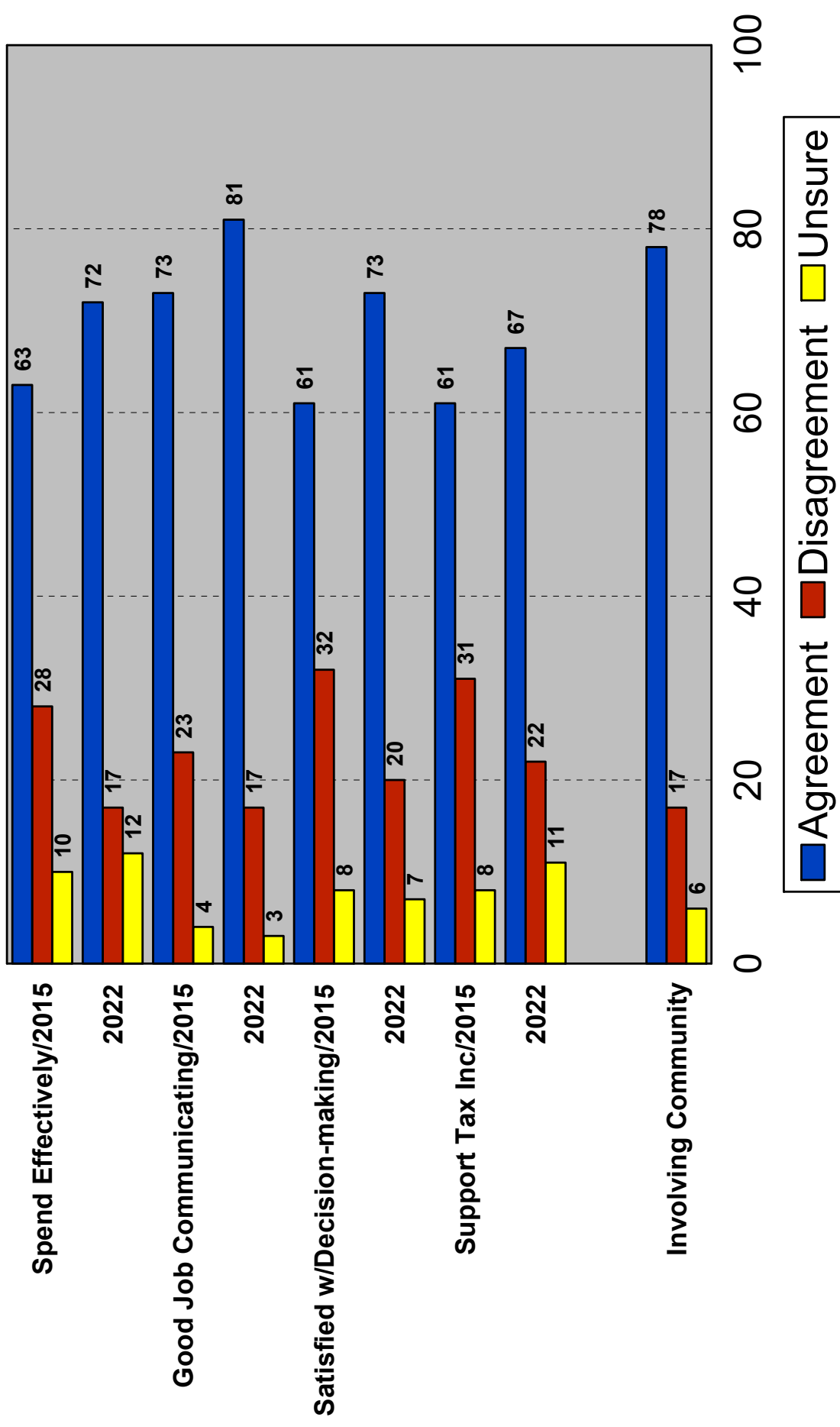
Meet Students' Learning Needs

2022 Westonka School District Study



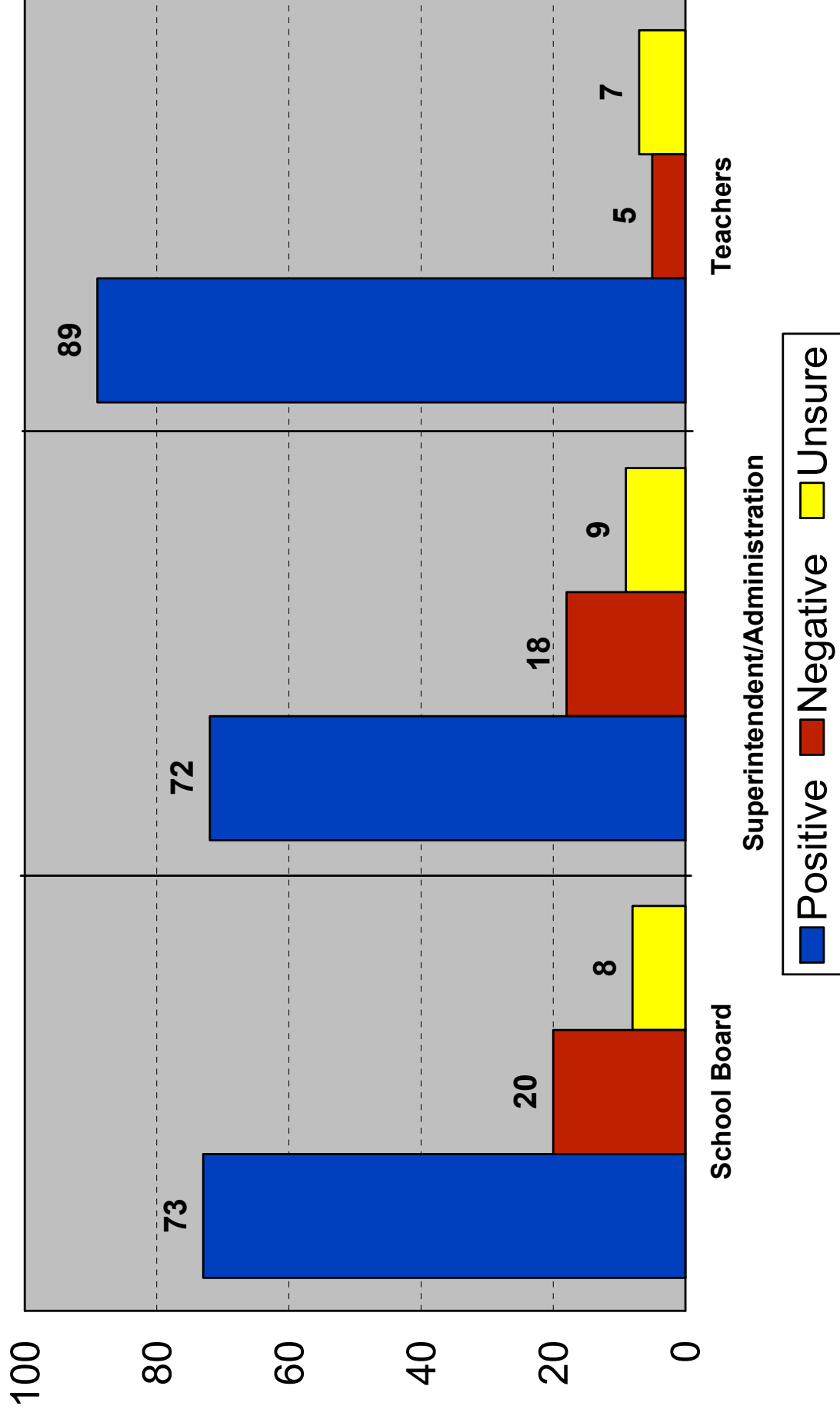
School District Perceptions

2022 Westonka School District Study



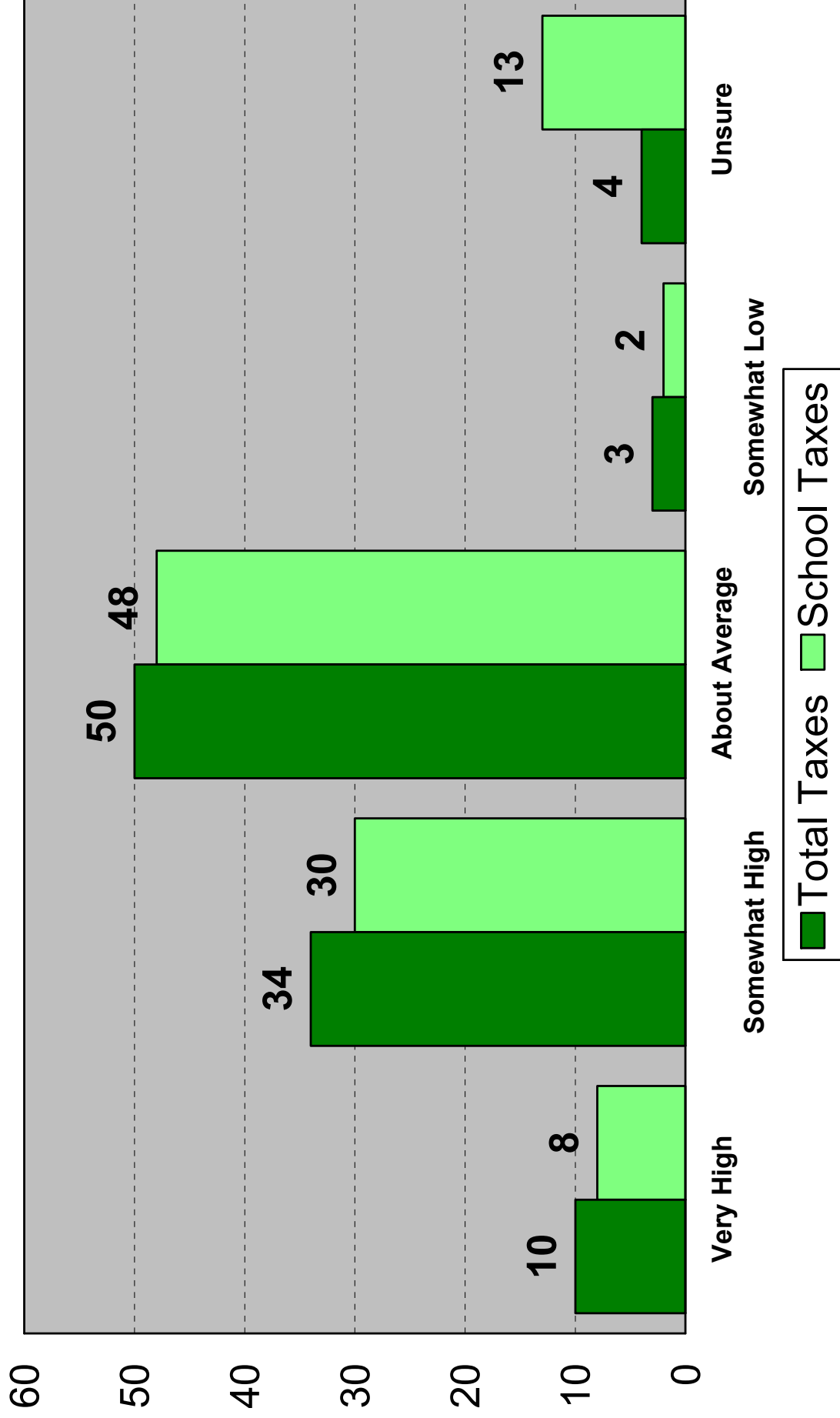
Job Performance Ratings

2022 Westonka School District Study



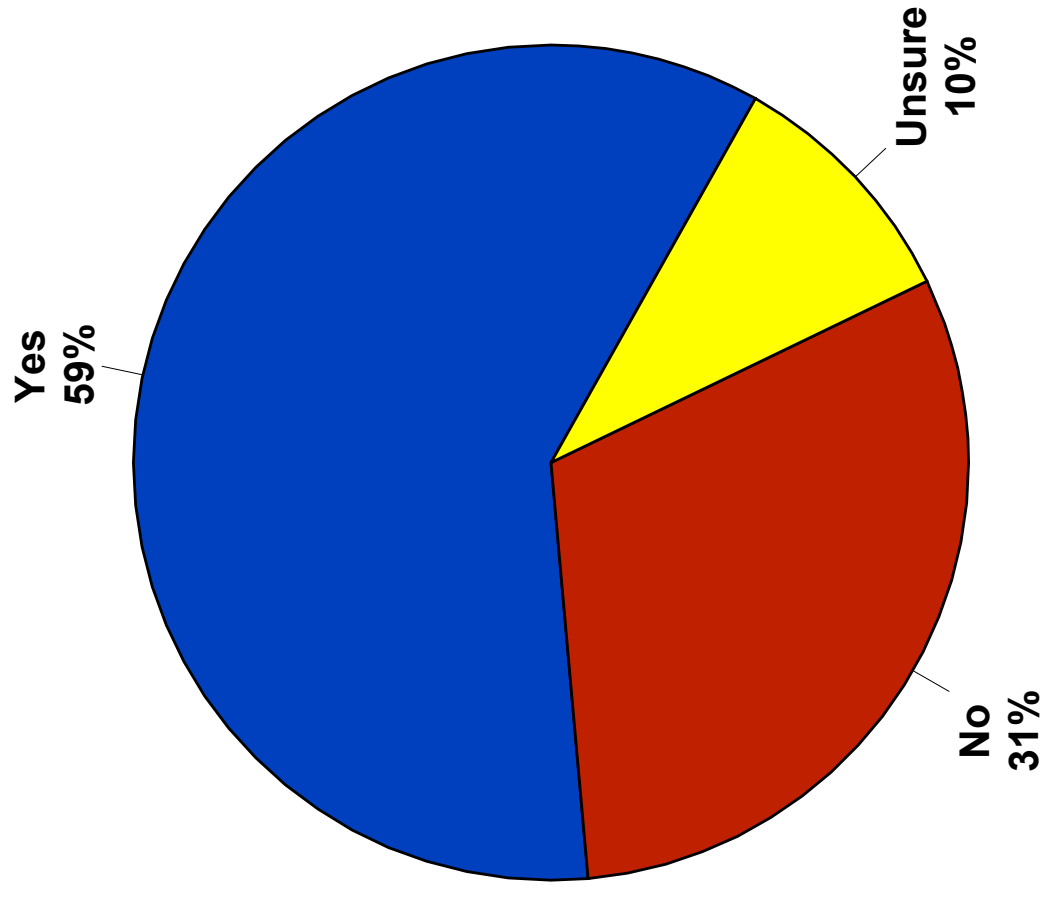
Property Tax Comparisons

2022 Westonka School District Study



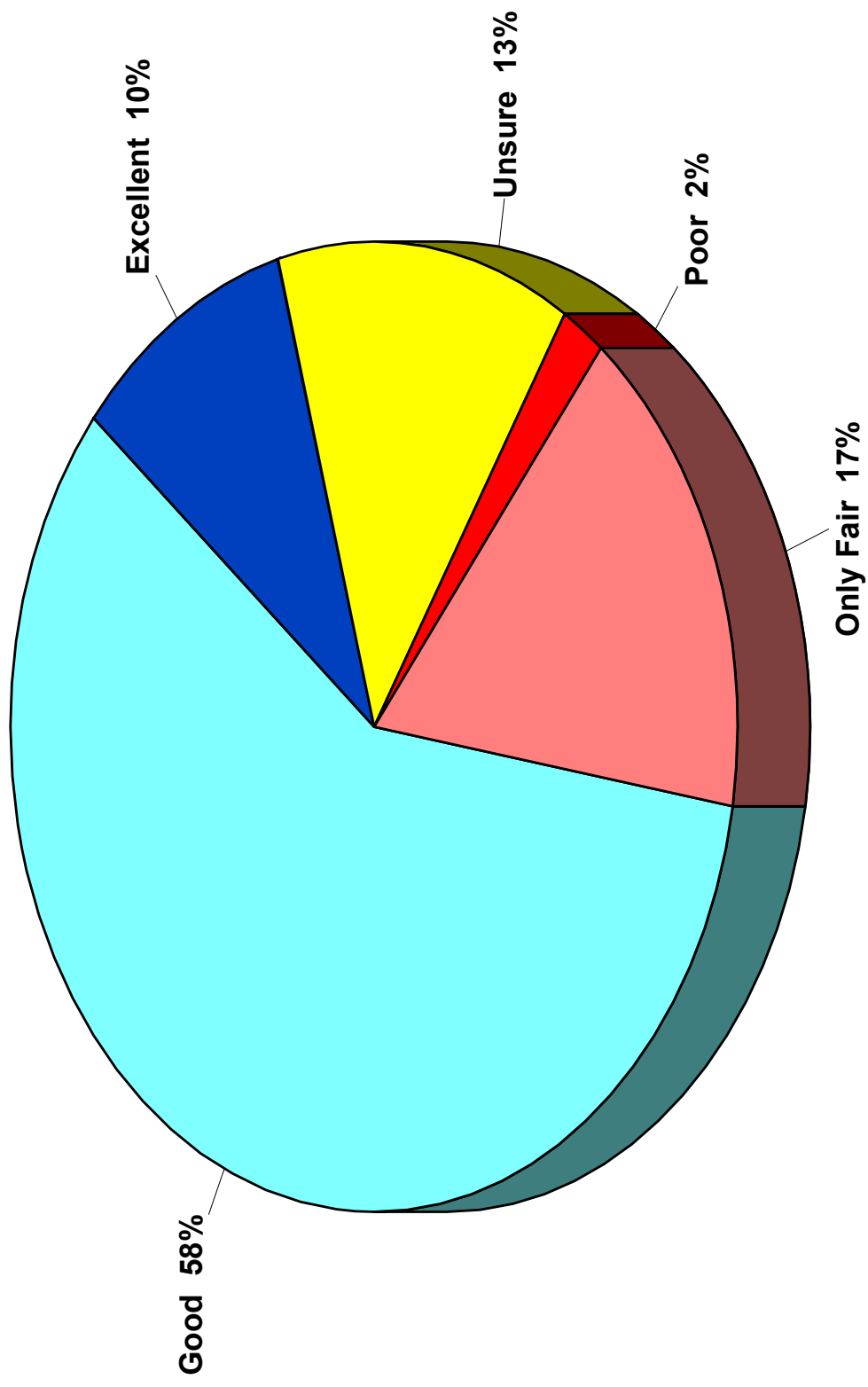
Adequately Funded

2022 Westonka School District Study



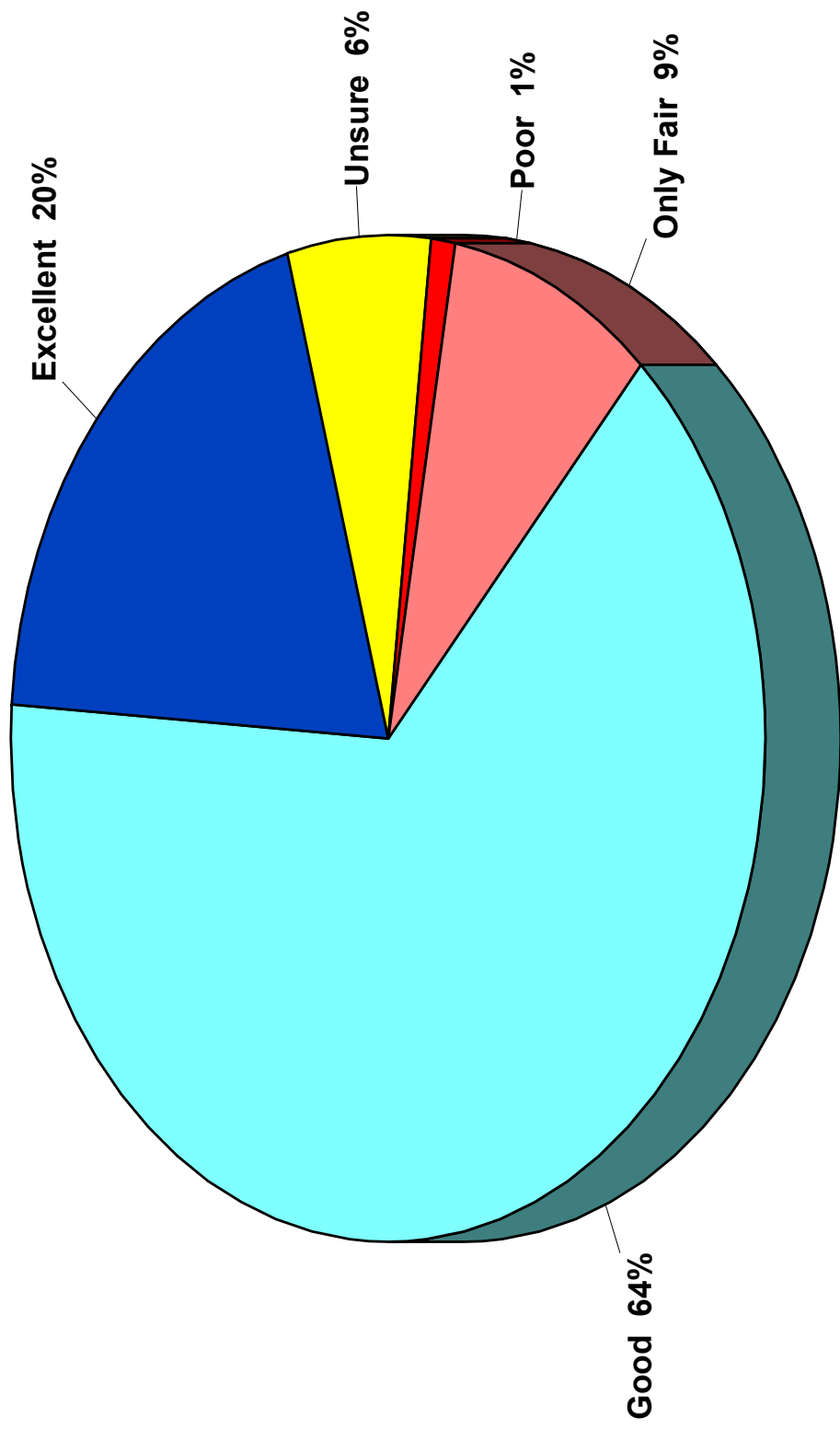
Financial Management

2022 Westonka School District Study



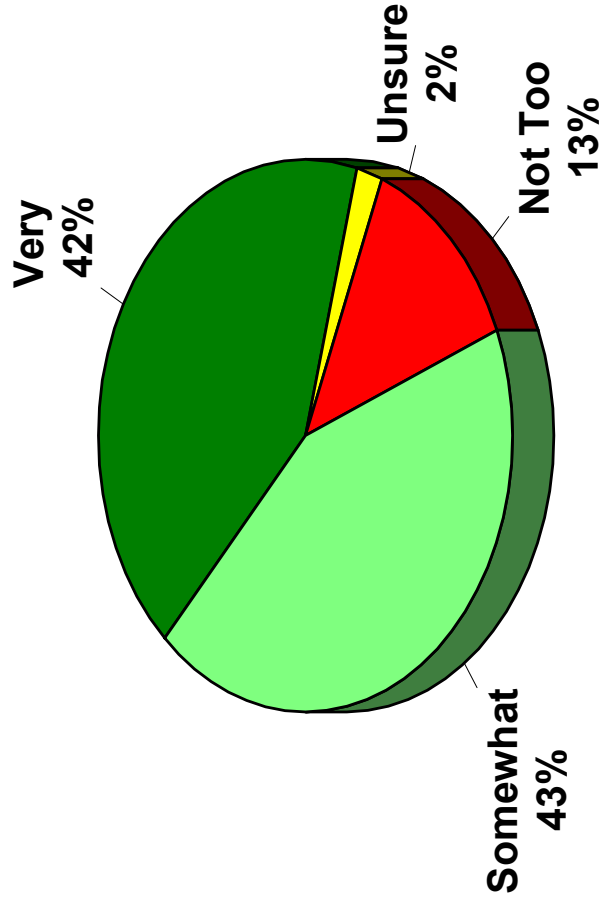
School Buildings and Facilities

2022 Westonka School District Study

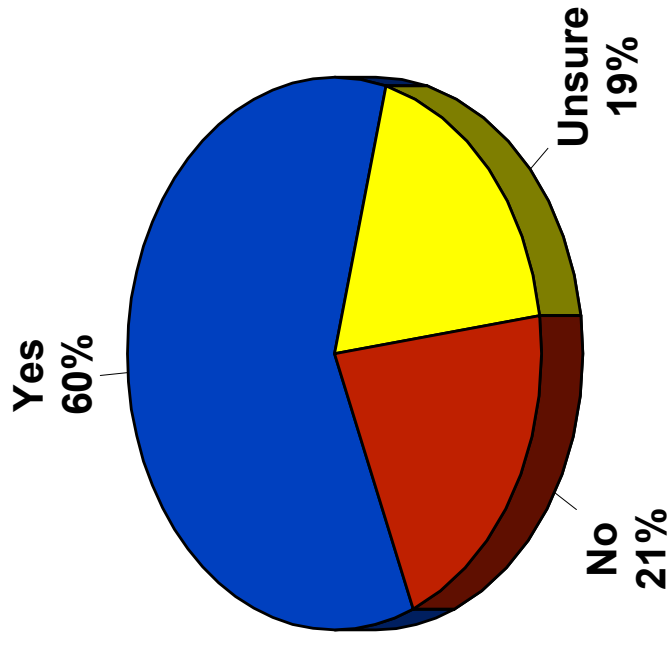


Classroom Design

2022 Westonka School District Study



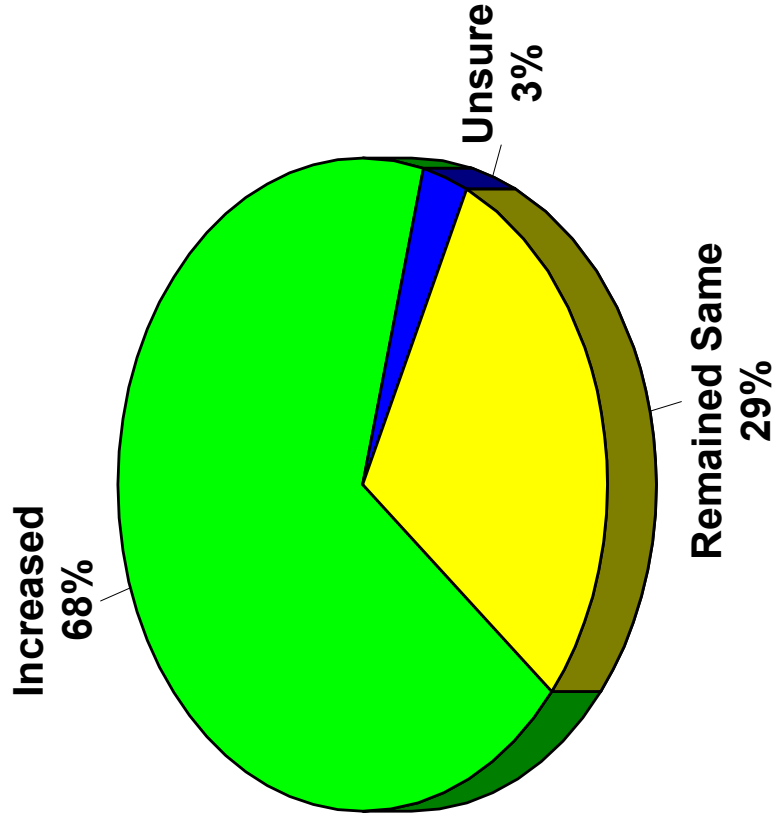
Importance to Student Learning



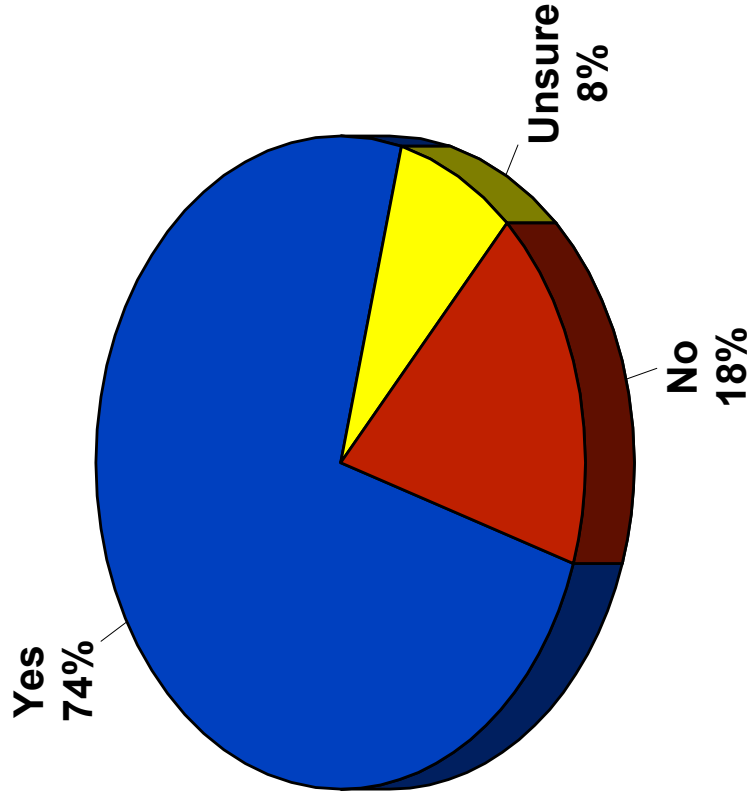
Westonka SD currently provides for sufficient learning spaces

New Housing Construction

2022 Westonka School District Study



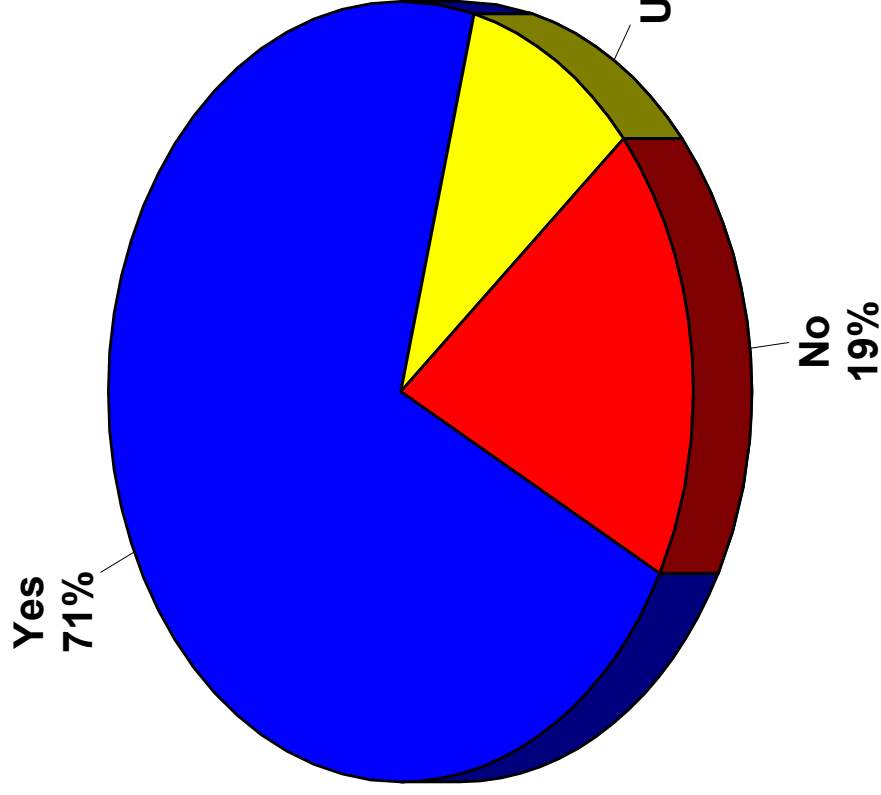
Over the past five years....



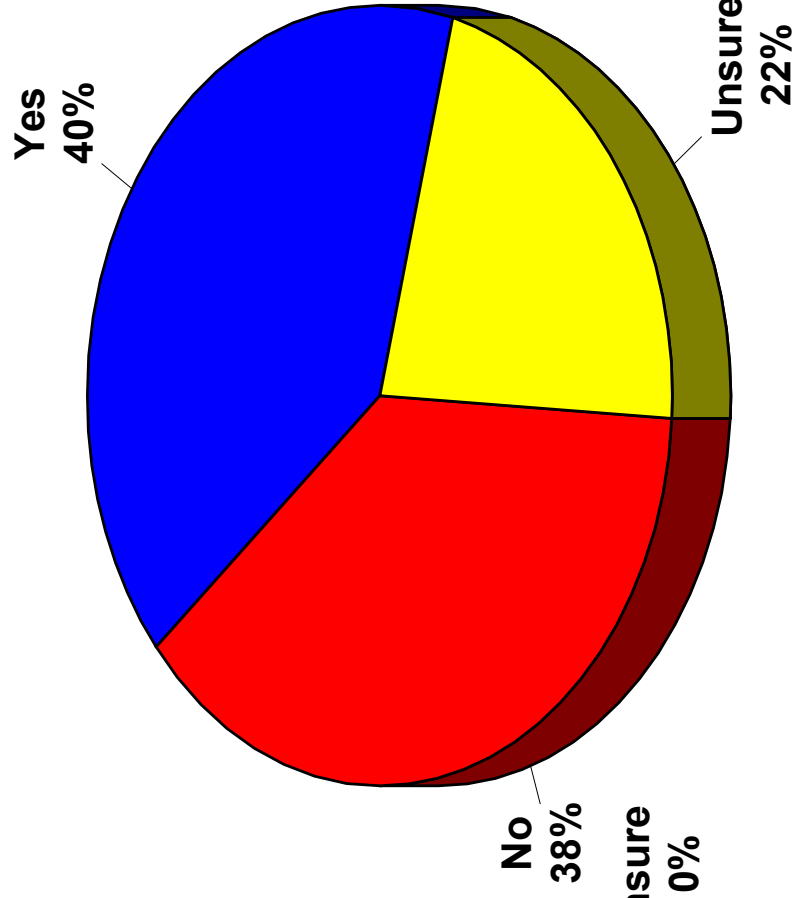
Increase over the next
five years....

Student Enrollment

2022 Westonka School District Study



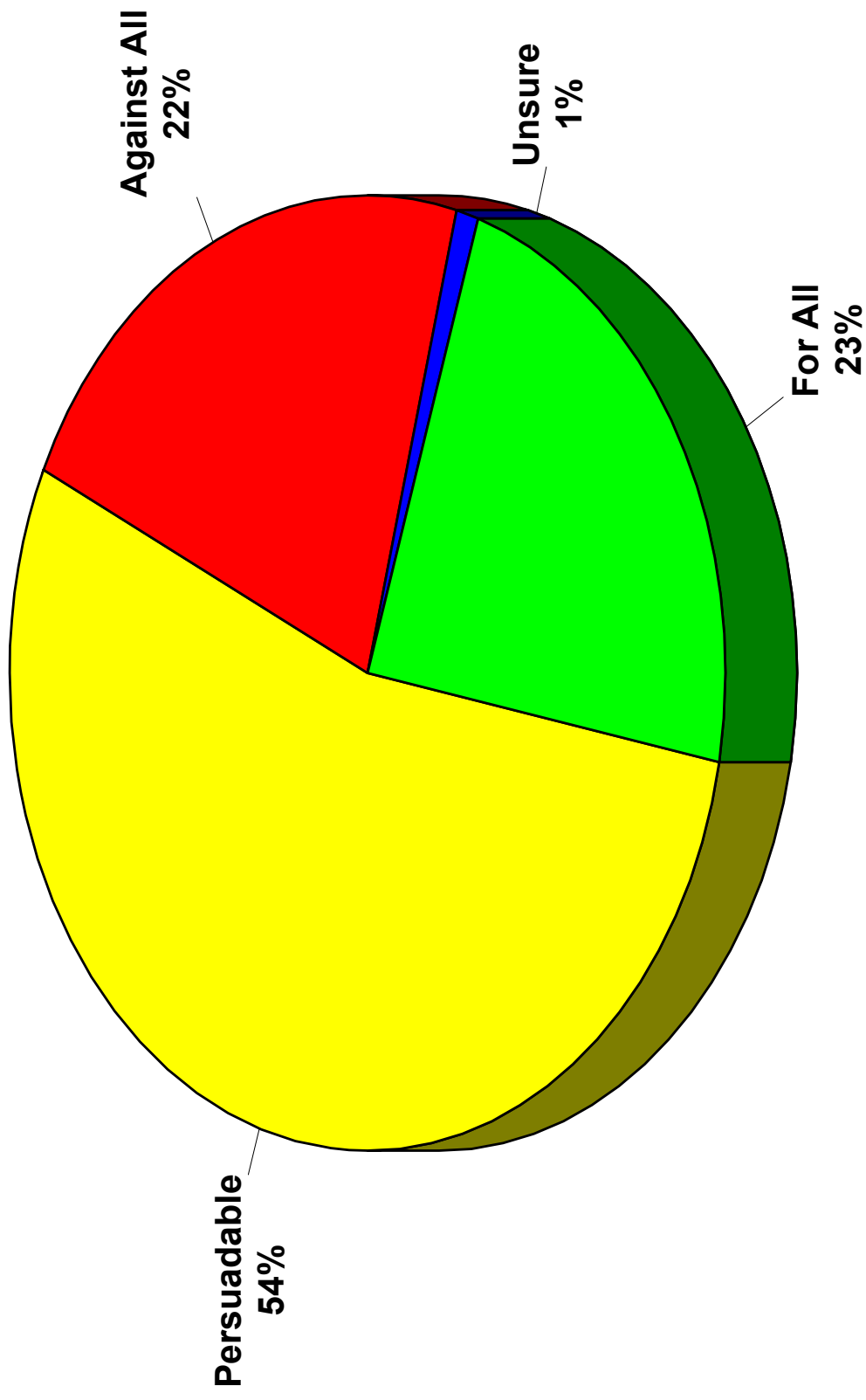
Increase over the next five years



Westonka SD has enough school space to accommodate enrollment

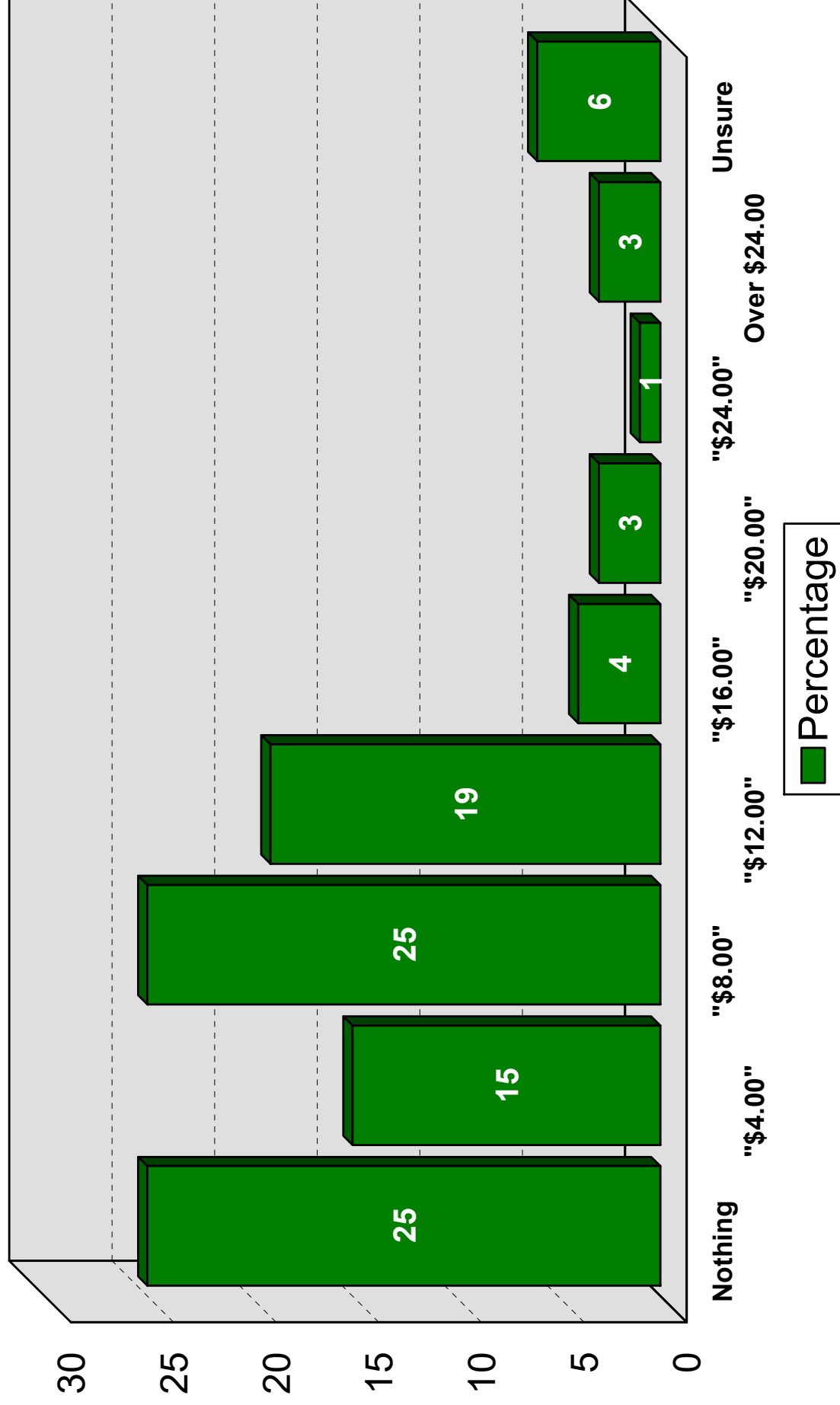
Referendum Predisposition

2022 Westonka School District Study



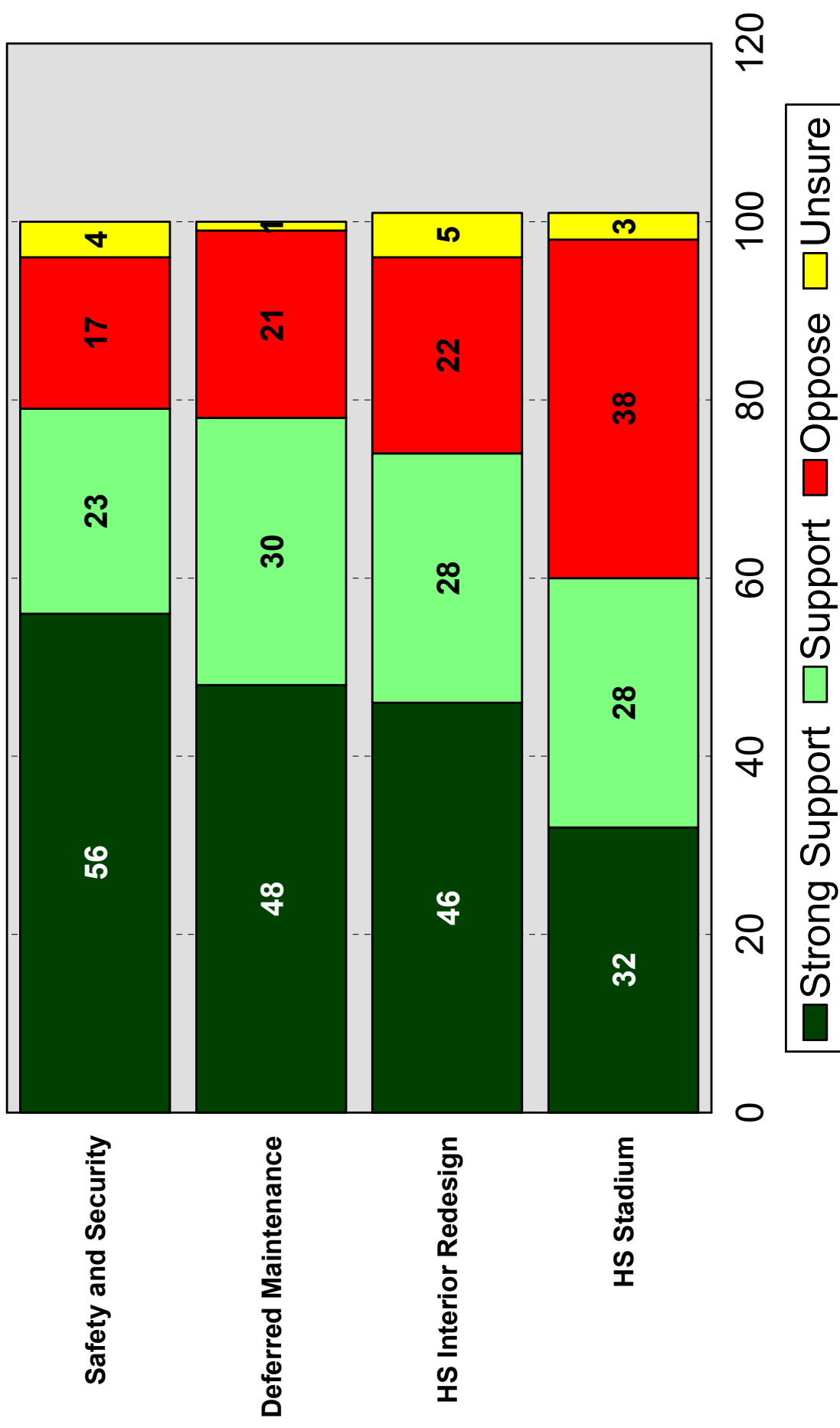
Property Tax Increase

2022 Westonka School District Study



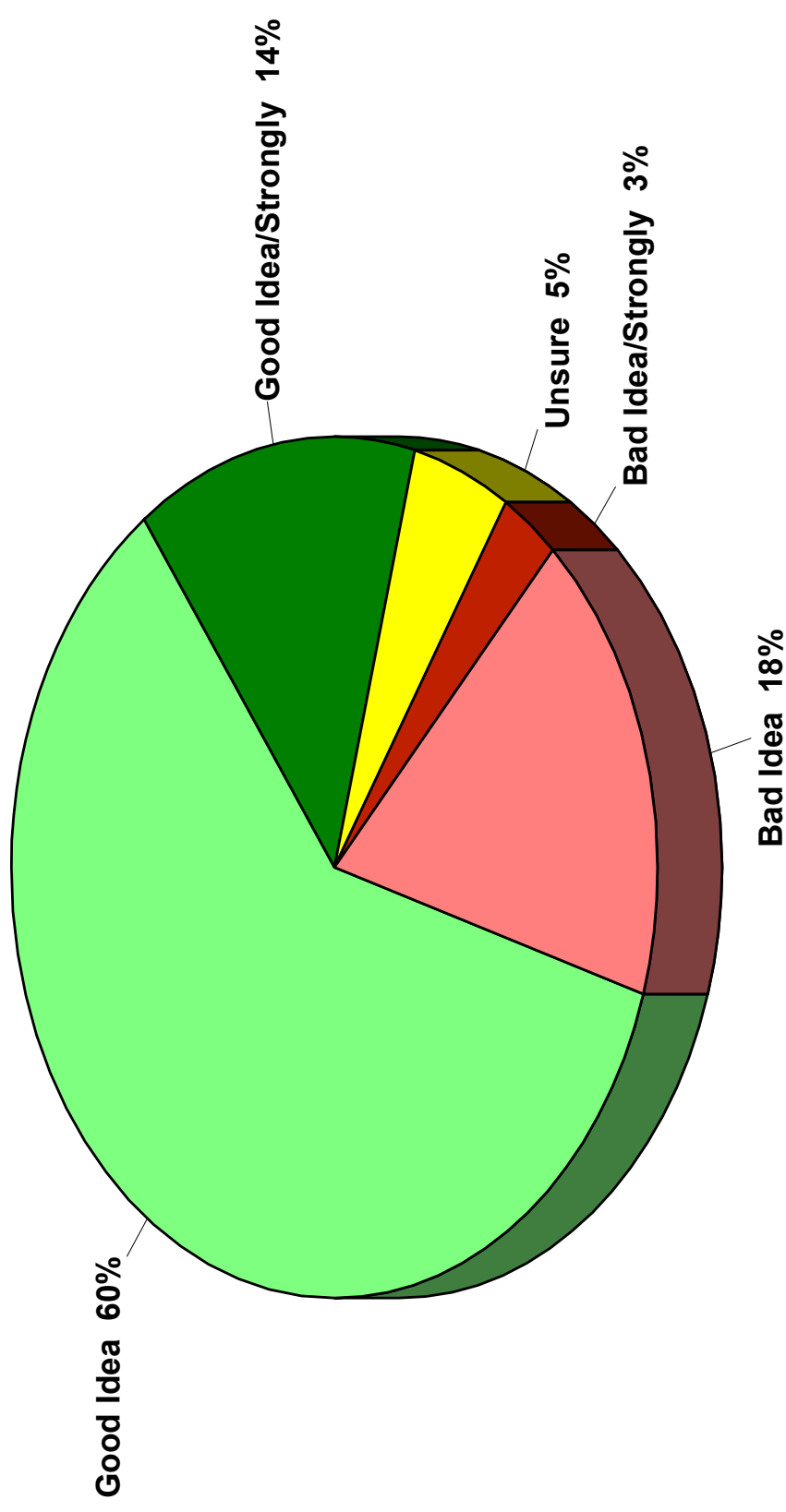
Property Tax Increase for....

2022 Westonka School District Study



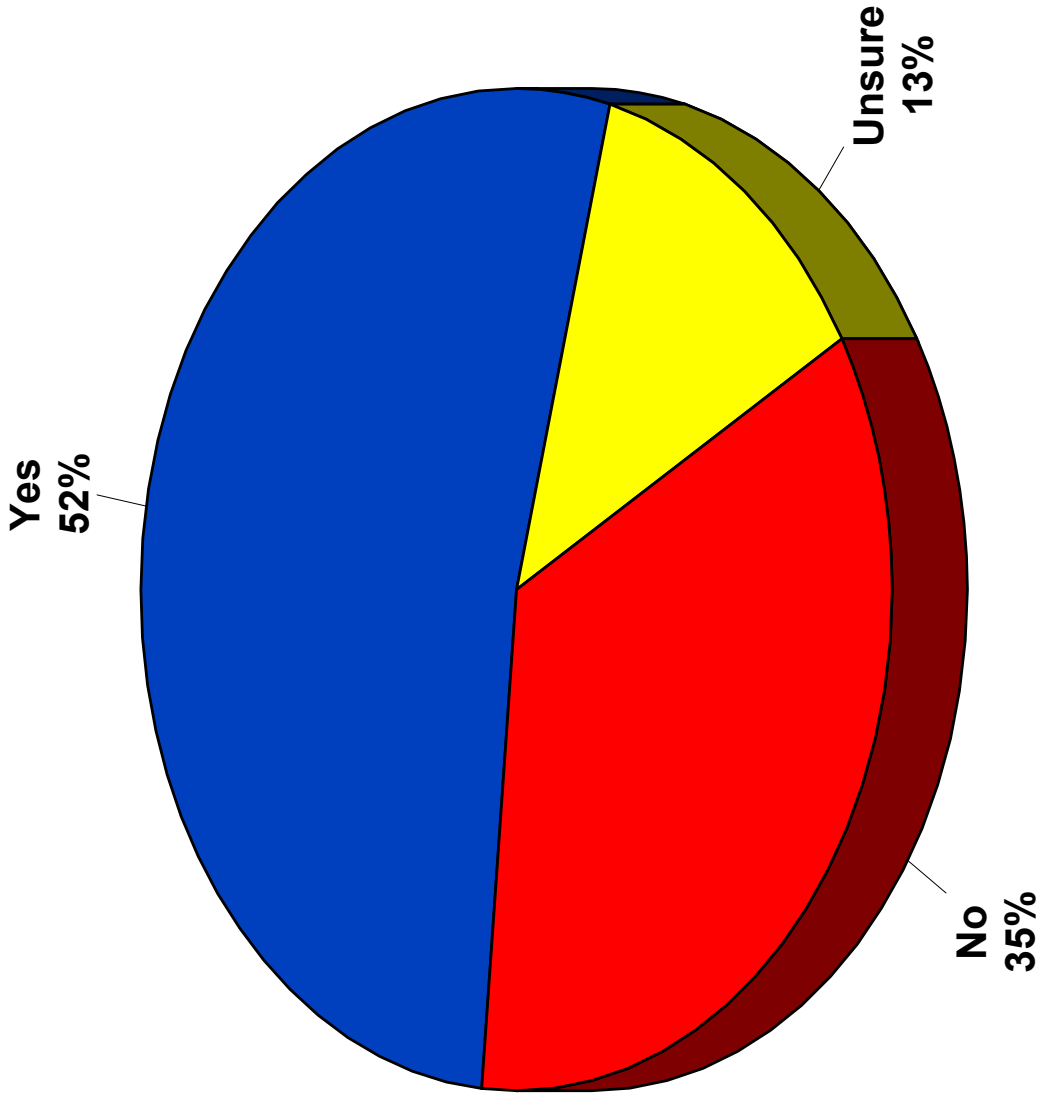
Idea of Improvements

2022 Westonka School District Study



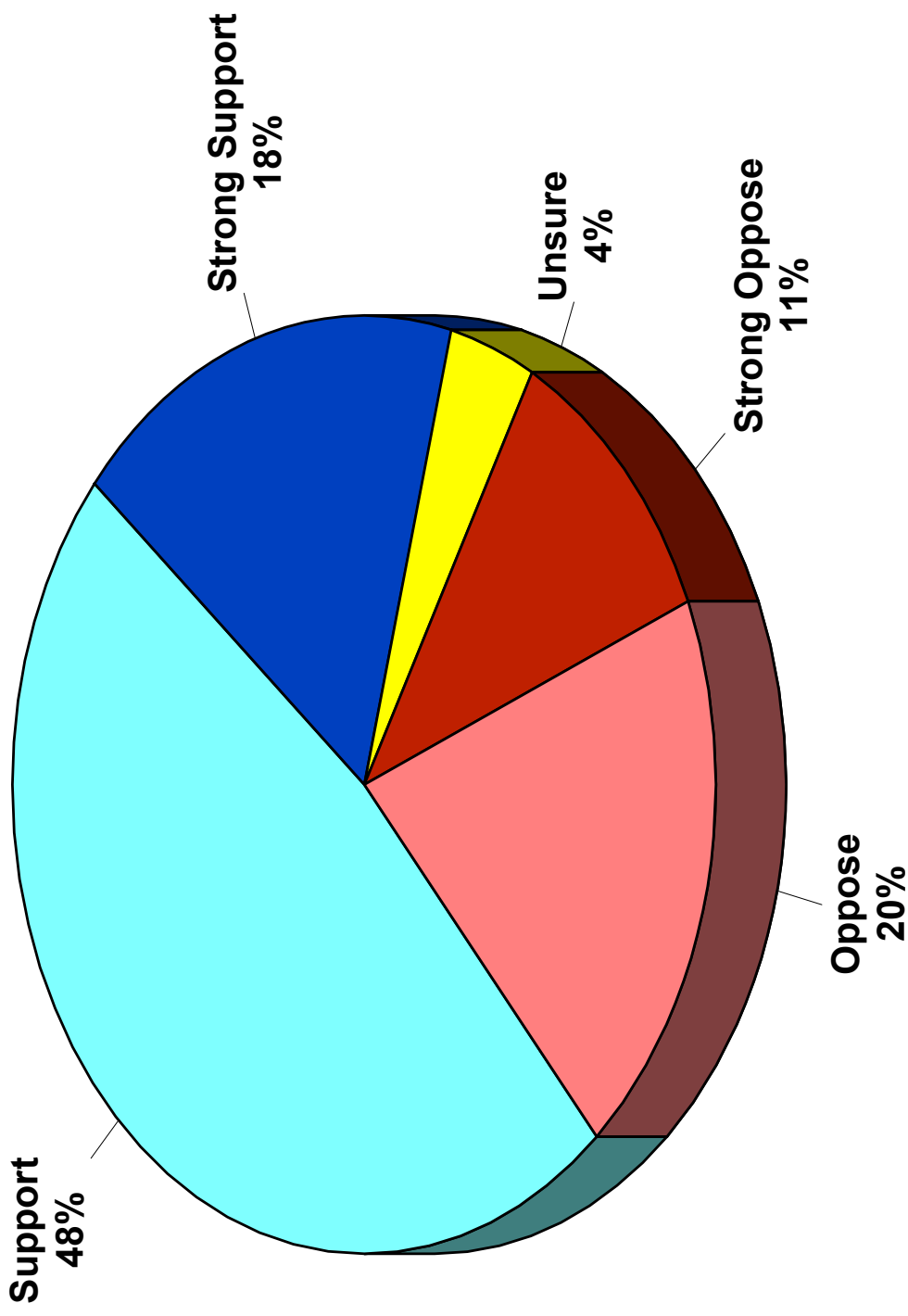
\$65MM Fair Price

2022 Westonka School District Study



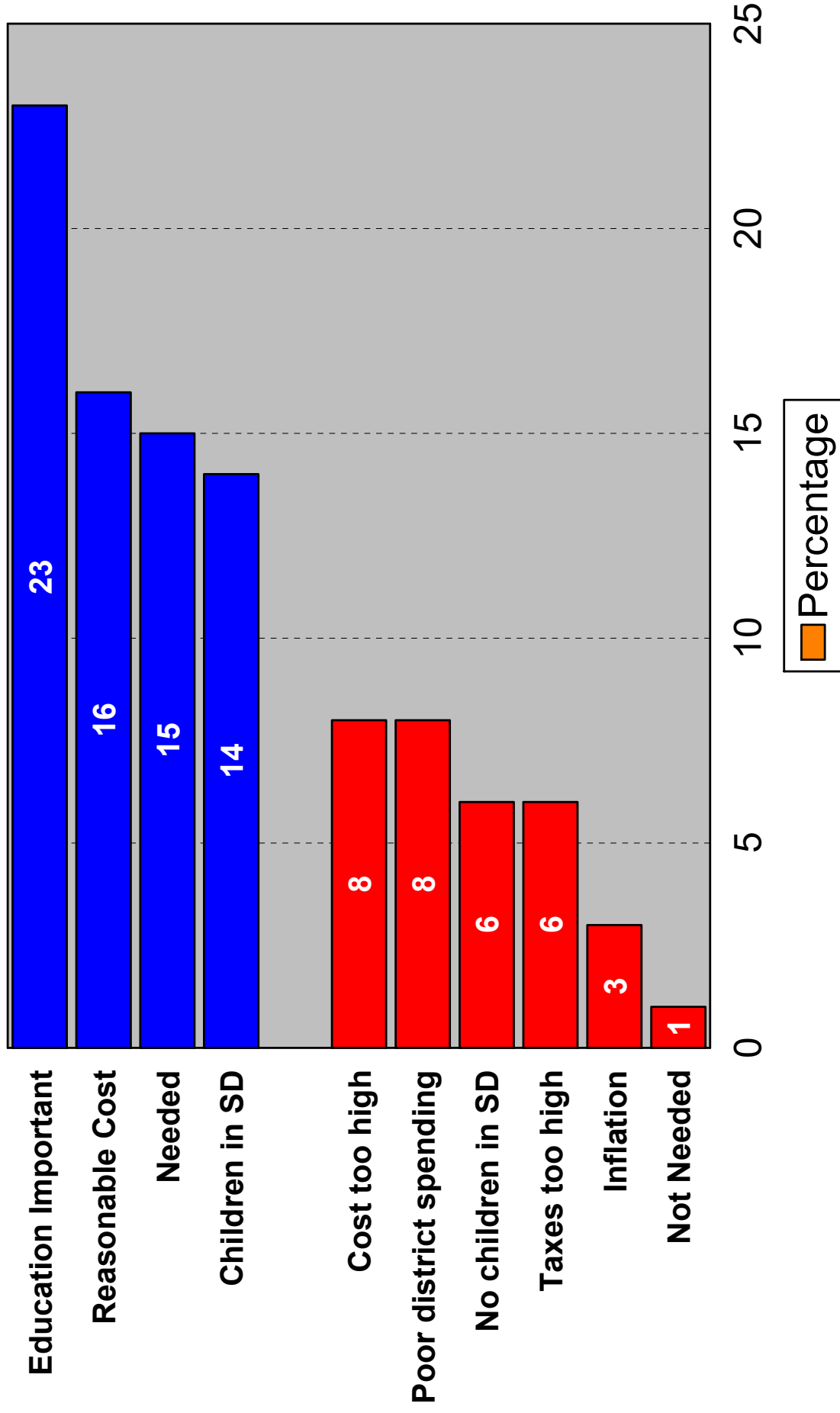
\$65MM Bond Referendum

2022 Westonka School District Study



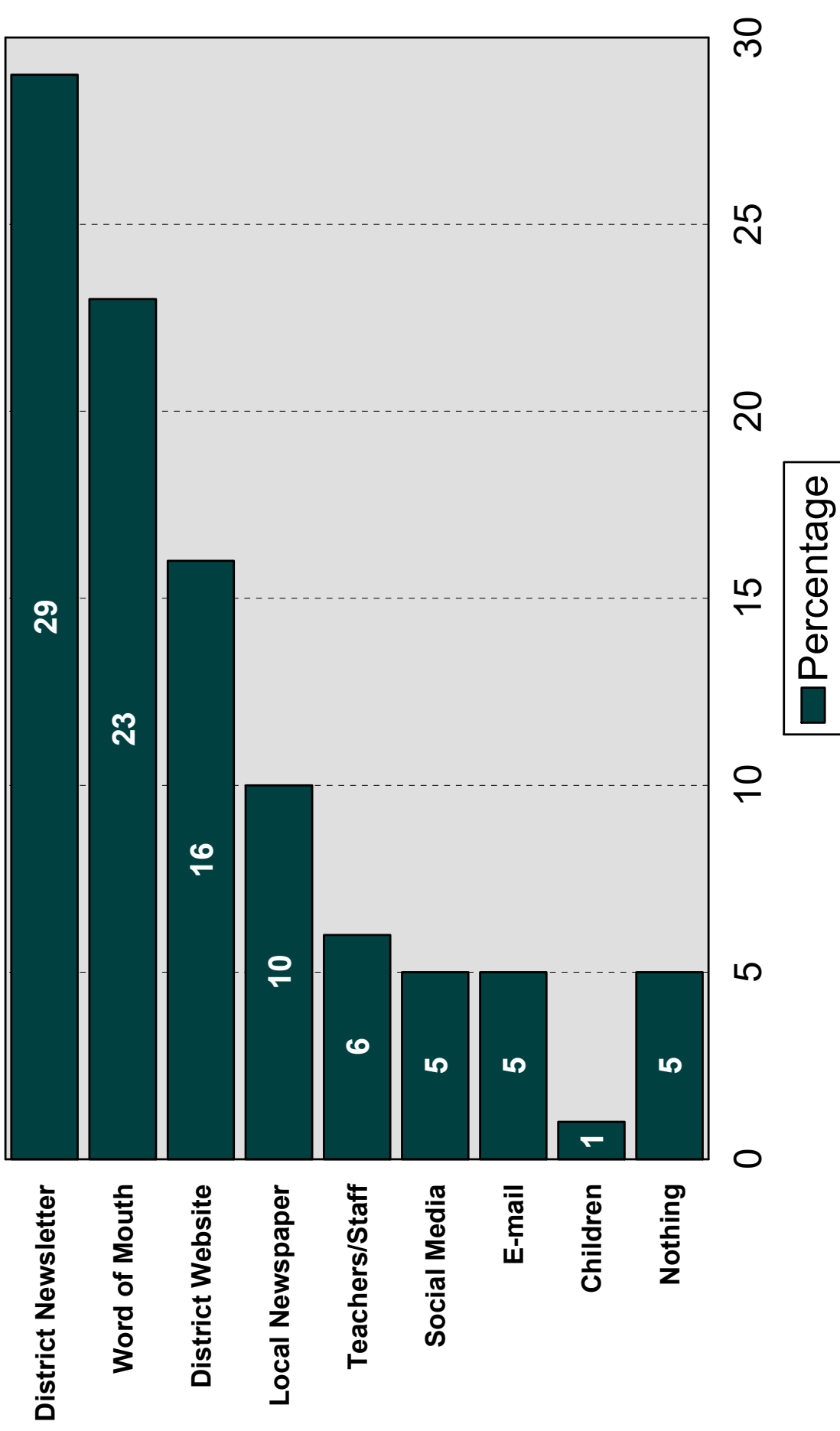
Reason for Bond Position

2022 Westonka School District Study



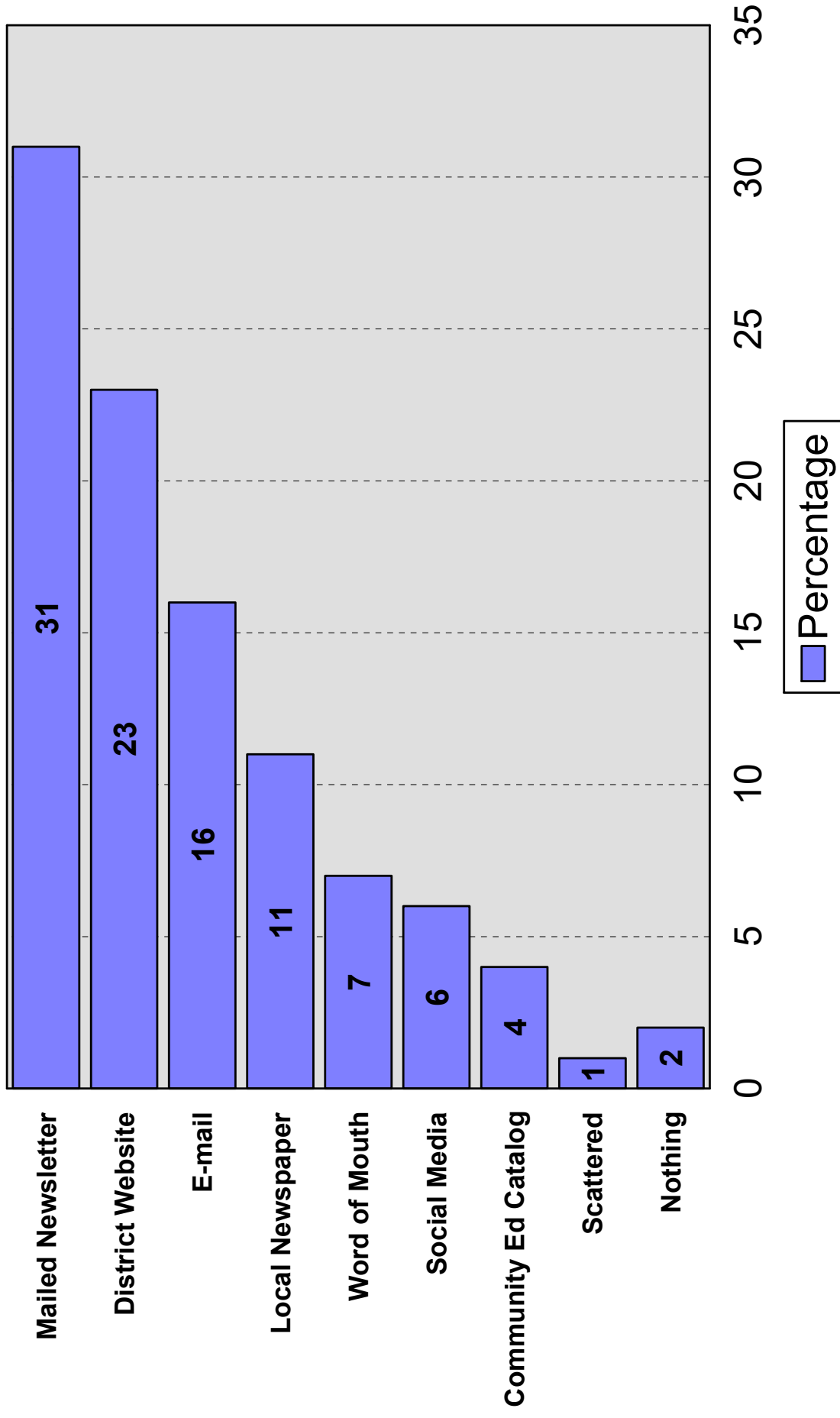
Principal Source of Information

2022 Westonka School District Study



Most Effective Way

2022 Westonka School District Study





Westonka Public Schools - ISD #277
2023 Review and Comment

Appendix E: Community Survey #2 Results

Westonka School District

2023 Residential Study

The Morris Leatheman Company

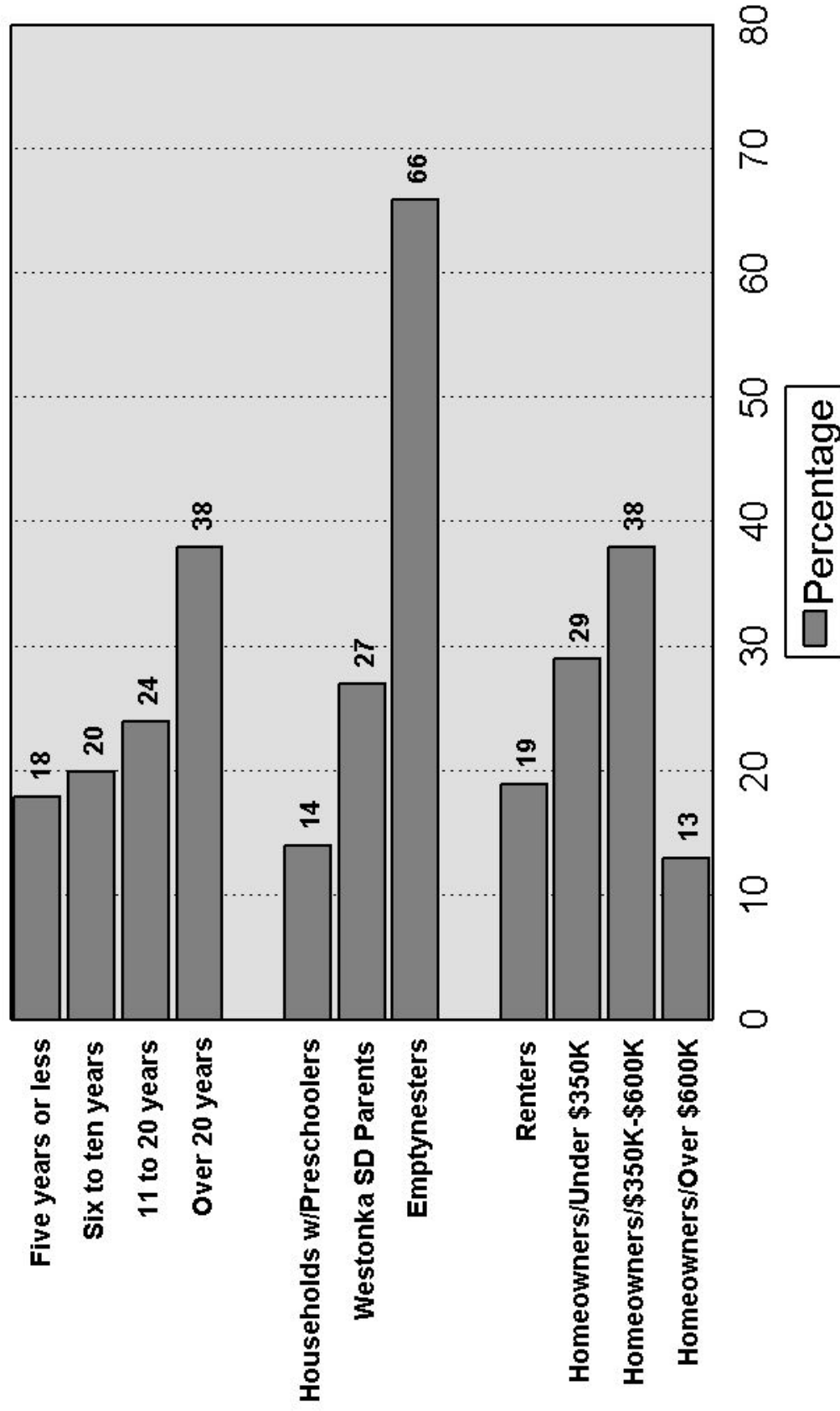
Survey Methodology

2023 Westonka School District Study

- ❑ 625 random household sample of School District residents
- ❑ Telephone interviews conducted between April 19th and May 4th, 2023
- ❑ Average interview time of 7 minutes
- ❑ Non-response level of 4.5%
- ❑ Projectable within +/- 4.0% in 95 out of 100 cases
- ❑ Cellphone Only Households: 55%
- ❑ Landline Only Households: 10%
- ❑ Both Landline and Cellphone Households: 35%

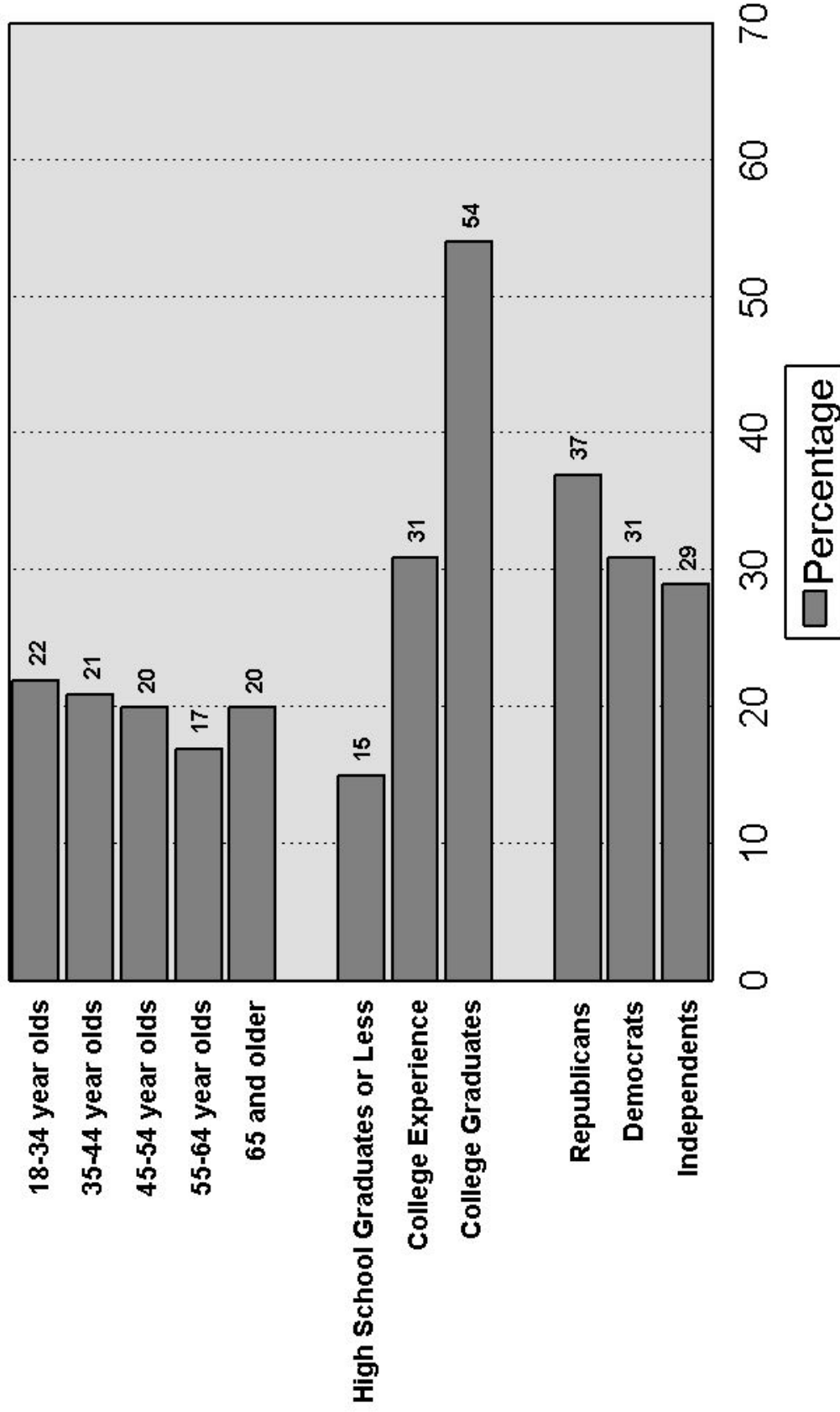
Demographics I

2023 Westonka School District Study



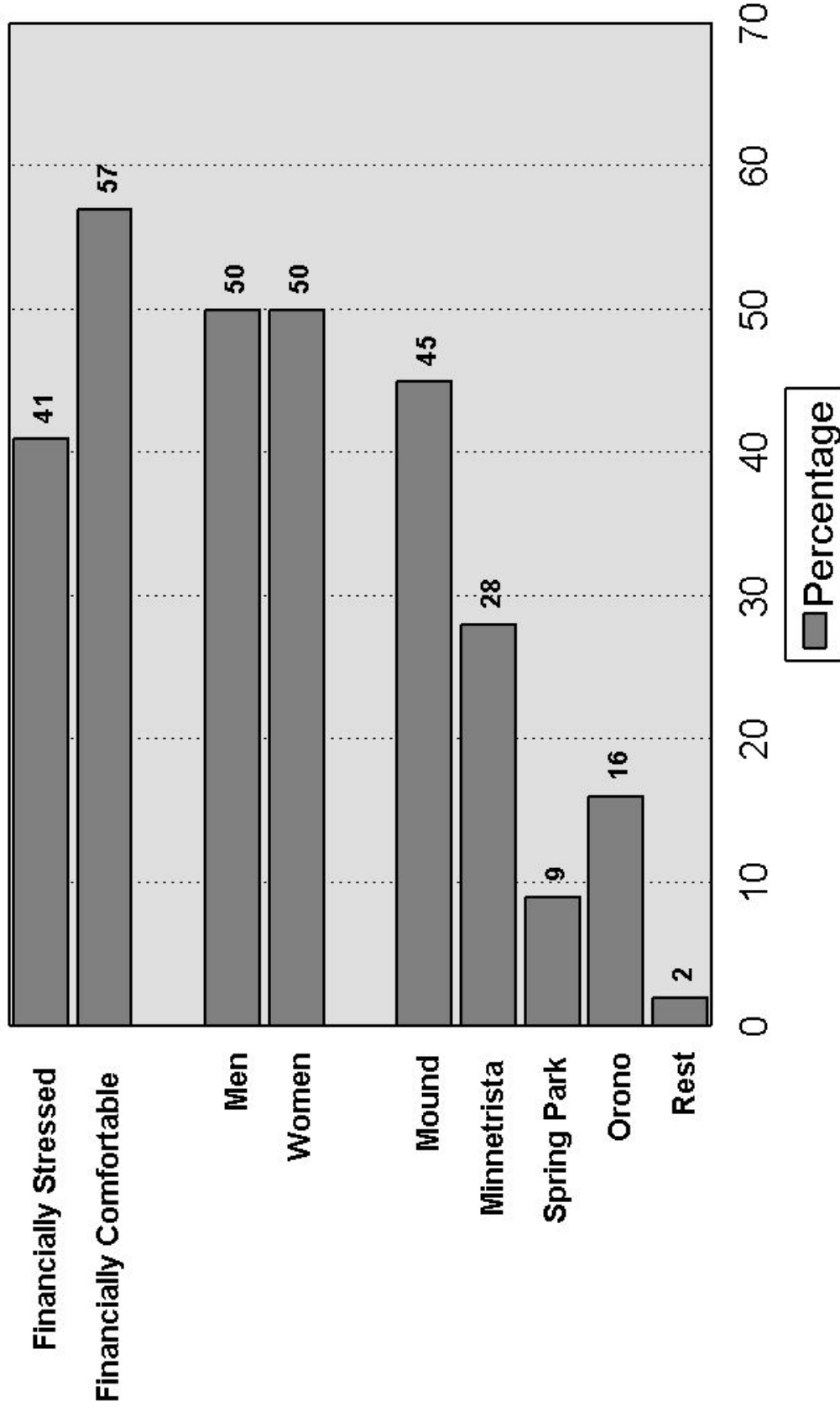
Demographics II

2023 Westonka School District Study



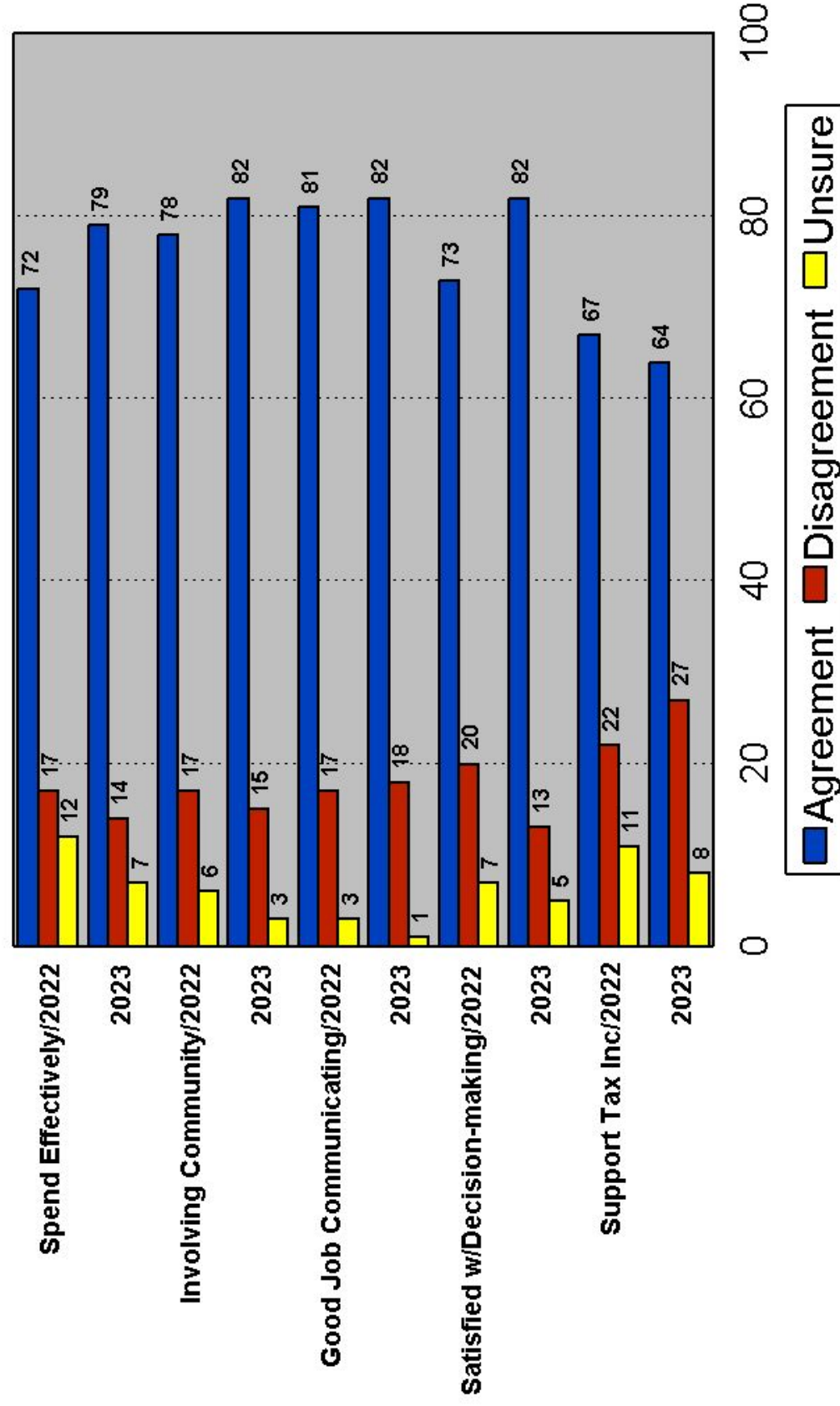
Demographics III

2023 Westonka School District Study



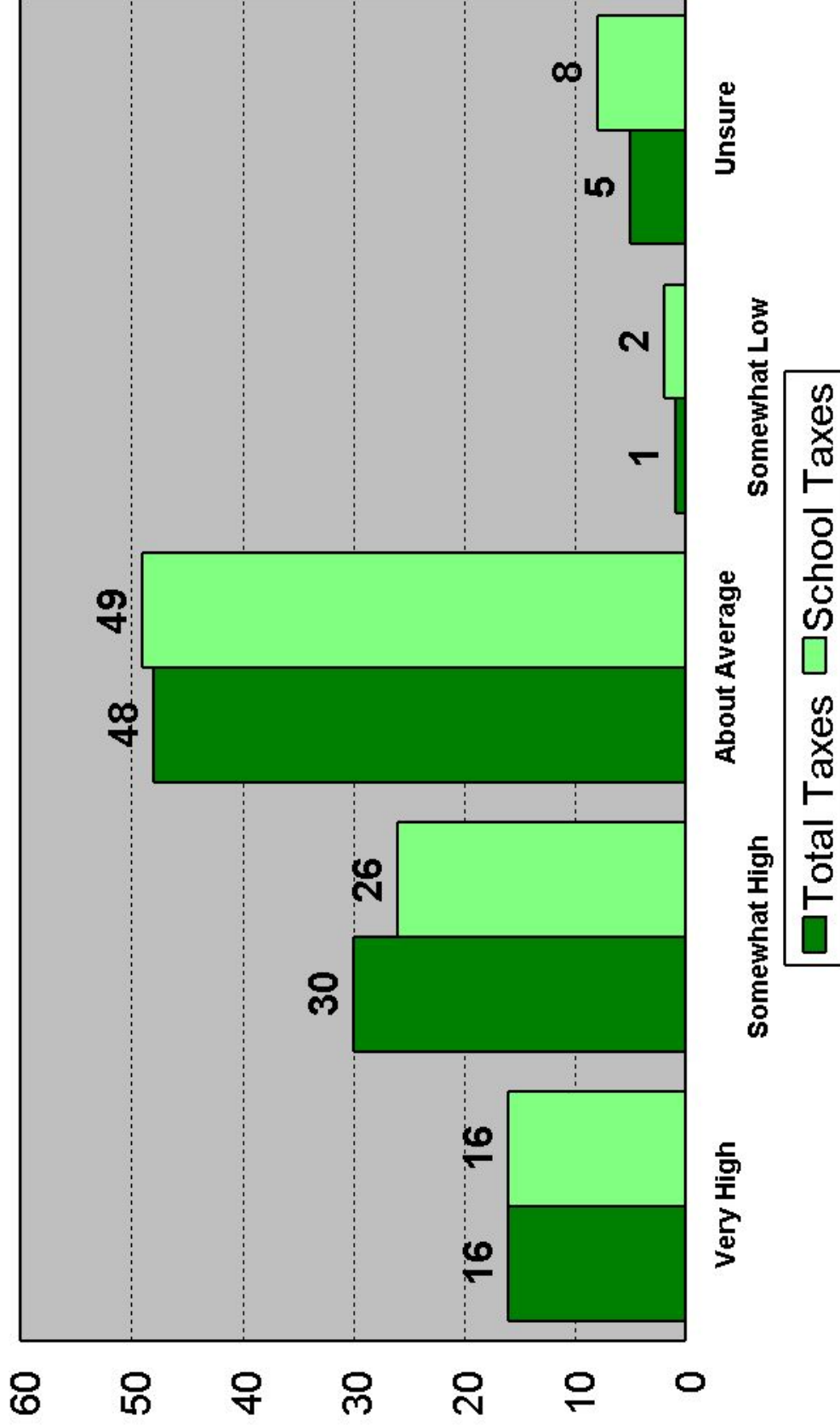
School District Perceptions

2023 Westonka School District Study



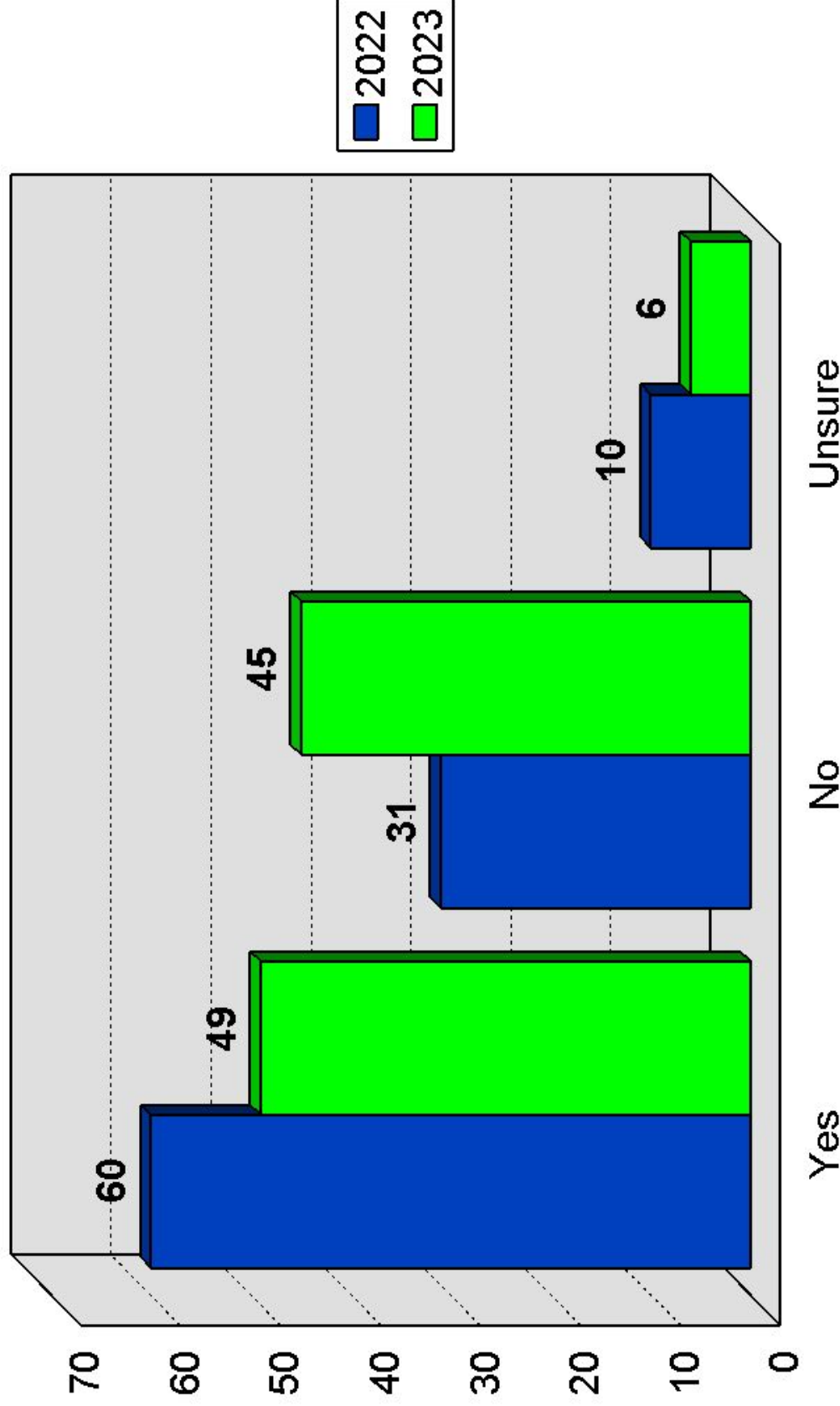
Property Tax Comparisons

2023 Westonka School District Study



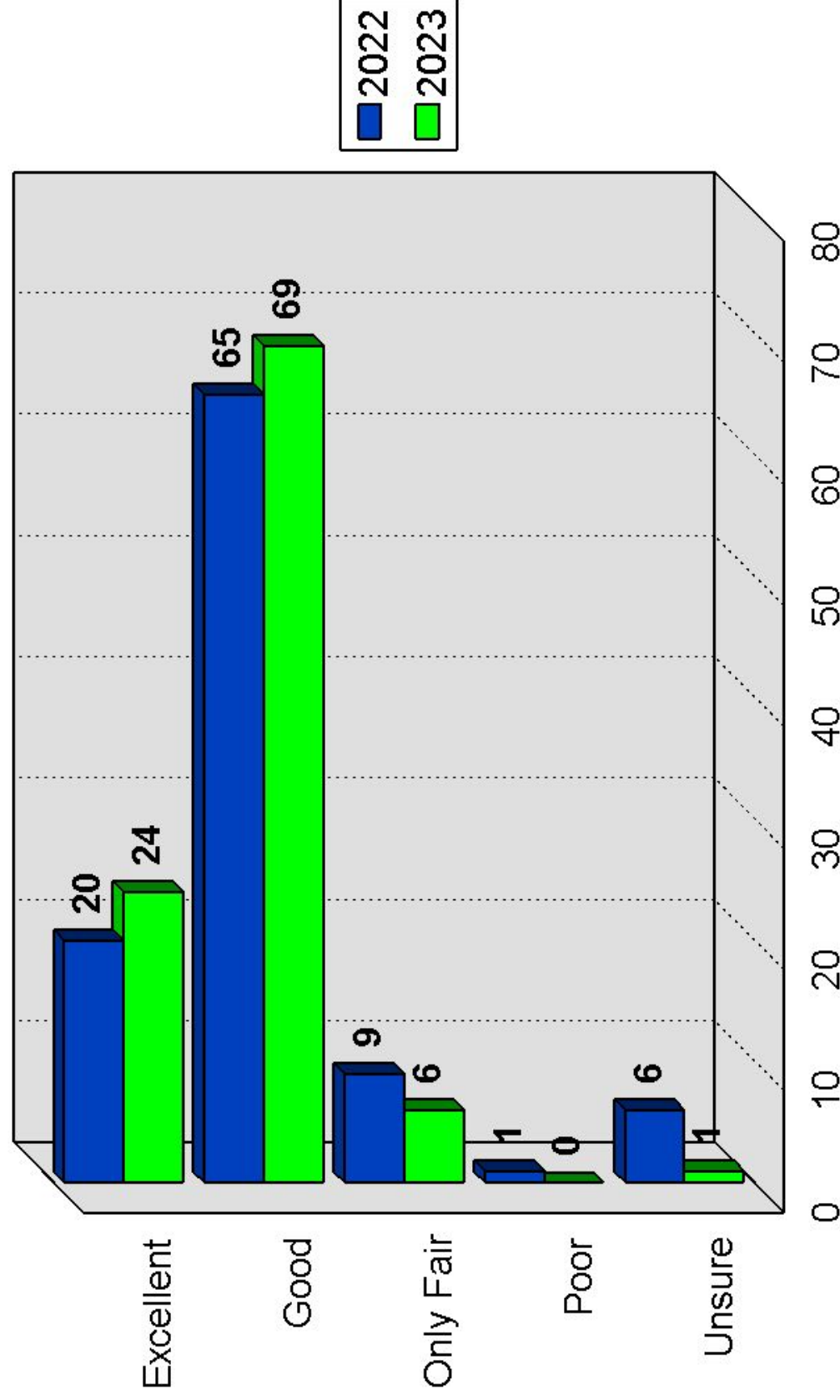
Adequately Funded

2023 Westonka School District Study



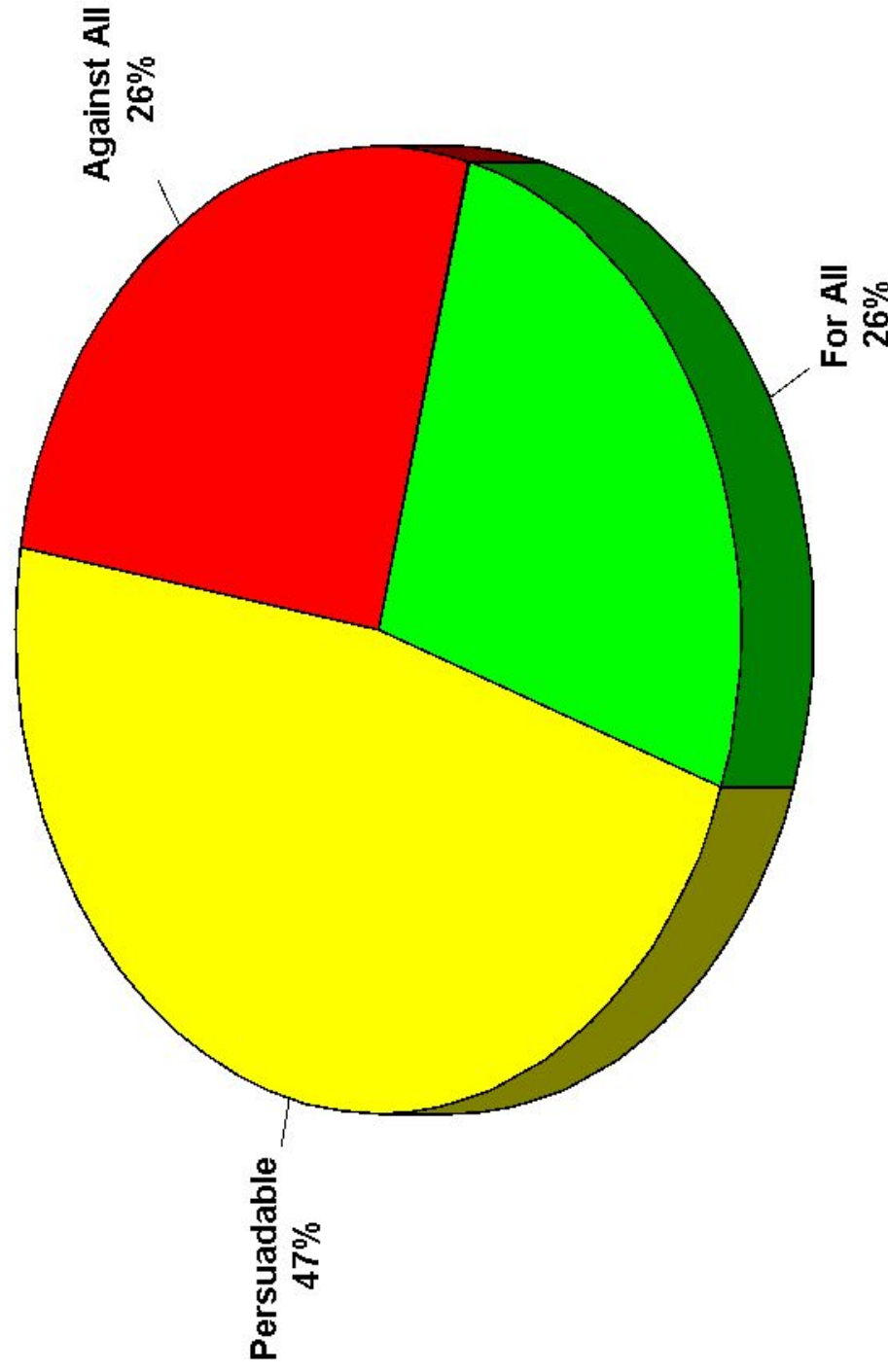
School Buildings and Facilities

2023 Westonka School District Study



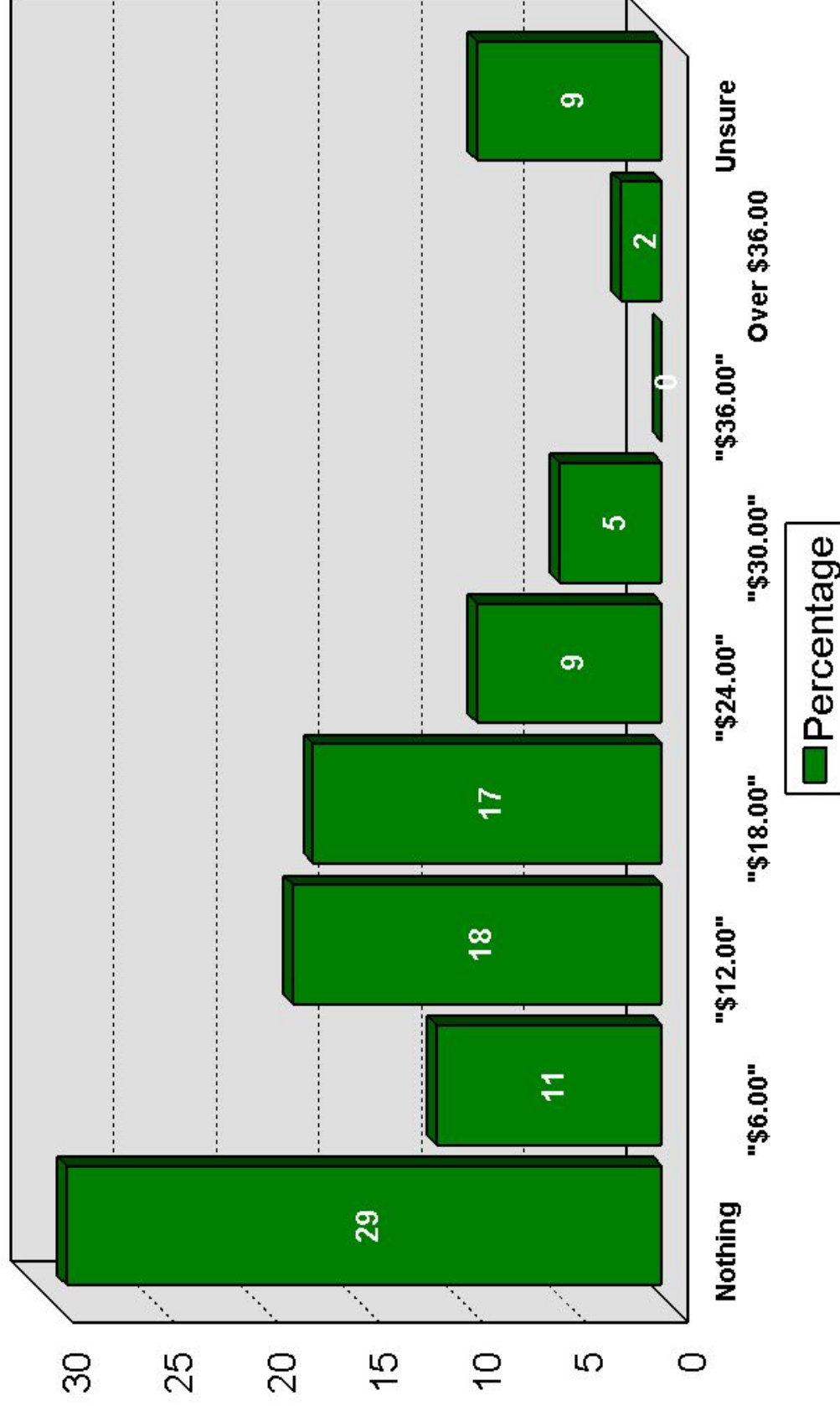
Referendum Predisposition

2023 Westonka School District Study



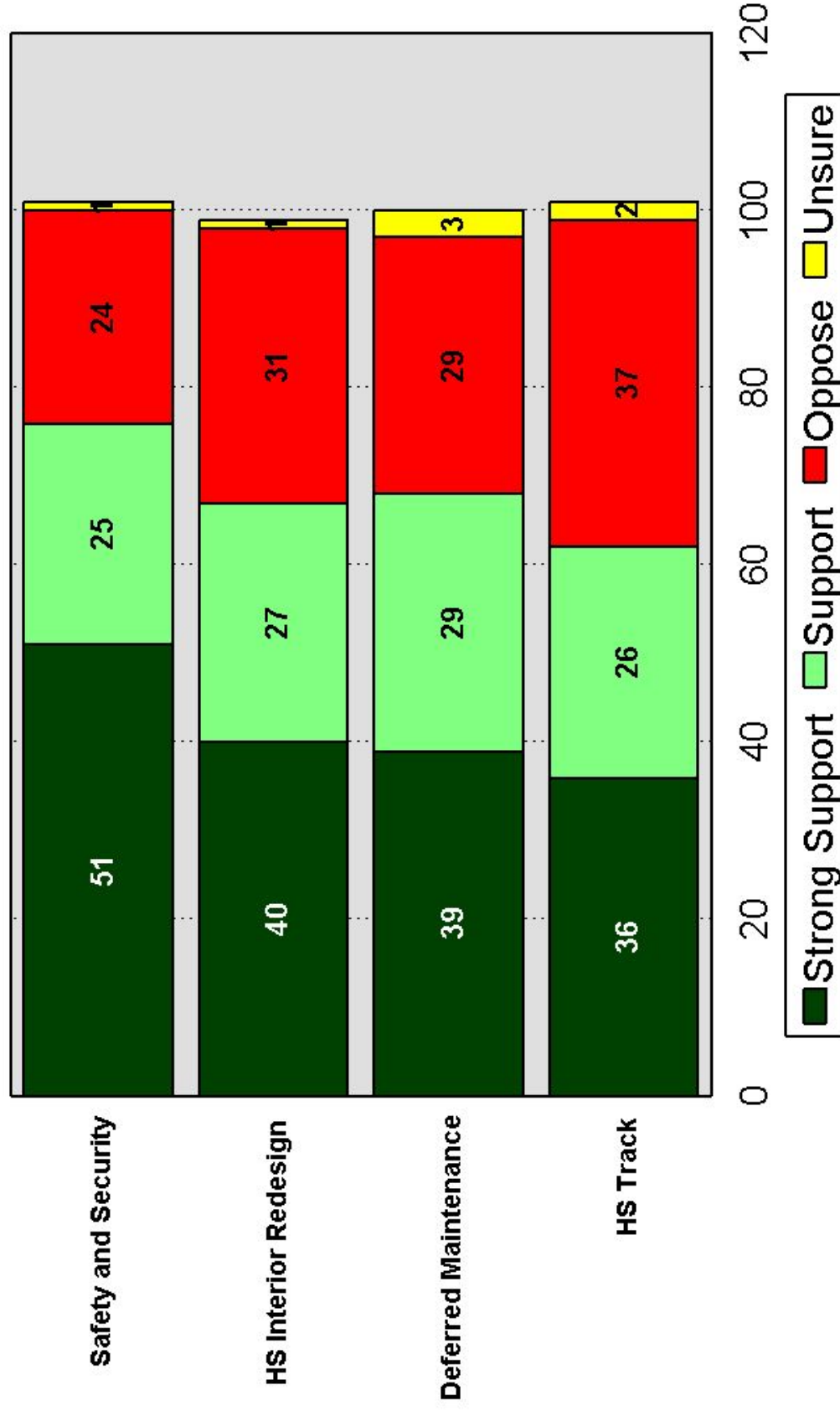
Property Tax Increase

2023 Westonka School District Study



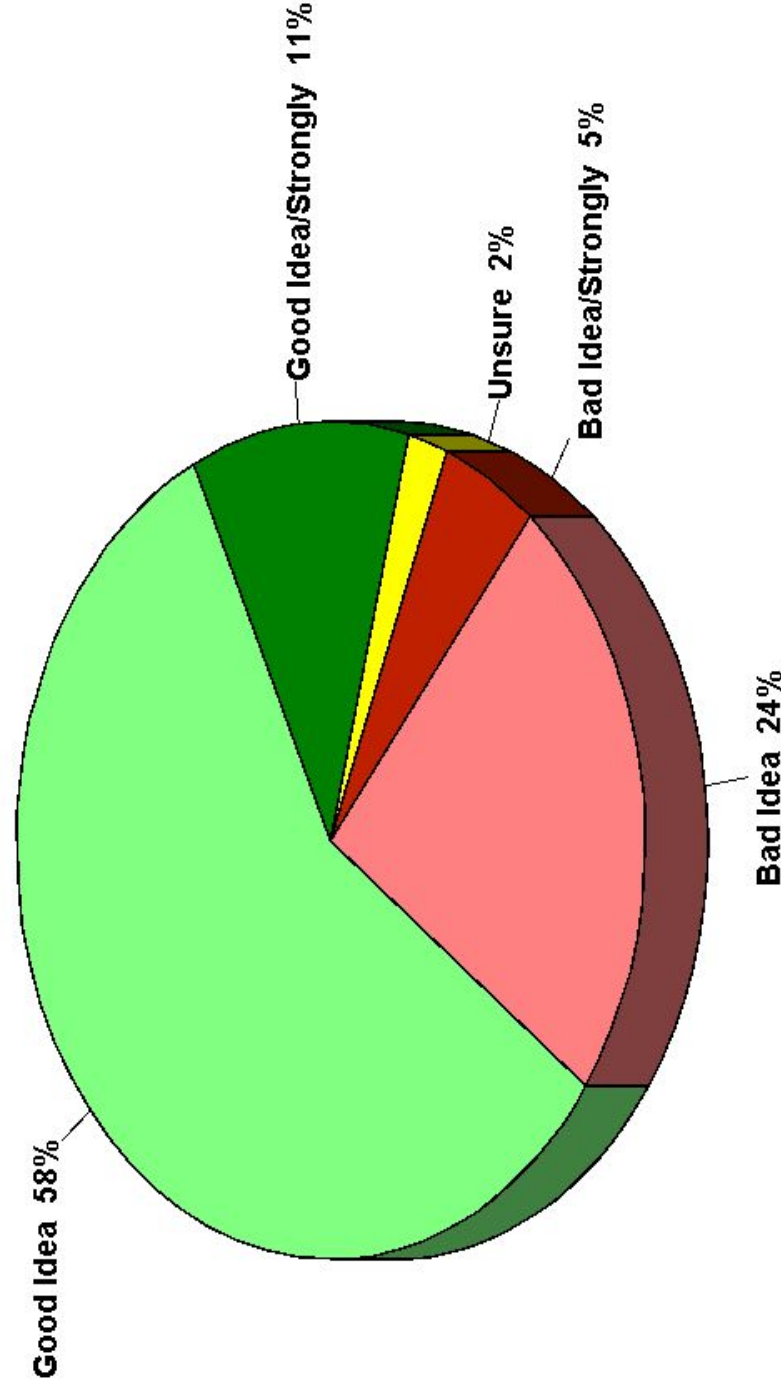
Property Tax Increase for....

2023 Westonka School District Study



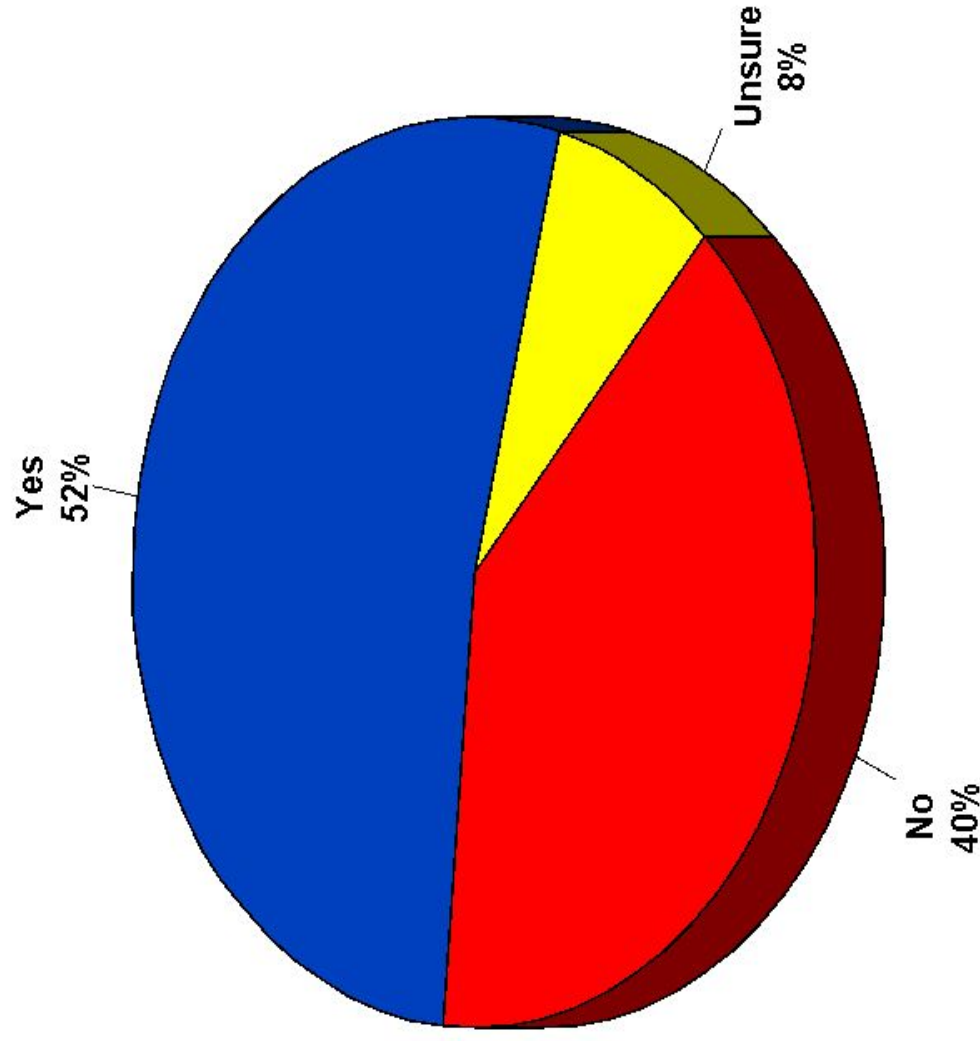
Idea of Improvements

2023 Westonka School District Study



\$93MM Fair Price

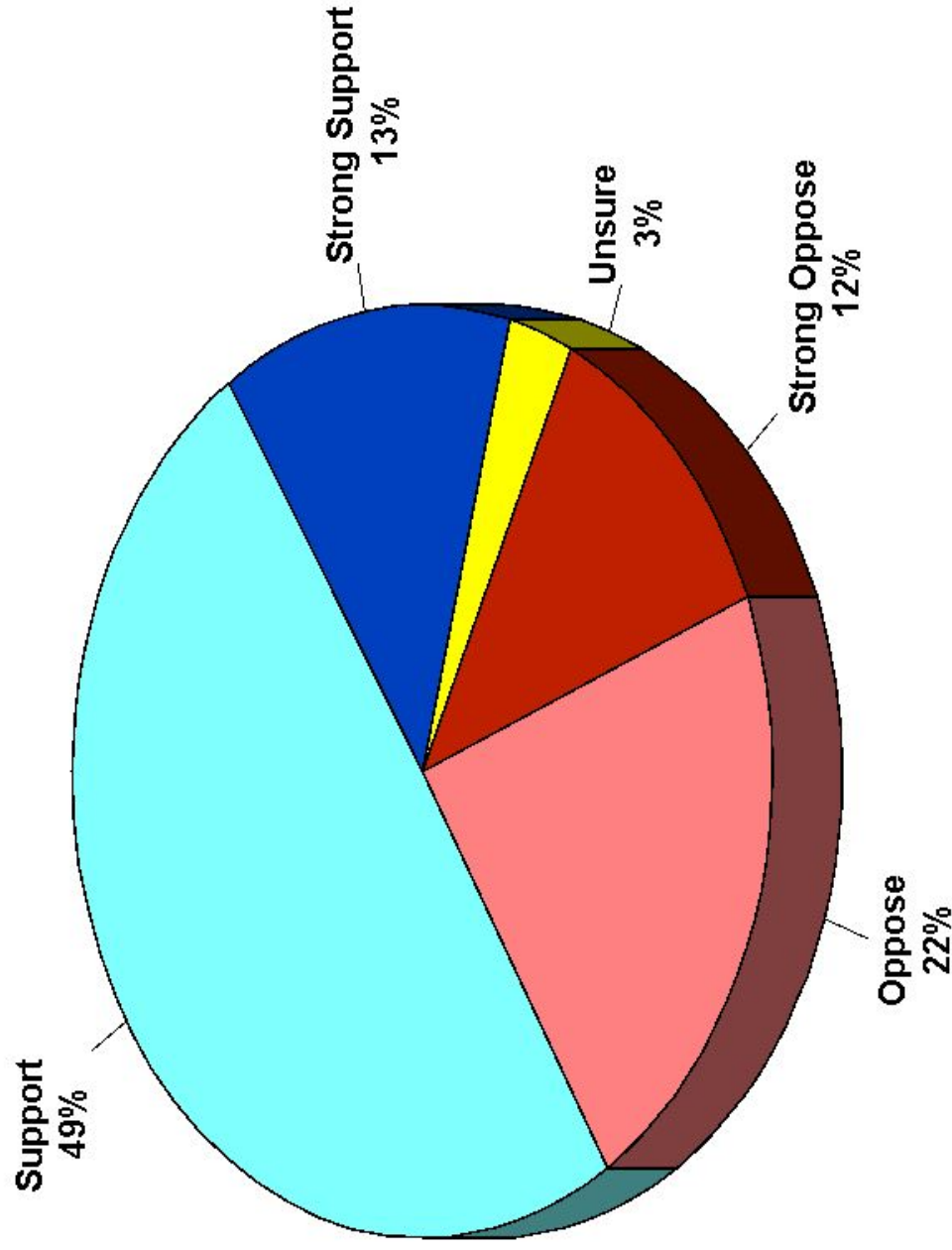
2023 Westonka School District Study



\$93MM Bond Referendum

(Overall)

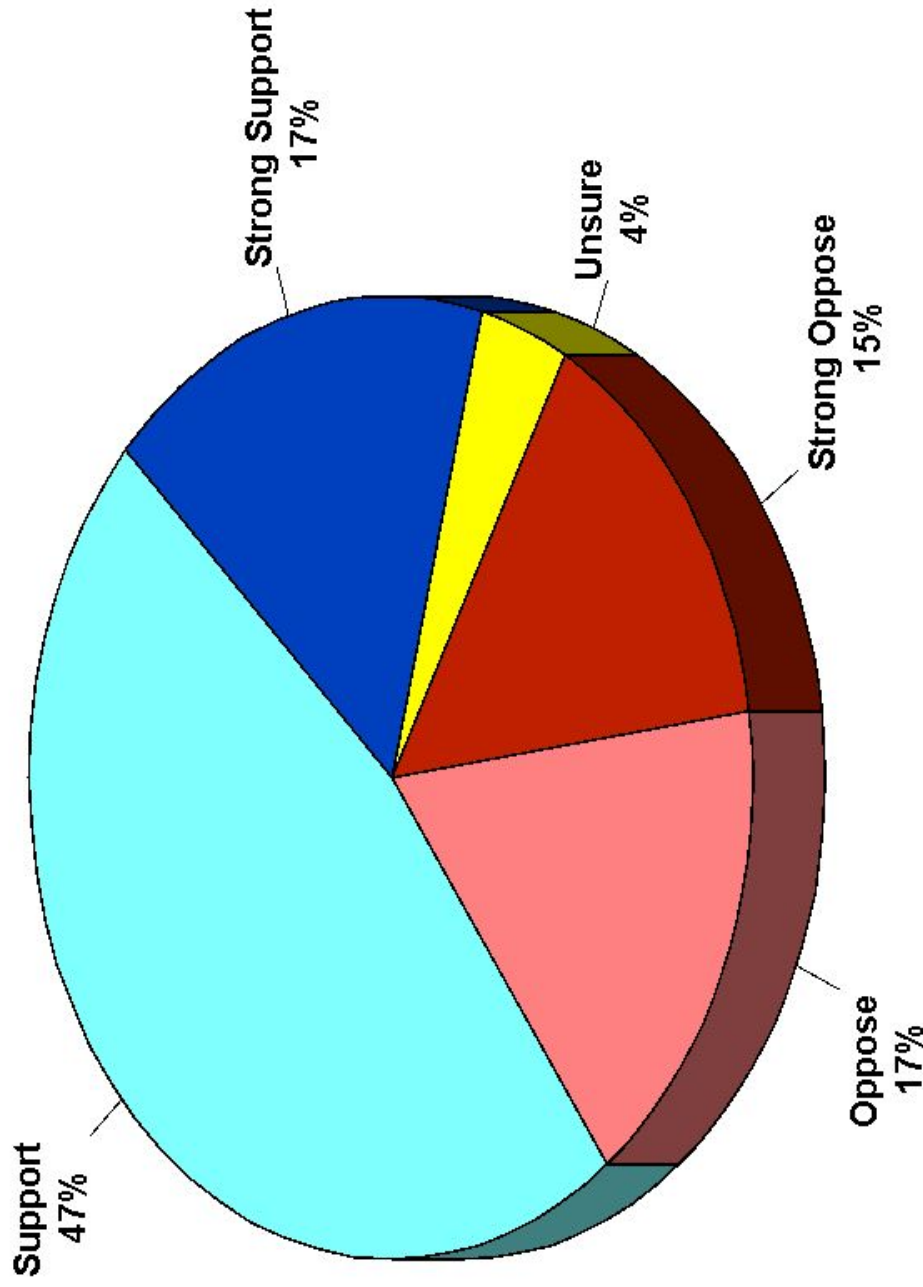
2023 Westonka School District Study



\$93MM Bond Referendum

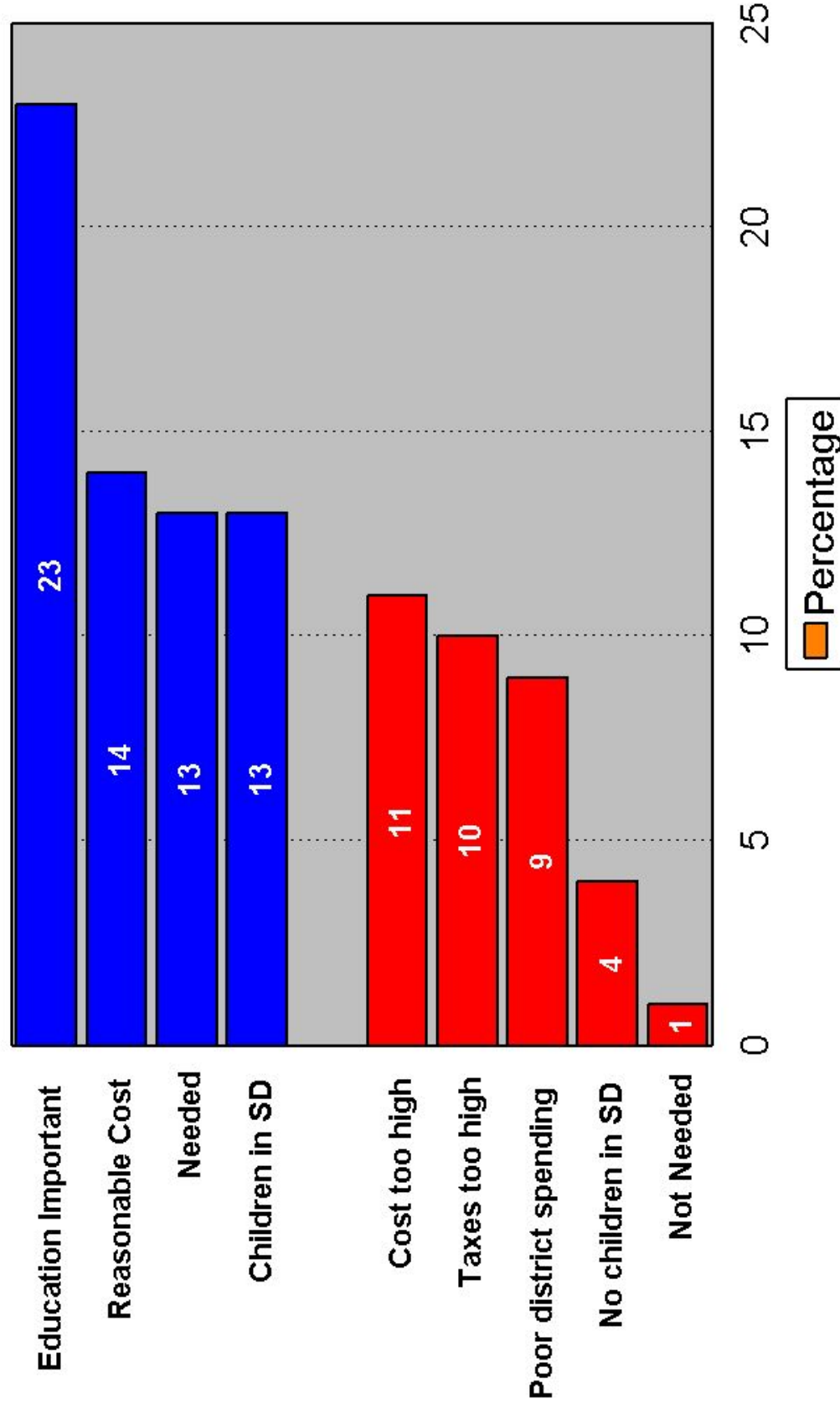
(Likely Voters)

2023 Westonka School District Study



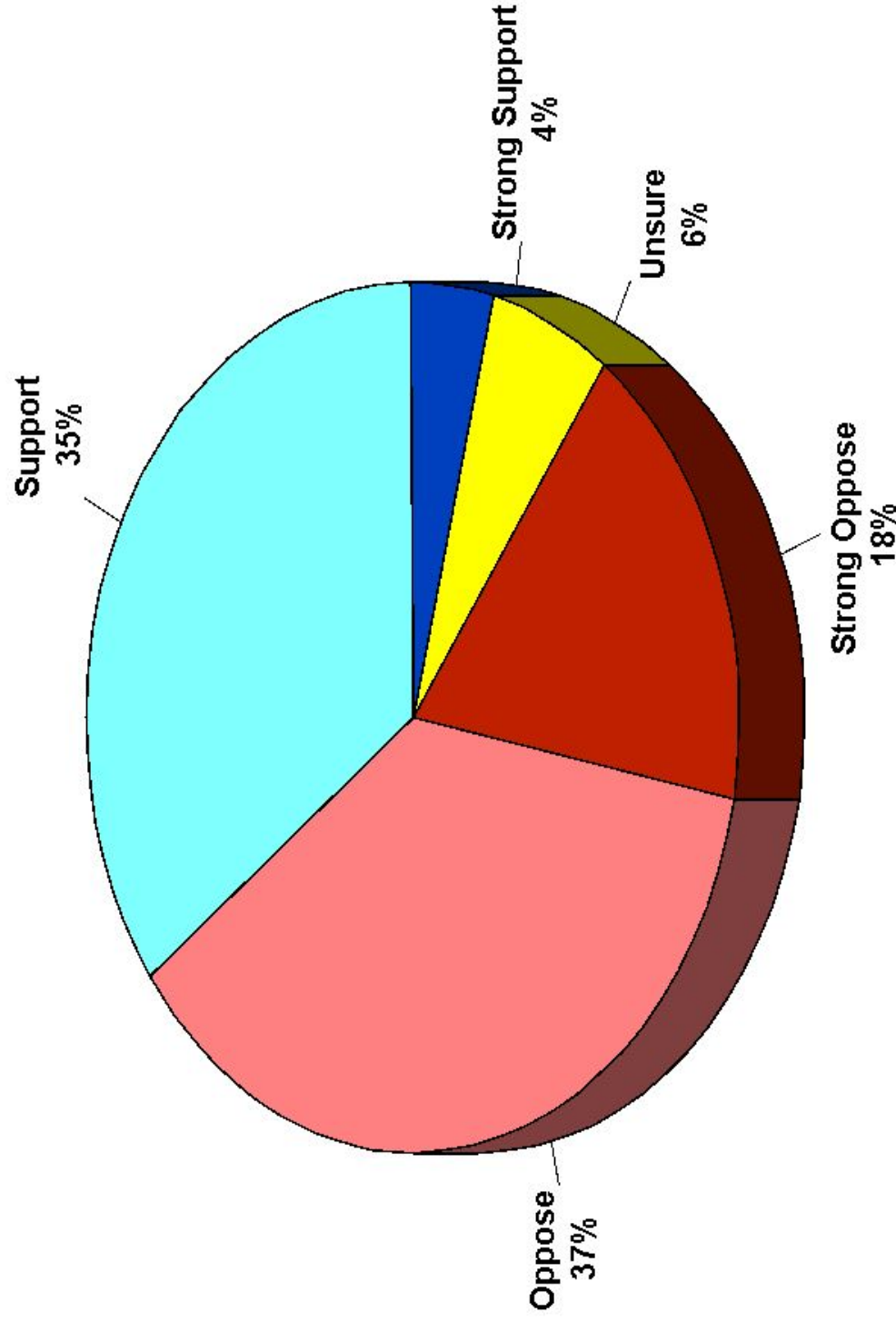
Reason for Bond Position

2023 Westonka School District Study



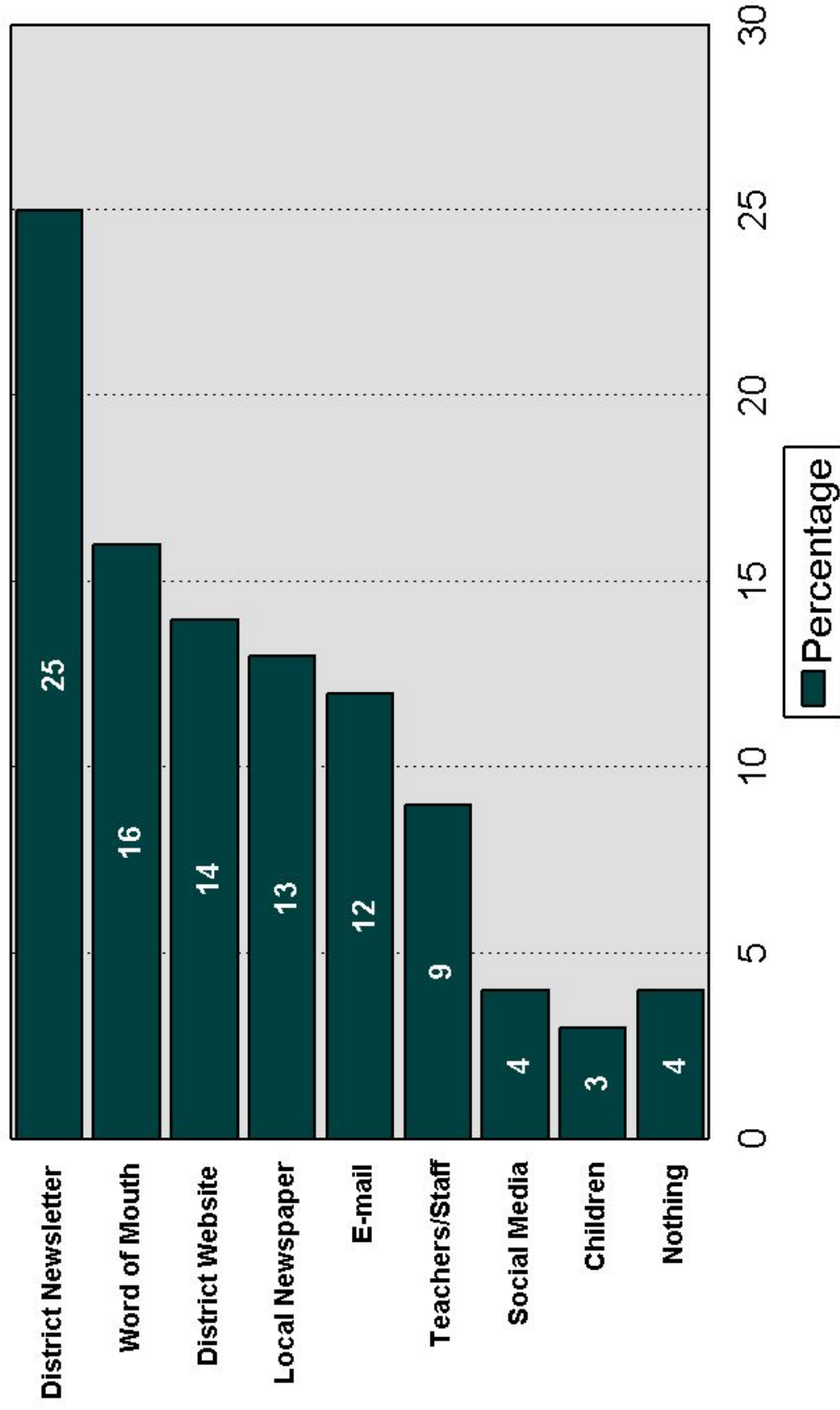
Purchasing Land for Future Needs

2023 Westonka School District Study



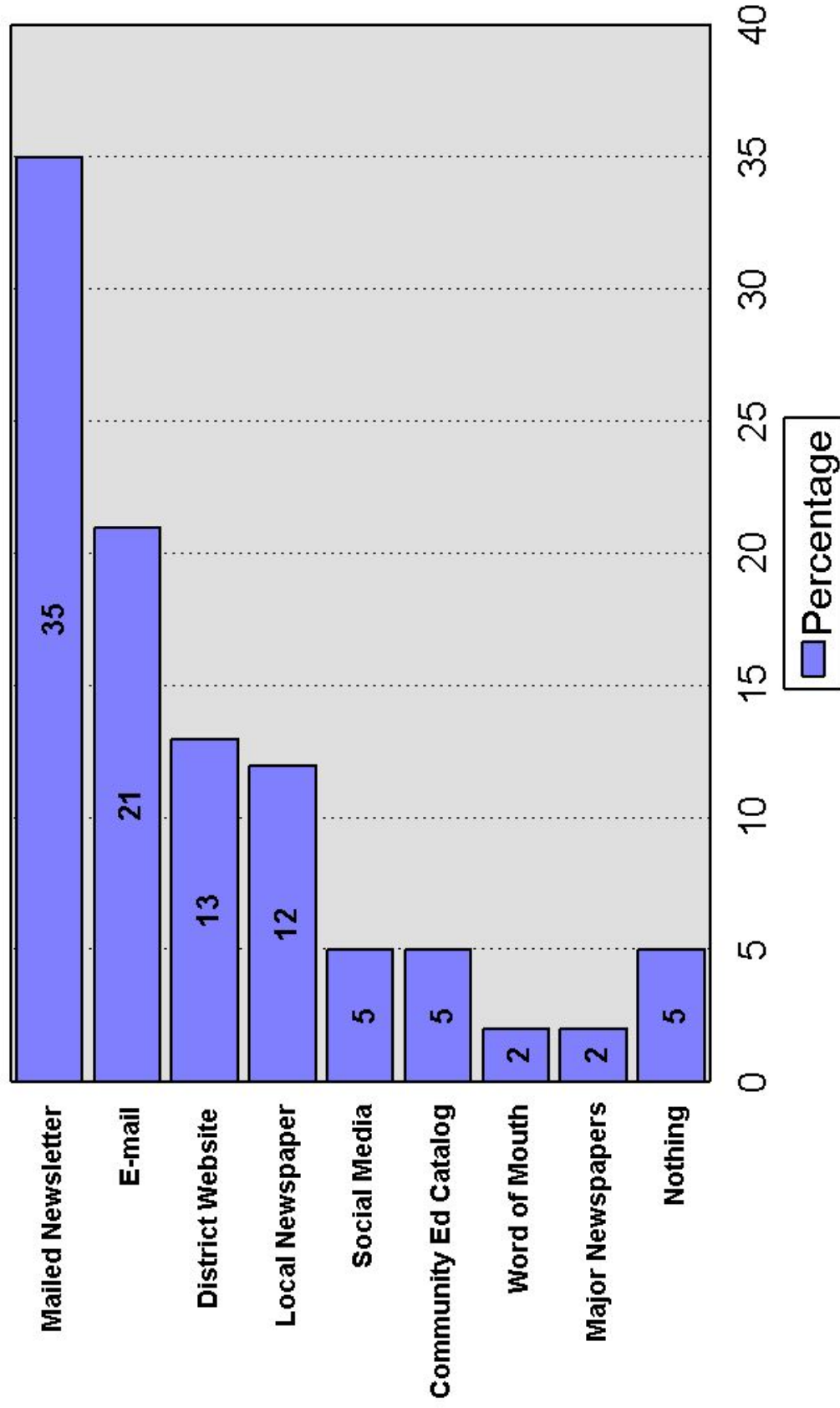
Principal Source of Information

2023 Westonka School District Study



Most Effective Way

2023 Westonka School District Study






Appendix F: Sample Ballot

Special Election Ballot

Independent School District No. 277 (Westonka Public Schools)

November 7, 2023

Instructions to Voters:

To vote, completely fill in the oval(s) next to your choice(s) like this: .

To vote for a question, fill in the oval next to the word "Yes" on that question.
To vote against a question, fill in the oval next to the word "No" on that question.

School District Question 1 Renewal of Expiring Capital Project Levy Authorization

The school board of Independent School District No. 277 (Westonka Public Schools) has proposed to renew the school district's existing capital project levy authorization of 3.400% times the net tax capacity of the school district, which is scheduled to expire after taxes payable in 2024. The money raised from the capital project levy authorization will provide funds for classroom and building technology, digital and print curriculum, technology to enhance safety and security, technology infrastructure and network improvements, technical staff support, device replacement, and testing. The proposed capital project levy authorization will raise approximately \$2,575,178 for taxes payable in 2025, the first year it is to be levied, and would be authorized for ten years. The estimated total cost of the projects to be funded over that time period is approximately \$25,751,780. The projects to be funded have received a positive Review and Comment from the Commissioner of Education.

☐

Yes

Shall the capital project levy authorization proposed by the school board of Independent School District No. 277 be approved?

☐

No

**BY VOTING "YES" ON THIS BALLOT QUESTION, YOU ARE
VOTING TO RENEW AN EXISTING CAPITAL PROJECTS
REFERENDUM THAT IS SCHEDULED TO EXPIRE.**

School District Question 2
Approval of School District Bond Issue

☐

Yes

☐

No

Shall the school board of Independent School District No. 277 (Westonka Public Schools) be authorized to issue its general obligation school building bonds in an amount not to exceed \$93,400,000 to provide funds for the acquisition and betterment of school sites and facilities, including the construction of secure entrances and other safety and security improvements at all school sites and facilities; districtwide deferred maintenance projects, including replacement of boilers, piping and electrical systems; the redesign, renovation and equipping of academic and activity spaces at the Mound Westonka High School site and facility; and the reconstruction and repair of athletic fields, tennis courts and track?

**BY VOTING "YES" ON THIS BALLOT QUESTION, YOU
ARE VOTING FOR A PROPERTY TAX INCREASE.**



Addendum Submitted on Aug. 11, 2023
in response to MDE request for additional budget detail by site.



Note: This report is a budget estimating tool for bond work. Budgets are developed based on conceptual scope and preliminary planning. This worksheet represents the intended scope of work and estimated budgets for the included items. Final project scope will vary based on design solutions developed after the referendum. All recommended amounts include contingencies and a projection for inflationary escalation. Individual line items are considered estimates and final costs may vary based on the construction market at the time of public bidding. Work will be awarded via sealed bids to lowest responsible bidder per the Mn State Statute 471.

	<u>Subtotal Budget</u>	<u>Category Budget</u>
EDUCATIONAL SPACE		
SECURITY		\$ 7,360,000
Early Childhood	\$ 84,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Hilltop	\$ 249,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Shirley Hills	\$ 238,000	
Door monitor		
Hardening Glass		
Zone Separation		
Alert Strobe		
Grandview	\$ 2,542,000	
Secure Entry		
Door monitor		
Hardening Glass		
Zone Separation		
Visual Alert Strobe		
High School	\$ 4,247,000	
Secure Entry (East and North)		
Door monitor		
Security Glass Upgrade		
Security Glass		
Security Film		
Zone Separation		
Alert Strobe		

DRAFT



MAINTENANCE

\$ 37,023,000

Hilltop Maintenance

\$ 4,338,000

Areas to be addressed include:

- Mill & Overlay North Shared Parking Lot
- Replace Remaining Original Building Windows
- Replace Carpet in Various Rooms not replaced in 2011
- Replace Interior Doors & Hardware Throughout
- Replace Existing Galvanized Steel Domestic Water Distribution Systems with New Copper Piping
- Boiler Plant Piping Modifications & Labeling
- Replace Existing Primary Boiler Plant with High Efficiency Condensing Boilers
- Replace AHU-1
- Replace AHU-2
- Replace AHU-3
- Replace MAU-1
- Replace Remaining Transfer Fans and Exhaust Fans Past Usable Life
- Add Dehumidification to Gym
- Replace Electrical Service
- Replace Electrical Panels (14 panels)
- Resurface Hard Surface by Playground

Shirley Hills Maintenance

\$ 2,058,000

Areas to be addressed include:

- Replace Interior Doors & Hardware Throughout
- Exterior Façade Repairs
- Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping
- Replace Underground Piping
- Replace MAU-1
- Replace CRAC Unit Serving Elevator Equip Room

Grandview Maintenance

\$ 3,775,000

Areas to be addressed include:

- Replace Lockers Throughout
- Replace Interior Doors & Hardware Throughout
- Replace Small Gym Flooring
- Entry Canopy & ADA Ramp Rebuild
- Small Gym Renovations
- Replace Display Cases with Cork Board
- Replace Domestic Water Softener
- Replace Galvanized Domestic Hot and Cold Water Distribution Systems with New Copper Piping
- Provide AHU to Ventilate Kitchen
- Remodel Media Center
- Media Center and Flex Area Furniture

DRAFT



High School Maintenance Priorities

\$ 16,067,000

Areas to be addressed include:

Gym Roof Replacement

Replace Interior Doors & Hardware Throughout

Replace Gym Bleachers, Curtains, Sound System & Add School Pride, repaint

Provide Cooling Coil for Dehumidification in AHU S-1 (Pool Unit)

Replace Insulation on Outside Air Duct for AHU S-1 (Pool Unit)

Replace the Steam Plant with New High Efficiency Hot Water Plant

Replace Galvanized Domestic Hot and Cold Water Distribution with New Copper Piping in 1970 building

Replace All Aging Mechanical Equip Past Usable Life (Exhaust Fans, Transfer Fans, etc)

Replace AHU S-4 with Constant Volume Unit

Replace AHU-1

Replace AHU S-6

Replace AHU S-7

Replace AHU S-8

Replace AHU S-10

Replace AHU S-11

Replace AHU S-12

Replace AHU S-13

Replace Sewer Piping

Pool & WAC/PAC Condensing Boiler

Replace Final Phase of Electrical Upgrades (Panelboards and Feeders)

Bus Garage Maintenance

\$ 218,000

Areas to be addressed include:

Miscellaneous Tuckpointing

Bus Garage Site Lighting

Electrical Panel Replacement

Campus Maintenance

Tennis Court Rebuild

\$ 2,568,000

Update Field #12 to Stadium

\$ 6,715,000

Demo and Stormwater Infrastructure

\$ 1,351,000

Stadium Components

\$ 1,800,000

Turf Field

\$ 1,197,500

Parking Improvements (old tennis court area)

\$ 627,500

Track & Field Events

\$ 1,301,500

Lighting

\$ 437,500

Thaler Modifications

\$ 709,000

JV Baseball Field Upgrades

\$ 575,000

Note: See campus diagram for areas of renovation



High School Redesign

\$ 47,117,000

High School Remodel

\$ 47,117,000

ML Addition (13,500 sf)

\$ 7,594,400

Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)
Vocational Space (Machining, Manufacturing)
Cafeteria
Secured Entrance Courtyard
Storage

LL Addition (15,750 sf)

\$ 12,291,800

Classrooms (Special Education, Regular Education, Circulation/Collaborative/Flex Space)
Vocational Space (Nursing, EMT)
Fitness/Athletic Storage/Circulation
Storage

ML Renovation (90,800 sf)

LL Renovation (68,900 sf)

ML General Classrooms & Special Education	\$ 6,183,800
LL General Classrooms & Special Education	\$ 7,101,700
Common Spaces	\$ 4,808,000
Activities, Gym, Theater, Cafeteria	\$ 3,626,700
Tech Ed and Vocational	\$ 4,841,400
Furniture & Equipment	\$ 669,600

Note: See diagram for areas of renovation

Bond Issuance

\$ 1,900,000 \$ 1,900,000

Grand Total: \$ 93,400,000 \$ 93,400,000

Notes:

1 Soft costs including FF&E, Fees, Permits, and Contingency are included in the budget amounts noted above.

2 Budget amount for Storm Shelter includes costs for architectural, structural, mechanical, and electrical requirements to be implemented in conjunction with portions of the total addition square footage noted above.

Note: It is anticipated by the School Board that any surplus from the above noted projects (if any) will be used for yet unidentified capital expenditures as the need may arise.



	<u>Construction</u>	
	<u>Budget</u>	<u>Project Budget</u>
<u>High School</u>		
Secure Entrance / Security Equipment	\$ 3,397,855	\$ 4,247,000
Deferred Maintenance	\$ 12,853,200	\$ 16,067,000
Building addition - Main Level	\$ 6,124,440	\$ 7,594,000
Building Addition - Lower Level	\$ 9,912,750	\$ 12,291,800
Renovations - ML General CI & Sped	\$ 4,986,976	
Renovations - LL General CI & Sped	\$ 5,727,198	\$ 13,285,500
Renovations - Common Areas	\$ 3,877,399	\$ 4,808,000
Renovations - Gym, Theater, Cafeteria	\$ 2,924,725	\$ 3,626,700
Renovations - CTE Areas	\$ 3,904,360	\$ 4,841,400
FF&E	\$ 540,000	\$ 669,600
	\$ 54,248,903	
Contingency	\$ 2,332,316	
Soft Costs & FFE	\$ 10,849,781	
Total Project Budget	\$ 67,431,000	\$ 67,431,000

<u>Outdoor Athletic Upgrades</u>		
Stadium / Pressbox Upgrades	\$ 1,440,000	\$ 1,800,000
Thaler Arena - Restroom Access	\$ 567,200	\$ 709,000
Artificial Turf Football Field	\$ 958,000	\$ 1,197,500
General Site Improvements	\$ 1,080,800	\$ 1,351,000
Parking Area - Existing Tennis Courts	\$ 502,000	\$ 627,500
Track Replacement / Field Events	\$ 1,041,200	\$ 1,301,500
Lighting Upgrades	\$ 350,000	\$ 437,500
JV Ballfield Upgrades	\$ 460,000	\$ 575,000
Tennis Courts	\$ 2,054,400	\$ 2,568,000
	\$ 8,453,600	
Contingency	\$ 422,680	
Soft Costs & FFE	\$ 1,690,720	
Total Project Budget	\$ 10,567,000	\$ 10,567,000

	<u>Construction</u>	
	<u>Budget</u>	<u>Project Budget</u>
<u>Grandview Middle School</u>		
Secure Entrance / Security Equipment	\$ 2,033,590	\$ 2,542,000
Deferred Maintenance	\$ 3,020,700	\$ 3,775,000
	\$ 5,054,290	
Contingency	\$ 251,852	
Soft Costs & FFE	\$ 1,010,858	
Total Project Budget	\$ 6,317,000	\$ 6,317,000

	<u>Construction</u>	
	<u>Budget</u>	<u>Project Budget</u>
<u>Hilltop Elementary</u>		
Secure Entrance / Security Equipment	\$ 199,000	\$ 249,000
Deferred Maintenance	\$ 3,470,400	\$ 4,338,000
	\$ 3,669,400	
Contingency	\$ 183,720	
Soft Costs & FFE	\$ 733,880	
Total Project Budget	\$ 4,587,000	\$ 4,587,000
<u>Shirley Hills Elementary</u>		
Secure Entrance / Security Equipment	\$ 190,200	\$ 238,000
Deferred Maintenance	\$ 1,646,400	\$ 2,058,000
	\$ 1,836,600	
Contingency	\$ 92,080	
Soft Costs & FFE	\$ 367,320	
Total Project Budget	\$ 2,296,000	\$ 2,296,000

<u>Bus Garage</u>		
Deferred Maintenance	\$ 174,000	\$ 218,000
Contingency	\$ 9,200	
Soft Costs & FFE	\$ 34,800	
Total Project Budget	\$ 218,000	\$ 218,000

<u>Hilltop Early Childhood Center</u>		
Security Equipment	\$ 67,500	\$ 84,000
Contingency	\$ 3,000	
Soft Costs & FFE	\$ 13,500	
Total Project Budget	\$ 84,000	\$ 84,000

<u>Districtwide</u>		
Bond Issuance	\$ 1,900,000	\$ 1,900,000

TOTAL REFERENDUM BUDGET \$ 93,400,000 \$ 93,400,000



Positive Review and Comment Summary

Description of Proposed School Construction Project

Westonka Public School District, ISD #0277-01 is proposing a two question referendum on November 7, 2023. The first ballot question would reauthorize an existing capital projects levy for a ten year period. If approved by voters, the district would annually levy \$2,575,178, beginning with the Payable 2024 levy. The annual levy amount in the nine subsequent years would be computed by multiplying 3.400% times the preceding year's Net Tax Capacity (NTC) and would be authorized for annual certification by the school board. The estimated total cost of the projects to be funded over the ten year period is \$25,751,780. Proposed projects include technology, software and curriculum/testing materials.

The second ballot question would authorize \$93.4 million in bonding authority to finance districtwide facility projects. Most of the proposed improvements would occur at the high school and include significant renovations and building additions. Proposed additions include: regular classrooms, Career Technical Education (CTE) classrooms, cafeteria space and a secure entrance. Outdoor athletic upgrades make up most of the other proposed projects and include: an artificial turf football field, stadium improvements, ballfield improvements, new tennis courts and the replacement of the existing track. Other proposed projects include security and deferred maintenance projects at the elementary schools, middle school, bus garage and Hilltop ECE Center.

The projects would be scheduled for completion in calendar years 2024 through 2026. Cost estimates for the Ballot Question #2 bonding projects by location are as follows:

High School		Grandview Middle School	
Secure Entrance / Security Equipment	\$3,397,855	Secure Entrance / Security Equipment	\$2,033,590
Deferred Maintenance	\$12,853,200	Deferred Maintenance	\$3,020,700
Building Addition - Main Level	\$6,124,440	Contingencies	\$251,852
Building Addition - Lower Level	\$9,912,750	Fees, Permits & Testing	\$1,010,858
Renovations - Main Level	\$4,986,976		\$6,317,000
Renovations - Classroom Areas	\$5,727,198	Hilltop Elementary	
Renovations - Common Areas	\$3,877,399	Security Equipment	\$199,000
Renovations - Gym, Theater, Cafeteria	\$2,924,725	Deferred Maintenance	\$3,470,400
Renovations - CTE Areas	\$3,904,360	Contingencies	\$183,720
FF&E	\$540,000	Fees, Permits & Testing	\$733,880
Contingencies	\$2,332,316		\$4,587,000
Fees, Permits & Testing	\$10,849,781	Shirley Hills Elementary	
	\$67,431,000	Security Equipment	\$190,200
Outdoor Athletic Upgrades		Deferred Maintenance	\$1,646,400
Stadium / Pressbox Upgrades	\$1,440,000	Contingencies	\$92,080
Thaler Arena - Restroom Access	\$567,200	Fees, Permits & Testing	\$367,320
Artificial Turf Football Field	\$958,000		\$2,296,000
General Site Improvements	\$1,080,800	Bus Garage	
Parking Area - Existing Tennis Courts	\$502,000	Deferred Maintenance	\$174,000
Track Replacement / Field Events	\$1,041,200	Contingencies	\$9,200
Lighting Upgrades	\$350,000	Fees, Permits & Testing	\$34,800
JV Ballfield Upgrades	\$460,000		\$218,000
Tennis Courts	\$2,054,400	Hilltop Early Childhood Center	
Contingencies	\$422,680	Security Equipment	\$67,500
Fees, Permits & Testing	\$1,690,720	Contingencies	\$3,000
	\$10,567,000	Fees, Permits & Testing	\$13,500
			\$84,000
TOTAL PROJECT COSTS	\$93,400,000	Districtwide	
		Bond Issuance	\$1,900,000

MINNESOTA DEPARTMENT OF EDUCATION

400 NE Stinson Blvd. ▪ Minneapolis, Minnesota 55413 ▪ 651-582-8200 ▪ mde.contactus@state.mn.us ▪ @MnDeptEd

The district is projecting enrollment growth of around 100 students over the next several years. The district loses a number of students via open enrollment. During the 2022-23 school year, 638 resident students open enrolled out of the district and 378 students open enrolled into the district. Most of the open enrollees into the district (233) come from the Waconia School District.

The high school was initially constructed in 1971 and a large addition was added in 2018. The district has supplied cost estimates to operate and staff the additional building space at the high school and outdoor athletic upgrades and it appears existing revenues will be sufficient to fund any associated operational cost increases. The proposed projects appear to be in the long-term interest of the school district. In addition, the school board is aware that capital projects levy proceeds are only authorized to fund the capital projects eligible under Minnesota Statutes, section 126C.10, Subdivision 14.

If the bond referendum is successful and bonds are sold, the debt service on the bonds will be eligible for debt service equalization under Minnesota Statutes, section 123B.53, subdivision 3, if the bond schedule is approved. The amount of debt service equalization aid, if any, the district receives is determined annually and is dependent upon property wealth, student population, and other statutory requirements.

Review and Comment Statement

Based on the department's analysis of the school district's required documentation and other pertinent information from sources of the Minnesota Department of Education, the Commissioner of Education provides a positive review and comment.

Additional Information is Available

Persons desiring additional information regarding this proposal should contact the school district superintendent's office.



Willie L. Jett II
Commissioner

August 25, 2023