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## Meeting of the Board of Education Park Ridge – Niles School District 64

Special Board Meeting Agenda  
Tuesday, October 10, 2017  
Roosevelt School – North Gym  
1001 S. Fairview  
Park Ridge, IL 60068

*On some occasions the order of business may be adjusted as the meetings progresses to accommodate Board members' schedules, the length of session, breaks and other needs.*

### TIME

### APPENDIX

- 6:00 p.m.      **Meeting of the Board Convenes**
- Roll Call
  - Introductions
  - Opening Remarks from President of the Board
- 6:00 p.m.      • **Board Recesses and Adjourns to Closed Session**  
-- The placement of individual students in special education programs and other matters relating to individual students. [5 ILCS 120/2(c)(10)] and litigation, when an action against, affecting or on behalf of the particular District has been filed and is pending before a court or administrative tribunal, or when the District finds that an action is probable or imminent, in which case the basis for the finding shall be recorded and entered into the closed meeting minutes. [5 ILCS 120/2(c)(11)].
- 6:30 p.m.      • **Board Adjourns from Closed Session and Convenes to a Committee-of-the-Whole: Update on Strategic Plan, Balanced Scorecard, Curriculum and Tech**
- 8:00 p.m.      • **Board Adjourns from Committee-of-the-Whole: Update on Strategic Plan, Balanced Scorecard, Curriculum and Tech and Resumes Special Board Meeting**
- **Tour and Recap of Roosevelt School Proposed Summer 2018 Projects**      A-1
  - **Pledge of Allegiance**
  - **Public Comments**
  - **Revisit Long-Range Financial Projections**      A-2  
-- Chief School Business Official
  - **Discussion of the Levy Process and District 64 2017 Levy**      A-3  
-- Chief School Business Official
  - **Superintendent Evaluation / Goal Overview**      A-4  
-- Superintendent

- **Approval of Recommended Personnel Report** A-5  
-- Board President **Action Item 17-10-1**

- **Other Discussion and Items of Information** A-6  
-- Superintendent

- Upcoming Agenda
- Freedom of Information Act Requests (FOIA)
- District Committee Update (none)
- Memorandum of Information
- Recommendation of PowerSchool Unified Classroom, Assessment, and Analytics
- Other

- **Adjournment**

Next Regular Meeting:

**Monday, October 23, 2017**  
Regular Board Meeting – 7:00 p.m.  
**Franklin School –Gym**  
2401 Manor Lane  
Park Ridge, IL 60068

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Upcoming Meetings and Topics  
As of October 4, 2017

**October 23, 2017 – Franklin School – Gym (2401 Manor Lane, Park Ridge)**

Regular Board Meeting – 7:00 p.m.

- Pledge of Allegiance and Welcome – Dr. Claire Kowalczyk, Principal Franklin Elementary School
- Resolution #1192 to Approve 2017 Proposed Tentative Tax Levy and Establishment of Public Hearing
- Follow-up Discussion on Emerson Lighting Proposal
- Discussion on Secure Vestibules
- Questions and Refinements of 2018 Summer Facility Projects
- Update and Approval of Intergovernmental Agreement for School Resource Officers
- Approval of Recommended Personnel Report
- Fall Housing Report (ISBE)
- Approval of PowerSchool Unified Classroom
- Approval of Financial Update for the Period Ending September 30, 2017 (consent)
- Review of Closed Session Minutes for Release (consent)

**November 13, 2017 – Washington School – Gym (1500 Stewart Avenue, Park Ridge)**

Public Hearing on the Tax Levy – TBD p.m.

Regular Board Meeting – 7:00 p.m.

- Pledge of Allegiance and Welcome – Mrs. Stephanie Daly, Principal Washington Elementary School
- Board Member Appreciation/ Recognition Day
- 2016-17 MAP & PARCC Data and State Report Card/2017 5 Essentials
- Present Tentative Calendar for 2018-19 school year and Tentative Calendar for 2019-20
- Summer Interim Session 2017 Report
- Presentation and Approval of Summer Interim Session 2018
- Approval of 2018 Summer Construction Projects
- Approval of Recommended Personnel Report
- Approval of Financial Update for the Period Ending October 31, 2017 (consent)

**December 11, 2017 – Jefferson School – Multipurpose Room**

Regular Board Meeting – 7:00 p.m.

- Pledge of Allegiance
- Adoption of Final 2017 Tax Levy Resolution #XXX and Resolution #XXX for the Reduction of Certain Fund
- Report and Acceptance of Annual Audit FY17
- Resolution #XXX Regarding the School District to Pay Certain Invoices Prior to Board Approval at the January 21, 2017 Regular Board of Education Meeting
- Approval of Recommended Personnel Report
- Approval of Financial Update for the Period Ending November 30, 2017 (consent)
- Adopt 2018-19 Tentative Calendar and 2019-20 Tentative Calendar (consent)
- 2017 District 64 Employee Campaign for Park Ridge Community Fund (memo of information)
- Triple I Conference (memo of information)

### Future Meeting Topics

- Resolution to Adopt Disclosure Compliance Policy
- Wellness Policy (memo)
- Adoption of Resolution # Directs the Chief School Business Official Under the Direct Supervision of the Superintendent to Begin Preparation of a Tentative Budget for the 2018-19 Fiscal Year in Accordance with Board Policy 4:10 Fiscal and Business Management and the Illinois School Code 105ILCS 5/17-1 (1/22/18)
- Enrollment Projections for 2018-19 School Year and Discussion on Staffing 2018-19
- Discussion on Student Fees (1/22/18)
- Superintendent Evaluation Mid-Year Update (1/22/18)
- Recommendation and Approval of Personnel Report (1/22/18)
- Approval of Financial Update for the Period Ending December 31, 2017 (1/22/18-consent)
- Mid-Year Update on 2020 Vision Strategic Plan Year 3 Implementation (February 2018)
- Review Enrollment Projections 2018-19 (2/26/18)
- Begin Discussion on 2018-19 Administrative Salaries (2/26/18)
- Recommendation for Regular Education Transportation (Spring 2018)
- Discussion on School Resource Officers Future Years (May 2018)
- Superintendent End-of-Year Evaluation (May/June 2018)

The above are subject to change.

To: Board of Education  
Dr. Laurie Heinz, Superintendent  
From Ron DeGeorge, Director of Facility Management  
Date: October 10, 2017  
Re: Recap and Tour of Roosevelt School Proposed Summer 2018 Projects

At the September 18, 2017 Board of Education Committee-of-the-Whole meeting, District 64 presented estimates from Studio GC architects of projects recommended for consideration for completion in summer 2018. Facility investments totalling \$8,477,076 were identified, including:

- HLS Category B (required) = \$635,512
- Critical infrastructure 2 (recommended) = \$5,390,945
- Critical infrastructure 3 = \$98,180
- Other capital projects = \$2,352,438

These projects would be undertaken at buildings throughout the District.

At tonight's meeting, the Board will have the opportunity to walk through the specific areas under consideration at Roosevelt School, primarily on the first floor.

Roosevelt Principal Dr. Dwyer will conduct a short tour of the building to allow the Board to better understand the areas that would be renovated and how he believes the construction projects will positively impact staff, students, parents and the community around Roosevelt School through enhancements to various learning environments and to direct supervision, safety and efficiency of day-to-day operations. (Attachment 1)

In addition, Studio GC will review their initial schematics of the renovation project to illustrate the proposed enhancements to the school environment. (Attachment 2)

We hope this tour and project recap will provide the Board with the background information and allow you to visualize the scope of the learning environment improvements that will benefit the more than 650+ students and approximately 100 staff members along with parents and daily visitors to the building.

# Tour of Roosevelt School Summer 2018 Proposed Projects

Board of Education  
October 10, 2017

# Roosevelt Summer 2018 Proposed Projects

## Improvements to learning environment:

- ❖ **Places all Grade 1 classrooms together within main hallway:**
  - This will increase collaboration and communication amongst team members
  - All other grade level classrooms are currently clustered together
  - This will eliminate grade 1 classrooms using different entrances
  - The main hallway will become the “primary wing” for both K and 1st.
- ❖ **Relocate the Special Needs Classroom** to a convenient central location directly across from the elevator used by some students with physical needs
- ❖ **Future Flexibility** - By having an additional classroom on both the first and second floors, Roosevelt could accommodate additional sections at a particular grade level if needed

(continued)

# Roosevelt Summer 2018 Proposed Projects

## Improvements to Fine Arts learning environment:

- ❖ Enhance the learning environment by the addition of a new music room
- ❖ Enhance the learning environment by the addition of an arts room
  - Creating an “Arts Wing”
- ❖ The existing art room on the second floor could be converted to a music room.
- ❖ These would be purpose-built rooms designed for the unique needs of instruction for these subjects (convertible, if needs be, to classroom space)



# Roosevelt Summer 2018 Proposed Projects

## Improvements to daily supervision, safety and efficiency:

- ❖ Move school office to vacated classrooms within existing building footprint - with no addition needed
- ❖ Main entry from Albion Avenue - wider street and less impact on neighbors than Fairview
- ❖ Separates parent/visitor access from students - via staff and visitor parking lot rather than through primary grades playground to entry door **\*Visitors will no longer pass through areas where students are playing**
- ❖ ADA compliant access for parent/visitor - not available from current Fairview Avenue entry
- ❖ Direct oversight of bus drop off /pick up - will happen directly in front of office for continual line-of-sight, oversight and safety

(continued)

# Roosevelt Summer 2018 Proposed Projects

## Improvements to daily supervision, safety and efficiency:

- ❖ **Serve increasingly complex health needs of students in expanded School Health Office**
  - Add ADA compliant washroom in renovated Health Office
- ❖ **Teacher work space/mailboxes improved** to increase flow and greater efficiency for teachers and office staff
- ❖ **Office secretary and the School Nurse can assist each other** as needed during the day in managing students/parents
- ❖ **Improve communication and efficiency by relocating AP from 3rd floor to main office** - managing visitors and students, increase efficiency, and improve communication and collaboration
- ❖ **Combine classroom reorganization and office Project with other Life Safety projects** - old PA system replacement

(continued)

# Roosevelt Summer 2018 Proposed Projects

## Improvements to daily supervision, safety and efficiency:

### ❖ **Beyond the Bell Pick up / Drop off**

- Can be conducted through the secure office, screening in parents picking up children after school
- Would move vehicles to Albion, which is more convenient for parents to access
- Wider street is able to accommodate the additional traffic from both directions
  - Good neighbors

To: Board of Education  
Dr. Laurie Heinz, Superintendent

From: Luann Kolstad, Chief School Business Official

Date: October 10, 2017

Re: Revisit Long-Range Financial Projection

At the September 25, 2017 Board of Education meeting, administration shared with the Board updated financial projections, which included 2016-17 unaudited actuals and the 2017-18 adopted budget. Every major financial decision that the Board considers typically involves reviewing the financial projections to see what the long term effect may be on the District's financial position.

The Board reviews the financial projections prior to:

- Approving the upcoming year's staffing plan
- Approving the annual budget
- Approving the annual tax levy
- Approving transfer of funds out of the Operating Funds to Capital Projects
- Approving Debt Certificates (2016-17 Issuance).

All of the above events cause a major impact on the long term financial health of the District. The financial projections are a fluid document in that as new information is gained, the projections are updated to reflect these changes. A District 64 Budget & Tax Levy Cycle (Attachment 1) is included showing at what time of the year each of the major financial events in the District occurs.

Tonight the administration is reviewing with the Board, the key assumptions that were used in the establishment of the 2017-18 budget. In terms of revenue, assumptions are made about major sources of revenue, including but not limited to the annual CPI-U used to determine the tax levy and state and federal funding.

The expenditure side of the equation has a few more moving pieces. Based on the annual enrollment projections, administration develops a staffing plan for the next year. This information is shared with the Board in terms of any new positions that will be required to meet enrollment projections or any new initiatives that the Board has approved. Salaries are adjusted based on collective bargaining agreements and in the current labor contract, upcoming retirements and the cost/savings associated with them. In terms of other areas of the expenditure

budget, assumptions are made based on prior experience and any known upcoming large expenditures.

Starting with the 2015-16 budget, the District has included in the financial projections a line item related to a potential pension cost shift being considered at the state level. The assumption currently being used is 0.5% of certified salaries, increasing annually by 0.5%.

The District has taken a very conservative approach in the financial projections so as to continue to be able to push off a rate increase referendum further into the future.

## District 64 Budget & Tax Levy Cycle

Date of Board Meeting/Committee of the Whole	Action
January 23, 2017	➤ Board authorizes preparation of the 2017-18 Tentative Budget in accordance with the Illinois School Code
February 6, 2017 – COW	<ul style="list-style-type: none"> <li>➤ Review Financial Projections.</li> <li>➤ Board reviews 2017-18 Staffing Plan and Enrollment Projections</li> </ul>
February 21, 2017	➤ Board approves 2017-18 Staffing Plan
June 12, 2017 - COW	➤ Board reviews 1 <sup>st</sup> draft of 2017-18 Tentative Budget
June 26, 2017	<ul style="list-style-type: none"> <li>➤ Board adopts 2017-18 Tentative Budget</li> <li>➤ Board sets date of Public Hearing prior to adoption of final budget</li> <li>➤ Board places 2017-18 Tentative Budget on public display for 30 days prior to the public hearing</li> </ul>
August 14, 2017	➤ Board reviews Version 2 of 2017-18 Tentative Budget
August 28, 2017	<ul style="list-style-type: none"> <li>➤ Board conducts a public hearing on the 2017-18 Tentative Budget</li> <li>➤ Board reviews Version 3 of the 2017-18 Tentative Budget</li> </ul>
September 18, 2017	➤ Board reviews Version 4 of the 2017-18 Tentative Budget
September 25, 2017	➤ Board adopts 2017-18 Budget
October 10, 2017	➤ Discussion of Levy Process and District 64 2017 Tax Levy
October 23, 2017	➤ Resolution #1192 to Approve 2017 Proposed Tax Levy and Establishment of Public Hearing
November 13, 2017	➤ Public Hearing on 2017 Tax Levy
December 11, 2017	➤ Adoption of Final 2017 Tax Levy Resolution

To: Board of Education  
Dr. Laurie Heinz, Superintendent

From: Luann Kolstad, Chief School Business Official

Date: October 10, 2017

Re: Discussion of Tax Levy Process and District 64 2017 Levy

### **Background on Tax Levy Process**

Per state statute, the school board must adopt an estimated tax levy not less than 20 days prior to the date it adopts its final levy. The final levy is scheduled for adoption at the December 11, 2017 regularly scheduled meeting of the Board of Education.

If the levy exceeds the previous year's operating fund extension by more than 5%, publication of the Truth-In-Taxation notice is required, and a hearing must be held before the levy is adopted.

Although the 2017 proposed levy does *not* exceed the 2016 levy by more than 5%, in keeping with the District's past practice and to increase transparency, the District recommends conducting a Truth-In-Taxation hearing despite not needing to do so. Again, this practice is consistent with the District's continued commitment to transparency and makes every step in the annual financial cycle *open to the community*. The hearing is planned to be held at the start of the November 13, 2017 Board meeting. The Board is not scheduled to adopt the final levy until the December 11, 2017 meeting.

### **How the Levy Request is Structured**

The variables in each year's levy are:

- Equalized Assessed Valuation (EAV) – unknown until July 2018
- New Property EAV (1<sup>st</sup> year property comes on the tax roll) – unknown until July 2018
- Prior Year Consumer Price Index, Urban (CPI-U) – 2.10% (CPI-U as of December 2016)

Because the amount of New Property EAV is unknown when the tax levy is filed, districts increase their levy so as to capture the funds that are available under the tax cap. Even with the increased request, the District will only receive the amount of dollars allowed under the Property Tax Extension Limitation Law (PTELL), known as the property tax cap.

***No matter how large the levy request is for 2017, District 64 will only receive a 2.10% increase plus the taxes associated with new construction. Assuming \$10M in new construction, this amount will be approximately 0.62% of the actual levy increase..***

### Setting the Levy Request

As this table indicates, past Boards over the last decade have consistently approved a levy request sufficiently high enough to capture all new property EAV. This decision has helped the District receive all monies it is entitled to receive, while still being subject to the tax cap. This has given the District maximum flexibility in allocating funds for current education and operations, while slowly strengthening the District’s financial position by increasing its operating fund balance. Strengthening the operating fund balance has allowed District 64 to fulfill the 10-year referendum commitment, and to extend the commitment for an additional four years to meet a further Board goal according to current projections.

Levy Year	CPI Used in PTELL	Board Approved Levy Request	Actual Levy Increase
2017	2.10%	<b>4.95% Proposed</b>	<b>2.72% Projected</b>
2016	0.70%	4.21%	0.79%
2015	0.80%	4.53%	0.74%
2014	1.50%	4.63%	1.90%
2013	1.70%	4.98%	2.55%
2012	3.00%	4.74%	3.10%
2011	1.50%	4.99%	1.70%
2010	2.70%	4.99%	3.60%
2009	0.10%	4.59%	0.08%
2008	4.10%	2.18%	1.50%
2007	2.50%	Referendum Driven	14.40%
2006	3.40%	Referendum Driven	19.10%
2005	3.30%	13.41%	9.20%

District 64, therefore, expects to receive a far lower percentage increase in its levy than the 4.95% being proposed.

For 2017, based upon the increase in the 2016 CPI-U of 2.10% and the projected increase in New Property EAV (see Attachment 1), our District’s tax rate model has calculated that a 4.95% increase in the overall projected 2017 levy dollars from the prior year’s levy should be sufficient



to capture all that District 64 is legally entitled to receive. Attachment 3 identifies this 2017 levy request.

### **What Portion of the Levy Request is Borne by Existing Taxpayers and What is New Construction?**

It is important to note that 2.85% of the 4.95% increase is a direct result of the addition of projected New Property EAV, which does not contribute any additional tax increase to the current taxpayers that comprise the base EAV property pool for the prior year. The existing EAV property tax pool will only increase a maximum of 2.10% as allowed by the PTELL law.

### **What Happens if the Levy is Set Too Low?**

The risk to setting the levy to low for a School District is very severe, because it is *not* a one-time loss of revenue. Rather, the impact of just a single year of foregoing what is available to the District under the tax cap actually *compounds* over time:

- We lose the money foregone in the first year.
- We can never “catch up” in a future year by asking for a greater amount, because each annual increase is limited by PTELL *It is essential to note that this is unlike municipal governments that operate outside of the PTELL tax cap.*
- The impact of the loss compounds significantly in *every* future year. Each year’s limiting rate formula under PTELL begins with the prior year’s actual tax extension. Therefore, we continue to increase according to the formula, but we are beginning from a lower base.
- Once lost, these critical funds that are rightfully the District’s can never be accessed again.
- The financial projections assume -- as directed by the Board -- that revenues will grow each year at the full amount legally available to the District.

As confusing as this process may seem due to the timing of when needed information becomes available in Cook County, *the bottom line is that it is the District’s fiscal responsibility to recommend a levy at a high enough rate to ensure that all funds legally permissible -- including new property EAV -- are obtained*, knowing that the PTELL will ultimately adjust that request to what is allowed by law.

### **Analysis of 2017 Levy Request by Fund**

The amount levied in each fund is based on the financial need within the fund. Several of the funds have *rate caps* on their levy amount. Please see the Assumptions page (Attachment 2) for this information.

So that we do not exceed the amount in a capped fund and lose tax dollars that the District is entitled to, the levies are adjusted to levy a greater amount in funds that can be transferred between Education, Operations & Maintenance, Transportation, and Working Cash. If the EAV increases, the worry over reaching the *rate cap* in a fund decreases.

### **Tax Rate Calculation**

The tax rate is directly related to the Equalized Assessed Valuation (EAV) in the District. If total EAV decreases, much like it did in 2015 and years prior to 2014, the tax rates for taxpayers naturally go up because there is less EAV to spread the costs over. If the EAV increases, the tax rates naturally drop – there is more EAV to spread the costs over. This is why when a homeowner’s house value drops, their tax bill does not necessarily follow suit. It is dependent on the District’s total EAV, not the value of a particular property.

### **Why is the Tax Levy So Critical?**

Local property revenues are the most significant portion of our budget -- about 85% of our Operating Fund revenues are from local property taxes.

The ability to agree to and meet the District’s financial commitments is in large part based on having current and future property tax revenues available to pay for them. If property tax revenues are not available, financial commitments cannot be met. Keep in mind that salaries and benefits comprise about 81.0% of Operating Fund expenditures, and are generally determined by long term collectively bargained agreements or specific employee agreements. Once the bargaining process is completed, the costs are known and not subject to adjustment. Adjustments can only be made at the time of bargaining and before agreements are signed. The federal and state governments also mandate several operational costs for public schools that they do not fund; these also represent fixed financial commitments. In addition, the District must maintain “safe, warm and dry” learning environments for students and staff while protecting the community’s investment in these important neighborhood assets, and is currently working to increase the amounts that can be invested in facilities going forward.

Accordingly, the District recommends that the Board seek all property tax revenues that are statutorily available in 2017.

**Park Ridge - Niles  
School District 64**

Tax Levy Projections: EAV Estimation

**Total Equalized Assessed Valuation**

Year		Residential	% Change EAV	New Construction	% Change New Growth	
2021	EST	\$ 1,745,437,085	1.00%	\$ 6,000,000	0.00%	
2020	EST	\$ 1,728,155,530	1.00%	\$ 6,000,000	0.00%	
2019	EST	\$ 1,711,045,079	2.36%	\$ 6,000,000	-40.00%	Tri-Annual North Reassessment
2018	EST	\$ 1,671,595,427	1.00%	\$ 10,000,000	0.00%	
<b>2017</b>	<b>EST</b>	<b>\$ 1,655,044,977</b>	<b>1.00%</b>	<b>\$ 10,000,000</b>	<b>-16.46%</b>	
2016	Actual	\$ 1,638,658,393	19.45%	\$ 11,969,943	79.93%	Tri-Annual North Reassessment
2015	Actual	\$ 1,371,795,137	-3.00%	\$ 6,652,708	0.23%	
2014	Actual	\$ 1,414,256,518	1.06%	\$ 6,637,442	21.74%	
2013	Actual	\$ 1,399,438,847	-17.93%	\$ 5,451,990	61.50%	Tri-Annual North Reassessment
2012	Actual	\$ 1,705,216,205	-7.48%	\$ 3,375,835	-40.99%	
2011	Actual	\$ 1,843,115,448	-8.59%	\$ 5,721,156	-45.03%	
2010	Actual	\$ 2,016,342,297	-4.95%	\$ 10,407,071	-32.69%	Tri-Annual North Reassessment
2009	Actual	\$ 2,121,453,047	7.75%	\$ 15,461,652	-35.00%	
2008	Actual	\$ 1,968,799,003	18.48%	\$ 23,786,571	-34.00%	
2007	Actual	\$ 1,661,682,786	4.22%	\$ 36,041,543	30.76%	
2006	Actual	\$ 1,594,439,099		\$ 27,562,834		

**Park Ridge - Niles School District 64**  
**Tax Levy Projections: Assumptions**

<b>Actuals:</b>	
a) 2016 Operating Tax Rate	<b>3.8598</b>
b) 2016 Operating Tax Extension	<b>\$63,266,070</b>
c) 2016 EAV	<b>\$1,638,658,393</b>
d) 2016 New Construction	<b>\$11,969,943</b>

**Assumptions:**

2017 EAV - Increase	1.00%	\$1,655,044,977
New Construction Estimate	-16.46%	\$10,000,000
Consumer Price Index (CPI-2016)		102.10%
2018 EAV - Increase	1.00%	\$1,671,595,427
New Construction Estimate	0.00%	\$10,000,000
Consumer Price Index (CPI-2017)		102.0%
2019 EAV - Increase	2.36%	\$1,711,045,079
New Construction Estimate	-40.00%	\$6,000,000
Consumer Price Index (CPI-2018)		102.0%
2020 EAV - Increase	1.00%	\$1,728,155,530
New Construction Estimate	0.00%	\$6,000,000
Consumer Price Index (CPI-2019)		102.0%
2021 EAV - Increase	1.00%	\$1,655,044,977
New Construction Estimate	0.00%	\$6,000,000
Consumer Price Index (CPI-2019)		102.0%

<b>Est.</b>	<b>2016</b>	<b>Maximum Rate (Capped)</b>
Education	2.733	N/A
Special Education	0.314	0.4000
Operations & Maintenance	0.377	0.5500
Transportation	0.220	N/A
IMRF	0.055	N/A
Social Security	0.102	N/A
Liability Insurance	0.025	N/A
Working Cash	0.035	0.0500
<b>Total Operating Rate</b>	<b>3.861</b>	
School Bonds	0.179	
<b>Total Tax Rate</b>	<b>4.040</b>	

**Park Ridge - Niles  
School District 64  
Tax Levy Projection: 2017 EST**

**2017 Tax Levy  
Rcvd Spring 2018, Fall 2018**

**Levy Estimate  
10/5/17**

2016 Extension	\$63,266,070
X 2016 CPI	1.0210
New Extension	\$64,594,657
 2017 EAV	 \$1,655,044,977
Less: New Construction	\$10,000,000
Adjusted EAV	\$1,645,044,977
 Adjusted Extension Base	 \$64,594,657
Divided by Adjusted EAV	\$1,645,044,977
Limited Rate	3.927
2017 EAV	\$1,655,044,977
Total Estimated Extension for 2017	<u>\$64,987,319</u>

Estimated Tax Rate	2016	2016 Extension	2017	2017 Extension		2017 Net Change	2017 Levy Request	2017 Net Change - Request
Education	2.733	\$44,777,570	2.875	\$47,587,319	70.13%	\$2,809,749	\$ 49,000,000	\$ 4,222,430
Operations & Maintenance	0.377	\$6,180,000	0.332	\$5,500,000	8.10%	-\$680,000	\$ 5,500,000	\$ (680,000)
Transportation	0.220	\$3,605,000	0.181	\$3,000,000	4.42%	-\$605,000	\$ 3,000,000	\$ (605,000)
IMRF	0.055	\$901,250	0.066	\$1,100,000	1.62%	\$198,750	\$ 1,100,000	\$ 198,750
Social Security	0.102	\$1,673,750	0.091	\$1,500,000	2.21%	-\$173,750	\$ 1,500,000	\$ (173,750)
Liability Insurance	0.025	\$412,000	0.045	\$750,000	1.11%	\$338,000	\$ 750,000	\$ 338,000
Special Education	0.314	\$5,150,000	0.302	\$5,000,000	7.37%	-\$150,000	\$ 5,000,000	\$ (150,000)
Working Cash	0.035	\$566,500	0.033	\$550,000	0.81%	-\$16,500	\$ 550,000	\$ (16,500)
<b>Total Operating Rate</b>	<b>3.861</b>	<b>\$63,266,070</b>	<b>3.927</b>	<b>\$64,987,319</b>		<b>\$1,721,249</b>	<b>\$66,400,000</b>	<b>\$3,133,930</b>
						2.72%		<b>4.95%</b>
<b>Bond &amp; Interest</b>	<b>0.179</b>	<b>\$2,931,689</b>	<b>0.174</b>	<b>\$2,872,919</b>	<b>4.23%</b>			
	<b>4.040</b>	<b>\$66,197,759</b>	<b>4.100</b>	<b>\$67,860,238</b>				

	<b>Mar-18</b>	<b>Jul-18</b>
Education Fund	\$ 25,531,824	\$ 22,055,496
Operations & Maintenance Fund	\$ 2,950,892	\$ 2,549,108
Transportation Fund	\$ 1,609,577	\$ 1,390,423
IMRF Fund	\$ 590,178	\$ 509,822
Social Security Fund	\$ 804,789	\$ 695,211
Liability Insurance Fund	\$ 402,394	\$ 347,606
Bond & Interest Fund	\$ 1,541,395	\$ 1,331,524
Special Education	\$ 2,750,000	\$ 2,250,000
Working Cash	\$ 302,500	\$ 247,500
<b>Total 2017 Levy to be Received in March 2018 (55% of 2016 Tax Levy)</b>	<b>\$ 36,483,549</b>	<b>\$ 31,376,689</b>

# 2017 Tentative Tax Levy

**Board of Education  
October 10, 2017**



**PARK RIDGE-NILES  
SCHOOL DISTRICT 64**

# Property Tax Extension Limitation Law (PTELL) “Tax Cap”

- ❖ Enacted in Cook County in 1995
- ❖ Limits the increase in property tax extension to 5% or the increase in the “Consumer Price Index-All Urban Consumers” (CPI-U), whichever is less.
  - CPI-U for December 2016 = 2.1% to be used for 2017 Levy
  - <https://data.bls.gov/cgi-bin/surveymost>

# Illinois State Statute

- ❖ School Board must adopt an estimated tax levy not less than 20 days prior to the date it adopts its final levy. Key dates:
  - October 23, 2017: Board adopts Tentative Tax Levy, Establishes Date/Time of Public Hearing
  - November 13, 2017: Public Hearing on Tax Levy
  - December 11, 2017: Board adopts Final 2017 Tax Levy
- ❖ File 2017 Tax Levy with County Clerk prior to last Tuesday in December.



# Truth-In-Taxation

If the Tax Levy exceeds the previous year's operating fund extension by more than 5%:

- Publication of Truth-In-Taxation notice required
- Public Hearing required before Tax Levy is adopted

# Requested & Actual Levy Increases

Levy Year	CPI Used in PTELL	Board Approved Levy Request	ACTUAL LEVY INCREASE
2017	2.10%	4.95% Proposed	2.72% Projected
2016	0.70%	4.21%	0.79%
2015	0.80%	4.53%	0.74%
2014	1.50%	4.63%	1.90%
2013	1.70%	4.98%	2.55%
2012	3.00%	4.74%	3.10%
2011	1.50%	4.99%	1.70%
2010	2.70%	4.99%	3.60%
2009	0.10%	4.59%	0.08%
2008	4.10%	2.18%	1.50%
2007	2.50%	Referendum Driven	14.40%
2006	3.40%	Referendum Driven	19.10%
2005	3.30%	13.41%	9.20%

# Why Increase the Tax Levy *Greater than the CPI-U?*

Projected 2017 Extension	2017 Levy Request
2.72% Increase	4.95%

- District increases Levy Request to *capture all new construction dollars* that are not under the tax cap the first year they are on the tax rolls.
- District will still only receive amount of dollars *allowed* under the tax cap for *existing EAV property tax pool*.

# Portion of Levy Request Borne by Existing Taxpayer

- 4.95% - Total Levy Request
- 2.85% - Direct result of addition of projected New Property EAV. DOES NOT contribute any additional tax increase to the current taxpayers that comprise the base EAV Property Pool.
- 2.10% - Existing EAV Property Pool will ONLY increase a maximum of 2.10% per PTELL law.

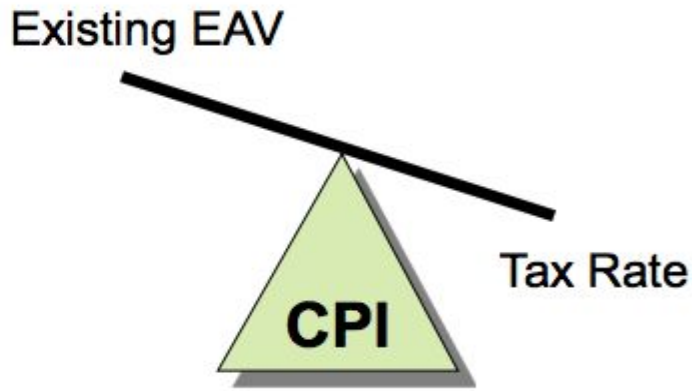
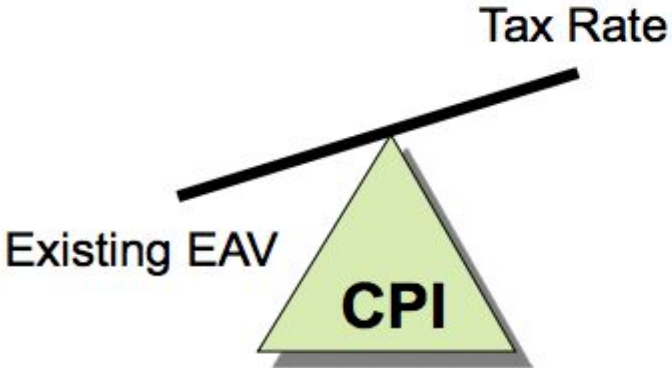
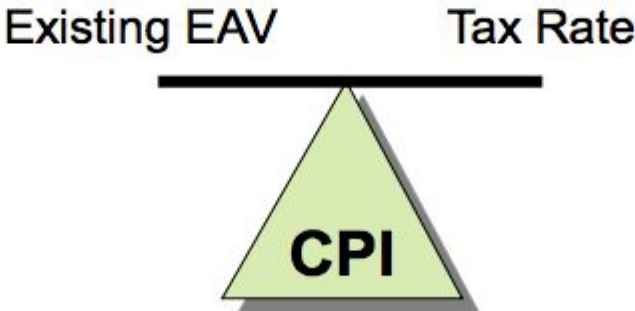
# What Happens if Levy Set *Too Low?*

- ❖ Lost money foregone in first year
- ❖ Compounds significantly in every future year
- ❖ We can never catch up - each annual increase is limited by PTELL (CPI-U)
- ❖ Each year's limiting rate formula under PTELL begins with the prior year's actual tax extension

# What Happens if Levy Set *Too Low?*

- ❖ Critical funds, rightfully the District's - *can never be accessed again.*
- ❖ Financial Projections assume - as directed by the Board - that revenues will grow each year at the full amount legally available to the District.
- ❖ Keep expenditures in line with CPI-U growth - should never need to go to referendum for an Operating Rate increase.

# EAV Change, CPI and Tax Rate



# Factors in Tax Levy

- CPI-U: 2.1% - Known
- EAV: \$1,655,044,977 – Unknown
- New Construction: \$10,000,000 - Unknown



# Tax Levy Calculation

• 2016 Extension	\$ 63,266,070
• X 2016 CPI	1.0210
• New Extension	<u>\$ 64,594,657</u>
• 2017 EAV	\$ 1,655,044,977
• Less: New Construction	\$ 10,000,000
• Adjusted EAV	<u>\$1,645,044,977</u>
• Adjusted Extension Base	\$ 64,594,657
• Divided by Adjusted EAV	\$1,645,044,977
• Limited Rate	3.927
• 2017 EAV	\$1,655,044,977
• Total Estimated Extension for 2017 (Rate X EAV)	\$ 64,987,319

# Tentative 2017 Extension

Fund	2016 Extension	Tentative 2017 Extension	Variance	New Money
Education	\$44,777,570	\$47,587,319	\$2,809,749	
Operations & Maintenance	\$ 6,180,000	\$ 5,500,000	- \$ 680,000	
Transportation	\$ 3,605,000	\$ 3,000,000	- \$ 605,000	
IMRF	\$ 901,250	\$ 1,100,000	\$ 198,750	
Social Security	\$ 1,673,750	\$ 1,500,000	- \$ 173,750	
Liability Insurance	\$ 412,000	\$ 750,000	\$ 338,000	
Special Education	\$ 5,150,000	\$ 5,000,000	- \$150,000	
Working Cash	\$ 566,500	\$ 550,000	- \$ 16,500	<b>\$1,721,249</b>

# What Happened with 2016 Tax Levy

Fund	2016 Total Levy (Inc. L&C)	2016 Actual Extension	Variance
Education	\$48,819,468	\$44,777,570	\$ - 4,041,898
Special Education	\$ 5,150,000	\$ 5,150,000	\$ 0
Building (O&M)	\$ 6,180,000	\$ 6,180,000	\$ 0
Transportation	\$ 3,605,000	\$ 3,605,000	\$ 0
IMRF	\$ 901,250	\$ 901,250	\$ 0
Social Security	\$ 1,673,750	\$ 1,673,750	\$ 0
Tort	\$ 412,000	\$ 412,000	\$ 0
Working Cash	\$ 566,500	\$ 566,500	\$ 0
<b>Total Reduction</b>			<b>\$ - 4,041,898</b>

# For More Information

## *“Demystifying School Finance: State & Local”*

District 64, District 207, Dr. Tom Kersten/Roosevelt University  
September 28, 2017

Sponsored by District 64, League  
of Women Voters of Park Ridge,  
AAUW NW Suburban Chapter

**Video available on D64 website:**  
[d64.org](http://d64.org) > Departments >  
Business Services



To: Members of the Board of Education

From: Dr. Laurie Heinz, Superintendent

Date: October 10, 2017

Re: 2017-18 Superintendent Evaluation Standards

Annually, I revise my Superintendent Evaluation tool to reflect areas of focused as identified within the corresponding year of the *2020 Vision* Strategic Plan, to include roles and responsibilities outlined within my job description as well as critical standards for leaders.

In 2014, I utilized a key document created by the Illinois Association of School Boards (IASB) entitled *The Superintendent Evaluation Process: Strengthening the Board-Superintendent Relationship* as well as a Leadership Standards document created by the Interstate Educational Leadership Policy Standards (ISLLC 2008\*).

ISLLC has identified six standards, which we named as a group based on tasks identified. The Board at that time also added a seventh standard to be monitored to reflect the importance of communications. The standards are as follows:

1. ***Vision:*** Promotes the success of every student by facilitating the articulation, implementation, and stewardship of a vision for learning that is shared and supported by all stakeholders.
2. ***Learning and Instruction:*** Promotes the success of every student by advocating, nurturing, and sustaining a school culture and instructional programs conducive to student learning and staff professional growth.
3. ***Organization, Finance and Facilities:*** Ensures effective management of the organization, operations, and District resources in order to create a safe, efficient, and effective learning environment.
4. ***Ethics:*** Acts with integrity and fairness in an ethical manner.
5. ***Social & Political Environments:*** Understands, responds to, and influences political, social, economic, legal, and cultural environments.
6. ***Policy and Governance:*** Works with the Board to formulate District policy.
7. ***Communication and Community Relations:*** Articulates District vision and purpose, handles media relations, solicits feedback, and builds consensus for community support.

Approval of Recommended Personnel Report

ACTION ITEM 17-10-1

I move that the Board of Education of Community Consolidated School District 64, Park Ridge – Niles, Illinois, approve the Personnel Report, noting that the Personnel Report is based on the recommendation of the Superintendent and not upon the Board’s direct knowledge regarding any of the specific individuals selected for employment.

The votes were cast as follows:

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_

AYES:

NAYS:

PRESENT:

ABSENT:

Personnel Report  
October 10, 2017

Carol Duffy	Employ as Teaching Assistant at Field School effective September 25, 2017 - Base, Step 1, \$16,886.30.
Bethany Johnson	Employ as (.50) Teaching Assistant at Carpenter School effective September 20, 2017 - Base, Step 1, \$8,595.69.
Jill Mazza	Employ as 10-Month Secretary Level IV at Emerson School effective October 4, 2017 - \$18.65 hr.
Bonita Porter	Resign as Lunch Program Supervisor at Washington School, effective September 29, 2017.
Sally Ann Civinelli	Retire as Special Education Teacher at Field School effective June 2019.

## Meeting of the Board of Education Park Ridge – Niles School District 64

Inspire every child to



**Regular Board Meeting Agenda  
Monday, October 23, 2017  
Franklin School – Gym  
2401 Manor Lane  
Park Ridge, IL 60068**

*On some occasions the order of business may be adjusted as the meetings progresses to accommodate Board members' schedules, the length of session, breaks and other needs.*

### TIME

### APPENDIX

7:00 p.m.

**Meeting of the Board Convenes**

- Roll Call
- Introductions
- Opening Remarks from President of the Board
  
- **Pledge of Allegiance and Welcome**  
-- Dr. Claire Kowalczyk, Principal Franklin Elementary School

• **Public Comments**

- **Resolution # 1192 to Approve 2017 Proposed Tentative Tax Levy and Establishment of Public Hearing** A-1  
-- Chief School Business Official

- **Follow-up Discussion on Emerson Lighting Proposal** A-2  
-- Chief School Business Official

- **Discussion on Secure Vestibules** A-3  
-- Superintendent

- **Questions and Refinements of 2018 Summer Facility Projects** A-4  
-- Superintendent/Chief School Business Official

- **Update and Approval of Intergovernmental Agreement for School Resource Officers** A-5  
-- Superintendent Action Item 17-10-2

- **Approval of PowerSchool Unified Classroom, Assessment, and Analytics System** A-6  
-- Director of Innovation and  
Instructional Technology Action Item 17-10-3

- **Approval of Recommended Personnel Report** A-7  
-- Board President Action Item 17-10-4



**• Consent Agenda** **A-8**  
-- Board President **Action Item 17-10-5**

- Bills, Payroll and Benefits
- Approval of Financial Update for the Period Ending September 30, 2017
- Review of Closed Session Minutes for Release
- Destruction of Audio Closed Minutes (none)

**• Approval of Minutes** **Action Item 17-10-6** **A-9**  
-- Board President

- Committee-of-the-Whole: Update on Strategic Plan, Balanced Scorecard, Curriculum and Tech ----- October 10, 2017
- Special Board Meeting ----- October 10, 2017
- Closed Session Meeting -----October 10, 2017
- Committee-of-the-Whole: IASB Starting  
Right Workshop -----September 25, 2017
- Regular Board Meeting -----September 25, 2017
- Committee-of-the-Whole: Facilities Meeting ----- September 18, 2017
- Special Board Meeting ----- September 18, 2017
- Closed Session Meeting -----August 14, 2017

**• Other Discussion and Items of Information** **A-10**  
-- Superintendent

- Upcoming Agenda
- District Committee Update (Elementary Learning Foundation)
- Memorandum of Information (none)
- Minutes of Board Committees (none)
- Other
  - National Principal Appreciation Month

**• Adjournment**

Next Meetings: **Monday, November 13, 2017**  
Public Hearing on the Tax Levy – TBD p.m.  
Regular Board Meeting – 7:00 p.m.  
**Washington School – Gym**  
1500 Stewart Avenue  
Park Ridge, IL 60068

In accordance with the Americans with Disabilities Act (ADA), the Board of Education of Community Consolidated School District 64 Park Ridge-Niles will provide access to public meetings to persons with disabilities who request special accommodations. Any persons requiring special accommodations should contact the Director of Facility Management at (847) 318-4313 to arrange assistance or obtain information on accessibility. It is recommended that you contact the District, 3 business days prior to a school board meeting, so we can make every effort to accommodate you or provide for any special needs.



Madelyn Wsol &lt;mwsol@d64.org&gt;

**Fwd: Public Information Request**

1 message

Laurie Heinz &lt;lheinz@d64.org&gt;

Wed, Sep 27, 2017 at 2:42 PM

To: Bernadette Tramm &lt;btramm@d64.org&gt;, Madelyn Wsol &lt;mwsol@d64.org&gt;

**From:** Katherine Baker <katherine@parents.foundation>**Date:** September 27, 2017 at 12:04:10 PM PDT**To:** Laurie Heinz <lheinz@d64.org>**Subject:** Public Information Request

## PUBLIC INFORMATION REQUEST

Parent's Foundation for Education  
Katherine Baker  
PO Box #7162  
Austin, TX 78713

September 27, 2017

Park Ridge CCSD 64

Laurie Heinz  
Superintendent  
164 S Prospect Ave  
Park Ridge, IL 60068

Dear Laurie Heinz,

This request is made under the Illinois Freedom of Information Act, 5 ILCS 140, which guarantees the public's access to information in the custody of public agencies. I respectfully request access to the following information:

An excel spreadsheet containing the following information for every teacher and staff member (employee) currently employed in Park Ridge CCSD 64. Please organize this information in the following manner:

- Campus (or office building name, for staff)
- First Name
- Middle Name
- Last Name
- Position
- Grade Level(for teachers)
- Subject Area taught (for teachers)
- Certified in Area of Instruction (for teachers)

- Home Address
- School Email
- Personal Email
- Personal Phone Number
- Gender
- Race/Ethnicity
- Hire Date
- Years of Experience
- Current Salary

If you have any questions about any of the data requested above, please feel free to reach out to me at [katherine@parents.foundation](mailto:katherine@parents.foundation), or call (512) 580-7117 for more immediate assistance. In particular, it may be easier to send multiple excel spreadsheets containing different data categories.

In addition, please notify me if there are any parts of this request that cannot be fulfilled for any reason.

Thank you for your attention to this request.

Sincerely,

Katherine Baker

From: Kirk Allen  
**Sent:** Monday, October 2, 2017 11:04 AM  
**To:** FOIA AWI  
**Subject:** FOIA request School District -

In accordance with the Freedom of Information Act of Illinois, I am requesting the following public records as part of an American Watchdogs Inc. research project.

1. A copy of all debt currently held by the School District in any form to include but not limited to, lines of credit, financial institution, bonds, credit card
2. A copy of all payment structures for that debt that reflects principal payment, interest payment, and time frame of those obligations.
3. A copy of all compensation provided to the Superintendent.
4. A copy of the Superintendents employment contract.
5. A copy of the minutes and agenda where the Superintendents contract was approved.

I qualify as both media and non-profit under the definitions in Section 2 (c-10) ("Commercial purpose"), Section 2 (f) ("News media"), Section 2 (g) ("Recurrent requester"), and Section 2 (h) ("Voluminous request") of the Freedom of Information Act, for the purposes of being exempt to the provisions of Section 3.1 (Requests for commercial purposes), Section 3.2 (Recurrent requesters), Section 3.6 (Voluminous requests), and Section 6 (Authority to charge fees).

I request expedited processing on the basis of an urgency to inform the citizens and taxpayers of Illinois about their government's activities. If any element of this request is denied in whole or in part, I ask that you justify all withholdings individually by reference to specific exemptions of the Act. Please provide all responsive information to me electronically.

I request a rolling production of records, such that the public body furnishes records to my attention as soon as they are identified, preferably electronically, but as needed then to my attention, at the below address. If you have any questions please do not hesitate to contact me. Rolling production is not to be perceived as an agreement to extend the time frame for compliance under FOIA.

If you are not the FOIA officer responsible for any part of this request you are required by law to forward it to the appropriate FOIA officer.

The purpose of the request is to access and disseminate information regarding the legal rights of the general public and is not for the principal purpose of personal or commercial benefit.

As outlined in FOIA, documents shall be furnished without charge or at a reduced charge, as determined by the public body, if the person requesting the documents states the specific purpose for the request and indicates that a waiver or reduction of the fee is in the public interest. Waiver or reduction of the fee is in the public interest if the principal purpose of the request is to access and disseminate information regarding the health, safety and welfare or the legal rights of the general public and is not for the principal purpose of personal or commercial benefit.

I am requesting the records be provided in electronic format if that is the method in which they are stored. If they are in paper form and the copier can convert them to electronic format I would appreciate receiving them electronically.

American Watchdogs Inc.  
[foia-awi@illinoisleaks.com](mailto:foia-awi@illinoisleaks.com)  
[7060 Illinois Highway 1](#)  
[Paris, Illinois 61944](#)  
[217-508-0564](tel:217-508-0564)

To: Board of Education  
Dr. Laurie Heinz, Superintendent

From: Mary Jane Warden, Director of Innovation and Instructional Technology

Date: October 10, 2017

Re: Recommendation of PowerSchool Unified Classroom, Assessment, and Analytics System

Over the 2016-17 school year, District 64 investigated system solutions with the vision that teachers would have one dashboard where they would be able to assess their students' learning progress through assignments, common assessments, and benchmark data. We began our search when *Inform* wasn't meeting our needs and it was retired as a system. The District sought to provide teachers with a tool that can generate a profile of a student's performance and strategically address learning gaps to help guide planning for differentiated instruction.

The District created a decision making framework by which a replacement system would be selected. The criteria included:

- Integration with existing student information system as well as other pertinent systems
- Robust storage of historical benchmark data and the capacity to generate and compare analytics of assessment data
- Easy searching and grouping of benchmark and local assessment data
- Ease of building a wide range of assessments that can be delivered and scored online
- Effective and efficient workflows from assignment/assessment to gradebook to analytics to instructional adjustments
- Incorporate standards and eventually standards-based grading
- Individual student data profiled all on one screen
- Comfortable and intuitive user interface
- Easy learning curve for users
- Flexibility in creating reports and graphics
- Possible replacement of any current systems (consolidation)
- Vantage points from all pertinent stakeholders for all areas of communication - student, parent, teacher, support staff, administrator
- Cost comparables
- Support and responsiveness from vendor as partners

During the course of the school year, the District partnered with Otus, an emerging company with much promise in being the system that would be our data warehouse, a tool for building online assessments, and a learning management system. As the year progressed, other products

entered this fast-changing market including: PowerSchool Unified Classroom, Decision Ed, Mastery Manager, Insight, and Performance Plus.

After a review of each of the products and a comparison to Otus, it has been determined that PowerSchool Unified Classroom/Assessment/Analytics is the system that best matched our requirements. We anticipate a fairly smooth transition to the Unified Classroom as we already use PowerSchool as our student information system, parent portal, and the online registration system (Infosnap recently merged with PowerSchool).

District 64, therefore, will benefit by having all its essential operating systems under this single, PowerSchool umbrella.

### **Impact on Student Learning**

PowerSchool Analytics will give teachers and administrators a 360° view of student progress. Student learning plans can be taken to a higher level of personalization as information and data can be compiled into one easy user interface. This will empower teachers to make strategic instructional adjustments, differentiate, and modify pacing so students are better able to learn and achieve. Through visual data illustrations, administrators and teacher leaders will be able to drive student growth and close achievement gaps with longitudinal student data, benchmark assessments, and other factors like discipline and attendance.

PowerSchool Assessment is a design tool that teachers can use to build local common assessments in pursuit of mastery learning for our students. Teachers will be able to create the assessment, share them in grade level or content area teams, deliver it to students online in our 1:1 learning environment, and analyze the data to reach learning outcomes. Local assessment data can also be compared with benchmark data for a fuller picture of a student's performance profile that influences student goal setting and the learning process.

PowerSchool Unified Classroom will be the one place where students, parents, and teachers can visit everyday to optimize learning. In the Unified Classroom, everyone will be able to communicate, collaborate, and access the same information in order to engage actively in the learning process.

### **Next Steps**

As Luann Kolstad had reported at the regular Board meeting on September 25, 2017, the expenditure of \$48,902.56 for PowerSchool Unified Classroom/Assessment/Analytics has been budgeted for the 2017-18 fiscal year. The annual licensing cost of \$33,502.56 for the system will be incorporated into the operating budget going forward. Attached is the quote for this system. We will return for Board approval at the October 23, 2017 regular meeting.



PowerSchool Group LLC  
 150 Parkshore Dr, Folsom, CA 95630  
 Quote #: Q-62825-1  
 Quote Expiration Date: 10/22/2017

Prepared By: Adam Frillman	Customer Contact: Mary Jane Warden
Customer Name: Park Ridge Community Consolidated School District 64	Title: Director of Information Technology
Enrollment: 4,368	Address: 164 S Prospect Ave
# of Schools: 9.00	City: Park Ridge
Contract Term: 36 Months	State/Province: Illinois
Start Date: 8/23/2017	Zip Code: 60068-4079
End Date: 8/22/2020	Phone #: 847.318.5427

Product Description	Quantity	Unit	Unit Price	Extended Price
<b>License and Subscription Fees</b>				
PS Unified Classroom (with Assessment)	4,368.00	Students	USD 6.50	USD 28,392.00
PS Unified Classroom Assessment Promo	4,368.00	Students	USD -1.63	USD -7,119.84
PS Analytics [Fall '17] Annual Fee	4,368.00	Students	USD 2.80	USD 12,230.40

License and Subscription Totals: **USD 33,502.56**

<b>Professional Services and Setup Fees</b>				
Unified Project Management Services/ Implementation	1.00	Each	USD 1,500.00	USD 1,500.00
PS Assessment [Spring '17] Implementation	1.00	Each	USD 2,500.00	USD 2,500.00
PS Analytics [Fall '17] Implementation	1.00	Each	USD 4,000.00	USD 4,000.00

Professional Services and Setup Fee Totals: **USD 8,000.00**

<b>Training Services</b>				
PS Unified Classroom with Assessment Training - Remote	2.00	Day	USD 1,500.00	USD 3,000.00
PS UC + AMS - Free Promotional Training - Remote	2.00	Day	USD 0.00	USD 0.00
PS Analytics Training Full Day Onsite	2.00	Day	USD 2,200.00	USD 4,400.00

Training Services Total: **USD 7,400.00**

#### Quote Total

<b>Total Discount:</b>	<b>USD 3,057.60</b>
<b>Year One Total:</b>	<b>USD 48,902.56</b>

<b>Annual Ongoing Fees</b>				
PS Unified Classroom (with Assessment)	4,368.00	Students	USD 6.50	USD 28,392.00



PS Analytics [Fall '17] Annual Fee	4,368.00	Students	USD 2.80	USD 12,230.40
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Annual Ongoing Fees Total: **USD 33,502.56**

**Fees for subsequent years within the term bound by the Start Date and End Date detailed on this quote will be equal to the 'Annual Ongoing Fees' amount uplifted by 3.0% in each following year.**

On-Going PowerSchool Subscription/Maintenance & Support Fees are invoiced at then current rates & enrollment per terms of the Licensed Product and Services Agreement, which may be subject to an annual increase after the first year for non-multi-year contracts and/or enrollment increases.

Any applicable state sales tax has not been added to this quote. Subscription Start and expiration Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order.

In the event that this quote includes promotional pricing, such promotional pricing may not be valid for the entire period stated on this quote.

All invoices shall be paid within thirty (30) days of the date of invoice.

**All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for administrative purposes only and shall not impact the terms or conditions reflected in this signed Quote and the applicable PowerSchool Licensed Product and Services Agreement....**

This quote is subject to and incorporates the terms and conditions of the PowerSchool Licensed Product and Services Agreement found at <https://www.powerschool.com/customer-contract-terms-and-conditions-us-6-2-17/>