

MOORHEAD SCHOOL DISTRICT #152

ORGANIZATIONAL ANALYSIS STUDY

Prepared for

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and
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Moorhead Public Schools**

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CHAPTER I

DESIGN OF THE STUDY

1.0 Purpose of the Study

Superintendent of Schools, Dr. Larry Nybladh, and the School Board of Moorhead School District #152 determined it was appropriate and necessary to commission an **Organizational Analysis Study** to gather and analyze school district data, present findings, draw conclusions, identify alternatives, and prepare recommendations that would lead to the formulation of decisions about the future of the school district's programs, services, staffing, grade level configuration, facilities, and other operational characteristics in order to insure the delivery of quality teaching/learning, community, social, and recreational opportunities for the school district's pre-school, school-aged, and adult populations.

Dr. Larry Nybladh served as the school district's lead representative and liaison in the conduct of Moorhead School District #152's **Organizational Analysis Study**.

The Superintendent of Schools and School Board selected Roger Worner Associates, Educational Systems' Consultants, Sartell, Minnesota, to serve as the school district's **independent third party neutral** to design and conduct the **Organizational Analysis Study**. Dr. Roger Worner, Roger Worner

Associates, Educational Systems' Consultant, served as the study's Project Consultant.

The timetable for the **Organizational Analysis Study** spanned five months, commencing on or about September 1, 2000 and concluding on or about February 15, 2001.

1.1 Need for the Study

About mid-way through the 1999-00 organizational year, Moorhead School District #152's School Board selected Dr. Larry Nybladh as its new Superintendent of Schools. Within mere months, the Superintendent of Schools found it necessary to implement a broadly-based budget analysis process which, unfortunately, led to a \$1.9 million budget reduction for the 2000-01 school year. Following the budget reduction, the Superintendent of Schools asserted his belief that, unless measures were to be taken in the future, Moorhead School District #152 would face, again and, perhaps, again, a succession of General Fund budget reductions.

Superintendent Nybladh recommended to the School Board of Moorhead School District #152 that an **independent third party neutral** educational consultant be employed by the school district to carry out an **Organizational Analysis Study** in an effort to identify mechanisms for increasing the organization's **effectiveness, efficiency, and cost/effectiveness**.

Roger Worner Associates determined that the School Board and Superintendent were in a position to verify that the needs of Moorhead School District #152's **Organizational Analysis Study** also included the following:

- ◆ The school district has a need to provide programs, services, staffing, and facilities that are cost/effectively operated within the financial parameters of the school district's budget.
- ◆ The school district has a need to insure that programs, services, staffing, organizational configuration, methodologies, delivery systems, and facilities will be enhancing to the teaching/learning process in the future and increase the probability the organization will maintain or, more importantly, expand the market share of mobile families, parents, and students who choose to locate/reside in the school district and its communities.
- ◆ The school district has a need to provide programs and services within facilities that are philosophically and architecturally modern-day and that meet Federal and State statutes and code for health, life safety, and accessibility.
- ◆ The school district has a need to provide quality programs, services, staffing, and facilities that will accommodate the short-term and long-term educational, extra-curricular, co-curricular, recreational, social, and support programs and services for the communities' pre-school, school-aged, and adult populations.

1.2 Methodology

Prior to initiation of the **Organizational Analysis Study**, the Project Consultant and Superintendent of Schools detailed methodological procedures to address the purpose and needs of the study. Salient components of the study's methodology were as follows:

- ◆ Interview the Superintendent of Schools.
- ◆ Interview School Board members.
- ◆ Interview key district level administrators.
- ◆ Interview building principals.
- ◆ Meet with each of the school district's school staff and building leadership teams.
- ◆ Meet with each of the school district's school parent groups.
- ◆ Interview a sampling of community patrons/leaders and employee unit leadership.
- ◆ Interview representatives of the City of Moorhead.
- ◆ Analyze enrollment, enrollment trend, open enrollment, home schooling, census, non-public school, and other demographic data.
- ◆ Analyze school district finance data.
- ◆ Analyze school district staffing data.

- ◆ Analyze class section size data.
- ◆ Analyze program and service data.
- ◆ Analyze secondary school course offerings.
- ◆ Analyze collaborative/cooperative programming data (including academy concept and Trollwood Program).
- ◆ Analyze community education data.
- ◆ Review the school district's technology status.
- ◆ Analyze teacher preparation data.
- ◆ Analyze instructional methodologies and delivery system data.
- ◆ Analyze alternative education programming.
- ◆ Tour school district facilities.
- ◆ Analyze facility data.
- ◆ Analyze facility lease agreements.
- ◆ Analyze organizational configuration data.
- ◆ Analyze operational cost data.
- ◆ Review school district data in the light of comparable data from like-sized school districts in the average all Minnesota school districts.
- ◆ Confer with representatives of the Minnesota Department of Children, Families and Learning.

- ◆ Confer regularly with the Superintendent of Schools.
- ◆ Gather and analyze additional data as may seem warranted.
- ◆ Prepare a final study document, including findings, conclusions, alternatives, and recommendations.
- ◆ Present the final study document to the School Board, Superintendent, Superintendent's Cabinet, and building administrators.
- ◆ Present, as desired, the final study document to the community at a public hearing.

1.3 Geographic Setting

Moorhead School District #152 is a large, rural school organization that encompasses 216 square miles in west-central Minnesota. The school district is located, primarily, in Clay County. The school district's largest communities are Moorhead, Sabin, and Georgetown with 1990 census figures, respectively, of 32,295 residents, 446 residents, and 124 residents. The Minnesota State Demographer estimated the City of Moorhead's 1997 population at 33,812 residents.

The City of Moorhead is situated in the Fargo-Moorhead metropolitan area which boasted a 1990 census population of 153,296 residents.

Contiguous school districts to Moorhead School District #152 are Fargo Public Schools, Fargo, North Dakota; Dilworth-Glyndon-Felton School District #2164; Norman County West School District #2527; Barnesville School District #146; and West Fargo (ND) School District.

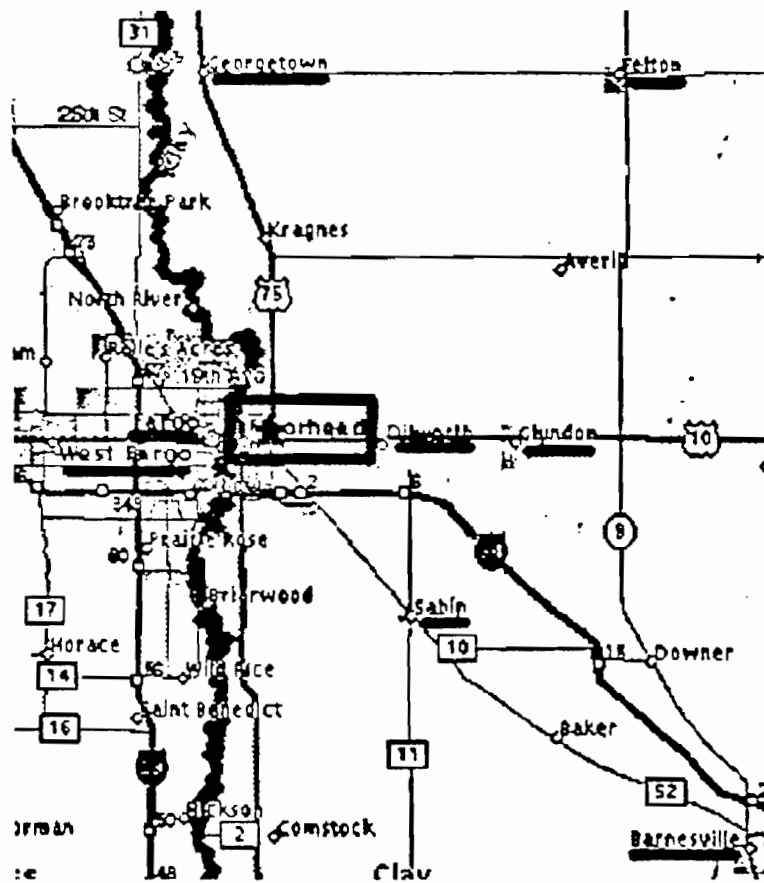
The City of Moorhead is located approximately 240 miles northwest of St. Paul along Interstate 94; immediately east of the City of Fargo, ND along Interstate 94 or Highway 10; 45 miles north of Breckenridge, MN and Wahpeton, ND along Highway 75; and 85 miles south of East Grand Forks, MN and Grand Forks, ND along Interstate 29.

The main headquarters of Moorhead School District #152 is in the community of Moorhead and, specifically, in the Townsite Centre, the former Moorhead High School facility, at 810 Fourth Avenue South, Moorhead, Minnesota. Dr. Larry P. Nybladh serves as the Superintendent of Schools of Moorhead School District #152 and maintains district administrative offices at the 810 Fourth Avenue South, Moorhead location. The School Board of Moorhead School District #152, as well, conducts its regular and special meetings at the 810 Fourth Avenue South, Moorhead facility location.

According to the Minnesota Department of Trade and Economic Development, major employers in the City of Moorhead include Moorhead School District #152; Moorhead State University; Concordia College (Moorhead); Eventide Lutheran Home (skilled nursing care facilities); Clay County;

American Crystal Sugar Company; Hornbacher's Foods; City of Moorhead; ASP, Inc. (detective and armored car services); Camas (concrete block and brick); Moorhead Electric, Inc.; Northwest Technical College (Moorhead); Heritage Marketing (business services); Moorhead Healthcare Center (skilled nursing care facilities); Sunmart (grocery stores).

Provided below is a diagram to assist the reader in establishing the location of Moorhead School District #152 and its communities in relationship to the surrounding area.



1.4 Questions of the Study

During the conduct of the Moorhead School District #152 **Organizational Analysis Study**, the Project Consultant posed select questions to aid in investigating the purpose of and needs for the study. Subsequently, the Project Consultant gathered and analyzed data which would permit the development of findings, conclusions, alternatives, and recommendations for review and consideration by the School Board and Superintendent of Moorhead School District #152.

The specific questions prepared to guide the Project Consultant and furnish substantial content for the **Organizational Analysis Study** document were as follows:

- ◆ What is the current status of the school district's enrollment, enrollment trends, finances, programs, services, staffing, organizational configuration, facilities, and related issues?
- ◆ What conclusions may be drawn about the effectiveness, efficiency, and cost/effectiveness of the school district's operations?
- ◆ What alternatives are plausible for increasing the effectiveness, efficiency, and cost/effectiveness of the school district's operations?
- ◆ What recommendations does the Project Consultant suggest may be employed to increase the effectiveness, efficiency, and cost/effectiveness of the school district's operations?

1.5 Assumptions

The Project Consultant identified specific, operating assumptions that would facilitate the qualitative conduct of the **Organizational Analysis Study** for Moorhead School District #152. As a precursor to actually gathering and analyzing comprehensive data, drawing conclusions, weighing alternatives, and tendering recommendations, the Project Consultant identified the following operating assumptions:

- ◆ Moorhead School District #152 is a large critical student mass school district – and will continue to be so – by State of Minnesota standards.
- ◆ Moorhead School District #152 has experienced student enrollment decline in recent years and, unless countervailing measures are instituted, will continue to experience enrollment decline.
- ◆ Moorhead School District #152 maintains a quality array of programs and services for its pre-school, school-aged, and adult populations.
- ◆ Moorhead School District #152 cost/effectively spends its budgetary resources.
- ◆ Moorhead School District #152 would appear to operate an organizational configuration (grade level) which has been driven by space availability rather than philosophical considerations.

- ◆ Moorhead School District #152's parents and patrons desire that quality, modern-day programs, services, teaching methodologies, delivery systems, organizational configurations, and teaching/ learning processes be made available to the school district's youth.
- ◆ Moorhead School District #152's parents and patrons are committed to providing high-quality, cost/effective programs, services, staffing, methodologies, delivery systems, organizational configurations, and facilities that best meet the needs of the young people and adults served by the school district.
- ◆ Moorhead School District #152's parents, patrons, and community leaders believe that the school district is "**the centerpiece**" of the area's infrastructure and essential to the vitality of its communities.
- ◆ Moorhead School District #152's parents and patrons will support, financially, improvements in and/or changes to programs, services, teaching methodologies, delivery systems, organizational configuration, and facilities to maintain the quality and reputation of the school district and to insure the short-term and long-term financial viability of the enterprise.

1.6 Organization of the Study

Moorhead School District #152's **Organizational Analysis Study** is organized in a six chapter format. Chapter I contains the study's design including

purpose, needs, methodology, geographic setting, questions, assumptions, and organization. Chapters II - V present data regarding the school district's enrollment and enrollment trends; finances; programs, services, staffing, teaching/learning methodologies, delivery systems, organizational configuration, and the like; and facilities. Chapter VI offers the Project Consultant's conclusions, alternatives, and recommendations for deliberation and future action by the Superintendent, School Board, parents, patrons, and administrative and teaching staffs of Moorhead School District #152.

CHAPTER II

DISTRICT SIZE AND ENROLLMENT TRENDS

2.0 Introduction

School district size and enrollment trends represent the two most significant variables which impact the long-term financial and programmatic viability of an educational enterprise, whether a large, urban school district, a wealthy, suburban school district, a large, rural educational enterprise, or a remote, small school district. Consequently, it was most logical that the Project Consultant would begin the Moorhead School District #152 **Organizational Analysis Study** by gathering and analyzing actual past and current student enrollments, projected enrollments, non-public school student enrollments, in-migration and out-migration student data, recent census figures, and related information. It was anticipated that, with the aforementioned information in hand, the Project Consultant, Superintendent of Schools, School Board, and school district staff would be in a position to identify the need, if any, for instituting "course corrections" in the school district's finances, staffing, programs and services, organizational configuration, and facilities.

District size provides a critical perspective on the status of any given school enterprise. While some exceptions will be noted, small school districts tend to have fewer staff members, smaller budgets, less course offerings, fewer services, teachers involved in more course preparations, greater percentages

of cost/ineffective courses or class section sizes, proportionately smaller fund balances, more frequent problems with the adequacy of their school facilities, and less bonded indebtedness. Larger sized school districts typically enjoy larger budgets, greater and more diversified staff, less teacher preparations, more expansive course offerings, a greater array of services, more updated (but not necessarily state-of-the-art) facilities, and a higher level of cost/ineffectiveness, but they typically encounter, as well, higher tax rates, greater bonded indebtedness, larger class sizes (though more cost/effective than their smaller district counterparts), and much more.

One critical disadvantage experienced by low critical mass school districts (those smaller than the average size of school districts in the State) is the lesser flexibility or capability of recovering from unanticipated downturns, unplanned events, or conditions that could jeopardize the organization's long-term survival, such as high inflation, meager (or no) increases in educational funding from the State level, increases in unfunded mandates, enrollment decline through weakening birthrates, loss of enrollment to other districts, changes in statute, a natural calamity (fire), vandalism, or the like. As an example, an enrollment drop of 200 students in two school districts – one of 1,000 students and the other of 10,000 students – presents a problem of the same magnitude (loss of 200 students each) but one of dramatically different proportionate magnitude (20% versus 2% loss of students). In the former case, the loss of students could very well be devastating to the existence of the school district, while in the latter case, the loss of students is unwelcomed

and presents a problem, but it can be dealt with as a part of a standard budget reduction process. Indeed, district size is a crucial variable for any school district to consider in planning its future options. The Project Consultant notes the importance of the district size variable to Moorhead School District #152.

A district's enrollment trend is a second and equally vital variable for school districts to consider in mapping their future. Enrollment is the variable which drives the funding of school districts in the State of Minnesota and virtually every other state. Enrollment trends (growth, stability, and decline) are the harbingers of change in a school district's budget, budget reserves, tax rates, staffing, programs and services, facility needs, ability to respond to changes in State requirements, needs, interests, and expectations (of students, parents, and patrons), as well as many other operational conditions. It is a certainty that smaller school districts – experiencing long-term moderate or steep enrollment decline – are much more vulnerable than school districts able to boast a large critical mass of students and experiencing stable or increasing enrollment.

2.1 District Size

Moorhead School District #152's 2000-01 grade level enrollment is reported in Table 1. The table illustrates that 5,662 students were enrolled in grades K-12. Consequently, the school district's critical student mass would place it among the largest 10% of all school districts in the State of Minnesota during

the 2000-01 school year. By State of Minnesota standards, Moorhead School District #152 would be classified as a large critical student mass school district.

An examination of Table 1 data affirmed that 414 students were enrolled in the kindergarten level of instruction, 2,524 students were enrolled in grades 1-6, and 2,724 students were enrolled in grades 7-12. The school district's largest grade level enrollments in 2000-01 occurred in grade 5 (460 students), grade 6 (447 students), grade 10 (436 students), and grades 3 and 9 (435 students). The school district's smallest grade level enrollments during the same school year appeared in grade 1 (363 students), grade 4 (391 students), grade 12 (411 students), and kindergarten (414 students). The school district's largest three-grade level enrollment span occurred at grades 5-7 with 1,331 students enrolled in 2000-01. The school district's smallest three-grade level enrollment span was recorded in grades K-2 with 1,192 students enrolled during that year.

The Project Consultant observed that the 2000-01 student enrollment in grades 5-7 (1,331 students), the school district's largest three-grade enrollment span, was 11.7% larger than the grades K-2 enrollment (1,192 students), the smallest three-grade level enrollment span in Moorhead School District #152.

TABLE 1
MOORHEAD SCHOOL DISTRICT #152
ENROLLMENT BY GRADE LEVEL
OCTOBER, 2000

<u>Grade</u>	<u>Enrollment</u>	<u>Rank by Size</u>
K	414	10
1	363	13
2	415	9
3	435	4-5
4	391	12
5	460	1
6	447	2
7	424	7
8	431	6
9	435	4-5
10	436	3
11	419	8
12	411	11
Total	5,509	
K	414	
1-6	2,511 + 13	
7-12	2,584 + 140	
Total	5,662	

*Largest three grade level span = grades 5-7 (1,331 students)

*Smallest three grade level span = grades K-2 (1,119 students)

The average grade level enrollment size in Moorhead School District #152 during the 2000-01 school year was 435.5 students. That figure amounts, on average, to the equivalent of 17 sections of approximately 25 students/section. Assuming section sizes of approximately 25 students/section, the number of grade level sections in Moorhead School District #152 during the 2000-01 school year would range from 14.5 (grade 1) to 18.5 (grade 5).

The Project Consultant concluded that Moorhead School District #152's student enrollment by grade level in 2000-01 yielded excellent current and future potential for cost/effective staffing and balancing class section sizes.

2.2 Enrollment Trends: Actual

Actual past enrollment trends for Moorhead School District #152 represented in Table 2 for the school years of 1989-90 through 1999-00 as reported by the Minnesota Department of Children, Families and Learning in its **Profiles** documents. (Past enrollment data for 1998-99 and 1999-00 were provided, directly, by Moorhead School District #152 administrators). The data permits the reader to evaluate changes in enrollment conditions over a ten year span of time and, more essentially, aid in projecting changes that did or did not occur in funding, staffing, programs and services, and facility utilization for students and adults in the school district.

Moorhead School District #152 enrolled an average daily membership of 5,269 students in 1989-90 and 5,781 students in 1999-00, a net gain of +512 students or +9.7%.

The school district's enrollment "low-water mark" between 1989-90 and 1999-00 was in 1989-90 when 5,269 students (average daily membership) were enrolled in the school district's K-12 programs. The "high-water mark" enrollment for the school district during the same 11 year span of time was in 1994-95 when 6,114 students were enrolled in grades K-12. From the base year 1989-90, Moorhead School District #152 experienced five consecutive years of student enrollment growth followed by five consecutive years of student enrollment decline.

The Project Consultant concluded that Moorhead School District #152 would be profiled as a **declining enrollment school district**.

<p style="text-align: center;">TABLE 2 MOORHEAD SCHOOL DISTRICT #152 ACTUAL PAST ENROLLMENT 1989-90/1999-00</p>											
<u>District</u>	<u>89-90</u>	<u>90-91</u>	<u>91-92</u>	<u>92-93</u>	<u>93-94</u>	<u>94-95</u>	<u>95-96</u>	<u>96-97</u>	<u>97-98</u>	<u>98-99</u>	<u>99-00</u>
#152	5,269	5,609	5,676	5,926	6,047	6,114	6,052	5,969	5,924	5,881	5,781

2.3 Enrollment Trends: Projected

Based on trend data for Moorhead School District #152, school district officials projected the organization's changes in average daily membership from 1999-00 through 2004-05. Enrollment projections are presented in Table 3.

Moorhead School District #152 officials projected the organization's student enrollment would decline from 5,781 students in 1999-00 to 5,157 students in 2004-05, a decrease of -624 students or -10.8% over the five year span of time. Thus, the Project Consultant concluded that Moorhead School District #152 could anticipate diminishing programs, services, and staffing in the future and, as a consequence, reduced stress on its school facilities.

TABLE 3 MOORHEAD SCHOOL DISTRICT #152 ENROLLMENT PROJECTIONS 1999-00 / 2004-05						
<u>Source</u>	<u>99-00</u>	<u>00-01</u>	<u>01-02</u>	<u>02-03</u>	<u>03-04</u>	<u>04-05</u>
#152	5,781	5,662	5,506	5,367	5,212	5,157

2.4 Changes in Average Daily Membership

Moorhead School District #152's average daily membership trends between 1989-90 and 2004-05 are presented in Table 4. Over the 15 year span of

time, the school district's enrollment (actual and projected) depicts a probable net reduction of -112 students or a loss of -2.1% from the base year enrollment (1989-90) figure of 5,269 students in grades K-12. Furthermore, however, the school district is projected to realize a loss of -957 students or -15.6% between 1994-95 and 2004-05.

TABLE 4 MOORHEAD SCHOOL DISTRICT #152 TRENDS IN AVERAGE DAILY MEMBERSHIP 1989-90 / 2004-05			
	<u>Actual Change</u> 1989-90 / 99-00	<u>Projected Change</u> 1999-00 / 04-05	<u>Gain/Loss</u>
District #152	+512	-624	-112

The Project Consultant concluded that Moorhead School District #152's actual and projected enrollment decrease will have a significant, negative impact on the school district's operation in the future **unless** measures are taken to reverse the organization's plummeting student enrollment.

2.5 Open Enrollment

The Minnesota Open Enrollment Options' Program is a variable that can significantly impact the short-term and long-term enrollment, financial, program and service, and staffing viability of a Minnesota school district and, as a result, was examined by the Project Consultant.

The State of Minnesota Open Enrollment Options' Program authorizes parents to enroll their youngsters in an alternative school district to the one in which they reside – providing there is sufficient space available in the receiving school district to accept such in-migrating students. If a school district experiences a larger number of "out-migrating students" than "in-migrating students," the school district's future could be jeopardized through losses in enrollment, finances, staffing, and programs and services.

Based on information provided by the school district's administration, the Project Consultant learned that in 1999-00, Moorhead School District #152 gained +117 non-resident students through "in-migration" from other school districts and lost -165 resident students through "out-migration" to other school districts. The school district's excess of "out-migration" of resident students to "in-migration" of non-resident students resulted in the loss of approximately -48 pupils in 1999-00. The disparity produced an estimated revenue loss of approximately \$250,000 in 1999-00.

TABLE 4-A MOORHEAD SCHOOL DISTRICT #152 OPEN ENROLLMENT 1999-00			
	<u>In-Migration</u>	<u>Out-Migration</u>	<u>Net</u>
District #152	+117	-165	-48

In 1999-00, the largest volume of resident student "out-migration" occurred from Moorhead School District #152 to Dilworth-Glyndon-Felton (130 students), Halstad-Hendrum (27 students), Hawley (4 students), Barnesville (3 students), and other (4 students). Non-resident student "in-migration" occurred in 1999-00 to Moorhead School District #152 from Dilworth-Glyndon-Felton (82 students), Hawley (8 students), Barnesville (8 students), Lake Park-Audubon (5 students), Detroit Lakes (4 students), Breckenridge (4 students), and other (3 students).

Moorhead School District #152 will want to continue examining factors and implementing strategies which will reverse the organization's level of "out-migration" through the Minnesota Open Enrollment Options' Program.

2.6 Parochial School and Home School Attendance

The State of Minnesota offers "choice options" for parents to educate their children in addition to the Minnesota Open Enrollment Options' Program. Attendance in non-public/parochial/private or home school settings is available for parents (and their children) to choose as beliefs, desires, and/or opportunities may dictate.

Table 4-B reports Moorhead School District #152's 1999-00 resident student enrollment in non-public/parochial/private school and home school settings. Moorhead School District #152 resident students attending non-public/

parochial/private schools in 1999-00 numbered 447 students with the following non-public schools claiming the largest number of Moorhead School District resident students: St. Joseph's (168 students); Park Christian (154 students); Oak Grove Lutheran (60 students); Shanley High School (28 students) and others.

During the 1999-00 school year, Moorhead School District #152 reported 75 resident students were delivered alternative programs and services in their homes (home schooling).

By State of Minnesota standards, Moorhead School District #152's non-public school and home school enrollments would be considered average for school districts of like-size (to Moorhead).

TABLE 4-B MOORHEAD SCHOOL DISTRICT #152 PAROCHIAL SCHOOL AND HOME SCHOOL ENROLLMENT 1999-00		
	<u>Parochial School</u>	<u>Home School</u>
District #152	-447	-75

2.7 0-4 Enrollment

Table 4-C presents Moorhead School District #152's 0-4 enrollment as

reported on November 16, 1999. The district's 0-4 enrollment furnishes an additional perspective on the organization's potential for maintaining or expanding its student population. (In the main, 0-4 enrollment figures tend to be a "conservative estimate" of a school district's future enrollment potential, given that census counting/gathering is not an exacting process).

According to table data, Moorhead School District #152 recorded 400 Age 0 and 391 Age 4 students. The Age 2 count yielded 340 future students, while Age 3 and Age 1 counts produced, respectively, 328 and 322 future students. Over the five year span of time, Age 0 - Age 4, Moorhead School District #152 reported 1,781 youngsters or a **conservative average** of 356 youngsters/grade level in the future.

The Project Consultant concluded the Moorhead School District #152's future enrollments appear to be weakening and likely support the school district's enrollment projection that future K-12 enrollment will continue to decline.

<p style="text-align: center;">TABLE 4-C MOORHEAD SCHOOL DISTRICT #152 0-4 YEAR OLD COUNT 1999-00</p>					
<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>Total</u>
400	322	340	328	391	1,781

2.8 Summary

Salient district size and enrollment trend data/facts – applicable to Moorhead School District #152 – are detailed below:

- ◆ The school district enrolled 5,662 students in grades K-12 during the 2000-01 school year.
- ◆ By State of Minnesota Standards, the school district would be classified as a large critical student mass school district.
- ◆ The school district's largest grade level enrollments occurred in grade 5 (460 students), grade 6 (447 students), grade 10 (436 students), and grades 3 and 9 (435 students) during the 2000-01 school year.
- ◆ The school district's smallest grade level enrollments during the 2000-01 school year were found at grade 1 (363 students), grade 4 (391 students), grade 12 (411 students), and kindergarten (414 students).
- ◆ The school district's largest three-grade level enrollment span occurred in grades 5-7 with 1,331 students enrolled in 2000-01.
- ◆ The school district's smallest three-grade level enrollment span was recorded in grades K-2 with 1,192 students enrolled during 2000-01.
- ◆ The school district's average grade level enrollment size during the 2000-01 school year was 435.5 students.

- ◆ The school district offered an average of 17 sections of approximately 25 students/section per grade level during the 2000-01 school year. an individual grade student mass that affords highly cost/ effective staffing, financing, and class section balancing.
- ◆ Between 1989-90 and 1999-00, the school district's average daily membership increased from 5,269 students to 5,781 students, yielding a net gain of +512 students or +9.7%.
- ◆ The school district's enrollment "low-water mark" between 1989-90 and 1999-00 was in 1989-90 when 5,269 students were enrolled.
- ◆ The "high-water mark" enrollment for the school district between 1989-90 and 1999-00 was in 1994-95 when 6,114 students were enrolled.
- ◆ The Project Consultant concluded that Moorhead School District #152 would be profiled as a declining enrollment school district.
- ◆ The school district projected student enrollment would decrease from 5,781 students in 1999-00 to 5,157 students in 2004-05, a decrease of -624 students or -10.8% over the five year span of time.
- ◆ The Project Consultant concluded the school district could anticipate declining programs, services, finances, and staffing in the future and, further, less economical utilization of its school facilities.
- ◆ Over the 15 year span of time from 1989-90 through 2004-05, the school district's enrollment is projected to realize a net decrease of

-112 students or -2.1% from the base year enrollment (1989-90) figure of 5,269 students in grades K-12.

- ◆ In 1999-00, the school district gained +117 non-resident students through Minnesota Open Enrollment Options' Program "in-migration" from other school districts and lost -165 students through open enrollment "out-migration" to other school districts.
- ◆ In 1999-00, 447 school district resident students attended non-public/parochial/private schools.
- ◆ In 1999-00, the school district realized the loss of -75 students through home school "out-migration."
- ◆ The school district's largest open enrollment "out-migration" during the 1999-00 school year was to Dilworth-Glyndon-Felton School District (130 students). The school district's largest open enrollment "in-migration" during the same school year was from Dilworth-Glyndon-Felton (82 students).

CHAPTER III

FINANCES

3.0 Background Information

Inasmuch as size, enrollment, and enrollment trends impact the finances of a school district, the Project Consultant followed the analysis of Moorhead School District #152 demographics with a study of the organization's financial condition. The purposes of the financial analyses were to assess the quality of the school district's fiscal management, ascertain financial trends, determine the organization's reserves, compare the school district's spending patterns with the average of all Minnesota school districts and the average of all like-sized (peer group) school districts, determine the organization's debt load, and establish whether or not the school district could afford – operationally – to support facility remodeling/expansion and/or new construction. The Project Consultant ascertained through past experiences that school district patrons are vitally interested in being apprised of the financial condition of the educational enterprise they support **prior to** approving a school bond referendum for the remodeling/expansion and/or construction of new facilities.

3.1 State of Minnesota School Funding

The State of Minnesota and nearly all other states in the nation finance public education through a foundation aid formula which is typically linked to student

enrollment. In Minnesota, each school district is funded on the basis of enrollment that is weighted in accordance with the organizational level at which each student is enrolled and instructed. For example, kindergarten students are weighted at .557 pupil units; grade 1-3 students are weighted at 1.115 pupil units; grade 4-6 students are weighted at 1.06 pupil units; and grade 7-12 students are weighted at 1.30 pupil units. Each school district in the State of Minnesota totals the number of students at each organizational level (that is, K, 1-3, 4-6, and 7-12), and multiplies the total students at each organizational level by the appropriate weighting (that is, .557 or 1.115 or 1.06 or 1.30), and multiplies each of those four figures by the foundation aid allotted for each pupil as affixed by the Minnesota State Legislature. The total number of pupil units times the aid allotment/pupil unit establishes the foundation aid reimbursement for school districts throughout the State of Minnesota. The level of funding furnished to school districts through the foundation aid formula on a pupil unit basis is set solely at the discretion of the Minnesota State Legislature.

In addition to funding provided by the State of Minnesota, a local school district **may elect to implement additional funding options** to augment and enhance their budget. These funding options must be adopted by local school boards and approved by a simple majority vote of the voting publics. The additional major sources of funding available for the support of staff, programs and services, and the construction and/or renovation of school facilities in

Minnesota school districts are the general levy referendum and bond referendum.

3.2 Financial Analysis

The Project Consultant examined Moorhead School District #152's annual audit reports for 1994-95, 1995-96, 1996-97, 1997-98, 1998-99, and 1999-00 as a part of the **Organizational Analysis Study**.

The General Fund budget is the largest and most flexible fund operated by a school district and contains dollar allocations for the employment of administrators, teachers, specialists, custodians, secretaries, and other personnel and for the purchase of textbooks, instructional materials, staff development, curriculum development, utilities, insurance, fringe benefits, and much more. Table 5 details the General Fund revenues, expenditures, and fund balances for Moorhead School District #152 for the six inclusive years from 1994-95 through 1999-00.

Table data delineates that the school district's General Fund revenue increased from \$31,511,415 in 1994-95 to \$40,942,638 in 1999-00, an increase of +\$9,431,223 or +29.9%. Within the same six year span of time, the school district's General Fund expenditures increased from \$30,626,427 in 1994-95 to \$43,600,427 in 1999-00, a gain of +\$12,974,000 or +42.4%.

Between 1993-94 (base year) and 1999-00, the school district's General Fund balance decreased from \$2,374,535 to \$1,207,075 in 1999-00, a decrease of -\$1,167,460 or -49.2%.

The Project Consultant observed that Moorhead School District #152 had operated sound General Fund revenue and expenditure budgets in 1994-95 and 1995-96, resulting in a balanced relationship between revenues and expenditures and a mounting General Fund balance. During 1996-97 and 1997-98, Moorhead School District #152's General Fund revenues and expenditures were either moderately imbalanced (1996-97) or moderately balanced (1997-98), resulting in a stable – if not stagnating – General Fund balance. General Fund revenue conditions in 1996-97 and 1997-98 **confirmed** that the school district's enrollment was in marked decline. By 1998-99 and 1999-00, Moorhead School District #152's General Fund revenues and expenditures were **extraordinarily imbalanced**, resulting in huge decreases in General Fund balance and an obviously crucial/large scale General Fund budget reduction in 1999-00 for the 2000-01 school year.

At the conclusion of the 1999-00 school year, Moorhead School District #152's General Fund balance of \$1,207,075 amounted to a paltry 2.8% of the school district's General Fund expenditure budget of \$43,600,427.

The Project Consultant observed that Moorhead School District #152's five year growth in General Fund revenue (+29.9%) **lagged behind** the organiza-

tion's five year growth in expenditures (+42.4%) by -12.5%.

The Project Consultant assessed that Moorhead School District #152 was a fiscally-troubled educational organization. The Superintendent of Schools, School Board, and administrative staff of the school district are and will continue to be faced with significant challenges in managing the organization's finances in the near future.

TABLE 5			
MOORHEAD SCHOOL DISTRICT #152			
GENERAL FUND REVENUES, EXPENDITURES, FUND BALANCES			
1993-94 / 1999-00			
<u>Fiscal Year</u>	<u>Revenue</u>	<u>Expenditures</u>	<u>Fund Balance</u>
1993-94			\$2,374,535
1994-95	\$31,511,415	\$30,626,427	\$2,980,047
1995-96	\$32,830,887	\$30,827,313	\$4,801,833
1996-97	\$37,584,188	\$37,930,675	\$5,937,354
1997-98	\$37,525,584	\$37,478,754	\$5,978,184
1998-99	\$37,806,133	\$39,904,453	\$3,864,864
1999-00	\$40,942,638	\$43,600,427	\$1,207,075
Change	+\$9,431,223	+\$12,974,000	-\$1,167,460
% Change	+29.9%	+42.4%	-49.2%

Moorhead School District #152's operating funds balance/pupil unit trends from 1988-89 (base year) through 1998-99 are reported in Table 6. In

addition, the operating funds balances/pupil unit for like-sized (peer group) school districts and the average of all Minnesota school districts are reported (peer group figures are detailed only for 1988-89 and 1998-99 throughout the course of the study).

A school district's operating funds balance is translated as a sum of the organization's designated balances – on June 30 of each year – for the operating funds of the school district (originally General, food service, pupil transportation, and community services) divided by the district's resident pupil units. (Recently, the pupil transportation fund was merged with school district General Fund budgets in Minnesota school districts through legislative action).

Table 6 reports that in 1988-89, Moorhead School District #152's operating funds balance was \$446/pupil unit. The operating funds balance of the average of all like-sized school districts in 1988-89 was \$245/pupil unit, some \$201/pupil unit or -45.1% **less than** Moorhead School District #152's operating funds balance. In 1988-89, as well, the operating funds balance of the average of all school districts in the State of Minnesota was \$282/pupil unit, a figure that was -\$164/pupil unit or -36.8% **less than** Moorhead School District #152's operating funds balance figure.

In 1998-99, Moorhead School District #152 recorded an operating funds balance of \$892/pupil unit, an increase of +\$446/pupil unit or +100% over the ten year span of time from 1988-89 through 1998-99. During the same ten

year span of time, the average of all like-sized school districts in the State of Minnesota reported an increase in operating funds balance from \$245/pupil unit in 1988-89 to \$426/pupil unit in 1998-99, an increase of +\$181/pupil unit or +73.9%. Over the same span of time, the average of all Minnesota school districts experienced an increase in operating funds balance from \$282/pupil unit in 1988-89 to \$511/pupil unit in 1998-99, a gain of +\$229/pupil unit or +81.2%.

In 1998-99, Moorhead School District #152's operating funds balance (\$892/pupil unit) **exceeded** the operating funds balance of the average of all like-sized school districts (\$426/pupil unit) by +\$466/pupil unit or +109.4% and **exceeded** the operating funds balance figure of the average of all Minnesota school districts (\$511/pupil unit) by +\$381/pupil unit or +74.6%.

The Project Consultant concluded that, between 1988-89 and 1998-99, Moorhead School District #152 consistently outstripped the dollar volume of operating funds balance/pupil unit for the average of all Minnesota school districts. (It is to be noted that, in 1998-99, the school district experienced its first decline in operating funds balance in six years. To be sure, when the State of Minnesota **Profiles** documents are produced for 1999-00 and 2000-01, Moorhead School District #152 will display continued decline in operating funds balance/pupil unit).

The Project Consultant concluded that, as of the date of preparation of the

final study report, Moorhead School District #152 was displaying (1998-99) above average operating funds balance – though declining – when compared to districts of like-size and the average of all school districts in the State of Minnesota.

<p style="text-align: center;">TABLE 6 MOORHEAD SCHOOL DISTRICT #152 OPERATING FUNDS BALANCE/PU 1988-89/1998-99</p>											
<u>Comparison</u>	<u>88-89</u>	<u>89-90</u>	<u>90-91</u>	<u>91-92</u>	<u>92-93</u>	<u>93-94</u>	<u>94-95</u>	<u>95-96</u>	<u>96-97</u>	<u>97-98</u>	<u>98-99</u>
#152	\$446	\$411	\$427	\$418	\$322	\$410	\$410	\$743	\$720	\$965	\$892
Peer	\$245										\$426
MN Average	\$282	\$259	\$258	\$275	\$236	\$285	\$338	\$528	\$534	\$576	\$511

After examining Moorhead School District #152's General Fund revenues, expenditures, and fund balances and comparing the district's operating funds balance/pupil unit – over a multi-year timeframe – with the average of all school districts in the State of Minnesota and the average of all like-sized school districts, the Project Consultant determined that additional facets of the school district's finances should be reviewed in greater detail. Thus, the Project Consultant analyzed school district, peer group, and State of Minnesota figures for total P-K-12 operating expenditures.

The total P-K-12 operating expenditures from Minnesota school districts incorporate the sum of operating expenditures for a school district's central

and school administration, support services, regular instruction, vocational instruction, exceptional instruction, instructional support services, pupil support services, operations and maintenance, pupil transportation, and other operating programs on a pupil unit basis.

In 1988-89, Moorhead School District #152 displayed total P-K-12 operating expenditures of \$3,872/pupil unit. In the same year, total P-K-12 operating expenditures for like-sized school districts was \$4,168/pupil unit and the average of all Minnesota school districts was \$4,017/pupil unit. Thus, in 1988-89, Moorhead School District #152's total P-K-12 operating expenditures **trailed** such expenditures in like-sized school districts by -\$296/pupil unit or -7.1% and **trailed** such expenditures in the average of all Minnesota school districts by -\$145/pupil unit or -3.6%.

Between 1988-89 and 1998-99, Moorhead School District #152's total P-K-12 operating expenditures increased from \$3,872/pupil unit to \$6,449/pupil unit, a gain of +\$2,577/pupil unit or +66.6%. During the same ten year span of time the total P-K-12 operating expenditures of like-sized school districts grew from \$4,168/pupil unit in 1988-89 to \$6,688/pupil unit in 1998-99, a growth of +\$2,520/pupil unit or +60.5%, while total P-K-12 operating expenditures for the average of all State of Minnesota school districts changed from \$4,017/pupil unit in 1988-89 to \$6,695 in 1998-99, a growth of +\$2,678/pupil unit or +66.7%.

In 1998-99, Moorhead School District #152's total P-K-12 operating expenditures (\$6,449/pupil unit) **trailed** the average of such expenditures for like-sized school districts (\$6,688/pupil unit) by -\$239/pupil unit or -3.6% and **trailed** the average of such expenditures for all school districts in the State of Minnesota (\$6,695/pupil unit) by -\$246/pupil unit or -3.7%.

TABLE 7
 MOORHEAD SCHOOL DISTRICT #152
 TOTAL P-K-12 OPERATING EXPENDITURES/PU
 1988-89/1998-99

	<u>88-89</u>	<u>89-90</u>	<u>90-91</u>	<u>91-92</u>	<u>92-93</u>	<u>93-94</u>	<u>94-95</u>	<u>95-96</u>	<u>96-97</u>	<u>97-98</u>	<u>98-99</u>
#152	\$3,872	\$4,177	\$4,248	\$4,552	\$4,678	\$4,583	\$4,888	\$5,602	\$6,142	\$6,071	\$6,449
Peer	\$4,168										\$6,688
MN Ave	\$4,017	\$4,192	\$4,398	\$4,655	\$4,706	\$4,746	\$4,935	\$5,788	\$6,080	\$6,313	\$6,695

The Project Consultant concluded that Moorhead School District #152 expends funds for total P-K-12 operations at a lower rate than is found in the average of all like-sized school districts in Minnesota and in the average of all school districts in the State of Minnesota. Thus, Moorhead School District #152 would be classified as a **below-average spending school district** by the Project Consultant's assessment.

Having examined comparative total P-K-12 operating expenditures among Moorhead School District #152, the average of like-sized school districts in Minnesota, and the average of all school districts in Minnesota in 1988-89 and

1998-99, the Project Consultant determined it would be valuable to review – comparatively – the expenditures that make up the cost category entitled "Total P-K-12 Operating Expenditures." Thus, the Project Consultant created Table 8 which would allow – both in 1988-89 and 1998-99 – a comparison of Moorhead School District #152's, the average of all like-sized Minnesota school districts', and the average of all State of Minnesota school districts' (a) district and school administration; (b) district support services; (c) regular instruction; (d) vocational instruction; (e) exceptional instruction; (f) instructional support services; (g) pupil support services; (h) operations and maintenance; (i) food services; and (j) transportation.

In 1988-89, Moorhead School District #152 expended \$158/pupil unit for district and school administration, while the average of all like-sized school districts expended (\$211/pupil unit), +\$53/pupil unit or +33.5% **more than** Moorhead School District, and the average of all Minnesota school districts (\$231/pupil unit) expended +\$73/pupil unit or +46.2% **more than** the school district in that year. By 1998-99, Moorhead School District #152 expended \$330/pupil unit for district and school administration, while the average of all like-school districts spent \$350/pupil unit or +\$20/pupil unit or +6.1% **more than** Moorhead School District, and the average of all Minnesota school districts spent \$369/pupil unit or +\$39/pupil unit or +11.8% **more than** the school district in that year.

In 1988-89, Moorhead School District #152 expended \$60/pupil unit for district

support services, while the average of all peer group school districts spent \$116/pupil unit and the average of all Minnesota school districts expended \$102/pupil unit for district support services. During that year, then, Moorhead School District #152's district support services **under spent** the average of all peer group school districts by -\$56/pupil unit or -48.3% and **under spent** such expenditures for the average of all Minnesota school districts by -\$42/pupil unit or -41.2%. In 1998-99, Moorhead School District #152 expended \$140/pupil unit for district support services, while the average of all peer group school districts spent \$199/pupil unit and the average of all Minnesota school districts expended \$194/pupil unit for district support services. During that year, then, Moorhead School District #152's district support services expenditures **trailed** the average of all peer group school districts by -\$59/pupil unit or -29.6% and **trailed** such expenditures for the average of all Minnesota school districts by -\$54/pupil unit or -27.8%.

In 1988-89, Moorhead School District #152 spent \$1,581/pupil unit for regular instruction, while the average of all peer group school districts spent \$1,710/pupil unit and the average of all Minnesota school districts expended \$1,751/pupil unit. Moorhead School District #152's regular instruction expenditures in that year **trailed** the average of all peer group school districts by -\$129/pupil unit or -8.2% and **under spent** such expenditures for the average of all Minnesota school districts by -\$170/pupil unit or -10.8%.

In 1998-99, Moorhead School District #152 expended \$2,946/pupil unit for regular instruction, while the average of all peer group school districts expended \$3,150/pupil unit and the average of all Minnesota school districts expended \$3,206/pupil unit for regular instruction. During that year, then, Moorhead School District #152's regular instruction expenditures **lagged behind** the average of all peer group school districts by -\$204/pupil unit or -6.9% and **lagged behind** such expenditures for the average of all Minnesota school districts by -\$260/pupil unit or -8.8%.

Moorhead School District #152's 1988-89 vocational instruction was \$18/pupil unit, while the average of all peer group school districts spent \$82/pupil unit and the average of all Minnesota school districts expended \$90/pupil unit for vocational instruction. During that year, Moorhead School District #152's vocational instruction expenditures **trailed** the average of all peer group school districts by -\$64/pupil unit or -78.0% and **trailed** such expenditures for the average of all Minnesota school districts by -\$72/pupil unit or -80.0%.

In 1998-99, Moorhead School District #152 expended \$66/pupil unit for vocational instruction, while the average of all peer group school districts spent \$123/pupil unit and the average of all Minnesota school districts expended \$134/pupil unit for vocational instruction. Consequently, Moorhead School District #152's vocational instruction expenditures **lagged behind** the average of all peer group school districts by -\$57/pupil unit or -46.3% and

lagged behind such expenditures for the average of all Minnesota school districts by $-\$68/\text{pupil unit}$ or -50.7% .

Moorhead School District #152 expended $\$652/\text{pupil unit}$ for exceptional instruction in 1988-89, while the average of all peer group school districts spent $\$564/\text{pupil unit}$ and the average of all Minnesota school districts expended $\$516/\text{pupil unit}$ for exceptional instruction. During that year, Moorhead School District #152's exceptional instruction expenditures **exceeded** the average of all peer group school districts by $+\$88/\text{pupil unit}$ or $+15.6\%$ and **exceeded** such expenditures for the average of all Minnesota school districts by $+\$136/\text{pupil unit}$ or $+26.4\%$. By 1998-99, Moorhead School District #152 spent $\$1,496/\text{pupil unit}$ for exceptional instruction, while the average of all peer group school districts spent $\$1,056/\text{pupil unit}$ and the average of all Minnesota school districts spent $\$998/\text{pupil unit}$ for exceptional instruction. Consequently, in 1998-99, Moorhead School District #152's exceptional instruction expenditures **exceeded** the average of all peer group school districts by $+\$440/\text{pupil unit}$ or $+41.7\%$ and **exceeded** such expenditures for the average of all Minnesota school districts by $+\$498/\text{pupil unit}$ or $+49.9\%$.

Moorhead School District #152's instructional support services expenditures in 1988-89 were $\$131/\text{pupil unit}$, while the average of all peer group school districts spent $\$175/\text{pupil unit}$ and the average of all Minnesota school districts spent $\$150/\text{pupil unit}$ for instructional support services. Moorhead School District #152's instructional support service expenditures **trailed** the average

of all like-sized school districts by $-\$44/\text{pupil unit}$ or -25.1% and **trailed** the average of all Minnesota school districts by $-\$19/\text{pupil unit}$ or -12.7% . In 1998-99, Moorhead School District #152's instructional support service expenditures reached $\$337/\text{pupil unit}$, while the average of all peer group school districts spent $\$684/\text{pupil unit}$ and the average of all Minnesota school districts expended $\$354/\text{pupil unit}$ for instructional support services. During that year, then, Moorhead School District #152's instructional support service expenditures **under spent** the average of peer group school districts by $-\$347/\text{pupil unit}$ or -50.7% and **under spent** such expenditures for the average of all Minnesota school districts by $-\$17/\text{pupil unit}$ or -4.8% .

Moorhead School District #152's expenditures for pupil support services were $\$69/\text{pupil unit}$ in 1998-99 and compared **unfavorably low** with the average of all like-school districts in Minnesota ($\$125/\text{pupil unit}$) and the average of all Minnesota school districts ($\$106/\text{pupil unit}$). Thus, in 1988-89, Moorhead School District #152 spent $-\$56/\text{pupil unit}$ or -44.8% **less than** pupil support service expenditures for the average of like-sized school districts and $-\$37/\text{pupil unit}$ or -34.9% **less than** such expenditures for the average of all Minnesota school districts in that year. By 1998-99, Moorhead School District #152 expended $\$166/\text{pupil unit}$ for pupil support services, while the average of all like-sized Minnesota school districts expended $\$222/\text{pupil unit}$ and the average of all Minnesota school districts expended $\$210/\text{pupil unit}$ for pupil support services. Consequently, in 1998-99, the average of peer group school districts spent $+\$56/\text{pupil unit}$ or $+33.7\%$ **more than** Moorhead School

District #152, while the average of all Minnesota school districts expended +\$44/pupil unit or +26.5% **more than** Moorhead's pupil support services' expenditures in that year.

In 1988-89, operations and maintenance costs were as follows: Moorhead School District #152 (\$236/pupil unit); the average of all like-sized Minnesota school districts (\$335/pupil unit); and the average of all Minnesota school districts (\$328/pupil unit). In that year, then, the average of all peer group school districts spent +\$99/pupil unit or +41.9% **more than** Moorhead's operations and maintenance expenditures, and the average of all Minnesota school districts spent +\$92/pupil unit or +39.0% **more than** such expenditures in Moorhead. By 1998-99, Moorhead School District #152 expended \$393/pupil unit for operations and maintenance, a figure that was -\$156 or -28.4% **less than** the average of all like-sized Minnesota school districts (\$549/pupil unit) and -\$156/pupil unit or -28.4% **less than** the average of all Minnesota school districts (\$549/pupil unit) in that year.

The 1988-89 Moorhead School District #152 food services' expenditures (\$131/pupil unit) **trailed** the average of all like-sized Minnesota school districts' (\$165/pupil unit) expenditures by -\$34/pupil unit or -20.6% and, further, **lagged behind** food services' expenditures for the average of all Minnesota school districts (\$169/pupil unit) by -\$38/pupil unit or -22.5%. By 1998-99, Moorhead School District #152's food services' expenditure (\$215/pupil unit) **trailed** the average of all the like-sized Minnesota school

districts' expenditures (\$274/pupil unit) by -\$59/pupil unit or -21.5% and lagged behind such expenditures for the average of all Minnesota school districts (\$281/pupil unit) by -\$66/pupil unit or -23.5%.

TABLE 8
MOORHEAD SCHOOL DISTRICT #152
DISTRICT, PEER, AND MINNESOTA STATE EXPENDITURES
1988-89/1998-99

	<u>1988-89</u>			<u>1998-99</u>		
	<u>152</u>	<u>Peer Ave.</u>	<u>MN Ave.</u>	<u>152</u>	<u>Peer Ave.</u>	<u>MN Ave.</u>
Dist./School Admin.	158	211	231	330	350	369
Dist. Support Services	60	116	102	140	199	194
Reg. Inst.	1,581	1,710	1,751	2,946	3,150	3,206
Voc. Inst.	18	82	90	66	123	134
Except. Inst.	652	564	516	1,496	1,056	998
Inst. Sup. Srv.	131	175	150	337	684	354
Pup. Sup. Srv.	69	125	106	166	222	210
Oper./Main.	236	335	328	393	549	549
Food Services	131	165	169	215	274	281
Transportation	220	236	242	349	350	370
Total P-K-12	3,872	4,168	4,017	6,449	6,688	6,695
Enrollment	5,182			5,881		

In 1988-89, Moorhead School District #152's transportation expenditures amounted to \$220/pupil unit, a figure that was -\$16/pupil unit or -6.8% **less than** the average of all like-sized Minnesota school districts (\$236/pupil unit) and -\$22/pupil unit or -9.1% **less than** transportation expenditures for the average of all Minnesota school districts (\$242/pupil unit) in that year. By 1998-99, Moorhead School District #152 expended \$349/pupil unit for transportation. That figure was virtually identical to the average of all like-sized Minnesota school districts (\$350/pupil unit) and **trailed** by -\$21/pupil unit or -5.7% the transportation expenditure of the average of all Minnesota school districts (\$370/pupil unit) in that year.

The Project Consultant concluded that, **both in 1988-89 and 1998-99**, Moorhead School District #152 displayed **lower expenditures** for district and school administration, district support services, regular instruction, vocational instruction, instructional support services, pupil support services, operations and maintenance, food services, and transportation than the average of all like-sized Minnesota school districts and the average of all Minnesota school districts. The Project Consultant further concluded that Moorhead School District #152 **expended significantly greater dollars for exceptional instruction** – both in 1988-89 and in 1998-99 – **than the average of all like-sized Minnesota school districts and the average of all Minnesota school districts**. The Project Consultant further concluded that Moorhead School District #152's rate of exceptional instruction expenditure growth from 1988-89 to 1998-99 outstripped both the rate of growth of exceptional instruction

expenditures of the average of all like-sized Minnesota school districts and the average of all Minnesota school districts.

3.3 Comparative Costs Among Like-Sized Districts

Data presented in Table 8 illustrated that the only cost category in which Moorhead School District #152 exceeded both the average of like-sized Minnesota school districts and the average of all Minnesota school districts in 1988-89 and 1998-99 was exceptional instruction. In this light, the Project Consultant believed it would be valuable to explore – in greater detail – comparative exceptional instruction expenditures among Moorhead School District #152 and a number of (13) school districts of approximately like-size (ranging from Willmar School District #347 with 4,517 students to Chaska School District #112 with 6,723 students) during the 1998-99 school year.

Table 9 presents comparative costs among like-sized school districts for the 1998-99 school year. Three comparative costs were provided: regular instruction; exceptional instruction; and total P-K-12 expenditures.

The contents of Table 9 illustrate that, among Moorhead, 13 like-sized school districts, St. Paul School District #625, the average of all peer school districts, and the average of all Minnesota school districts, Moorhead School District #152 displayed the largest expenditure for exceptional instruction in 1998-99 (\$1,496/pupil unit). The next closest school district in exceptional instruction

expenditures included Willmar School District #347 (\$1,389/pupil unit), St. Paul School District #625 (\$1,291/pupil unit), Faribault School District #656 (\$1,274/pupil unit), and Roseville School District #623 (\$1,201/pupil unit). It is worthy of note that, in 1998-99, Moorhead School District #152 expended – on average – \$629,267 **more than** Willmar School District #347 for exceptional education; \$1,205,605 **more than** St. Paul School District #625; \$1,734,895 **more than** Roseville School District #623; \$2,587,640 **more than** the average of all like-sized school districts in Minnesota; and \$2,987,548 **more than** the average of all Minnesota school districts for exceptional instruction in that year.

Table 9 delineates that Moorhead School District #152 spent \$2,946/pupil unit for regular instruction, while the average of all like-sized Minnesota school districts spent \$3,150/pupil unit and the average of all Minnesota school districts spent \$3,206/pupil unit for regular instruction in 1998-99. As a consequence, then, Moorhead School District #152 spent -\$204/pupil unit or, on average, \$1,199,724 **less for** regular instruction than the average of like-sized Minnesota school districts **and** expended -\$260/pupil unit or, on average, \$1,529,060 **less for** regular instruction than the average of all Minnesota school districts in 1998-99. Despite the fact that Moorhead School District #152's expenditures for exceptional instruction exceeded all of the 13 like-sized districts listed **and** the average of like-sized school districts **and** the average of all Minnesota school districts, Moorhead's regular instruction expenditures exceeded **only 4 of 13 like-sized school districts** and **did not**

exceed either the average of like-sized Minnesota school districts or the average of all Minnesota school districts.

**TABLE 9
MOORHEAD SCHOOL DISTRICT #152
COMPARATIVE COSTS AMONG LIKE-SIZED DISTRICTS
1998-99**

<u>District</u>	<u>Size</u>	<u>Regular Instruction</u>	<u>Exceptional Instruction</u>	<u>Total P-K-12</u>
Moorhead #152	5,881	\$2,946	\$1,496	\$6,449
Willmar #347	4,517	\$3,100	\$1,389	\$7,196
St. Paul #625	48,348	\$3,866	\$1,291	\$8,019
Faribault #656	4,488	\$2,936	\$1,274	\$6,716
Roseville #623	6,722	\$3,591	\$1,201	\$8,117
Winona #861	4,928	\$3,071	\$1,188	\$6,381
Cambridge/Isanti #911	4,611	\$2,874	\$1,172	\$6,168
West St. Paul #197	5,030	\$3,205	\$1,136	\$7,180
Grand Rapids #318	4,616	\$3,440	\$1,135	\$7,070
Centennial #12	6,379	\$2,689	\$1,096	\$6,039
Chaska #112	6,723	\$2,765	\$1,083	\$6,613
Average of Peers		\$3,150	\$1,056	\$6,688
Average of MN		\$3,206	\$988	\$6,695
Hastings #200	5,236	\$3,180	\$945	\$6,157
Edina #273	6,370	\$3,444	\$875	\$6,803
Owatonna #761	4,833	\$2,962	\$779	\$6,305
Buffalo #877	4,795	\$3,037	\$620	\$5,947

Table 9 further illustrated that Moorhead School District #152 displayed a total P-K-12 operating expenditure in 1998-99 that **trailed** the average of all like-sized Minnesota school districts, the average of all Minnesota school districts, and 8 of 13 school districts which ranged in sized from 4,517 students to 6,723 students.

The Project Consultant concluded that Moorhead School District #152 displayed **extraordinarily high** exceptional instruction expenditures and **extraordinarily low** regular instruction expenditures during the 1998-99 school year. The Project Consultant found that, only on one occasion (1989-90), did Moorhead School District #152's regular instruction expenditures exceed the average of all Minnesota school districts between 1988-89 and 1998-99.

3.4 Tax Capacity

Tax capacity (formerly mill rate) is the dollar expression of the worth of property that comprises the school district (or town, city, county, or other taxing jurisdiction). The extraordinarily diverse tax capacities (property wealth) of school districts in the State of Minnesota were reviewed by the judicial system in the early 1990's as a major source of fiscal inequity among school districts in the State of Minnesota.

Some Minnesota school districts have immense property wealth and tax

capacity, while other school districts have comparatively small property wealth and tax capacity. The inequity in property wealth and adjusted net tax capacities forced property-poor school districts with low tax capacities in the past to conduct general or bond referenda of much greater magnitude of such issues in property-rich school districts in order to secure the same dollar support for school district budgets or the construction, remodeling, and/or betterment of school facilities. The "equity funding lawsuit" focused on this issue and the disadvantages experienced by low property wealth school districts and the students they were entrusted to educate. The outcome of the "equity funding lawsuit" was a decision by the Minnesota State Legislature to implement debt service equalization, a financial mechanism for assisting property-poor school districts in updating, remodeling, bettering, and constructing new facilities that would be similar in kind and quality to those which would be affordable if the property-poor school districts were property-rich.

Table 10 details the adjusted net tax capacity/pupil unit of Moorhead School District #152 from 1992-1998. Adjusted net tax capacity figures have been delineated, as well, for the average of all peer group (like-sized) school districts and the average of all State of Minnesota school districts during the same seven year span of time.

Moorhead School District #152's adjusted net tax capacity was \$2,187/pupil unit in 1992. By comparison, the average of all like-sized school districts' adjusted net tax capacity was \$4,142/pupil unit, and the average of all

Minnesota school districts' adjusted net tax capacity was \$3,532/pupil unit in that year. Consequently, in 1992, the adjusted net tax capacity of Moorhead School District #152 was -\$1,955/pupil unit or -47.2% **less than** the average of all like-sized school districts and -\$1,345/pupil unit or -38.1% **less than** the average of all Minnesota school districts in that year.

Between 1992 and 1998, the adjusted net tax capacity of Moorhead School District #152 grew from \$2,187/pupil unit to \$2,475/pupil unit, a growth of +\$288/pupil unit or +13.2%. During the same six year span of time, the average of all like-sized school districts' adjusted net tax capacity grew from \$4,142/pupil unit in 1992 to \$5,279/pupil unit in 1998, an increase of +\$1,137/pupil unit or +27.5% and the average of all Minnesota school districts' adjusted net tax capacity grew from \$3,532/pupil unit in 1992 to \$4,379/pupil unit in 1997, an increase of +\$847/pupil unit or +24.0%.

By 1998, the adjusted net tax capacity of Moorhead School District #152 (\$2,475/pupil unit) **trailed** the figure for the average of all like-sized school districts (\$5,279/pupil unit) by -\$2,804/pupil unit or -53.1% and **lagged behind** the average of all Minnesota school districts (\$4,379/pupil unit) by -\$1,904/pupil unit or -43.5%.

Moorhead School District #152 boasts significantly less property wealth per student than the average of all Minnesota school districts and the average of all like-sized school districts. Consequently, by State of Minnesota standards,

Moorhead School District #152 would be classified as a property-poor school organization. Therefore, the school district – if it chose to conduct a future school bond referendum – would likely qualify for a significant measure of debt service equalization to support future new facility construction, remodeling, expansion, and/or betterment projects.

TABLE 10 MOORHEAD SCHOOL DISTRICT #152 ADJUSTED NET TAX CAPACITY 1992-1998							
<u>Comparisons</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>
#152	\$2,187	\$2,277	\$2,452	\$2,796	\$2,813	\$2,449	\$2,475
Peer	\$4,142						\$5,279
MN Average	\$3,532	\$3,517	\$3,673	\$4,421	\$4,191	\$4,126	\$4,379

3.5 Bonded Indebtedness

According to the school district's financial statements for the year ended June 30, 2000, Moorhead School District #152 reported outstanding bonds in the amount of \$10,795,000 (principal), \$2,095,070 (interest), and \$12,888,070 (total).

Moorhead School District #152 has an estimated market value of \$1,048,171,794 and a debt limit (10% of market value) of \$104,817,179. The

school district's net debt applicable to the debt limit is \$5,501,054. Consequently, Moorhead School District #152's percent of legal debt incurred is 5.2%.

By State of Minnesota standards, Moorhead School District #152 has a miniscule level of bonded indebtedness for an educational organization of Moorhead's size.

3.6 Comparative Debt Service and Long-Term Debt

Table 11 provides 1998-99 comparative long-term debt and debt service expenditures for Moorhead School District #152, select peer group school districts (13), the average of all like-sized school districts, and the average of all Minnesota school districts.

Table data yield that Moorhead School District #152 has the lowest long-term debt (\$2,176/pupil unit) and second lowest debt service (\$196/pupil unit) of the 13 peer school districts, the average of all Minnesota school districts, and the average of all like-sized school districts in Minnesota in 1998-99. Among comparatively-sized school districts, Faribault School District #656, Chaska School District #112, Buffalo School District #877, and West St. Paul School District #197 expended, respectively, for 1998-99 long-term debt the following dollar amounts: \$15,697/pupil unit; \$15,438/pupil unit; \$14,034/pupil unit; and \$13,502/pupil unit. The average of all like-sized school districts' long-term debt

in 1998-99 was \$7,814/pupil unit, while the average of all Minnesota school districts' long-term debt in 1998-99 was \$7,065/pupil unit. By comparison, Moorhead School District #152 spent – on average – about one-seventh the dollar amount for long-term debt that was expended in Faribault, Chaska, Buffalo, West St. Paul, and Centennial School Districts and, further, less than one-third the annual dollar volume for long-term debt as the average of all like-sized Minnesota school districts and the average of all Minnesota school district.

Moorhead School District #152's 1998-99 debt service expenditure was \$196/pupil unit. The organization's expenditure pattern was meager when compared to the debt service expenditure average for all Minnesota school districts (\$644/pupil unit) and the average of all like-sized Minnesota school districts (\$842/pupil unit).

The Project Consultant concluded that Moorhead School District #152 displays extraordinarily low expenditures for long-term debt and debt service, yielding the further conclusion that the school district has under-invested in its teaching/learning facilities when compared to school districts of comparable or larger size.

TABLE 11
MOORHEAD SCHOOL DISTRICT #152
COMPARATIVE COSTS AMONG LIKE-SIZED DISTRICTS
1998-99

<u>District</u>	<u>Size</u>	<u>Debt Service</u>	<u>Long Term Debt</u>
Faribault #656	4,488	\$1,328	\$15,697
Chaska #112	6,723	\$808	\$15,438
Buffalo #877	4,795	\$668	\$14,034
West St. Paul #197	5,030	\$928	\$13,502
Centennial #12	6,379	\$710	\$10,432
Hastings #200	5,236	\$195	\$9,595
Owatonna #761	4,833	\$700	\$8,474
Roseville #623	6,722	\$498	\$8,417
Average of Peers		\$842	\$7,814
Edina #273	6,370	\$498	\$7,569
Grand Rapids #318	4,616	\$516	\$7,476
Average of MN		\$644	\$7,065
Willmar #347	4,517	\$578	\$6,345
Winona #861	4,928	\$493	\$6,045
Cambridge/Isanti #911	4,611	\$398	\$5,509
Moorhead #152	5,881	\$196	\$2,176

3.7 Excess Levy Referendum

The Project Consultant learned that Moorhead School District #152's taxpayers authorized an excess levy referendum (override) to provide

additional funding to institute capital improvements in select facilities over a multi-year timeframe. The excess levy referendum has generated approximately \$1,865,000 in 1998-99 and will create resources of a like amount for each of the subsequent ten years.

The Project Consultant concluded that Moorhead School District #152's facilities require additional betterments/improvements in the future. It would be advisable, however, that currently-scheduled and future capital improvements be funded through a school bond referendum to be brought before the public in the near future. Simultaneously, the Project Consultant concluded the School Board would do well to seek authorization of the public for usage of the current excess levy referendum to support General Fund operations (programs and services) in the immediate future – rather than expending the excess levy referendum for facility improvement/betterment.

3.8 Summary

The Project Consultant identified the following points as worthy of notation on the financial condition of Moorhead School District #152:

- ◆ The school district's General Fund revenue increased from \$31,511,415 in 1994-95 to \$40,942,638 in 1999-00, an increase of +\$9,431,223 or +29.9%.

- ◆ The school district's General Fund expenditures increased from \$30,626,427 in 1994-95 to \$43,600,427 in 1999-00, a gain of +\$12,974,000 or +42.4%.
- ◆ The school district's General Fund balance decreased from \$2,374,535 in 1993-94 to \$1,207,075 in 1999-00, a decrease of -\$1,167,460 or -49.2%.
- ◆ Between 1994-95 and 1999-00, the school district operated balanced General Fund budgets on three of six occasions and improved its General Fund balance on four of six occasions.
- ◆ At the conclusion of the 1999-00 school year, the school district's General Fund balance of \$1,207,075 amounted to a paltry 2.8% of the school district's General Fund expenditure budget of \$43,600,427.
- ◆ The Project Consultant assessed that the school district was a financially-troubled educational organization.
- ◆ In 1998-99, the school district recorded an operating funds balance of \$892/pupil unit, an increase of +\$446/pupil unit or +100% over the ten year span of time from 1988-89 through 1998-99.
- ◆ In 1998-99, the school district's operating funds balance (\$892/pupil unit) **exceeded** the operating funds balance of the average of like-sized school districts (\$426/pupil unit) by +\$466/pupil unit or +109.4% and **exceeded** the operating funds balance figure of the

average of all Minnesota school districts (\$511/pupil unit) by +\$381/pupil unit or +74.6%.

- ◆ Between 1988-89 and 1998-99, the school district's total P-K-12 operating expenditures increased from \$3,872/pupil unit to \$6,449/pupil unit, a gain of +\$2,577/pupil unit or +66.6%.
- ◆ In 1998-99, the school district's total P-K-12 operating expenditures (\$6,449/pupil unit) **trailed** the average of such expenditures for like-sized school districts (\$6,688/pupil unit) by -\$239/pupil unit or -3.6% and **trailed** the average of such expenditures for all school districts in the State of Minnesota (\$6,695/pupil unit) by -\$246/pupil unit or -3.7%.
- ◆ The Project Consultant concluded that the school district expends funds for total P-K-12 operations at a lower rate than is found in the average of all like-sized school districts in Minnesota and in the average of all school districts in the State of Minnesota. Consequently, the Project Consultant assessed the school district as a **below-average spending organization**.
- ◆ In 1988-89 and 1998-99, the school district **trailed** district and school administration spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** district support services spending in the average of all like-sized school districts and the average of all Minnesota school districts.

- ◆ In 1988-89 and 1998-99, the school district **trailed** regular instruction spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** vocational instruction spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **exceeded** exceptional instruction spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** instructional support services' spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** pupil support services' spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** operations and maintenance spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1988-89 and 1998-99, the school district **trailed** food services' spending in the average of all like-sized school districts and the average of all Minnesota school districts.

- ◆ In 1988-89 and 1998-99, the school district **trailed** transportation spending in the average of all like-sized school districts and the average of all Minnesota school districts.
- ◆ In 1998-99, the school district displayed the largest expenditure for exceptional instruction among 13 like-sized school districts, St. Paul School District #625, the average of all like-sized school districts, and the average of all Minnesota school districts.
- ◆ The school district's adjusted net tax capacity grew from \$2,187/pupil unit in 1992 to \$2,475/pupil unit in 1998, a gain of +\$288/pupil unit or +13.2%.
- ◆ By 1998, the adjusted net tax capacity of the school district (\$2,475/pupil unit) **trailed** the figure for the average of all like-sized school districts (\$5,279/pupil unit) by -\$2,804/pupil unit or -53.1% and **lagged behind** the average of all Minnesota school districts (\$4,379/pupil unit) by -\$1,904/pupil unit or -43.5%.
- ◆ By State of Minnesota standards, the school district would be classified as a property-poor school district.
- ◆ The school district would likely qualify for debt service equalization to support any future new facility construction, remodeling, expansion, and/or betterment projects.
- ◆ As of June 30, 2000 the school district reported outstanding bonds in

the amount of \$10,795,000 (principal), \$2,095,070 (interest), and \$12,888,070 (total).

- ◆ By State of Minnesota standards, the school district has a miniscule level of bonded indebtedness for an educational organization of Moorhead's size.
- ◆ The Project Consultant concluded the school district displays extraordinarily low expenditures for long-term debt and debt service, yielding the further conclusion that the school district has under-invested in its teaching/learning facilities when compared to school districts of comparable or larger size.
- ◆ The school district's public approved an excess levy referendum in 1998-99 which will create approximately \$1,865,000 of available resources annually to institute capital improvements in select facilities over a multi-year timeframe.

CHAPTER IV

EDUCATIONAL PROGRAMS, SERVICES, AND STAFFING

4.0 Introduction

The primary purpose of the operation of public school districts in Minnesota and throughout the United States is the delivery of instructional programs and services to resident P-K-12 students, initially, and, evermore increasingly in recent decades, to resident and non-resident pre-school youngsters and adults. The breadth, scope, and sophistication of school district's programs and services have manifoldly increased over the past four decades in response to changing societal needs, family structure, business/industrial priorities, population aging, technological expansion, global competition, and a myriad of other interacting and intersecting variables.

The school district's size, enrollment trends, and finances have a direct bearing on the number, breadth, scope, and sophistication of programs and services, the numbers and types of staff members, and the numbers, types, and sophistication of facilities. In this light, it is axiomatic that the Project Consultant would investigate the status of Moorhead School District #152's educational programs, services, staffing, and related issues (including collaboration/cooperation, technology, community education programming, methodologies, delivery systems, class sizes, pupil/professional staff ratios,

organizational configurations, and the like) to serve the school district's pre-school, school-aged, and adult populations and their communities.

A cross-section of the Project Consultant's findings on examining programs, services, staffing, and other indicators is presented in this chapter. The purposes inherent in the analyses of such data are to determine Moorhead School District #152's status, assess the organization's strengths and needs, conduct comparative analyses, and, as appropriate, identify potential, future courses of action for consideration by the School Board and Superintendent of Schools.

4.1 Elementary Class Sizes

A summary of Moorhead School District #152's 2000-01 elementary class section sizes, grades K-4 and grades 5-6, are presented, respectively, in Table 12 and 12-A.

Moorhead School District #152 provided elementary instructional programming in grades K-4 at Probstfield and Washington Elementary Schools, in grades K-5 at Riverside and Edison Elementary Schools, and in grades 5-6 at Robert Asp School during the 2000-01 school year. The school district served 414 kindergarten students and 2,524 grade 1-6 students for an average of 419.7 students/grade level in grades K-6 in 2000-01.

The Project Consultant used 20 students/section as a minimum threshold below which enrollments would be considered cost/ineffective (except in kindergarten and grade 1 where special funding has been provided by the Minnesota State Legislature (and Federal legislation) to facilitate sub-20 student class section enrollments). An examination of Table 12 illustrates that Moorhead School District #152 operated 89 elementary class sections in Edison, Probstfield, Riverside, and Washington during the 2000-01 school year. Thirteen class sections or 14.6% were operated with enrollments of less than 20 students, while 51 sections or 57.3% enrolled 20-25 students/section and 22 sections or 24.7% enrolled 26-29 students/section. Only three elementary class sections or 3.3% operated with enrollments of 30 students or larger during the 2000-01 school year.

<p style="text-align: center;">TABLE 12 MOORHEAD SCHOOL DISTRICT #152 ELEMENTARY CLASS SIZES 2000-01</p>					
<u>School</u>	<u>Less than 20</u>	<u>20-25</u>	<u>26-29</u>	<u>30 or ></u>	<u>Total</u>
Elementary	13	51	22	3	89
%	14.6%	57.3%	24.7%	3.3%	100.0%

Table 12-A divulges that Moorhead School District #152 operated 27 elementary class sections in grades 5-6 at Robert Asp School during the 2000-01 school year. Twenty-five class sections or 92.6% were operated with enrollments of 26-29 students/sections, while two sections or 7.4% enrolled

30 students or larger/section. Robert Asp School staffed no elementary class sections with enrollments of less than 20 students/section or 20-25 students/section.

The Project Consultant rated Moorhead School District #152's elementary class sections as staffed at a highly cost/effective level.

The average class section size in grades K-6 in Moorhead School District #152 during the 2000-01 school year was computed at 25.3 students/section.

<p style="text-align: center;">TABLE 12-A MOORHEAD SCHOOL DISTRICT #152 ROBERT ASP CLASS SIZES 2000-01</p>					
<u>School</u>	<u>Less than 20</u>	<u>20-25</u>	<u>26-29</u>	<u>30 or ></u>	<u>Total</u>
Robert Asp	0	0	25	2	27
%	0.0%	0.0%	92.6%	7.4%	100.0%

4.2 Secondary School Class Section Sizes

Table 13 delineates Moorhead School District #152's high school class section sizes in grades 9-12 during the 2000-01 school year.

The Project Consultant again utilized class section sizes of 20 students as a threshold for staffing cost/ineffectiveness and cost/effectiveness.

During the first semester of the 2000-01 organizational year, Moorhead Senior High School conducted 313 semester sections of which 24 sections or 7.7% enrolled less than 20 students (at a cost/ineffective level). Conversely, the high school operated 71 course sections or 22.7% with enrollments of 20-25 students/section, 109 course sections or 34.8% with enrollments of 26-29 students/section, and 109 course sections or 34.8% with enrollments of 30 or more students/section – yielding 289 course sections or 92.3% with enrollments of 20 or more students (at a cost/effective level).

The Project Consultant concluded that Moorhead School District #152 maintained a high level of cost/effectively staffed high school courses during the 2000-01 school year. School districts would normally be expected to operate within the range of 20-40% cost/effective course sections at the secondary school level. The reason for such broad tolerance in accepting cost/ineffectiveness in the enrollment of secondary school course sections is the reality that a broad array of courses are required by secondary schools to address the diverse needs and interests of students, including typically low-enrolled disciplines, low-ability student electives, high-ability student electives, singleton electives (offered only once during the school day or once during the school year), maintenance of multi-course sequences and others. The Project Consultant further concluded that Moorhead School District #152's high level

of cost/effective secondary course sections was attributable to the large critical mass of secondary school students.

Subject matter disciplines in Moorhead School District #152 that scheduled course sections with enrollments of 19 students or less during the 2000-01 school year included, more frequently, the following: mathematics (five sections); industrial technology (five sections); English (four sections); and social studies (four sections). Subject matter disciplines that scheduled course sections with enrollments of 30 or more students included, most often, the following: social studies (32 sections); English (30 sections); and mathematics (15 sections).

<p style="text-align: center;">TABLE 13 MOORHEAD SCHOOL DISTRICT #152 SECONDARY CLASS SIZES 2000-01</p>					
<u>School</u>	<u>Less than 20</u>	<u>20-25</u>	<u>26-29</u>	<u>30 or ></u>	<u>Total</u>
High School	24	71	109	109	313
%	7.7%	22.7%	34.8%	34.8%	100.0%

During the 2000-01 organizational year, Moorhead Junior High School conducted 194 sections of which 10 sections or 5.2% enrolled less than 20 students/section (at a cost/ineffective level). On the other hand, Moorhead Junior High School operated 58 course sections or 29.9% with enrollments of 20-25 students/section, 78 course sections or 40.2% with enrollments of

26-29 students/section, and 48 course sections or 24.7% with enrollments of 30 or more students/section – yielding 184 course sections or 94.8% with enrollments of 20 or more students/section (at a cost/effective level).

Subject matter disciplines in Moorhead Junior High School that scheduled course sections with enrollments of 19 students or less during the 2000-01 school year included, most frequently, the following: physical education/health (three sections); world languages (three sections); English (two sections). Subject matter disciplines that scheduled course sections with enrollments of 30 or more students included, most often, the following: physical education/health (15 sections); science (seven sections); social studies (seven sections); mathematics (seven sections); and English (five sections).

<p style="text-align: center;">TABLE 13-A MOORHEAD SCHOOL DISTRICT #152 MOORHEAD JHS CLASS SIZES 2000-01</p>					
<u>School</u>	<u>Less than 20</u>	<u>20-25</u>	<u>26-29</u>	<u>30 or ></u>	<u>Total</u>
Junior H.S.	10	58	78	48	194
%	5.2%	29.9%	40.2%	24.7%	100.0%

The Project Consultant rated the staffing of Moorhead School District #152's high school and junior high school class sections as highly cost/effective.

4.3 Senior High School Credit Course Offerings

Moorhead School District #152's high school operated a seven period schedule with 55 minute periods. School hours extend from 8:30 a.m. to 2:55 p.m.

Moorhead High School courses are primarily structured on a semester and year-long basis.

The Project Consultant examined Senior High School (grades 9-12) course offerings for Moorhead School District #152 during the 2000-01 school year as described in **Registration Information, 2000-2001**. Table 14 indicates the school district made available 229 semester course offerings to high school students in grades 9-12 during the 2000-01 school year. Course offerings spanned 11 disciplines: art; business; English; family and consumer science; industrial technology; mathematics; music; physical education/health; science; social studies; and world languages.

High school students were afforded the broadest array of semester course offerings in the following disciplines: English (36 semesters); mathematics (29 semesters); social studies (26 semesters); industrial technology (25 semesters); and world languages (25 semesters). The narrowest range of high school semester course offerings was made available to grade 9-12 students in the following disciplines in 2000-01: art (8 semesters); physical

education/health (8 semesters); and family and consumer science (9 semesters).

**TABLE 14
MOORHEAD SCHOOL DISTRICT #152
SEMESTER COURSE OFFERINGS, 9-12
2000-01**

<u>Discipline/Subject</u>	<u>Semester Credits</u>
Art	8
Business	17
English	36
Family and Consumer Science	9
Industrial Technology	25
Mathematics	29
Music	18
Physical Education	8
Science	20
Social Studies	26
World Languages	25
Other	8
Total	229

The breadth and scope of grade 9-12 semester offerings made available to Moorhead Senior High School students in 2000-01 were comparable to offerings found in high schools with an average critical student mass of 1,500-2000 students.

4.4 Curriculum Standards

From the very onset of development by the State of Minnesota and the Minnesota Department of Children, Families and Learning, Moorhead School District #152's School Board, administration, and teaching staff have been involved in training and design activities leading to implementation of the State of Minnesota Graduation Standards.

The Project Consultant's assessment of the school district's implementation of Graduation Standards' processes and coursework is that outstanding progress has been made by the school district's personnel in components related to training, curriculum alignment, curriculum development, and field-testing of performance packages.

The school district's students had been administered the State of Minnesota's basic skills' assessments in mathematics, reading, and writing. The school district's student performances on State assessments are clearly within acceptable parameters.

4.5 Course Preparations

The Project Consultant reviewed the master schedule of Moorhead Senior High School during the first semester of the 2000-01 school year to determine the number of course preparations assigned to full-time teaching staff members in grades 9-12. Course preparations assigned to full-time (and part-time) teaching staff members during the 2000-01 school year are presented in Table 15.

The purpose of reviewing teacher course preparations in the senior high school of any school district is to establish the teaching load assigned to staff members and, further, make judgments about the cost/effectiveness of the school district's staffing operation.

A course preparation or teacher preparation is defined as a unique teaching assignment for which a professional staff member must prepare lecture or discussion notes, worksheets, tests, supplemental materials, media, laboratory activities, or instructional resources for teaching and/or guiding students in the teaching/learning process. Course preparations/teaching preparations are distinguishable from the number of courses taught. That is, if a teaching staff member is assigned a responsibility of instructing five sections (classes) of Algebra I during the course of the school day, five courses are taught, indeed, but only one course preparation (Algebra I) is required. On the other hand, if a professional teaching staff member is assigned to teach three class

sections of Algebra I and two class sections of Geometry, five classes are taught, but two course preparations (Algebra I and Geometry) are involved. The "preparation load" of the former teacher is less than that on the latter teacher.

In school districts the size of Moorhead School District #152, it would be anticipated by the Project Consultant that, perhaps, 75-80% of the teaching staff members at the senior high school level would be assigned 1-3 teaching preparations, and 20-25% of the teaching staff members would be assigned 4-5 teaching preparations.

An examination of Table 15 indicates that Moorhead School District #152's senior high school employed 67 full-time **regular education** teaching staff members and 11 part-time **regular education** teaching staff members during the first semester of 2000-01 school year. All 11 part-time high school teaching staff members or 100% were assigned 1-2 teaching preparations daily. Fifty-two full-time **regular education** high school teaching staff members or 77.6% were assigned 1-2 teaching preparations daily, while 15 full-time **regular education** high school teaching staff members or 23.4% were assigned 3-4 teaching preparations daily (actually 13 of the 15 staff members were assigned 3 preparations daily). No full-time **regular education** high school teaching staff members were assigned 5-6 teaching preparations daily during the 2000-01 school year.

TABLE 15
MOORHEAD SCHOOL DISTRICT #152
TEACHING PREPARATIONS (SEMESTER 1)
2000-01

	Preparations			
	1-2	3-4	5-6	Total
Staff FT	52	15	0	67
Staff PT	11	0	0	11

The Project Consultant concluded that the number of daily preparations assigned to full-time **regular education** high school teaching staff members in Moorhead School District #152 was actually more favorable than would typically be found in a school district of comparable size. The Project Consultant discovered a comparatively high number of high school teaching staff members with 1-2 preparations and a somewhat smaller number of high school teaching staff members with 4-5 preparations daily than had been anticipated.

4.6 Staffing and Pupil/Professional Staff Ratio

The Project Consultant investigated Moorhead School District #152's full-time equivalent teaching staff members and pupil/professional staff ratios between the 1988-89 and 1998-99 school years. In the case of pupil/professional staff ratios, the school district's figures were compared to like-sized (peer group)

school districts and the average of all Minnesota school districts during the identical ten year span of time.

As detailed in Table 16, Moorhead School District #152 employed 343 full-time professional staff members in 1988-89 and 446 full-time professional staff members in 1998-99, an increase of +103 staff members or +30.0% over the ten year span of time.

Moorhead School District #152's student enrollment increased from 5,182 youngsters in 1988-89 to 5,881 students in 1998-99, a gain of +699 students or +13.5%. During the same time period, Moorhead School District #152's full-time professional staff increased by 30.0%. The Project Consultant concluded that Moorhead School District #152 had added **significant** full-time professional staff members at a greater (percentage) rate than the organization experienced growth (percentage) in students over the previous ten year time span. Most particularly, the Project Consultant observed that, between 1994-95 and 1999-00, the school district realized a net decrease of -333 students or -5.4% while the organization's full-time professional staff increased +7 staff members or +1.6%.

The Project Consultant cautions the school district in the future to institute measures to insure that increases or decreases in professional staff members more closely parallel increases or decreases in student enrollment, thereby preserving the financial viability of the organization.

TABLE 16
MOORHEAD SCHOOL DISTRICT #152
TOTAL STAFF (FTE)
1988-89/1998-99

<u>School</u>	<u>88-89</u>	<u>89-90</u>	<u>90-91</u>	<u>91-92</u>	<u>92-93</u>	<u>93-94</u>	<u>94-95</u>	<u>95-96</u>	<u>96-97</u>	<u>97-98</u>	<u>98-99</u>
Moorhead	343	362	380	394	414	417	439	445	435	431	446

The pupil/professional staff ratios of Moorhead School District #152 between 1988-89 and 1998-99 are reported in Table 17. Staff ratio trends are reported, as well, for the average of all Minnesota school districts and like-sized (peer group) school districts over the same span of time.

In 1988-89, Moorhead School District #152 recorded a pupil/professional staff ratio of 15.0/1, while the average of all peer group (like-sized) school districts reported a much higher (poorer) pupil/professional staff ratio of 15.6/1 and the average of all Minnesota school districts maintained an identical (to Moorhead) 15.0/1 pupil/professional staff ratio figure. In that year, then, Moorhead School District #152 could boast a pupil/professional staff ratio that was .6 students/1 professional staff member **better than** the ratio of the average of all like-sized school districts in Minnesota.

By 1998-99, Moorhead School District #152's pupil/professional staff ratio had decreased (improved) from 15.0/1 (1988-89) to 12.8/1 (1998-99), a drop of -2.2 students/1 professional staff member or -14.7%. During the same span of time, the average of all peer group school districts' pupil/professional staff

ratio decreased (improved) from 15.6/1 (1988-89) to 14.4/1 (1998-99), a decline of -1.2 students/1 professional staff member or -7.7% and the average of all Minnesota school districts' pupil/professional staff ratio declined (improved) from 15.0/1 (1988-89) to 14.0/1 (1998-99), a decrease of -1.0 students/1 professional staff member or -6.7%.

<p style="text-align: center;">TABLE 17 MOORHEAD SCHOOL DISTRICT #152 PUPIL/PROFESSIONAL STAFF RATIO 1988-89/1998-99</p>											
School	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Moorhead	15.0/1	14.4/1	14.6/1	14.2/1	14.0/1	14.3/1	13.6/1	13.3/1	13.4/1	13.4/1	12.8/1
Peer	15.6/1										14.4/1
MN Ave	15.0/1	15.1/1	15.1/1	15.0/1	15.2/1	15.1/1	14.9/1	15.2/1	15.0/1	14.4/1	14.0/1

The Project-Consultant concluded that Moorhead School District #152's pupil/professional staff ratio has been consistently lower than (better than) the average ratio of all Minnesota school districts and the average ratio of all like-sized school districts between 1988-89 and 1998-99. To be sure, Moorhead School District #152's comparatively low pupil/professional staff ratio is consistent with the organization's high staffing, declining fund balances, and recent budget reductions.

4.7 Instructional and Support Services

Moorhead School District #152 furnishes a broad and comprehensive array of

instructional and support services for pre-school, school-aged, and adult populations that would be characteristic of Minnesota school districts with enrollments of 5,000-10,000 students.

Instructional and support services are typically defined as programs and services which extend beyond those dispensed by professional teaching staff members **in the regular or general classroom setting** during the regular school day (8 a.m.-4 p.m.).

According to Table 18, Moorhead School District #152 furnishes such typical instructional support services as co-curricular and extra-curricular activities; programs and services delivered by specialist personnel; special education programs and services; community education programs and services; programs and services for disenfranchised learners; programs and services for under-achieving students; pre-school and early childhood programs and services; school-aged childcare services; multi-school district and/or multi-institutional collaborative/cooperative programming; student and adult enrichment programs; and the like.

The unique aspect of instructional programs and services, cited in Table 18, is that each program and service is either conducted outside of or as an enhancement to the teaching/learning process in the regular/general purpose classroom.

TABLE 18
MOORHEAD SCHOOL DISTRICT #152
INSTRUCTIONAL AND SUPPORT SERVICES (SAMPLE)
2000-01

<u>X</u> Athletics	<u>X</u> Learning Disability
<u>X</u> Cheerleading	<u>X</u> Communication/Speech Disorder
<u>X</u> Dramatics/Plays	<u>X</u> Mental Disability
<u>X</u> Speech	<u>X</u> Emotional/Behavioral Disability
<u>X</u> Band	<u>X</u> Physical Disability
<u>X</u> Orchestra	<u>X</u> Other Health Impaired
<u>X</u> Choir	<u>X</u> Psychological Services
<u>X</u> Music Ensembles	<u>X</u> Vision Services
<u>X</u> Musical	<u>X</u> Deaf/Hard of Hearing
<u>X</u> Yearbook/Annual	<u>X</u> Physical Therapy
<u>X</u> Student Newspaper/Publication	<u>X</u> Occupational Therapy
<u>X</u> Academic Competitions	<u>X</u> Early Childhood/Special Education
<u>X</u> Leadership Groups	<u>X</u> Early Childhood/Family Education
<u>X</u> Clubs	<u>X</u> Learning Readiness
<u>X</u> Art Specialist	<u>X</u> Extended Day/Childcare
<u>X</u> Music Specialist	<u>X</u> Adult Education
<u>X</u> Physical Education Specialist	<u>X</u> Adult Enrichment
<u>X</u> Library/Media Specialist	<u>X</u> Adult Basic Education
<u>X</u> Gifted/Talented Specialist	<u>X</u> Youth Enrichment
<u>X</u> Technology Specialist	<u>X</u> Youth Recreation
<u>X</u> Guidance Counselor	<u>X</u> Area Learning Center
<u>X</u> Social Worker	<u>X</u> Alternative Learning Program
<u>X</u> Nurse Service	<u>X</u> Senior Citizens
<u>X</u> D.A.R.E.	<u>X</u> Multi-District Telecommunication
<u>X</u> Police Liaison	<u>X</u> Cooperative Programming
<u>X</u> Title I	<u>X</u> Spanish Immersion
<u>X</u> Pre-School Screening	<u>X</u> English as a Second Language
	<u>X</u> School Aged Child Care

The Project Consultant concluded that the school district's taxpayers, parents, and patrons have much of which to be proud in programs and services delivered to students and patrons of all ages. To be sure, the school district's instructional and support services are excellent! Nonetheless, it is apparent to **the independent third party neutral** the school district is faced with the need to make significant alterations in its budgeting, staffing, and programs and services as a result of student enrollment losses and budgetary difficulties. Furthermore, the Project Consultant noted that the school district's facilities are less capable of accommodating modern-day programs and services than they were at the time of their original construction (and additions) and, in some instances, require remodeling, betterment, expansion, or replacement to cost/effectively and appropriately serve the communities and students in the 21st Century. In select cases, the facilities fail to meet modern-day standards for the delivery of quality teaching/learning processes, methodologies, and general community usage.

4.8 Organizational Configuration

Moorhead School District #152 operated a K-4/5; 5-6; 7-8; 9-12 organizational configuration during the 2000-01 school year. K-4 programming was delivered at Probstfield and Washington Elementary Schools, while K-5 programming was made available at Riverside and Edison Elementary Schools. Robert Asp School delivered instructional programs and services to most of the school district's grade 5 and all grade 6 students during the 2000-01 school year.

Moorhead Junior High School and Moorhead Senior High School served, respectively, all of Moorhead School District #152's grades 7-8 and grades 9-12 students during the 2000-01 school year.

Following administrative and School Board interviews, facility tours, and data analyses, the Project Consultant concluded that the school district's organizational (grade level) configuration and the placement of students of particular ages/grade levels in select buildings were structured on the basis of the district's size (student enrollment) and the availability of facility space to house/accommodate that student enrollment – rather than having designed and implemented the current organizational configuration on the basis of a philosophical conviction that such facility locations of students would be more enhancing to student achievement and the teaching/learning process than some alternative organizational configuration. The fact is that, given the availability of adequate facility space, Moorhead School District #152 would not have selected the current organizational configuration as the best structure for conducting instructional programs and services for the school district's young people.

The Project Consultant noted as unusual that a school district of the size and quality of Moorhead School District #152 did not have in place (operationally) a modern-day middle school facility, philosophy, and programs and services.

Since creation of kindergarten programming, the design and implementation

of middle schools for "middle level" students has been the most significant, sweeping change in the organizational configuration of public school districts in the 20th Century. Middle schools have provided a modern-day response to the academic, social, emotional, and physical needs of youngsters making the transition from childhood to adulthood. As opposed to the more prevalent junior high school configuration employed by school districts from the turn of the century to the early 1960's, the middle school's philosophy/concept has been intended to be more "user-friendly" to pre-adolescent and adolescent youth. Such a philosophy/concept gathers together students in an age range that would be more characterized by social, emotional, and physical change than at any other period of life. Typical middle school programming emphasizes academics, social skills, exploration, inclusion, co-curricular and intramural, and application-based designs. Teaching methodologies include project-based learning, technology-based learning, advisory-advisee programming, team teaching, team planning, and authentic/performance-based assessment.

The Project Consultant identified the following as significant advantages for implementing a middle school concept in Moorhead School District #152:

- ◆ Provides special program philosophy for pre-adolescent/adolescent students.
- ◆ Provides opportunity to design an environment, programs, and services for a unique (age) population.

- ◆ Implements the most successful organizational structure designed in public school districts since the inception of kindergarten.
- ◆ Separates grade 6, 7, and 8 from elementary students and from high school students.
- ◆ Allows tailor-making of curriculum in academics, social skills, exploration, physical development, emotional development, service learning, and citizenship.
- ◆ Provides students with access to a staff with commitment to middle level education.
- ◆ Provides each student with access to an adult advisor and/or mentor who will maintain an open, caring, and assisting relationship with the student.
- ◆ Implements an organizational (grade level) configuration that is supported by research.
- ◆ Encourages team planning.
- ◆ Encourages interdisciplinary curriculum design.
- ◆ Is consistent with the precepts of Minnesota's Graduation Standards.
- ◆ Encourages follow-through with and monitoring of students' progress.

- ◆ Encourages more hands-on, application-based, applied learning, and performance-based/authentic assessment.
- ◆ Encourages greater parental involvement in the schools.
- ◆ Involves peer tutoring, cooperative learning, and teaming.
- ◆ Typically involves some measures of multi-age level grouping.
- ◆ Often encourages (staff) team teaching.

4.9 Modern-Day Program/Service Delivery

For the first two-thirds of the 20th Century, school districts employed relatively traditional (non-modern day) program and service deliveries/methodologies. As would be expected, school district facilities mirrored those traditional deliveries/methodologies. For example, the preferred methodology found in the classroom was a lecture style where teachers actively disseminated information in a single discipline (curricular area) and students passively listened, recorded lecture notes, read their textbooks, and, on a weekly basis (or more often), were examined with true/false, multiple choice, and fill-in-the-blank quizzes or test. Teachers customarily did not plan with one another, develop curriculum, group students for instruction, or teach collaboratively (team teaching). Special education students and, many times, low ability students were taught separately from average to high ability students. Older

students – to the degree possible – were segregated from younger students and, more certainly, would not be involved in tutoring younger pupils. Like-aged pupils rarely worked together in teams, and sharing information between/among students was considered cheating. 16 mm projectors were considered advanced technology, and computers, video cassette recorders/players, DVD's, interactive telecommunication, and the like did not exist. School districts collaborated with few external organizations. Other than periodic "shop" and "home ec" courses, application-based (hands-on) learning was rare and shunned as less worthy than paper/pencil activities.

School facilities constructed from 1900-1960's reflect the more traditional delivery systems and methodologies. Almost exclusively, they were multi-story fortresses – designed to last for a long time – even a century (and they have). By today's standards, classrooms in those buildings are small; the structures are handicapped inaccessible; unless somewhat modernized, they fail to meet fire code; air quality is typically below average; spaces for special education are converted storage areas or regular classrooms; electrical systems are inadequate to meet modern-day demand; conference spaces, teacher planning areas, and small group study areas are virtually non-existent; libraries are depositories for books – not multi-media technology centers; fine art spaces are antiquated; gymnasiums, weight rooms, practice areas, and the like are insufficient to meet the needs of both boys' and girls' programs – much less community patrons interested in aerobics, walking, running, volleyball and basketball leagues, and a myriad of other activities.

By comparison, modern-day program and service deliveries/methodologies incorporate the intertwining of related curricula (interdisciplinary curriculum design); grouping students for instruction (multi-age level grouping); clusters of teachers working together in the delivery of programs/services (team teaching); incorporation of technology (technology-based); students working together (cooperative learning) on complex, multi-faceted projects (project-based learning); students working cooperatively on elaborate community undertakings (community-based projects/experiences); students tutoring and serving as models for younger students (peer tutoring); lessons guided by staff members using a multiplicity of techniques and materials (multi-media) in extended time blocks (block scheduling) and assessing student acquisition of skills, concepts, and processes through demonstration and application (performance-based assessment and application-based learning); multiple agencies cooperating to provide educational, social, emotional and other support to students and families (multi-agency collaboration); schools providing opportunities for all students and adults to take maximum advantage of the school district's offerings (inclusive education, life-long learning, and community education).

It goes without saying that modern-day program and service deliveries and methodologies are extraordinarily different from the traditional systems that were in place for the first six decades of the 20th Century, and, most assuredly, the facilities that served communities, staff, and students so accommodatingly in the past are neither accommodating nor supportive of

modern-day instructional programs and services currently in place and, also, those envisioned in the future.

4.91 Delivery System and Methodology

The Project Consultant and Project Assistant interviewed the Superintendent of Schools, select district administrators, and all Principals of Moorhead School District #152 and observed the delivery of instructional programs and services in the school district's facilities to determine the prevalent instructional delivery systems and methodologies.

At the elementary school level, the Project Consultant and Project Assistant found instruction to be predominately delivered by individual teachers in self-contained classrooms. Complimentary methodologies included inclusive instruction (extensive), resource-based instruction (extensive), grouping for instruction (extensive), project-based learning (extensive), service learning (extensive), technology-based learning (extensive), peer tutoring (some), performance-based assessment (extensive), cooperative learning (extensive), team teaching (minimal), team planning (minimal), interdisciplinary curriculum design and delivery (some), and other methodological approaches (on a limited bases).

In addition to regular classroom delivery of instructional programs, specialists are available to deliver original or support services in art (Art Shop), physical

education, music, enrichment (gifted/talented), media, Title I, technology, special education, early childhood/special education, English as a second language, and other, related programs and services. Moorhead School District #152 employs an extensive amount of inclusive instruction with special education specialists working with individual students in the classroom while regular instruction is ensuing.

At the secondary school level, programs/courses are organized on a disciplinary (subject matter) basis. Staff members are typically employed according to their discipline (subject matter content) licensure. Almost exclusively, programs/courses are delivered in self-contained classrooms on a disciplinary (rather than an interdisciplinary) design.

Teaching methodologies at the secondary school level (and elementary school, as well) have begun changing as a result of mandatory implementation of State of Minnesota's Graduation Standards, district-sponsored staff development, curriculum realignment, and performance package development and implementation.

Moorhead School District #152's secondary school methodologies include inclusive instruction (extensive), cooperative learning (extensive), school-to-work programming (extensive), technology-based learning (extensive), research-based learning (extensive), applied learning (extensive), performance-based assessment (moderate to extensive), multi-age level grouping

(some), independent study (moderate to extensive), small group instruction (moderate to extensive), team teaching (little), team planning (little), interdisciplinary curriculum design and delivery (moderate and increasing), resource-based instruction (moderate), and other methodologies.

The Project Consultant acknowledges that Moorhead Senior High School students have access to an excellent array of dual college/high school course credits that may be taken from a number of area institutions of higher learning under the Post-Secondary Education Options Program.

4.92 Community Education Programs and Services

A review of Moorhead School District #152's **Community Education Annual Report, 1999-00** yielded that the school district displayed a beginning balance of \$442,509, garnered \$1,226,927 in revenue, and expended \$1,355,354. On June 30, 2000, the Community Education Program fund balance was \$414,082.

The school district's Community Education Program is extraordinarily broad and complex, including the following program areas: adult enrichment; adult basic education; after school programming; choices for adults with disabilities; early childhood/family education; early childhood screening; English as a second language; GED testing; kindergarten readiness; older adults programming (Senior Citizens); and youth service.

The 1999-00 Annual Report divulged outstanding participation levels in Moorhead School District #152's Community Education Programs and Services: adult basic education (574 participants); summer school, K-12 (280 participants); job skills training/retraining (6,732 participants); GED testing (581 participants); parent and child classes (997 participants); parent only classes (54 participants); special events for early childhood/family education (150 participants); pre-school screening (384 participants); family education/ services – non-ECFE (419 participants); non-credit general interest courses (2,301 participants); art/humanities (12,594 participants); tours/trips/travel/ films (454 participants); skills development (454 participants); recreational (713 participants); health and safety (1,024 participants); and social concerns (3,500 participants).

4.93 Technology

In meeting with Moorhead School District #152's Director of Information Systems and Instructional Support, an examination of program documents, and a tour of technology areas in the school district's teaching/learning facilities illustrated that Moorhead School District #152 has a vastly advanced technology plan and financial investment than would be found in Minnesota school districts of like-size or larger. The school district plans a 2000-01 investment of \$565,130 in its technology holdings and, more impressively, a \$7,674,336 investment in its technology holdings over the nine year span of

time, inclusive, from 2000-01 to 2008-09. (Computer work stations over the nine year span of time accounts for an anticipated expenditure of \$3,145,000).

A number of impressive accomplishments by the Department of Information Systems and Instructional Support staff over the past few years include the following: in the past two years, every school district teacher has received an on-desk computer with e-mail and Internet access; phones have been installed in all classrooms; there is connectivity to all school district buildings; a new telephone system has been installed in all buildings except Lincoln; fiber optic wire has been laid to all buildings except Lincoln and the Red River Area Learning Center; there are 1,800 computer units in the school district (500 are ten or more years old); a very cost/effective maintenance agreement has been secured; the district has achieved standard software on all computers; staff development classes are being offered – free of charge – to all staff members; and much more.

The Project Consultant concluded that the school district is in a position to use the status of its technology holdings and services as a marketing device for attracting student enrollment from other school districts into the Moorhead Public Schools.

4.94 Alternative Programming

The Project Consultant met with chief administrators of the Youth Educational

Services (Y.E.S.) and the Red River Area Learning Center, two programs with very similar focuses that serve disenfranchised youth from Moorhead School District #152 and other, surrounding school districts.

The Youth Educational Services is operated by Lakes Country Service Cooperative and is classified as an Alternative Learning Program.

Red River Area Learning Center is substantially cost-underwritten by Moorhead School District #152, though three other area school districts' students receive RRALC services. The Red River Area Learning Center currently operates with full area learning center status (school year and summer programming).

According to information requested of Moorhead School District #152 in late December, 2000, 132 Moorhead School District students were attending the Red River Area Learning Center as of December 1, 2000 while 64 Moorhead School District students had attended the Youth Educational Services program in September-October, 2000.

While the Project Consultant has had extensive experience working with and evaluating both Area Learning Programs and Area Learning Centers, the **Organizational Analysis Study** did not call for an exhaustive investigation/analysis of any particular program. Nonetheless, the Project Consultant did bring to the attention of Moorhead's Superintendent of Schools and the

executive administrators of the Youth Educational Services and Red River Area Learning Center that (a) Moorhead School District #152's enrollment in the two programs seemed excessive (for a school district of Moorhead's size) and (b) it was difficult for the Project Consultant to fathom why these two programs could/should not operate – administratively – as one. The Project Consultant recommends that (a) the administrative and teaching staffs at Moorhead Senior High School examine and address those factors which may be causing the seemingly large number of students to out-migrate from the high school to either the Red River Area Learning Center or Youth Educational Service Program and (b) Moorhead School District's executive administration work with the leadership of the RRALC and YES to determine whether or not the two programs could be merged and administrative and operational costs to Moorhead School District #152 reduced.

4.95 Special Program: Spanish Immersion Program

The Project Consultant and Project Assistant interviewed Principal Anne Moyano, Probstfield Elementary School, regarding Moorhead School District's Spanish Immersion Program. Additionally, materials prepared by the Foreign Language Immersion Program Task Force and December, 2000 demographics were reviewed.

At the time of conducting the **Organizational Analysis Study**, Moorhead School District #152's Spanish Immersion Program enrolled 109 students in

grades K-2. Participants in the voluntary district-wide program appear to mirror the school district's socio-economic, racial/ethnic, and special needs' figures from throughout the school district. Class sizes – as of December 1, 2000 – for the Spanish Immersion Program's kindergarten, grade 1, and grade 2 were **all higher** (worse) than the district's grade level averages.

As a district-wide program, it is axiomatic that the Spanish Immersion Program would be more expensive to operate on a cost per pupil basis than if no such program existed. Indeed, greater transportation and special material costs exist and could provide justification – in some individuals' minds – for elimination of the program. At the same time, however, the Project Consultant does not envision that Moorhead School District #152's fiscal future will rise or fall as a result of minor additional expenditures being allocated to the school district's Spanish Immersion Program. To be sure, the Project Consultant envisions the school district has substantially larger issues to address than whether or not this unique program were allowed to blossom or were to be eliminated in the future.

4.96 Special Program: Art Shop

The Project Consultant was asked to examine the school district's centralized elementary art program, located in a large, open-space suite of classrooms on the second floor of the Sports' Center. School district elementary school students are transported to the Art Shop for art instruction on a (approximately) monthly basis.

Centralized delivery of the school district's elementary art instruction does incur costs which would not normally be experienced by the school district if such art instruction/programming were to be carried out in individual elementary school buildings. Conversely, however, centralized art instruction in the Sports' Center likely (a) reduces duplicated supply costs among multiple elementary school buildings, (b) provides uniform, quality, teaching/learning spaces, (c) insures consistency in the program's curricular quality and delivery, (d) eliminates over-stressing individual elementary buildings (employing an art room in each building), (e) eliminates "art on the cart" programs that typically emerge in school districts when classroom space is at a premium, and (f) eliminates travel costs associated with art staff members serving multiple buildings.

As was the case in examining the school district's Spanish Immersion Program, the Project Consultant could find no **significantly compelling reason** for dismantling the school district's Art Shop (or turning it over to the Senior High School) to realize a comparatively small savings in student transportation while, simultaneously, reducing the general quality of the school district's elementary art program.

4.97 Trollwood Performing Arts School

The Project Consultant discussed with Superintendent Larry Nybladh and Assistant Superintendent Lynne Kovash, Moorhead Public Schools, the

nature and content of the Trollwood Performing Arts School, the contents of a grant proposal to the Perpich Center for Arts, and additional information/documentation regarding potential, expanded commitments on the part of the school district to arts education.

The Project Consultant was most impressed by descriptive information (video-tape and written) reviewed on the Trollwood Performing Arts School. Unfortunately, given the current, dire status of Moorhead School District #152's financial resources, the Project Consultant recommends that the school district only become involved in the Trollwood Performing Arts Schools or a derivative program thereof if such involvement can be initiated without requiring new, significant cost obligations on the part of the school district. The Project Consultant cannot emphasize more strongly that the district currently could ill-afford to institute new or expanded programs without simultaneously eliminating offsetting expenditures. (See Appendix I for a more extensive treatment of this topic).

4.98 Special Program: Moorhead High School Methodology Changes

During the course of conducting the **Organizational Analysis Study**, the Project Consultant had numerous opportunities to converse with a sampling of school district representatives regarding potential methodological changes that were in the process of being considered by Moorhead High School's administrative and teacher leadership. Select methodological changes under

study included an advisor-advisee program; a school within a school program; alternative scheduling; and a series of program academies (programs/course clusters).

The Project Consultant was most enthusiastic about efforts being made by Moorhead Senior High School's administrative and teaching staffs to implement any and all methodological changes that heighten staff contact with individual students, personalize instruction, reduce enrollment in the Red River Area Learning Center and/or Youth Educational Services, reduce the out-migration of resident students to other school districts through the Minnesota Open Enrollment Options' Program, reduce students dropping out, and increase the in-migration of non-resident students from other school districts to Moorhead Senior High School through the Minnesota Open Enrollment Options' Program.

The Project Consultant recommends that Moorhead Senior High School's administrative and teaching staffs proceed with instituting, most particularly, the advisor-advisee program, school within a school program, and academy program as expeditiously as possible and, further, weigh the merits/demerits of a modified block schedule for the high school in the future.

4.99 District-Wide Curriculum

The Project Consultant and Project Assistant explored with members of

Moorhead School District #152's central and building administrative staffs and, to a lesser degree, teaching staff members the status of the organization's curriculum – including detailed specifications of skills, concepts, and processes; program/course scope and sequences; performance-based assessment instruments; content articulation between grade levels and between buildings; and the like. While significant improvements have taken place in recent years (State of Minnesota Graduation Standards' implementation), both administrators and teachers expressed the need for increased curriculum development and staff development between/among buildings, between/among building levels, within grade levels, across grade levels, and district-wide.

The Project Consultant found district and building administrators and classroom teachers most supportive of curriculum specification measures which will enhance student learning, delivery of the teaching/learning process, and accountability.

4.991 Summary

Summarized below are salient data elements which describe the status of Moorhead School District #152's educational programs, services, staffing, organization, delivery systems, methodologies, community education programming, technology, special programs, and others:

- ◆ The school district operates a P-K-4, 5-6, 7-8, 9-12 organizational configuration.
- ◆ The school district's average elementary class section size (K-6) during the 2000-01 school year was 25.3 students/section.
- ◆ The school district staffed 86 elementary class sections or 96.7% with enrollments of 29 students or less at Edison, Probstfield, Riverside, and Washington Elementary Schools during the 2000-01 school year.
- ◆ The school district staffed 25 of 27 grade 5-6 class sections or 92.6% with enrollments of 29 students or less at Robert Asp School during the 2000-01 school year.
- ◆ The Project Consultant rated Moorhead School District #152's elementary class sections as staffed at a highly cost/effective level during the 2000-01 school year.
- ◆ The school district's high school conducted 24 course sections or 7.7% with less than 20 students/section, 71 course sections or 22.7% with 20-25 students/sections, 109 sections or 34.8% with 26-29 students/section, and 109 sections or 34.8% with 30 students or larger/section during the 2000-01 school year.

- ◆ Moorhead Junior High School conducted 194 sections of which 10 sections or 5.2% enrolled less than 20 students/section, 58 course sections or 29.9% enrolled 20-25 students/section, 78 course sections or 40.2% enrolled 26-29 students/section, and 48 course sections or 24.7% enrolled 30 or more students/section during the 2000-01 school year.
- ◆ The Project Consultant rated the staffing of Moorhead School District #152's high school and junior high school class sections as highly cost/effective.
- ◆ The school district made available 229 semester course offerings to high school students in grades 9-12 during the 2000-01 school year.
- ◆ The school district's high school course offerings spanned 11 disciplines: art; business; English; family and consumer science; industrial technology; mathematics; music; physical education/health; science; social studies; and world languages.
- ◆ The school district's high school offered students the broadest array of semester course offerings in the following disciplines during the 2000-01 school year: English (36 semesters); mathematics (29 semesters); social studies (26 semesters); industrial technology (25 semesters); and world languages (25 semesters).

- ◆ The school district's narrowest range of high school semester course offerings was made available in the following disciplines during the 2000-01 school year: art (8 semesters); physical education/health (8 semesters); and family and consumer science (9 semesters).
- ◆ The school district has made extraordinary progress in implementing the State of Minnesota's Graduation Standards, including training, curriculum alignment, and development/field testing of performance packages.
- ◆ The school district's high school employed 67 full-time **regular education** teaching staff members during the 2000-01 school year. Fifty-two of the full-time high school teaching staff members or 77.6% were assigned 1-2 teaching preparations daily, while the remainder was assigned 3-4 teaching preparations daily (actually 13 of the 15 staff members were assigned 3 preparations daily).
- ◆ The school district employed 343 full-time professional staff members in 1988-89 and 446 full-time professional staff members in 1998-99, an increase of 103 staff members or +30.0% over the 10 year span of time.
- ◆ The school district's student enrollment increased from 5,182 youngsters in 1988-89 to 5,881 students in 1998-99, a gain of +699

students or +13.5%. During the same time span, the school district's full-time professional staff increased by 30.0%.

- ◆ The Project Consultant cautions the school district in the future to institute measures to insure that increases or decreases in professional staff members more closely parallel increases or decreases in student enrollment, thereby preserving the financial viability of the organization.
- ◆ The school district's pupil/professional staff ratio decreased (improved) from 15.0/1 in 1988-89 to 12.8/1 in 1998-99, a drop of -2.2 students/1 professional staff member or -14.7%.
- ◆ The average of all peer group school districts' pupil/professional staff ratio decreased (improved) from 15.6/1 in 1988-89 to 14.4/1 in 1998-99, a decline of -1.2 students/1 professional staff member or -7.7%, and the average of all Minnesota school districts' pupil/professional staff ratio declined from 15.0/1 in 1988-89 to 14.0/1 in 1998-99, a decrease of -1.0 students/1 professional staff member or -6.7%.
- ◆ The school district's pupil/professional staff ratio has been consistently lower than (better than) the average ratio of all Minnesota school districts and the average ratio of all like-sized school districts between 1988-89 and 1998-99.

- The school district furnishes a broad and comprehensive array of instructional and support services for pre-school, school-aged, and adult populations that would be characteristic of Minnesota school districts with enrollments of 5,000-10,000 students.
- The school district operated a K-4/5; 5-6; 7-8; 9-12 organizational configuration during the 2000-01 school year.
- The Project Consultant noted as unusual that a school district of the size and quality of Moorhead School District #152 did not have in place (operationally) a modern-day middle school facility, philosophy, and programs and services.
- The school district's teaching staff predominately delivered instruction in self-contained classrooms employing, largely, lecture methodologies. Complimentary methodologies included inclusive instruction, resource-based instruction, grouping for instruction, project-based learning, service learning, technology-based learning, peer tutoring, performance-based assessment, cooperative learning, team teaching, team planning, interdisciplinary curriculum design and delivery, and other methodological approaches.
- The school district's Community Education Program is broadly-based and service-oriented, expanding the range of programs and services available to youth and adults in the metropolitan area.

- ◆ The school district's technology program is well planned, designed, and implemented, providing the school district with a state-of-the-art mechanism for attracting students to the school district.

- ◆ Disenfranchised school district students receive alternative instruction through the Youth Educational Services and the Red River Area Learning Center. School district administrators are encouraged to examine with the leadership of the RRALC and YES whether or not the two programs could be merged and administrative and operational costs reduced to the school district.

- ◆ The Project Consultant could not find compelling reasons for the school district to dismantle its Spanish Immersion Program.

- ◆ The Project Consultant could not find substantial reasons for dismantling the school district's Art Shop.

- ◆ The Project Consultant felt that the school district would benefit from pursuing a possible implementation of an expanded fine arts program in cooperation with the Fargo Public Schools, City of Fargo, and City of Moorhead. The school district should only become involved in an expanded fine arts program, however, if such involvement can be initiated without requiring new, significant cost obligations on the part of the school district.

- ◆ The school district's Moorhead Senior High School should proceed with instituting an advisor-advisee program, school within a school program, an academy program as expeditiously as possible and, further, weigh the merits/demerits of a modified block schedule for the high school in the future.
- ◆ The school district has a need for greater coordination and accountability in the development of curriculum between and among buildings, between and among building levels, within grade levels, across grade levels, and district-wide.

CHAPTER V

SCHOOL FACILITIES

5.0 Introduction

Following the Project Consultant's examination of Moorhead School District #152's district size, enrollment trends, finances, educational programs and services, staffing, organization, delivery system and methodologies, community education programming, technology, and related issues, a context had been provided within which an assessment could be made of the condition of the school district's current facilities.

5.1 Importance of School Facilities

It is axiomatic that the environment in which a process occurs may be supremely important to the final outcome, productivity, performance, and accountability of the process. School facilities provide the environment within which the teaching/learning process unfolds and the environment within which students either will or will not acquire skills, concepts, processes, and attributes necessary to function with distinction in the highly-competitive global economy that will characterize the 21st Century.

It is with more than just passing interest the Project Consultant observed that, only in the last few decades, school districts have given genuine consideration

to the degree to which school facilities may enhance or detract from the delivery of educational programs and services for students.

Prior to the 1970's and the onset of special education programs, gender equity and the delivery of curricular, extra-curricular, and co-curricular programs, handicapped accessibility, health and life safety issues, technology expansion, child-care, early childhood/family education programming, parent education, Senior Citizen programming, multi-institutional collaboration, burgeoning recreational and enrichment programming, and a myriad of other programs and services, school facilities simply "housed" instructional programs and services. In today's and tomorrow's information age, school facilities must do much more than "house" the needs of pre-schoolers, school-aged students, parents, and community patrons. Access to sophisticated laboratories, a range of co-educational programs, rapidly changing technology, sophisticated media, child-care programming, early childhood opportunities, enhanced parent/patron involvement in the schools, business/educational partnerships, performance-based curricular design, multi-district telecommunications connectivity, co-location of governmental programs and services, expanded volunteerism, community-based and project-based learning, graduation standards' implementation, and much, much more must be taken into consideration in appraising and assessing existing and/or future school facilities.

In part, Moorhead School District #152's **Organizational Analysis Study** is focused on assessing the school district's teaching/learning environment in

which "students either will or will not acquire the skills, concepts, processes, and attributes necessary to function with distinction in a highly-competitive global economy that will characterize the 21st Century;" offering conclusions, alternatives, and recommendations to assist the School Board, Superintendent, administration and teaching staffs, and community patrons strengthen the organization's teaching/learning environment; and, indeed, providing a framework within which the school district can be strengthened as the "centerpiece of the community's infrastructure" to attract prospective parents, patrons, and students to the school district and community in the future.

5.2 Guidelines for School Facilities

Presented below in Table 19 are Selected Guidelines for School Facilities – established by the State of the Minnesota – which provide representative benchmarks for school districts to use when undertaking new construction, renovation, and remodeling projects and/or comparative facility appraisal.

TABLE 19 SELECTED GUIDELINES FOR SCHOOL FACILITIES MINNESOTA DEPARTMENT OF CHILDREN, FAMILIES AND LEARNING			
<u>School Enrollment</u>	<u>Elementary SF</u>	<u>Middle Level SF</u>	<u>High School SF</u>
Less than 500	125-155	170-200	200-225
500-999	110-135	160-190	190-220
For Pool Addition	10-12	10-12	10-12
For Auditorium Addition	10-12	10-12	10-12

5.3 Overview of the School District's Facilities

At the time of the conduct of the **Organizational Analysis Study**, Moorhead School District #152 owned or operated all or parts of 11 on-site facilities: Edison Elementary School; Probstfield Elementary School; Riverside Elementary School; Washington Elementary School; Robert Asp School; Moorhead Junior High School; Moorhead Senior High School; Lincoln (early childhood center); Sports Center (owned by the City of Moorhead); Townsite Centre (district administrative offices; leased space; and former senior high school); Voyager School (adult basic education programming).

Table 20 below provides the dates of original construction of and additions to each of the aforementioned facilities; types of organizational configuration; facility square footages; 2000-01 enrollments (if applicable); and 2000-01 square footages/student (if applicable).

Edison Elementary School is a K-5 teaching/learning facility, located in the city of Moorhead. The facility was constructed in 1953 and received four subsequent additions in 1960, 1969, 1972, and 1992. The Edison structure provided 52,479 square feet of teaching/learning, office, and support spaces for the 2000-01 student population of 539, offering a miniscule 97.4 square feet/student. (It is to be noted that the Project Consultant used **Minnesota Department of Children, Families and Learning** facility square footage figures in constructing Table 20).

Probstfield Elementary School is a K-4 teaching/learning facility, located in south Moorhead. The Probstfield facility provided 70,130 square feet of teaching/learning, office, and support spaces for a 2000-01 student population of 642, affording a minimal 109.2 square feet/student. The Probstfield Elementary School facility was constructed in 1965 and received two additions in 1970 and 1993.

Riverside Elementary School is a K-5 teaching/learning facility, located in southwest Moorhead. The facility was constructed in 1951 and received two subsequent additions in 1960 and 1969. The Riverside Elementary School structure provided 40,425 square feet of teaching/learning, office, and support spaces for a 2000-01 student population of 374, offering a minimum 108.1 square feet/student.

Washington Elementary School is a K-4 teaching/learning facility, located in the city of Moorhead's north side. The facility was constructed in 1951 and received two additions in 1960 and 1970. The Washington structure afforded 66,490 square feet of teaching/learning, office, and support spaces for a 2000-01 student population of 592, yielding a minimal 112.3 square feet/student.

Robert Asp School is a grade 5-6 teaching/learning facility and is located in the north side of the city of Moorhead. The facility was constructed in 1958

and received additions in 1992 and 1993. The Asp building granted a 2000-01 student population of 788 some 94,985 square feet of teaching/learning, office, and support spaces, yielding an average of 120.5 square feet/student.

Moorhead Junior High School is a grade 7-8 teaching/learning facility. The building is located in the south side of the city of Moorhead. Originally constructed in 1958, Moorhead Junior High School received subsequent additions in 1989, 1990, and 1993. The South structure provided 111,005 square feet of teaching/ learning, office, and support spaces for a 2000-01 student population of 856. Thus, the facility provided 129.7 square feet/student in that year.

The Moorhead Senior High School facility is located on the east side of the city of Moorhead and houses the school district's grade 9-12 student population. Originally constructed in 1966, Moorhead Senior High School has received two subsequent additions in 1991 and 1993. The Senior High School facility provided 286,031 square feet of teaching/learning, office, and support space in 2000-01 for 1,728 students. The average number of square feet/student available in 2000-01 at Moorhead Senior High School was 165.5.

Lincoln School is located in north Moorhead and is the school district's smallest facility. Constructed in 1971, the building has received no subsequent additions. Used primarily for the delivery of Early Childhood/Family Education Program offerings, the school offers 7,022 square feet of teaching/ learning, office, and support spaces.

The Sports Center was constructed by the City of Moorhead in 1992 and has received no subsequent additions. Located adjacent to Moorhead Senior High School, the Center offers 19,473 square feet of teaching/learning, recreational, and support spaces. Moorhead School District leases portions of the Sports Center for delivery of athletic, art, and special education/day treatment programming.

The Townsite Centre is located in the center of the city of Moorhead and previously served as Moorhead School District #152's Senior High School. The facility was constructed in 1920 and received an addition in 1936. Currently, the 79,870 square foot facility serves as office headquarters for Moorhead School District #152 and, additionally, leased space for a number of private and public sector organizations.

Voyager School is located in north Moorhead on property which is contiguous to Washington Elementary School. The facility was previously owned by the St. Francis Church (Crookston Diocese) and purchased by Moorhead School District #152. Constructed in 1948, the structure received an addition in 1956. Currently, the 38,822 square foot Voyager School is used by Moorhead School District #152 for the delivery an array of adult programs.

The Project Consultant noted that the average age of **original school structures** in Moorhead School District #152's **current seven teaching/learning facilities** was 43.6 years. The Project Consultant concluded that

Moorhead School District #152's facilities are quite aged.

**TABLE 20
MOORHEAD SCHOOL DISTRICT #152
OVERVIEW OF FACILITIES
2000-01**

<u>School</u>	<u>Dates</u>	<u>Type</u>	<u>Square Feet</u>	<u>Enrollment</u>	<u>Sq. Ft./Student</u>
Edison	1953 1960 1969 1972 1992	K-5	20,652 19,950 7,250 2,880 1,747 (52,479)	539	97.4
Probstfield	1965 1970 1993	K-4	46,013 14,807 9,310 (70,130)	642	109.2
Riverside	1951 1960 1969	K-5	19,540 13,455 7,430 (40,425)	374	108.1
Washington	1951 1960 1970	K-4	38,780 23,870 3,840 (66,490)	592	112.3
Robert Asp	1958 1992 1993	5-6	80,000 1,685 13,300 (94,985)	788	120.5
Moorhead JHS	1958 1989 1990 1993	7-8	80,000 1,897 4,962 24,146 (111,005)	856	129.7
Moorhead HS	1966 1991 1993	9-12	238,800 5,069 42,162 (286,031)	1,728	165.5
Lincoln	1971	EC	7,022		
Sports Center	1992		19,473		
Townsite Centre	1920 1936	Offices	76,000 3,870 (79,870)		
Voyager	1948	Adult	26,332		

	1956		12,490 (38,822)		
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5.4 Facility Observations by the Project Consultant

The Project Consultant toured Moorhead School District #152's school facilities to assess the **educational adequacy** of the facilities. **Educational adequacy** is a phrase employed to describe the capabilities of a school facility to enhance the delivery of modern-day programs, services, methodologies, delivery systems, and learning experiences that will ensure students are well-positioned to perform with distinction in a highly-competitive, global marketplace upon high school graduation and subsequent further training in an institution of higher learning (e.g. technical institution, college, university, military, or other).

Except in newly-constructed schools, most modern-day school facilities lack select components of **educational adequacy**, but in the main, they clearly exhibit a significant majority of the following design components and characteristics:

- ◆ Adequate size, including space for parking, playgrounds, athletics/recreational/community usage, transportation access, other.
- ◆ Meet health, life safety, and accessibility statutes and codes.
- ◆ Display modern-day electrical and mechanical systems.

- ◆ Display current technology, including voice, video, and data access.
- ◆ Provide adequate classroom and specialty room space per student.
- ◆ Are flexibly-designed to accommodate multi-purpose functions.
- ◆ Accommodate modern-day teaching methodologies and delivery systems, including team teaching, project-based learning, applied learning, cooperative learning, community-based learning, interdisciplinary curriculum delivery, performance-based assessment, co-located programming, inclusion model, resource-based model, multi-age level grouping, technology-based learning, peer tutoring, and the like.
- ◆ Provide adequate conferencing space.
- ◆ Furnish variable teaching/learning spaces, including independent study, small group, and large group spaces.
- ◆ Offer specialty spaces for teacher planning, teaming, and curriculum design.
- ◆ Offer a centrally-located, spacious, multi-purpose media center as the "hub" of the school.
- ◆ Provide teacher office areas.

- ◆ Furnish adequate meeting spaces.
- ◆ Incorporate contemporary equipment, furniture, and fixtures.
- ◆ Encourage before and after school usage by the community, while maintaining the integrity (security) of the school district's properties.
- ◆ Facilitate usage of technology in the teaching/learning process.
- ◆ Other factors.

Among notations (including select educational inadequacies) identified by the Project Consultant in Moorhead School District #152's teaching/learning facilities were the following:

Edison Elementary School

- ◆ A largely aged facility.
- ◆ Predominately under-sized classrooms.
- ◆ Under-sized site.
- ◆ Over-taxed facility for student population served.
- ◆ Under-sized library/media center.

- ◆ Insufficient teacher planning, conferencing, and office spaces and areas.
- ◆ Facility is not flexibly designed to accommodate multi-purpose functions.

Probstfield Elementary School

- ◆ The school district's most modern-day elementary school design.
- ◆ More favorably-sized site (10 acres).
- ◆ More flexibly designed facility.
- ◆ Appropriately-sized classrooms.
- ◆ Under-sized media center.
- ◆ Multiple music suites.
- ◆ Multiple multi-purpose gymnasium spaces.
- ◆ Inadequate space available for teacher planning, conferencing, and offices.
- ◆ Less than desirable location for Principal's office.

Riverside Elementary School

- ◆ Under-sized, cost/ineffectively small elementary school by modern-day standards.
- ◆ Generally under-sized classrooms.
- ◆ Under-sized library/media center.
- ◆ Appropriately-sized kindergarten classrooms.
- ◆ Under-sized site size (1.5 acres).
- ◆ Aged facility.
- ◆ Facility is not designed for flexibility and modern-day teaching methodologies/delivery systems.
- ◆ Inadequate teacher planning, conferencing, and office spaces.
- ◆ Under-sized gymnasium.
- ◆ Under-sized music suite.

Washington Elementary School

- ◆ The school district's only two story elementary school.
- ◆ Under-sized site (5.94 acres).
- ◆ Aged (1951 original) facility.

- ◆ Favorably sized general purpose classrooms.
- ◆ Excellent sized kindergarten classrooms.
- ◆ Insufficient teacher planning, work, conferencing, and office spaces.
- ◆ Adequate music suite.
- ◆ Inadequate gymnasium/multi-purpose space.

**Robert Asp Intermediate School
and
Moorhead Junior High School**

- ◆ Both two story structures.
- ◆ Robert Asp has a somewhat limited site (approximately 7 acres), while Moorhead Junior High School has an ample site (20 acres). Neither facility was designed as either an elementary school or middle school.
- ◆ Both schools' general purpose classrooms range from adequate to marginal.
- ◆ Science laboratories are antiquated.
- ◆ Adequate gymnasias.

- ◆ Adequate cafeteria/multi-purpose space.
- ◆ Adequate music space.
- ◆ Poor location of administrative suites.
- ◆ Marginally-sized library/media centers.
- ◆ Somewhat greater facility flexibility than the school district's elementary schools.
- ◆ More favorable teacher planning, conferencing, office, and support spaces (than elementary schools).

Moorhead Senior High School

- ◆ The school is situated on an ample 55 acre site.
- ◆ The media center is amply-sized and centrally located.
- ◆ The school has multiple physical education stations, including three gymnasias, a competitive pool, and weight training area.
- ◆ The school has an auditorium and ample, quality music spaces.
- ◆ The school has multiple, quality science laboratories.
- ◆ The school has acceptable family and consumer science laboratories.

- ◆ The school has acceptable industrial technology teaching/learning spaces.
- ◆ The administrative suite is poorly located.
- ◆ The school's business education/technology spaces are acceptable.
- ◆ The school has marginally adequate teacher planning, conferencing, support, and office spaces.
- ◆ The school does not have an accommodating "commons area" for students.
- ◆ Much of the school's classrooms have no natural light.
- ◆ The school's design is confusing and not accommodating to the separation of students into smaller groupings (e.g. grade level houses).

Lincoln School

- ◆ The school provides an adequate setting for the district's Early Childhood/Family Education Program.

Sports Center

- ◆ The facility is modern-day.

- ◆ The ice surface is excellent.
- ◆ The elementary art instructional spaces are excellent.
- ◆ The gymnasium space is acceptable by modern-day standards.
- ◆ Office spaces are acceptable.
- ◆ Instructional (special education) spaces are acceptable by modern-day standards.

Townsite Centre

- ◆ The facility serves as the headquarters for Moorhead School District #152.
- ◆ The facility serves as leased space for numerous profit and non-profit businesses/organizations.
- ◆ As a teaching/learning facility, the building does not meet modern-day standards.

Voyager School

- ◆ A multi-story structure.
- ◆ Situated on a woefully small 1.37 acre site.
- ◆ Cost/ineffectively small facility.

- ◆ Does not meet modern-day standards.

5.5 Leased Property

Moorhead School District #152 requested authorization from the Minnesota Department of Children, Families and Learning to levy for the lease of \$347,423.50 worth of properties during the 2000-01 school year. Specific property leases were as follows:

- ◆ D & M Technologies to house the Red River Area Learning Center = \$128,850
- ◆ City of Moorhead/Moorhead Sports Center to provide weight room and art education space = \$25,600; house the Outreach Center = \$28,095; and provide ice and dry floor space for physical education = \$34,606
- ◆ Lakes Country Service Cooperative to house the Clay County Coordinated Pre-school = \$29,040; to rent a pro rata share of the YES Area Learning Center = \$17,032
- ◆ Fargo Public School District to provide a gymnasium space for gymnastics = \$10,000
- ◆ Richards Warehouse to provide storage space = \$10,200

- ◆ University of Minnesota, Moorhead/Concordia College to provide access to athletic fields = \$4,000

The Project Consultant observed that Moorhead School District #152 was leasing considerable property – at a cost to the local taxpayer – to house or accommodate essential programs and services offered by the organization. Simultaneously, the Project Consultant observed that Moorhead School District #152 was managing, maintaining, and leasing property to both profit and non-profit organizations (e.g. Townsite Centre). It is the Project Consultant's assessment that the school district's management, maintenance, and leasing of excess (surplus) properties (e.g. Townsite Centre and Voyager School) places an inordinately large workload on the organization's business administration and, furthermore, could ultimately be responsible for future dissipation of the school district's capital resources in repairing and retrofitting facilities which are only marginally used for school programming.

CHAPTER VI

CONCLUSIONS, ALTERNATIVES, AND RECOMMENDATIONS

6.0 Introduction

Superintendent of Schools, Dr. Larry Nybladh, and the School Board of Moorhead School District #152 determined it was appropriate and necessary to commission an **Organizational Analysis Study** to gather and analyze school district data, present findings, draw conclusions, identify alternatives, and prepare recommendations that would lead to the formulation of decisions about the future of the school district's programs, services, staffing, grade level configuration, facilities, and other operational characteristics in order to insure the delivery of quality, cost/effective teaching/learning, community, social, and recreational opportunities for the school district's pre-school, school-aged, and adult populations.

Cited below are those questions which were prepared to guide the conduct of the **Organizational Analysis Study**:

- ◆ What is the current status of the school district's enrollment, enrollment trends, finances, programs, services, staffing, organizational configuration, facilities, and related issues?

- ◆ What conclusions may be drawn about the effectiveness, efficiency, and cost/effectiveness of the school district's operations?
- ◆ What alternatives are plausible for increasing the effectiveness, efficiency, and cost/effectiveness of the school district's operations?
- ◆ What recommendations does the Project Consultant suggest may be employed to increase the effectiveness, efficiency, and cost/effectiveness of the school district's operations?

6.1 Conclusions

Based on data gathered, analyzed, and presented in the previous four chapters of the **Organizational Analysis Study**, the Project Consultant offers the following conclusions to the School Board and Superintendent of Moorhead School District #152:

District Size and Enrollment Trends

- ◆ **By State of Minnesota standards, the school district would be classified as a large critical student mass school district.**
- ◆ **While the school district displayed a net gain in student enrollment between 1989-90 and 1999-00, declining enrollment**

figures have characterized the school organization for six consecutive years.

- ◆ An examination of 2000-01 enrollment by grade level profiles Moorhead School District #152 as a declining enrollment school district.
- ◆ The school district's student enrollment is projected to decline in the future and, unless intervening variables modify that trend, the loss of students will be accompanied by diminishing programs, services, staffing, and, likely, facilities.
- ◆ The school district's loss of student enrollment through the Minnesota Open Enrollment Options' Program, non-public school attendance, home school participation, Alternative Learning Center and Alternative Learning Program opportunities – as well as participation in the Post-Secondary Education Options' Program – exacts a significant revenue drain on the school district. In virtually no instances are departing students receiving higher quality instructional programs and services than are available in the school district.
- ◆ Face-to-face, telephone, and e-mail contact with the parents of students and actual students who have departed programming in Moorhead School District #152 illustrate that, among reasons

for leaving the school district, "impersonal environment" and "unconnectedness" ranked near the top (along with "convenience in attending another school district" and "desire for smaller environment"). Impersonal environment comments were cited, most often, about the school district's junior high school and, then, senior high school.

- ◆ The school district's 0-4 census count suggests a continuing weakening of the organization's K-12 student enrollment in the future.

Finances

- ◆ Between 1994-95 and 1999-00, the school district's General Fund revenues increased by +\$9,431,223 or +29.9%, while the General Fund expenditures increased by +\$12,974,000 or +42.4%.
- ◆ The school district's General Fund balance decreased from \$5,978,184 in 1997-98 to \$1,207,075 in 1999-00.
- ◆ Between 1993-94 and 1999-00, the school district operated balanced General Fund budgets on three of six occasions and improved its General Fund balance on four of six occasions.

- ◆ **At the conclusion of the 1999-00 school year, the school district's General Fund balance of \$1,207,075 amounted to a paltry 2.8% of the school district's General Fund expenditure budget of \$43,600,427.**

- ◆ **The Project Consultant assessed that Moorhead School District #152 was a financially-troubled educational organization.**

- ◆ **The Project Consultant concluded that the school district expends funds for total P-K-12 operations at a lower rate than is found in the average of all like-sized school districts in Minnesota and in the average of all school districts in the State of Minnesota. The school district is a below-average spending organization.**

- ◆ **Between 1988-89 and 1998-99, the school district trailed the average of all like-sized school districts in Minnesota and the average of all Minnesota school districts in the following expenditure categories: district and school administration; district support services; regular instruction; vocational instruction; instructional support services; pupil support services; operations and maintenance; food services; and transportation.**

- ◆ **The school district significantly exceeded exceptional instruction spending for the average of all like-sized school districts in Minnesota and the average of all Minnesota school districts in 1988-89 through 1998-99.**

- ◆ **The school district displays low adjusted net tax capacity when compared to the average of all like-sized school districts in Minnesota and the average of all Minnesota school districts. Consequently, by State of Minnesota standards, the school district would be classified as a property-poor school district.**

- ◆ **The school district would likely qualify for debt service equalization to support any future new facility construction, remodeling, expansion, and/or betterment projects.**

- ◆ **By State of Minnesota standards, the school district has a miniscule level of bonded indebtedness for an educational organization of similar size.**

- ◆ **The Project Consultant concluded the school district displays extraordinarily low expenditures for long-term debt and debt service.**

- ◆ **The Project Consultant concluded the school district has under-invested in its teaching/learning facilities when compared to school districts of comparable or larger size.**

- ♦ The school district has employed an excess levy referendum to provide funding resources for select capital improvement projects in the school district over a multi-year timeframe. The Project Consultant suggests that the school district utilize dollars derived from the excess levy referendum – if approved by the public – for the support of instructional programs and services ... not capital improvements.

Educational Programs, Services, and Staffing

- ♦ The school district staffs its elementary class sections at a highly cost/effective level.
- ♦ The school district staffs its junior high school and senior high school class sections at highly cost/effective levels.
- ♦ The school district made available 229 semester course offerings to high school students in grades 9-12 during the 2000-01 school year.
- ♦ The school district offers an excellent, broad array of course offerings for high school students in grades 9-12.
- ♦ The school district has made extraordinary progress in implementing the State of Minnesota's Graduation Standards,

including training, curriculum alignment, and development/field testing of performance packages.

- ◆ **The school district's regular junior high school and senior high school staff members are assigned – in the main – a favorable number of teaching preparations daily when compared to school districts of like-size.**
- ◆ **The school district's pupil/professional staff ratio in 1998-99 was cost/ineffectively low.**
- ◆ **The school district continued to increase the number of professional staff members in recent years – despite the fact that student enrollment was declining.**
- ◆ **The school district's pupil/professional staff ratio has been consistently lower than (better than) the average ratio of all Minnesota school districts and the average ratio of all like-sized school districts between 1988-89 and 1998-99.**
- ◆ **The school district furnishes a broad and comprehensive array of instructional and support services for pre-school, school-aged, and adult populations that would be characteristic of Minnesota school districts with enrollments of 5,000-10,000 students.**

- ◆ **The Project Consultant found it unusual that a school district of the size and quality of Moorhead School District #152 did not have in place (operationally) a modern-day middle school facility, philosophy, and programs and services.**
- ◆ **The Project Consultant found that the school district's facilities – in many instances – limited the implementation and/or refinement of modern-day teaching methodologies and delivery systems.**
- ◆ **The school district's Community Education Program is broadly-based and service-oriented, expanding the range of programs and services available to youth and adults in the metropolitan area. The program is a real asset to the school district.**
- ◆ **The school district's technology program is well planned, designed, and implemented, providing the school district with a state-of-the-art mechanism for attracting students to the school district. The Project Consultant encourages technology leaders to place an even higher priority on providing staff development (on technology) to the regular classroom teacher – thus resulting in the infusion of technology into the teaching/learning process.**
- ◆ **The Project Consultant recommends that the School Board and**

administration seek taxpayer funding of continued (and, even, expanded) technology spending from a future bond referendum ... rather than the currently-employed excess levy referendum.

- ◆ **The school district is encouraged to examine ways in which the Red River Area Learning Center and Youth Education Services could be coordinated more closely/effectively to reduce excess, duplicatory expenditures incurred by the school district.**
- ◆ **The school district would benefit from developing a refined process for district-wide curriculum specification, scope and sequence development, curriculum software preparation, and grade and building level articulation.**
- ◆ **The school district would benefit from pursuing a possible implementation of an expanded fine arts program in cooperation with the Fargo Public Schools, City of Fargo, and City of Moorhead.**
- ◆ **The school district would benefit from encouraging the administration and staff of Moorhead Senior High School to implement methodologies and delivery systems (including advisor-advisee programming, block scheduling, academy concept, school-within-a-school concept, others) to enhance**

the personalizing of students' academic, social, emotional, and physical experiences in the school.

School Facilities

- ◆ **The school district operated four K-4/5 elementary schools, one grade 5-6 intermediate school, one grade 7-8 junior high school, and one grade 9-12 senior high school during the 2000-01 school year.**
- ◆ **While the school district's teaching/learning facilities would be classified as marginally to moderately educationally adequate, they (the facilities) are quite aged (40-50 years), not modern-day, not attractive (for marketing purposes), and not particularly accommodating to modern-day teaching methodologies and delivery systems. (It should be noted, however, that the school district's facilities are well maintained).**
- ◆ **The school district has insufficiently invested in the remodeling and renovation of its schools over the past 3-4 decades.**
- ◆ **The school district's junior high school design is not conducive to the delivery of modern-day middle-level programming.**

- ◆ **The school district operates two cost/ineffectively-sized elementary school facilities (Riverside and Lincoln).**
- ◆ **The school district operates a cost/ineffectively small and non-modern day facility (Voyager).**
- ◆ **The school district operates a large, predominately leased facility (Townsite Centre) which adds time-consuming burden to the responsibility of district administrators at minimal visible profit to the school district and which, ultimately, will require significant capital investment by the school district to keep the facility in repair.**
- ◆ **The school district annually leases \$347,423 worth of properties to house or accommodate curricular and extracurricular programs operated by the school district.**
- ◆ **The Project Consultant concluded that the school district would do well to consider divesting itself of its leasing obligations and, additionally, organizing the usage of its current or future facilities to reduce the district's volume of facility leasing.**

Other Information

- ◆ **Through telephone conversations, e-mail communications, and**

face-to-face dialogue, the Project Consultant received numerous comments about the "strictness" and "student unfriendly" atmosphere of the school district's junior high school. (Such comments have been shared with the Principal by the Project Consultant).

- ◆ Large numbers of parents, patrons, and staff expressed a desire to see the school district implement a "true middle school" concept.
- ◆ Numerous parents, patrons, staff, and students expressed that student out-migration has occurred (and continues to occur) as a result of many students feeling "unconnected" to other students, staff, or the school (as a preferred environment in which to be).

6.2 Alternatives

The Project Consultant assessed that Moorhead School District #152's School Board, Superintendent, staffs, students, community patrons, parents, and community leaders find themselves at a treacherous crossroad in the history of the school district. Alternative solutions abound but many of those solutions, long-term, will prove to be short-sighted, poorly-conceived, cost/ineffective, and harmful to the long-term viability of the school district. To be sure, the Project Consultant's observation is that many past decisions

made by Moorhead School District #152 have proven, short-term, to be cost/effective and economical but, long-term, have proven to posture the school district less well for survival in the increasingly more competitive educational milieu.

The Project Consultant encourages Moorhead School District #152's School Board, Superintendent, and all other stakeholders to evaluate, carefully, the alternative paths offered by the **Organizational Analysis Study's** recommendations.

6.3 Recommendations

The Project Consultant tenders the following recommendations to the School Board and Superintendent of Moorhead School District #152:

Recommendation 1

That the Superintendent and School Board create, minimally, four task forces to study implementation of recommendations regarding (a) student demographics; (b) design and implementation of a middle school philosophy, programming, and facility; (c) implementation of alternative special education delivery models; and (d) future facility utilization and betterment.

Recommendation 2

That the school district develop a plan of action to reduce student out-migration through open enrollment, non-public school attendance, home schooling, and alternative program enrollment.

Recommendation 3

That the school district request authorization from its public to expend excess levy funds – previously approved over a ten year span of time for capital improvements and technology implementation – to support General Fund operations, thereby reducing General Fund budget reductions, and, further, approve a bond referendum to fund new facility construction, capital improvements, and continued technology implementation.

Recommendation 4

That the school district study and implement a lower-costed, alternative special education delivery model.

Recommendation 5

That the school district reconfigure its organization from a K-4/5, 5-6, 7-8, 9-12 design to a K-3, 4-5, 6-8, 9-12 design.

Recommendation 6

That the school district conduct a bond referendum to (a) construct a new 1,300 student, multi-house, grade 6-8 middle school and (b) remodel Moorhead Senior High School.

Recommendation 7

That the school district convert Edison, Washington, and Probstfield Schools to K-3 facilities.

Recommendation 8

That the school district convert Robert Asp School to a grade 4-5 intermediate school.

Recommendation 9

That the school district close Riverside Elementary School, Voyager School, Moorhead Junior High School, and Lincoln School. As soon as practicable, the school district close Edison Elementary School.

Recommendation 10

That the school district market and sell Riverside Elementary School and Lincoln School and demolish Voyager School.

Recommendation 11

That the school district market, vacate, and sell the Townsite Centre and relocate its offices to Moorhead Junior High School or some other facility/setting as may be deemed more appropriate through a facility analysis.

Recommendation 12

That the school district convert Moorhead Junior High School to a district administrative, community education, alternative education, early childhood/family education, and adult learning center or, alternately, market and sell Moorhead Junior High School and relocate the mentioned programs/services to some other facility/setting as may be deemed more appropriate through a facility analysis.

Recommendation 13

That the school district reduce current expenses incurred in leasing select spaces to house instructional programs and services.

Recommendation 14

That the school district implement measures to reduce costs incurred through

duplicatory alternative education programming.

Recommendation 15

That the school district's high school implement advisor-advisee, school within a school, and academy curriculum concepts to personalize the school's teaching/learning environment.