

BOARD OF EDUCATION
The School District of South Orange and Maplewood
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November 12, 2012

MEMORANDUM

TO: Members, Board of Education
 Members, Board of School Estimate
 Brian Osborne, Superintendent

FROM: Cheryl Schneider, Business Administrator *Cheryl Schneider*

SUBJECT: BASELINE DATA FOR 2013-14 SCHOOL BUDGET DEVELOPMENT

The school budget is a planning document. Building the school budget is not done by simply inflating prior year spending by a given percentage. The development process requires the thoughtful review of the current education program, compilation and analysis of a variety of data, and the involvement of a multitude of stakeholders. The following information will provide baseline data for development of the 2013-14 school budget.

Enrollment Projections.

Enrollment is an important element of budget development. It is used to determine appropriate amounts to budget in several areas including staffing levels, facility needs, equipment, textbooks, supplies and materials. The New Jersey Department of Education considers district enrollment in the state aid formula and per pupil cost analyses are used for comparative purposes among districts.

The district enrollments are determined as of October 15 and filed with the NJDOE. It appears from the October 15, 2012 data that while the large enrollment growth in 2008 and 2009 tapered off, we have been experiencing a slow but steady increase over the past two years. The district will need to watch the elementary growth as we continue to see increasing demand for space at that level, and the anticipated increase at the middle school level is beginning to become evident. There were 6,625 students on the roll, 93 more than on the October 15, 2011 roll. The count of students “on the roll” does not include resident students placed in schools out of the district.

As of Oct 15,	Elementary (K-5)	% Change	Middle (6-8)	% Change	High School (9-12)	% Change	Special Education	% Change	Total Enrolled	% Change
2001	2,874	0%	1,522	-0%	1,855	.%	139	32%	6,396	1%
2002	2,806	-2%	1,511	-0.7%	1,877	1%	170	22%	6,364	-0.4%
2003	2,753	-2%	1,474	-3%	1,996	6%	167	-2%	6,390	0.4%
2004	2,716	-1%	1,450	-2%	2,004	0.4%	130	-22%	6,300	-1%
2005	2,716	0%	1,404	-3%	1,975	-1%	126	-3%	6,221	-1%
2006	2,683	-1%	1,361	-3%	1,885	-5%	171	36%	6,100	-2%
2007	2,750	2.5%	1,332	-2%	1,862	-1%	153	-11%	6,097	0%
2008	2,847	3.5%	1,356	2%	1,840	-1%	145	-5%	6,188	2%
2009	3,016	6%	1,394	3%	1,851	0.6%	153	6%	6,414	4%
2010	3,133	4%	1,404	0.7%	1,803	-3%	119	-22%	6,459	0.7%
2011	3,153	1.2%	1,416	0.9%	1,834	1.7%	129	8%	6,532	1.1%
2012	3,216	1.5%	1,438	1.6%	1,847	0.7%	124	-4%	6,625	1.4%

Self-contained special education in-district enrollment continues to fluctuate, decreasing by 4% after increasing by 8% in 2011 and decreasing by 22% in 2010. At the same time, the number of special education students (162) sent to out-of-district schools full-time and shared-time increased slightly to approximately 2.4% of the total resident enrollment for the past four years.

The annual Application for State School Aid details all resident students, those on the roll and sent out of district on October 15. The Fall Survey Enrollment Report which detailed a breakdown of in-district students by demographic categories is no longer produced. Copies of the Enrollment Summary and the ASSA report summary submitted to the state in October is provided as **Attachments A and B**.

Enrollment data has been provided to Sara Weissman, a professional demographer, to update district level and building level enrollment projections for future planning. The demographer will also complete a migration analysis to identify trends.

Low-income (at-risk) Students.

The number of students eligible for free or reduced-price lunches is also an important element of budget development. The concentration of free eligible students is used by NJDOE to determine whether the district qualifies for additional state aid. The number of low-income students is also used to determine qualification for federal Title I funding and the requirement to provide a breakfast program. The number of eligible students in 2012 (1,329) is an increase of 64 students from 2011 and increased slightly to represent about 20% of the total student population. The number of eligible students has remained about 18%-19% of the student population for the past several years. A report that presents the trends in the numbers of eligible students by school, by category as a percentage of enrollments and the percent of change from the previous years is provided as **Attachment C**.

Transported Students.

The cost of transporting resident students within the district and to out-of-district schools is a major expenditure in the school budget. The number of students transported as of October 15 is reported to NJDOE in the annual District Report of Transported Resident Students (DRTRS). The New Jersey Department of Education considers the number of transported students in the state aid formula and per pupil cost analyses used for comparative purposes among districts. An efficiency analysis is also performed by NJDOE to determine that buses are fully loaded. The state standard for efficiency is 120%. The district's rating in 2011-12 was 1.29, above the state standard, even though bus seats filled with courtesy students are considered empty. In previous years the district's rating was below 1.0. The improved rating was due to changes in the bell schedules at two elementary schools allowing the use of single buses to run two routes (tiering) and increase the load factor (efficiency). 2009-2010 was the first time the district had successfully met the state efficiency standard, and while we fell slightly below the 1.20 level in 2010-2011, efforts to return to the 1.20 level were successful.

The district transports 2,035 students to and from school each day. Of the students transported, 980 are regular students transported to district schools, (525 of the 980 are transported as a courtesy due to policies regarding the Marshall-Jefferson school pairing, Seth Boyden Demonstration school and hazardous walking routes), 750 are transported to non-public schools and 10 are transported to charter schools (or paid aid in lieu of transportation) and 295 special

needs students are transported to district and out of district schools. A copy of the DRTRS summary is provided as **Attachment D**.

Salaries and Benefits.

Salaries and benefits comprise the largest expenditure of the school budget. The budgeted count of district employees for the 2012-13 school year was 748.54 full-time equivalent certificated and non-certificated staff members including 688.54 members of South Orange and Maplewood Education Association (SOMEA), 35 members of Administrators, Supervisors and Coordinators Association (ASCA) and 25 central office staff (including 8 confidential secretaries). The Board of Education agreement with SOMEA was ratified on May 23, 2011 and the contract extends through June 30, 2013. The salary increase for 2013-14 is unknown at this time and will be determined as part of negotiations. The Board of Education agreement with ASCA was ratified on December 10, 2010 and also extends through June 30, 2013. The salary increase for 2013-14 over the current year is unknown at this time and will be determined through negotiations.

Benefits for all groups include group insurance, social security, unemployment compensation, workmen's compensation, health benefits, tuition reimbursement, and retiree unused sick-day reimbursement. As of January 2012, the Board of Education will pay the premium for Direct 15 for SOMEA members. If members opt for a more expensive health benefits package, the employee is responsible for 100% of the difference in premiums. With the expiration of the agreements with the bargaining units, all employees will be required to make contributions towards their health benefits based on statute. For the initial year of contributions, the majority of the employees will be required to contribute a minimum of 1.5% of salary towards their health benefits. The total benefit package is estimated to be approximately 26% of salaries.

A summary chart comparing the budgeted staff for 2012-13 to the actual staffing for 2011-12 and 2010-11 is provided as **Attachment E**. This staffing chart will be updated to reflect the actual staffing for 2012-13 as part of the budget building documentation.

School Facilities.

The aging school facilities require major investments of resources. Funds are budgeted in three categories. Custodial services and routine maintenance are funded in the operating budget and capital improvements are funded primarily by bond proceeds. The NJDOE has established a minimum requirement that 0.2% of building replacement value must be budgeted annually for routine maintenance. For the past few years, the district has established a minimum budget of 1% of building value each year due to the age and condition of the buildings. A copy of the Annual Maintenance Budget Amount Worksheet and Comprehensive Maintenance Plan are provided as **Attachment F**. The Long Rang Facilities Plan provides for capital projects according to a schedule that attempts to maintain a level debt service. A Facilities Conditions Assessment was completed last year which is being used to develop a long range capital plan. The results of the assessment helped inform the comprehensive maintenance plan and will help inform the budget as well as determine future projects and maintenance planning.

The 2010-11 Comprehensive Annual Financial Report (audit) and Management Discussion and Analysis (MD&A).

This document presents historical financial information prepared by an independent auditing firm. The document will be distributed to the Board of Education and Board of School Estimate members separately. Mr. Morrison from the auditing firm of Hodulik and Morrison will be available to present the audit at the November 19 Board meeting to answer questions from members of the Board.

General Fund Free Balance Status.

The amount of general fund free balance is important to determine if surplus funds are available to supplement revenues and reduce taxes. It is also used to identify the amount available for dealing with contingencies. The Board of Education has established a policy that it is prudent to maintain a minimum amount equal to 3% of budgeted appropriations for unforeseen circumstances. The NJDOE requires that amounts exceeding 2% are surplus and must be appropriated in the subsequent school budget.

A report of changes in general fund free balance from 1996-97 to 2011-12 is provided as **Attachment G**. It shows that the net unreserved general fund balance on June 30, 2012 was \$1,442,544. This is an amount equal to 1.40% of 2011-12 expenditures and below board policy. The amount of unreserved funds dropped below Board policy due to the NJDOE requirement that amounts in excess of 2% must be reserved as surplus. The amount is less than 2% because the NJDOE includes the final state aid payment in the calculation of surplus even though receipt was deferred until after June 30 and therefore is not reflected in the fund balance on June 30, 2012. An amount of \$2,152,272 was legally reserved and appropriated toward the 2013-14 revenues.

Budget Calendar and Priorities

The reports provided in this document represent the key information needed to build the 2013-14 school budget. The district goals, adopted by the Board of Education provide the priorities for budget development and allocation of scarce resources. Additional data will be collected and compiled as needed to perform various analyses and complete reports to aid in the overall budget development process. They will be provided to the Board of Education and Board of School Estimate as part of those reports. The reports will also be available on-line at www.somsk12.nj.us. The District Goals adopted by the Board of Education are provided as **Attachment H**.

The administration is scheduled to present a preliminary 2013-14 school budget to the Board of Education at its public meeting on Monday, February 25. The NJDOE has not yet provided the schedule for budget submission. It is anticipated that the Board of Education will approve a 2013-14 school budget for advertising by March 4. The Board of Education will then submit the approved budget to the Board of School Estimate to raise the taxes necessary to fund the budget tentatively scheduled for March 27, 2013. A copy of the DRAFT 2013-14 budget calendar is provided as **Attachment I**.

Please contact me if you have any questions about the data provided.

Enrollment Summary

2012-2013

As of 10/15/2012

Grade	Clinton	Jefferson	Marshall	Seth Boyden	South Mountain	Tuscan	Total
PK		21					21
K	70		173	84	107	121	555
1	93		141	81	105	104	524
2	93		166	79	99	104	541
3	94	158		85	92	93	522
4	64	168		112	109	88	541
5	86	136		96	107	108	533
Sp. Ed.*	6	44	31				81
Total	506	527	511	537	619	618	3318

*These are SpEd self-contained students.

Grade	Maplewood Middle	South Orange Middle	Total
5			
6	240	254	494
7	267	243	510
8	231	203	434
Sp. Ed.*		11	11
Total	738	711	1449

*These are SpEd self-contained students.

Grade	Columbia High School
8	
9	512
10	479
11	438
12	418
Sp. Ed.*	11
Total	1858

*These are SpEd self-contained students

Elementary Schools	Middle Schools	High School	District
3318	1449	1858	6625

STUDENTS ELIGIBLE FOR FREE OR REDUCED MEALS

Number of eligible students by school, by category as a percentage of enrollment and the percent change from the previous year.

School	October 15, 2008			October 15, 2009			October 15, 2010			October 15, 2011			October 15, 2012		
	#	% of Enr	% Chg	#	% of Enr	% Chg	#	% of Enr	% Chg	#	% of Enr	% Chg	#	% of Enr	% Chg
COLUMBIA															
Enrollment	1,856	100%	-1%	1,866	100%	1%	1,816	100%	-3%	1,863	100%	3%	1,858	100%	0%
Free	277	15%	0%	322	17%	16%	314	17%	-2%	354	19%	13%	368	20%	4%
Reduced	109	6%	2%	102	5%	-6%	99	5%	-3%	84	5%	-15%	113	6%	35%
Total	386	21%	1%	424	23%	10%	413	23%	-3%	438	24%	6%	481	26%	10%
MMS															
Enrollment	707	100%	0%	735	100%	4%	734	100%	0%	755	100%	3%	738	100%	-2%
Free	102	14%	-10%	116	16%	14%	131	18%	13%	143	19%	9%	140	19%	-2%
Reduced	55	8%	17%	54	7%	-2%	43	6%	-20%	36	5%	-16%	41	6%	14%
Total	157	22%	-2%	170	23%	8%	174	24%	2%	179	24%	3%	181	25%	1%
SOMS															
Enrollment	660	100%	3%	674	100%	2%	681	100%	1%	674	100%	-1%	711	100%	5%
Free	83	13%	-3%	88	13%	6%	97	14%	10%	105	16%	8%	98	14%	-7%
Reduced	34	5%	6%	40	6%	18%	26	4%	-35%	24	4%	-8%	32	5%	33%
Total	117	18%	-1%	128	19%	9%	123	18%	-4%	129	19%	5%	130	18%	1%
MARSHALL															
Enrollment	443	100%	-1%	450	100%	2%	510	100%	13%	485	100%	-5%	511	100%	5%
Free	23	5%	0%	34	8%	48%	32	6%	-6%	37	8%	16%	40	8%	8%
Reduced	4	1%	-50%	15	3%	275%	9	2%	-40%	11	2%	22%	9	2%	-18%
Total	27	6%	-13%	49	11%	81%	41	8%	-16%	48	10%	17%	49	10%	2%
JEFFERSON															
Enrollment	418	100%	10%	433	100%	4%	472	100%	9%	507	100%	7%	527	100%	4%
Free	36	9%	50%	47	11%	31%	58	12%	23%	59	12%	2%	63	12%	7%
Reduced	13	3%	8%	17	4%	31%	14	3%	-18%	18	4%	29%	10	2%	-44%
Total	49	12%	36%	64	15%	31%	72	15%	13%	77	15%	7%	73	14%	-5%
CLINTON															
Enrollment	453	100%	-2%	483	100%	7%	510	100%	6%	500	100%	-2%	506	100%	1%
Free	83	18%	-9%	84	17%	1%	95	19%	13%	99	20%	4%	97	19%	-2%
Reduced	35	8%	21%	38	8%	9%	26	5%	-32%	20	4%	-23%	17	3%	-15%
Total	118	26%	-2%	122	25%	3%	121	24%	-1%	119	24%	-2%	114	23%	-4%
SETH BOYDEN															
Enrollment	482	100%	12%	525	100%	9%	526	100%	0%	514	100%	-2%	537	100%	4%
Free	105	22%	30%	122	23%	16%	117	22%	-4%	124	24%	6%	147	27%	19%
Reduced	31	6%	-3%	41	8%	32%	48	9%	17%	45	9%	-6%	55	10%	22%
Total	136	28%	20%	163	31%	20%	165	31%	1%	169	33%	2%	202	38%	20%
SOUTH MOUNTAIN															
Enrollment	578	100%	-2%	628	100%	9%	613	100%	-2%	625	100%	2%	619	100%	-1%
Free	21	4%	-13%	25	4%	19%	25	4%	0%	35	6%	40%	25	4%	-29%
Reduced	13	2%	117%	11	2%	-15%	9	1%	-18%	11	2%	22%	8	1%	-27%
Total	34	6%	13%	36	6%	6%	34	6%	-6%	46	7%	35%	33	5%	-28%
TUSCAN															
Enrollment	591	100%	3%	620	100%	5%	597	100%	-4%	609	100%	2%	618	100%	1%
Free	49	8%	58%	54	9%	10%	41	7%	-24%	48	8%	17%	46	7%	-4%
Reduced	23	4%	-15%	13	2%	-43%	16	3%	23%	12	2%	-25%	20	3%	67%
Total	72	12%	24%	67	11%	-7%	57	10%	-15%	60	10%	5%	66	11%	10%
DISTRICT															
Enrollment	6,188	100%	1%	6,414	100%	4%	6,459	100%	1%	6,532	100%	1%	6,625	100%	1%
Free	779	13%	4%	892	14%	15%	910	14%	2%	1004	15%	10%	1024	15%	2%
Reduced	317	5%	6%	331	5%	4%	290	4%	-12%	261	4%	-10%	305	5%	17%
Total	1,096	18%	4%	1,223	19%	12%	1,200	19%	-2%	1,265	19%	5%	1,329	20%	5%

Source: District Records: State Fall Reports

Nov-12

New Jersey Department of Education
 DRTRS Summary Report
 School Year 2012-2013

14:00:24

11/02/2012

COUNTY : 13 - ESSEX
 DISTRICT: 4900 - SOUTH ORANGE-MAPLEWOOD

A - Eligible REGULAR and In-District Special Education Students
 without Special Transportation Needs

1 - Students - Grade PK	0.0
2 - Public School Students Excl. Voc. Students...	<u>455.0</u>
3 - Vocational School Students	<u>2.0</u>
4 - Charter School Students	<u>0.0</u>
5 - CSPP Charter School Students	<u>10.0</u>
6 - Transported Non-Public School Students	<u>423.0</u>
7 - AIL Non-Public School Students	<u>327.0</u>
8 - Special Education Public School Students ...	<u>35.0</u>
9 - Special Education Charter School Students ...	<u>0.0</u>
10 - Private School for the Handicapped Students .	<u>0.0</u>
11 - Total Students	<u>1252.0</u>
12 - Total Mileage	<u>8094.9</u>
13 - Average Home to School Mileage	<u>6.5</u>
14 - Total Mileage Excluding Grade PK	<u>8094.9</u>
15 - Average Home to School Mileage Excluding Grade PK	<u>6.5</u>

B - Eligible SPECIAL EDUCATION STUDENTS with Special Transportation
 Needs and Out-of-District Special Education Students without
 Special Transportation Needs

1 - Public School Students with Special Transportation Needs	<u>128.0</u>
2 - Charter School Students with Special Transportation Needs	<u>0.0</u>
3 - Private School for the Handicapped Students with Special Transportation Needs	<u>87.0</u>
4 - Total Special Education Students with Special Transportation Needs	<u>215.0</u>
5 - Total Mileage for Special Education Students with Special Transportation Needs	<u>1723.1</u>
6 - Out-of-District Public School Students without Special Transportation Needs	<u>21.0</u>
7 - Out-of-District Charter School Students without Special Transportation Needs	<u>0.0</u>
8 - Out-of-District Private Sch for the Handicapped Students without Special Transp. Needs ..	<u>22.0</u>
9 - Total Out-of-District Special Education Students without Special Transportation Needs ...	<u>43.0</u>
10 - Total Mileage for Out-of-District Special Ed. Students without Special Transp. Needs ..	<u>695.2</u>
11 - Total Special Education Students	<u>258.0</u>
12 - Total Special Education Mileage	<u>2418.3</u>
13 - Average Home to School Mileage	<u>9.4</u>

14:00:24

11/02/2012

COUNTY : 13 - ESSEX
DISTRICT: 4900 - SOUTH ORANGE-MAPLEWOOD

C - Courtesy Students

1 - Total Elementary School Students	500.0
2 - Total Elementary School Student Mileage ...	688.7
3 - Total Secondary School Students	25.0
4 - Total Secondary School Student Mileage	51.1
5 - Total Courtesy Students	525.0
6 - Total Courtesy Student Mileage	739.8
7 - Average Home to School Mileage	1.4

D - Nonpublic School Students over 20 Miles

1 - Transported Nonpublic Sch. Students 20.1-30 Miles	0.0
2 - Transported Nonpublic Sch. Students > 30 Miles	0.0
3 - AIL Nonpublic School Students 20.1-30 Miles	0.0
4 - AIL Nonpublic School Student - > 30 Miles ...	0.0
5 - Total Mileage	0.0

Name of routing vendor or "NONE" for none: VERSATRANS

Does your district have a subscription busing program for resident students?(Y/N): N

Does your district have a subscription busing program for nonresident students?(Y/N): N

Does your district provide Non-Mandated transportation to resident students who would be required to walk to and from school along a route designated as a hazardous route by the school district pursuant to NJSA 18A:39-1.5 if transportation were not provided?(Y/N) Y

Students transported pursuant to NJSA 18A:39-1.5: 237

SOUTH ORANGE & MAPLEWOOD
CURRENT CERTIFICATED STAFF

3/1/2012

Category	Actual FTEs					Actual FTEs 2011-12	Proposed FTEs 2012-13	+/- Changes in FTEs
	2010-11	Elementary	Middle School	High School	District			
Elementary School Teachers								
Kindergarten	26.00	25.00	----	----	----	25.00	25.00	0.00
1st Grade	24.00	24.00	----	----	----	24.00	24.00	0.00
Multi-Age (1st/2nd)	4.00	4.00	----	----	----	4.00	4.00	0.00
2nd Grade	26.00	25.00	----	----	----	25.00	25.00	0.00
3rd Grade	25.00	25.00	----	----	----	25.00	25.00	0.00
4th Grade	22.00	24.00	----	----	----	24.00	24.00	0.00
5th Grade	22.00	21.00	----	----	----	21.00	21.00	0.00
SUB TOTAL	149.00	148.00	0.00	0.00	0.00	148.00	148.00	0.00
Others								
Art	19.45	6.35	4.00	9.10	----	19.45	19.45	0.00
Music	18.00	8.60	6.40	3.00	----	18.00	18.00	0.00
World Language/ESL	28.40	6.00	7.00	17.40	----	30.40	30.40	0.00
Health & Physical Education	34.30	12.50	7.00	13.40	----	32.90	32.90	0.00
Reading Specialist	2.00	1.00	----	----	----	1.00	2.00	1.00
Math Specialist	1.00	1.00	----	----	----	1.00	2.00	1.00
Enrichment	3.20	4.00	----	----	----	4.00	4.00	0.00
Project Ahead	0.00	----	----	----	----	0.00	0.00	0.00
Technology	2.00	----	2.00	----	----	2.00	2.00	0.00
Accademic Intervention Teacher	7.50	8.80	----	----	----	8.80	8.80	0.00
Athletic Trainer	1.00	----	----	1.00	----	1.00	1.00	0.00
SUB TOTAL	116.85	48.25	26.40	43.90	0.00	118.55	120.55	2.00
TOTAL CERTIFICATED STAFF	646.96	301.35	142.60	189.49	21.00	654.44	652.54	-1.90
TOTAL NON-CERTIFICATED STAFF	102.20					101.70	96.00	-5.70
GRAND TOTAL	749.16	301.35	142.60	189.49	21.00	756.14	748.54	-7.60

	Category	Actual FTEs 2010-11	Actual FTEs 2011-12	Proposed FTEs 2012-13	+/- Changes in FTEs
Central Office					
	Chief Information Officer	1.00	1.00	1.00	0.00
	Communications Coordinator	1.00	0.50	----	-0.50
	Director of Strategic Communications		1.00	1.00	0.00
	In-House Counsel	1.00	1.00	1.00	0.00
	PEP Coordinator	1.00	1.00	0.00	-1.00
	SUB TOTAL	4.00	4.50	3.00	-1.50
Business Office					
	Supervisor of Payroll	1.00	1.00	1.00	0.00
	Network Manager	1.00	1.00	1.00	0.00
	AV Tech	2.00	2.00	2.00	0.00
	Telecommunications Specialist	----	----	----	----
	Supervisor of Buildings & Grounds	1.00	1.00	1.00	0.00
	Asst. Supervisor of Buildings & Grounds	1.00	1.00	1.00	0.00
	Maintenance Workers	7.00	7.00	7.00	0.00
	Supervisor of Food Service	1.00	1.00	1.00	0.00
	Custodial Supervisor	----	----	----	----
	Custodians	----	----	----	----
	Supervisor of Transportation	----	----	----	----
	Transportation Coordinator	1.00	1.00	1.00	0.00
	Bus Drivers	8.50	8.50	7.70	-0.80
	Bus Aides	6.10	6.10	5.30	-0.80
	School District Physician	----	----	----	0.00
	Treasurer of School Monies	1.00	1.00	1.00	0.00
	SUB TOTAL	30.60	30.60	29.00	-1.60
Technology					
	Information Systems Manager	1.00	1.00	1.00	0.00
	Assistant Network Manager	----	----	----	0.00
	Data Entry Manager	2.00	2.00	2.00	0.00
	Technology Facilitators	----	----	----	----
	Technology Trainer	3.00	3.00	3.00	0.00
	ETTC	----	----	----	----
	SUB TOTAL	6.00	6.00	6.00	0.00
Secretarial Staff					
	Confidential Secretaries	8.00	8.00	8.00	0.00
	Secretaries	45.00	44.00	42.00	-2.00
	Clerical Aides	5.60	5.60	5.00	-0.60
	SUB TOTAL	58.60	57.60	55.00	-2.60
Security					
	Security Guards at CHS	----	----	----	----
	SUB TOTAL	0.00	0.00	0.00	0.00
Aides					
	Instructional Aides				
	Special Education	----	----	----	0.00
	Medical Aide	----	----	----	0.00
	Regular Education	----	----	----	0.00
	504 Aides	----	----	----	0.00
	ELL Instructional Assistant	1.00	1.00	1.00	0.00
	Title I Aides	2.00	2.00	2.00	0.00
	Lunch Aides/Breakfast Aides	----	----	----	0.00
	SUB TOTAL	3.00	3.00	3.00	0.00
	TOTAL NON-CERTIFICATED STAFF	102.20	101.70	96.00	-5.70
	TOTAL CERTIFICATED STAFF	646.96	654.44	652.54	-1.90
	GRAND TOTAL	749.16	756.14	748.54	-7.60



**NJ DEPARTMENT OF EDUCATION
SCHOOL FACILITIES**

Form M-1

**Annual Maintenance
Budget Amount Worksheet
Per N.J.A.C. 6A:26A**

County **Essex**
 District Name **So. Orange Maplewood**
 District Number **4900**
 Filing Date **10/15/2012**

Current Area Cost Allowance per SF \$ **143.00**
 District contact name **Cheryl Schneider**
 District contact phone **973-762-5600 ext 1800**
 District contact e-mail **cschneid@somsd.k12.nj.us**

A School Facility Name	B School Number	C Gross Building Area (GSF)	D Building Replacement Value	E Prior Years Actual & Current Year Budgeted expenditure (See Detailed Sheet)	F Min. Annual Target Expenditure for FY 13-14	G Anticipated Budget for FY 13-14
Maintenance Building		6,596	\$ 943,228	\$ 98,639	\$ 1,886	\$ 8,797
Administrative Building	170	27,989	\$ 4,002,427	\$ 467,791	\$ 8,005	\$ 55,903
Columbia High School	030	341,209	\$ 48,792,887	\$ 6,395,780	\$ 97,586	\$ 603,921
Montrose	110	32,117	\$ 4,592,731	\$ 274,936	\$ 9,185	\$ 38,666
Underhill Field	030	7,470	\$ 1,068,210	\$ 440,845	\$ 2,136	\$ 12,325
Maplewood Middle School	040	144,980	\$ 20,732,140	\$ 2,252,122	\$ 41,464	\$ 239,730
South Orange Middle School	050	157,112	\$ 22,467,016	\$ 2,756,470	\$ 44,934	\$ 258,814
Clinton	060	63,071	\$ 9,019,153	\$ 1,047,642	\$ 18,038	\$ 107,500
Jefferson	090	71,293	\$ 10,194,899	\$ 1,104,276	\$ 20,390	\$ 141,085
Marshall	100	53,297	\$ 7,621,471	\$ 945,476	\$ 15,243	\$ 90,057
Seth Boyden	130	80,116	\$ 11,456,588	\$ 1,529,200	\$ 22,913	\$ 128,308
South Mountain	140	56,414	\$ 8,067,202	\$ 1,092,559	\$ 16,134	\$ 99,827
South Mountain Annex	140	19,930	\$ 2,849,990	\$ 482,020	\$ 5,700	\$ 34,479
Tuscan	150	67,235	\$ 9,614,605	\$ 1,386,161	\$ 19,229	\$ 129,938
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
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			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
District Total		1,128,829	\$ 161,422,547	\$ 20,273,917		
Min. Required amount for FY 13-14					\$ 322,845	
Anticipated Budget amount for FY 13-14						\$ 1,949,350

Prepared by:
District School Business Administrator

Max. Maintenance Reserve Amount (4% of column D) \$ 6,456,902
 Current District Maintenance Reserve Amount \$ -
 Print Cheryl Schneider
 Sign *Cheryl Schneider*
 Date 10/15/2012

Detailed Actual Expenditures by Year by Building Worksheet

District Name	So. Orange Maplewood		District Number													4900
	A	B	C	F	G	H	I	J	K	L	M	N	O	P		
A. School Facility Name	School Number	Gross Building Area (GSF)	FY 03-04	FY 04-05	FY 05-06	FY 06-07	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12	12-13	Total			
Maintenance Building	000	6,596	\$ 2,733	\$ 2,674	\$ 9,615	\$ 5,465	\$ 10,803	\$ 6,412	\$ 2,046	\$ 38,865	\$ 11,231	\$ 8,795	\$ 98,639			
Administration Building	170	27,989	\$ 83,163	\$ 24,803	\$ 17,422	\$ 42,748	\$ 50,353	\$ 47,743	\$ 55,984	\$ 53,778	\$ 35,894	\$ 55,903	\$ 467,791			
Columbia High School	030	341,209	\$ 634,878	\$ 563,694	\$ 654,774	\$ 507,727	\$ 567,304	\$ 640,264	\$ 524,558	\$ 578,970	\$ 1,119,690	\$ 603,921	\$ 6,395,780			
Montrose	110	32,117	\$ 8,239	\$ 7,378	\$ 24,064	\$ 27,350	\$ 35,291	\$ 39,479	\$ 48,609	\$ 25,410	\$ 20,450	\$ 38,666	\$ 274,936			
Underhill Field	030	7,470	\$ 15,536	\$ 5,725	\$ 10,478	\$ 18,442	\$ 41,279	\$ 140,374	\$ 32,421	\$ 43,323	\$ 120,941	\$ 12,326	\$ 440,845			
Maplewood Middle School	040	144,980	\$ 228,951	\$ 159,292	\$ 272,253	\$ 200,106	\$ 258,270	\$ 211,508	\$ 148,198	\$ 235,337	\$ 298,477	\$ 239,730	\$ 2,252,122			
South Orange Middle School	050	157,112	\$ 211,655	\$ 250,603	\$ 197,306	\$ 426,213	\$ 331,013	\$ 348,283	\$ 211,230	\$ 282,068	\$ 239,730	\$ 258,814	\$ 2,756,470			
Clinton	060	63,071	\$ 67,459	\$ 80,228	\$ 101,171	\$ 60,538	\$ 105,765	\$ 179,049	\$ 106,182	\$ 111,812	\$ 127,938	\$ 107,500	\$ 1,047,642			
Jefferson	090	71,293	\$ 110,520	\$ 58,601	\$ 49,257	\$ 73,082	\$ 117,975	\$ 120,727	\$ 87,628	\$ 142,118	\$ 203,282	\$ 141,086	\$ 1,104,276			
Marshall	100	53,297	\$ 83,260	\$ 52,967	\$ 79,477	\$ 48,325	\$ 120,725	\$ 131,844	\$ 100,052	\$ 142,315	\$ 96,454	\$ 90,057	\$ 945,476			
Seth Boyden	130	80,116	\$ 168,401	\$ 64,672	\$ 97,020	\$ 160,193	\$ 263,562	\$ 203,483	\$ 193,665	\$ 132,210	\$ 117,686	\$ 128,308	\$ 1,529,200			
South Mountain	140	56,414	\$ 32,326	\$ 86,336	\$ 92,461	\$ 39,037	\$ 46,909	\$ 66,769	\$ 273,802	\$ 190,128	\$ 164,964	\$ 99,827	\$ 1,092,559			
South Mountain Annex	140	19,930	\$ 15,223	\$ 15,011	\$ 10,127	\$ 11,472	\$ 79,376	\$ 78,406	\$ 62,860	\$ 53,028	\$ 122,038	\$ 34,479	\$ 482,020			
Tuscan	150	67,235	\$ 159,917	\$ 62,895	\$ 144,400	\$ 104,035	\$ 93,318	\$ 187,898	\$ 162,348	\$ 109,004	\$ 232,408	\$ 129,938	\$ 1,386,161			
New Field House	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
	000	0											\$ -			
District Total		1,128,829	\$ 1,822,261	\$ 1,434,879	\$ 1,759,825	\$ 1,724,733	\$ 2,121,943	\$ 2,402,239	\$ 2,009,583	\$ 2,138,366	\$ 2,910,738	\$ 1,949,350	\$ 20,273,917			

South Orange Maplewood
Essex County - County Code 4900
Comprehensive Maintenance Plan

Actual Fiscal Year 2011-2012-- Budget Fiscal Year 2012-2013-- Planned Fiscal Year 2013-2014

Building Name	Actual 2011-12	Budget 2012-13	Planned 2013-14
Columbia High School	\$1,119,690	\$603,921	\$603,921
	Repair flat roofs on A wings. Paint selected stairs. Provide water treatment for heating system. Reseal hall windows D-wing. Install roof ladders to gyms and wrestling room. Replace lockers in girls locker room. Annual lawn treatments. Refinish gym floors. Parking lot repairs. Abate clock tower. Maintenance of mechanical controls. of mechanical controls. Rewire C-wing fire alarms.	Install motion sensor lights in selected areas. Paint selected rooms and halls. Repair tiles in pool area. Repair roof fans on B and C wings. Repair air handler to pool area. Replace selected rugs. Sidewalk repairs. Install 250 lockers in B-wing. Annual lawn treatment. Install emergency generator for servers and telephones. Make selected repairs to Dwing roof. Install drinking fountains on 3d floor.	Paint selected classrooms. Remove selected carpets. Install rails on D-wing ramp. Repair vent fans on Awing. Replaced damaged wall mats in West gym. Annual lawn maintenance. Replace chalk boards as needed. Repair cracks in walls. Repair selected sidewalks/curbs. Repair Dwing canopies. Repair AV lot retaining wall. Demolish fan coil in Awing basement. Refinish front door of school.
Montrose School	\$20,450	\$38,666	\$38,666
	Paint selected rooms. Remove trees as needed.	Building to be remodeled to include room renovation, roof replacement and new additional parking area.	Complete remodeling of building
Maplewood Middle	\$298,477	\$239,730	\$239,730
	Paint halls and selected rooms. Provide water treatment for heating system. Repair selected sidewalks. Repair hall lockers. Remove selected rugs. Repaired selected roof sections. Repair library roof. Abated selected rooms. Replaced flat roof over auditorium. Replace flooring in one hall.	Repair selected floors. Provide water treatments for heating systems. Repair selected unit ventilators. Replace some chalk boards and remove old carpets. Complete plumbing repairs in custodial office. Remove selected carpets. Install room motion sensors on one floor. Remove hot water storage tank. Create storage in girl's locker room.	Paint selected rooms. Repair selected roof tiles. Clean interior of clock tower. Provide water treatments for heating systems. Repair selected sidewalks. Renovate two science rooms. Install 175 hall lockers. Remove hot water storage tank. Create storage area in boiler room. Remove furniture from attic. Install new lights in attic. Remove selected rugs.

South Orange Maplewood
Essex County - County Code 4900
Comprehensive Maintenance Plan

Actual Fiscal Year 2011-2012-- Budget Fiscal Year 2012-2013-- Planned Fiscal Year 2013-2014

Building Name	Actual 2011-12	Budget 2012-13	Planned 2013-14
South Orange Middle	\$239,285	\$258,814	\$258,814
	Paint selected stairwells. Refurbish fitness room. Replace selected library rugs. Repair holes in parking lot. Repair selected windows. Remove selected rugs. Apply boiler water treatment. Repair leaking toilets. Repair selected sidewalk sections. Remove dead trees. Extend handicap entrance to girls' locker room. Repair foundation in office area.	Paint selected rooms and stairwells. Refinish gym floor. Repair all damaged wall lockers. Repair auditorium ventilation system. Repair holes in parking lot. Replaced lighting in offices and cafeteria. Install locking devices on auditorium doors. Remove dead trees. Repaint fire lane marking. Refinish gym floor.	Paint halls. Apply boiler water treatment. Remodel one science room. Repair selected sidewalks and curbs. Install light motion sensors in offices and library. Install locking devices on auditorium doors. Replace selected auditorium seating. Install new ventilation system in old photo lab. Repair lockers in girls locker room.
Clinton ES	\$127,938	\$107,500	\$107,500
	Paint halls. Replace floor coverings in selected areas. Prune selected trees. Repair selected playground equipment and provide mulch. Replace library air conditioners. Replace damaged univents and repaired selected sidewalks. Repaired water fountains. Installed additional security cameras. Established fitness area.	Replace floor coverings in selected areas. Repair ramps from portables. Install light motion sensors in offices and portables. Prune selected trees and provide mulch. Repair vent fans on roof. Renovate nurse's office. Provide mulch. Paint stairwells. Replace selected interior room doors.	Paint selected rooms and library. Replace rugs in selected rooms. Install light motion sensor in ground floor rooms. Refurbish two bathrooms. Replace stair treads. Repair wall cracks. Replace gym air handler. Upgrade building electrical service. Repair steps on south side of building to include handrails.
Jefferson ES	\$203,282	\$141,086	\$141,085
	Paint selected areas in school. Replace floor coverings in selected rooms. Repair faculty bathroom. Refinished gym floor. Removed selected playground equipment. Pruned selected trees.	Paint selected stairwells and rooms. Replace floor coverings in selected rooms. Repair several student bathrooms. Repair roof over main hall. Patched driveway. Pruned selected trees. Provided playground mulch.	Paint halls. Playground repairs. Replace five room rugs. Install light motion sensors in all office areas. Repair steps leading from road. Prune selected trees. Provide mulch. Repave Parking lot. Repair canopies at office entrance. Repair glazing on doors to music, art, & library.

South Orange Maplewood

Essex County - County Code 4900

Comprehensive Maintenance Plan

Actual Fiscal Year 2011-2012-- Budget Fiscal Year 2012-2013-- Planned Fiscal Year 2013-2014

Building Name	Actual 2011-12	Budget 2012-13	Planned 2013-14
Marshall ES	\$96,454 Paint halls and selected stairwells. Replace selected floor coverings. Repair roof leaks. Repair selected sidewalks. Prune selected trees. Install whiteboards. Repair access ramps to portable. Provide playground mulch.	\$90,057 Paint selected classrooms. Replace selected classroom rugs. Repair roof damages. Repair boiler fire tubes. Replace white boards in five classrooms. Paint flag pole. Repair slate roofs. Provide playground mulch. Remove trees. Install ADA hardware	\$90,057 Paint selected areas . Replace rugs in five rooms. Install ADA door hardware. Repair roof fans. Repair roof leaks. Install ADA hardware. Provide playground mulch. Install light motion sensors. Replace five white boards. Refinish roof gables.
Seth Boyden ES	\$117,686 Expanded side parking lot. Replace floor coverings in selected rooms. Replace termite damaged floors. Install addressable fire alarm panel. Provided mulch. Repaired sidewalks to portables. Removed selected trees. Replaced stage curtains.	\$128,308 Paint halls . Install light motion sensors in all offices and portables. Remove rugs in selected classrooms. Mulch playground. Repair selected water boiler sections. Repair front entrance steps. Remove old handrail in playground. Prune trees.	\$128,308 Paint selected rooms. Replace rugs in five classrooms. Replace hand rails at auditorium Paint flagpole. Repair auditorium west soffit Install light motion sensors on ground floor Provide mulch. Prune trees. Replace several chalk boards. Glaze five interior doors.
South Mountain ES	\$164,964 Paint stairwells. Provided security looks for gym and auditorium. Provided playground mulch. Installed addressable fire alarms. Fixed leaks in auditorium. Refinished gym floor. Removed seven classroom rugs.	\$99,827 Paint halls and selected classrooms. Replace rugs in five rooms. Install light motion sensors in offices. Refinish stage floor. Repair selected rugs. Repair selected sidewalk. Auditorium wall repair.	\$99,827 Paint selected areas . Replace rugs in five rooms. Glaze selected classroom doors. Repair gutters. Repair stair treads. Provide mulch. Install ADA hardware on one floor Install handrails on steps to street.
South Mountain Annex	\$122,038 Paint selected rooms. Replace selected rugs. Prune selected trees. Replaced gym floor. Fireproofed stage curtain. Created additional learning area.	\$34,479 Paint halls. Replace rugs in two rooms. Make repairs to roof as needed. Install light motion sensors in all rooms. Replace door glazing on classrooms. Provide mulch.	\$34,479 Paint gym. Refinish gym floor. Paint boiler room. Apply boiler water treatment. Install white boards in three rooms. Repair selected sidewalks and curbing.

South Orange Maplewood

Essex County - County Code 4900

Comprehensive Maintenance Plan

Actual Fiscal Year 2011-2012-- Budget Fiscal Year 2012-2013-- Planned Fiscal Year 2013-2014

Building Name	Actual 2011-12	Budget 2012-13	Planned 2013-14
Tuscan ES	\$232,408	\$129,938	\$129,938
	Paint selected areas. Replace selected floor coverings. Repair music room doorway. Remove dead trees as needed. Refinish gym floor. Replaced damaged fence. Repair damaged portable wall. Expand sidewalk drop-off area. Rebuilt bathroom	Paint selected rooms. Replace selected floor coverings. Apply boiler water treatment. Prune trees as needed. Install roof ladders. Install curbing in playground area. Improve air ventilation in PE storage area. Fence repair. Seal selected basement walls.	Paint selected halls. Remove selected rugs. Apply boiler water treatment. Prune trees as needed. Refinish gym floor. Replace fencing by edge of playground. Install light motion sensors in bathrooms. Pave walking path from Harvard Street.
Underhill Field	\$120,941	\$12,326	\$12,325
	Paint selected room in new field house. Remove dead trees. Repair fencing. Repair fire alarm system in new field house. Replace rear walking gate. Replace wood floor in old field house. Paint bleachers.	Paint bleachers. Build new storage shed. Replace plumbing in old field house. Install lockers in old field house. Repair bathroom in old field house.	Repair bleachers. Paint interior, new field house. Install lighting along path to Clinton. Paint bleachers as needed. Repair selected fences.
Administration Bldg	\$35,894	\$55,903	\$55,903
	Paint selected rooms. Install new fire alarm panel. Repair selected sidewalks. Install attic safety flooring and railings. Repair parking area fencing.	Install new chair lift. Paint office storage rooms. Repair selected sidewalks. Install light motion sensors. Improve auditorium lighting and outlets.	Paint halls and bathrooms . Repair fire escape. Construct access ladder to roof. Repair selected sidewalks. Repair fans in district meeting room.
Maintenance	\$11,231	\$8,795	\$8,797
	Paint break room . Repair sloped roof. Replace damaged front fence. Remove hazardous material from site.	Install front sidewalk. Dispose of used lights from district.	Paint main machine shop. Repair locksmith area. Build shelving in storage room.
Total	\$2,910,738	\$1,949,350	\$1,949,350

COMPARISON OF CHANGES IN GENERAL FUND FREE BALANCE

General Fund* Free Balance	1996-1997	1997-1998	1998-1999	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Beginning Balance (7/1)	3,563,828	4,408,526	5,609,561	7,115,036	9,348,104	7,236,763	4,133,305	4,116,862	4,106,098	3,621,361	5,896,125	5,653,972	8,516,414	9,957,324	7,045,271	5,684,110
Plus: Revenues																
State Aid	3,952,583	4,013,812	4,703,730	5,535,408	4,193,427	4,510,119	4,782,967	5,559,600	5,888,789	5,943,758	6,060,927	6,319,328	8,448,548	6,835,261	4,223,017	4,390,312
Taxes	43,727,433	46,408,516	49,233,260	52,126,140	56,012,410	58,619,379	63,836,172	68,166,201	72,998,938	76,068,980	81,911,476	86,724,181	90,709,873	94,670,065	98,000,243	99,960,248
Tuition	62,032	51,353	33,326	78,974	96,279	109,880	79,402	22,894	26,514	113	0	30,579	22,720	90,247	20,335	106,089
Misc	1,405,582	1,080,527	817,344	855,688	1,319,485	524,488	323,770	216,146	401,006	975,948	1,095,572	839,798	672,803	379,444	171,818	775,041
Adjustments							(323,898)	(349,379)	(54,286)	(47,149)	(50,907)	(89,233)	(1,932,986)	(295,854)		
							***	***	***	***	***	***				
Less: Contractual Orders	(48,302,932)	(50,353,173)	(53,302,185)	(56,363,142)	(63,732,942)	(66,867,324)	(68,714,856)	(73,626,226)	(79,245,698)	(80,666,886)	(88,934,221)	(90,962,211)	(96,480,048)	(104,591,216)	(103,414,605)	(103,324,231)
Appropriation fr Cap Res									(500,000)	0	(325,000)	0	0	0		
Special items															(361,969)	
Ending Balance (6/30)	4,408,526	5,609,561	7,115,036	9,348,104	7,236,763	4,133,305	4,116,862	4,106,098	3,621,361	5,896,125	5,653,972	8,516,414	9,957,324	7,045,271	5,684,110	7,591,569
Change in Free Balance	844,698	1,201,035	1,505,475	2,233,068	(2,111,341)	(3,103,458)	(16,443)	(10,764)	(484,737)	2,274,764	(242,153)	2,862,442	1,440,910	(2,912,053)	(1,361,161)	1,907,459
Year-End Encumbrances	(675,029)	(515,895)	(640,035)	(988,531)	(1,194,503)	(572,068)	(372,133)	(350,084)	(352,427)	(2,624,993)	(963,650)	(1,953,856)	(2,848,438)	(1,607,476)	(1,014,841)	(1,508,912)
Approp to Capital Reserve		(372,138)	(387,806)	(1,247,731)	(1,298,801)	(959,591)	(967,656)	(971,853)	(483,237)	(493,901)	(179,849)	(187,018)	(669,936)	(669,936)	(669,936)	(804,936)
Capital Reserve-Designated																
Approp of Excess Surplus		(835,321)	(865,016)	(2,024,048)	(1,706,005)	0	0	(802,239)	(1,432,981)	(634,861)	(1,250,623)	(1,709,145)	(3,088,587)	(3,065,389)	(1,023,192)	(165,000)
Approp of Excess Surplus										(1,250,623)	(1,709,145)	(3,088,587)	(3,065,389)	(1,023,192)	(1,517,905)	(1,517,905)
Reserve for subsequent year																(2,152,272)
Unreserved Free Balance	3,733,497	3,886,207	5,222,179	5,087,794	3,037,454	2,601,646	2,777,073	1,981,922	1,352,716	891,747	1,550,705	1,577,808	284,974	679,278	1,458,236	1,442,544
Free Balance as a percent of Expenditures	7.73%	7.72%	9.80%	9.03%	4.77%	3.89%	4.04%	2.69%	1.70%	1.11%	1.74%	1.73%	0.30%	0.65%	1.41%	1.40%
Excess Surplus (amount exc	835,321	865,016	2,024,048	1,706,005	(786,523)	(1,410,394)	(1,345,819)	(2,435,652)	(3,402,026)	(3,948,266)	(3,785,348)	(3,879,925)	(5,503,829)	(5,596,195)	(4,746,640)	(4,756,910)

* General Fund (FUND 10) includes Current Expense (FUND 11) and Capital Outlay (FUND 12). The Special Revenue Fund (FUND 20) accounts for restricted grants. It does not have a reserve.

** Beginning 7/1/93, the basis of accounting was changed from cash to accrual (GAAP).

*** Final State Aid payment deferred; not recognized on GAAP basis

*District Goals 2012-2014
Adopted October 15, 2012 Resolution #2951*

Vision

The South Orange-Maplewood School District will be the top-performing diverse suburban school district in the nation.

Our Mission

To prepare each and every student, regardless of demographic or socioeconomic background, for postsecondary educational success, and to educate all students to be responsible and productive members of the global society at large, and especially:

- caring, collaborative and ethical people
- critical thinkers and problem solvers
- effective writers and speakers
- thoughtful consumers and producers of media
- lifelong learners

Core Values

We measure success by student growth and achievement

Every student is worthy of intellectual, social, and emotional respect

Effective teaching is essential

Quality education demands genuine appreciation of differences

We can all learn from each other

Parents and guardians are our partners

Demography should not be destiny, academically or otherwise

All students deserve the opportunity to achieve their fullest potential

Preamble

These *district goals* establish the ends by which the district's success in fulfilling its mission of educating students shall be measured from 2011-14. Each of these goals, and the underlying objectives, is important and relates to the others. No objective shall be considered met if its achievement comes through the erosion of another objective's baselines.

These goals—specifically their achievement or lack thereof—shall form the primary basis for evaluation of the superintendent by the board. The board presents this document as the primary statement of priorities that shall govern the initiatives, and budget allocations in 2011-12. Each year the board will review and amend these goals by resolution, including resetting and adding milestones.

Lastly, the board wishes to emphasize that the schools of South Orange-Maplewood seek to educate the *complete* student, utilizing a broad and diverse curriculum that includes art, music, languages, technology, physical education and other subjects that may not be mentioned as priorities in the goals that follow. Although continuing improvement in the quality of language-arts and math instruction is an essential priority (as indicated in Goal One), it is not the board's intent that such improvement should occur through a de-emphasis of the arts, humanities and sciences.

Roles

The board has a responsibility to ensure that the district goals reflect community values, to establish the necessary policies to achieve the goals, and to communicate with the community about the goals and progress toward them.

The superintendent is responsible for progress toward the goals, through the management of all staff to achieve clearly stated milestones. The board shall evaluate his performance by assessing success against the milestones on an annual basis.

Definitions

Each of the four district goals has four or five components:

Goal statement. Articulation of the fundamental, long-term aspirations for the schools of South Orange-Maplewood.

Objectives. Major components of the goals.

Indicators. Criteria used to evaluate progress toward the objectives. They consist of types of information, both quantitative and qualitative, that can reasonably be used to evaluate progress.

Baselines. Articulation of the current status for each indicator.

Milestones. One-year targets that serve as the primary basis for measuring the district's progress and the chief means among several for evaluating the superintendent's annual performance.

Other terms:

Rigorous. Defined by Common Core Curriculum principles as “robust and relevant to the real world, reflecting the knowledge and skills that our young people will need for success in college and careers.”

Differentiated Instruction. Provision of appropriate instructional materials and approaches to facilitate student learning of same curriculum

Goal One: Student Learning

The South Orange-Maplewood Public Schools will promote the intellectual development of all students, challenging and inspiring them to do their best.

Objective A, Student Performance: Students will demonstrate proficiency on key benchmarks to postsecondary readiness equal to or better than peer districts (District Factor Group I).

Indicator 1: Improve performance relative to the DFG.

Student performance comparisons, for both proficiency and advanced proficiency, to the DFG-I on an aggregated **student-population** basis, district-wide, on state assessments in language arts, math and science for each grade tested.

*Milestones:*¹

2012-13	2013-14	2014-15
Narrow the existing gap between SOMSD and DFG by 25%. (The goal is to cut 25% of the gap, not to gain 25 points.)	Same—narrow gap by an additional 25%.	Same—narrow gap by an additional 25%

Indicator 2: Meet NJDOE annual performance targets for the ‘all students’ group and in each subgroup. NJDOE annual performance targets are based on the NJDOE ESEA waiver.

Milestones:

NJDOE annual performance targets are set in annual equal increments so that within six years (by 2017 using 2011 as a starting point), the percentage of non-proficient students in the ‘all students’ group and in each subgroup is reduced by half.

For example, if the ‘all students’ group is currently demonstrating a proficiency rate of 40 percent, the methodology would take the 60 percent point gap between 100 percent proficiency and the current rate ($100 - 40 = 60$) and then divide the gap in half to determine the target for the sixth year – a gain of 30 percentage points ($60 / 2 = 30$). Then, the 30-percentage point gain is divided into six equal increments ($30/6 = 5$) so that annual targets can be set.

¹ This same methodology (narrowing gap vs. DFG) will be used on a school-by-school basis for the purposes of calculating performance bonuses for administrators covered by the district’s performance compensation plan. In cases where district schools already exceed the DFG on state assessments, the superintendent shall set appropriate milestones for higher absolute performance on the state assessments in lieu of a DFG-gap closing goal.

Thus, the group in this example begins this process with a rate of 40 percent and is then expected to move to proficiency rates of 45 percent, 50 percent, 55 percent, 60 percent, 65 percent, and finally 70 percent in each of the following years of the six-year period.²

SOMSD Annual Performance Targets

Language Arts: Percentage of Students Proficient and Above									
	2010-2011 #_Students	2010-2011 Baseline	2011-2012 Goal	2011-2012 Actual	2012-2013 Goal	2013-2014 Goal	2014-2015 Goal	2015-2016 Goal	2016-2017 Goal
Districtwide	3471	80%	82%	83%	83%	85%	87%	88%	90%
White	1683	93%	93%	94%	94%	94%	95%	96%	96%
Black	1463	64%	67%	69%	70%	73%	76%	79%	82%
Hispanic	166	77%	79%	76%	81%	83%	85%	87%	89%
Native American	13	-	-	-	-	-	-	-	-
Asian	124	89%	89%	89%	90%	91%	92%	93%	94%
Pacific Islander	4	-	-	-	-	-	-	-	-
Multi-Racial	18	-	-	-	-	-	-	-	-
Special Education	523	41%	46%	47%	51%	56%	61%	66%	71%
English Language Learners	47	26%	32%	58%	38%	44%	50%	57%	63%
Economically Disadvantaged	661	55%	58%	60%	62%	66%	70%	74%	77%
Male	1743	76%	78%	78%	80%	82%	84%	86%	88%
Female	1728	84%	85%	87%	87%	88%	89%	91%	92%

² ESEA Waiver Request from New Jersey, Updated January 25, 2012. Accessed at: <http://www.state.nj.us/education/grants/ncib/waiver/waiver.pdf>. The NJDOE's performance goal is that the 'all students' group and every subgroup reach 90% proficiency, with annual performance targets note exceeding 90%. Note that SOMSD's performance goals, as shown on the following page, continue to increase after the 90% goal is met.

Math: Percentage of Students Proficient and Above									
	2010-2011 #_Students	2010-2011 Baseline	2011-2012 Goal	2011-2012 Actual	2012-2013 Goal	2013-2014 Goal	2014-2015 Goal	2015-2016 Goal	2016-2017 Goal
Districtwide	3471	81%	83%	84%	84%	86%	88%	89%	91%
White	1683	95%	96%	96%	96%	97%	97%	97%	98%
Black	1463	66%	69%	68%	72%	75%	77%	80%	83%
Hispanic	166	76%	78%	81%	80%	82%	84%	86%	88%
Native American	13	-	-	-	-	-	-	-	-
Asian	124	94%	95%	93%	95%	96%	96%	97%	97%
Pacific Islander	4	-	-	-	-	-	-	-	-
Multi-Racial	18	-	-	-	-	-	-	-	-
Special Education	523	50%	54%	48%	58%	62%	67%	71%	75%
English Language Learners	47	32%	38%	54%	43%	49%	55%	60%	66%
Economically Disadvantaged	661	56%	60%	61%	64%	67%	71%	75%	78%
Male	1743	80%	82%	81%	84%	85%	87%	88%	90%
Female	1728	82%	84%	85%	85%	87%	88%	90%	91%

Indicator 3: Participation and success in Advanced Placement (AP) courses in the high school.

Milestones: 2012-13 and 2013-14:

- Increase the percentage of the high school student body enrolled in AP courses by 10% and the percentage of black students in the high school student body enrolled in AP courses by 20%
- Increase the number of 2011-2012 AP scores of 3 or higher by 5%

Indicator 4: Track student readiness for college and careers using a roadmap with milestones at least every other grade, beginning in 1st grade and data collection continuing through four (4) years beyond graduation from Columbia High School.

Milestone 2012-13:

- Develop preliminary roadmap to college and career readiness and launch roadmap publicly
- Use of National Clearinghouse Data related to post-graduation matriculation to evaluate District progress

Milestone 2013-14:

- Initial BOE reports comparing student post-graduation matriculation to evaluate District progress
- Align school accountability system and begin tracking

Objective B, Learning Opportunities: Rigorous curricula, differentiated instruction (see glossary) and expanded learning opportunities will enable all students to thrive and fulfill their academic potential.

Indicator 1: District-wide attention, across subject areas and spanning grade cohorts to instruction, curriculum, professional development and resource allocation for effective and equitable implementation of Common Core Curriculum Standards (CCCS), Middle Years Program-International Baccalaureate (MYP-IB) and Partnership of Assessments for Readiness of College and Careers (PARCC).

Milestones:

Core Area	2012-2013
English Language Arts <ul style="list-style-type: none"> • Mathematics • Media/Educational Technology • Science • Social Studies • World Language • Physical Education • Fine and Performing Arts 	Grades 6 revisions to address Middle Years Programme of the International Baccalaureate (for 2013-14 implementation)
English Language Arts	Align grades K-12 curricula with CCSS
Mathematics	Align grades 6-12 curricula to new state standards and assessments Implement grades K-2 curricula aligned with CCSS <i>Math in Focus</i> Revise grades 3-5 curricula for alignment with CCSS and <i>Math in Focus</i>
Social Studies	Revise K-5 curricula, make interdisciplinary with select ELA units Finalize and approve grade 6-12 drafted curricula
Science	Revise K-5 curricula, make interdisciplinary with select ELA units. Revise 9-12 curricula to standards adopted by NJDOE

Core Area	2013-2014
All Core Areas: <ul style="list-style-type: none"> • English Language Arts • Mathematics • Media/Educational Technology • Science • Social Studies • World Language • Physical Education • Fine and Performing Arts 	Grades 7 revisions to address Middle Years Programme of the International Baccalaureate (for 2014-15 implementation)
Mathematics	Implement 6-12 curriculum aligned to new state standards and assessments Implement grades 3-5 curriculum aligned with CCSS and <i>Math in Focus</i>
Social Studies	Implement revised K-5 curricula, interdisciplinary with select ELA units
Science	Implement revised K-5 curricula, interdisciplinary with select ELA units Implement revised 9-12 curricula to standards adopted by NJDOE

Core Area	2014-2015
All Core Areas: <ul style="list-style-type: none"> • English Language Arts • Mathematics • Media/Educational Technology • Science • Social Studies • World Language • Physical Education • Fine and Performing Arts 	Grades 8 revisions to address Middle Years Programme of the International Baccalaureate (for 2015-16 implementation)

Indicator 2: Public documents that are distributed, widely available and articulate

- 1) learning aims
- 2) content scope and sequence and
- 3) student performance expectations.

These elements will clearly illustrate differences that exist between academic levels in appropriate courses.

Milestone 2012-13: All leveled social studies and science courses

Milestone 2013-14: All other leveled courses

Indicator 3: Comprehensive improvement plans in place at Columbia High School, South Orange Middle School and Maplewood Middle School, articulating the means by which improved curricula, expanded learning opportunities, technology infusion, professional development and teacher evaluation will lead to improved teaching and learning.

Milestones 2012-13:

- Implement year two initiatives in the CHS 5-year Strategic Plan
- Update CHS Strategic Plan as needed, develop action plan for 2013-14
- Implement year one of the 5-year improvement plan for both middle schools
- Expand virtual learning programs at CHS to include total enrollment in regular-credit virtual classes to 40 or more
- Expand partnerships with institutions to enable students to earn college credit before graduation

Milestones 2013-14:

- Implement year three initiatives in the CHS 5-year Strategic Plan
- Update CHS Strategic Plan as needed, develop action plan for 2014-15
- Implement year two of the 5-year improvement plan for both middle schools
- Expand virtual learning programs at CHS to include total enrollment in regular-credit virtual classes to 100 or more
- Expand partnerships with institutions to enable students to earn college credit before graduation

Indicator 4: Expanded Learning Opportunities

Milestones 2012-13:

- Report to BOE key community stakeholders, activities, gaps and overlaps related to extra-curricular opportunities for students with particular emphasis on Middle School
- Provide options in response to BOE Guiding Change framework for a Gifted and Talented strategy

Milestones 2013-14:

- Development of extra-curricular options and consideration of implementation of program rollout
- Planning phase for Gifted and Talented strategy

Milestones 2014-15:

- Implement Gifted and Talented strategy

Goal Two: Professional Staff

The staff of the South Orange–Maplewood Public Schools will consistently and collaboratively lead students of diverse backgrounds and learning styles to learn at or above the appropriate grade-level standards.

Objective A: Professional development programs and activities will strengthen district faculty's ability to contribute to measurable improvements in student achievement.

Indicator 1: Professional development for district staff to increase their ability to effectively deliver the written curriculum and meet the social emotional needs of our students.

Milestones 2012-13:

- Pilot Learning Walk
- Pilot 360° feedback tool for non-principal administrators

Milestones 2013-14:

- Implement Learning Walk
- Implement 360° feedback tool for non-principal administrators

Indicator 2: A mechanism to measure the effectiveness of internal professional development.

Milestone 2012-13: Develop inventory of district provided professional development

Objective B: Recruitment and hiring will increase the quality and diversity of the professional staff.

Indicator 1: Highly qualified and diverse applicants.

Milestones 2012-13 and 2013-14:

- Exceed 85% "top choice" hires
- 20% increase in the proportion of candidates identifying themselves as people of color
- One hundred percent of hires made according to district practices—including use of the Framework for Teaching to assess knowledge of effective practice, a group interview, and a sample lesson done in a district classroom with students (or presented to staff if students are not available)

Objective C: A performance evaluation and compensation system will be driven by objective measures that are tied to student learning and school/district goals.

Indicator 1: Valid, fair, reliable and constructive systems for performance evaluation of principals, assistant principals, supervisors, teachers (non-tenured and tenured) and district administrators, driven by multiple measures (student achievement and individual evaluation) of individual performance as well as contributions to team efforts that are aligned to school/district goals.

Milestones 2012-13:

- Summative rating for each staff member for the year, using the Framework for Teaching levels of performance

Milestones 2013-14:

- Continue summative rating for staff and align with Effective Educators for New Jersey (EE4NJ)

Objective D: A staff recognition program will identify and celebrate excellent teaching.

Indicator 1: *Innovation and Excellence in Teaching Award* at both the school and district level.

Milestones 2012-13: Review criteria and process

- Review award criteria and selection process established in 2011-12

Goal Three: Engagement and Outreach

The South Orange-Maplewood Public Schools will communicate effectively with parents, students and the South Orange-Maplewood community.

Objective A: Parents will receive timely information about their children, their schools and the District and be engaged in the education of their children and their schools.

Indicator 1: Parents will receive timely information about their children:

Milestones 2012-13 and 2013-14:

- 75% of parent/guardians of grade 6-12 students will use the Teacher Gradebook feature of PowerSchool
- Early and frequent outreach to underperforming students and their families
- Students and their families will be notified when key milestones on the roadmap to success in college are in danger of being missed

Indicator 2: Parents will receive timely, relevant information about their schools and the District

Milestones 2012-13 and 2013-14:

- Reorganize District website to provide timely information desired by parents in a user-friendly format.
- Improve school level websites to provide timely information desired by parents about their schools and school events.

Objective B: The South Orange-Maplewood Public Schools will communicate with the School District community to foster transparency, accountability and community engagement with respect to the development and implementation of District policies.

Indicator 1: The District will make available to the public information related to major policy proposals to ensure that the public has sufficient information to understand and an opportunity to provide meaningful input to the Board and the Superintendent regarding such proposals.

Indicator 2: The District will make available to the public information, data and reports requested by the Board related to the implementation of major policy initiatives and progress toward meeting District goals.

Indicator 3: An annual survey will be completed to gather information from parents, students and staff regarding the achievement of District goals and the delivery of educational services in the District.

Milestones 2012-13 and 2013-14:

- Achieve minimum 10% gains in applicable satisfaction ratings compared with 2011-12, 2012-13 ratings respectively
- The participation rates of parents from demographic groups which have participated in disproportionately low levels in the past will increase

Objective C: A variety of communications tools will be used to regularly share with parents, students and the South Orange-Maplewood community positive information about our District, schools, staff and students, celebrating in particular the achievements of our students and staff.

Indicator 1: Implementation of communications strategy addressing tools including the district website, email communications, written publications and external media relations.

Milestones 2012-2013 and 2013-14:

- Through the District website and E-Newsletter, provide regular and timely information which highlights positive information about the District, our schools, staff and students
- By no later than January 1, 2013, the District will have developed and begun implementing a communications strategy for publicizing the positive aspects of Columbia High School

Goal Four: Resource Management

The South Orange–Maplewood Public Schools will pursue and achieve Goals 1-3 while slowing the rate of increase in operating expenditures.

Objective A: A transparent, efficient budget that aligns with and supports the attainment of district goals and that reins in spending on budget categories that are rising at a faster rate than the cost of living.

Indicator 1: Timely approval of the district budget aligned to district goals, responsive to taxpayer burden, and articulated in the context of a 5-year budget forecast projecting trends in revenues, expenses and tax levies.

Milestone 2012-13:

- Approve 2013-14 operating budget with a year-over-year tax impact not greater than 2% for the operating budget. Should, after exhausting all feasible options to reduce costs, it be impossible to limit the tax impact to 2% without substantially impeding the district's ability to meet its goals, banked cap may be used.
- 5-year budget forecast projecting trends in revenues, expenses and tax levies

Indicator 2: Rate of growth in energy consumption.

Milestone 2012-13 and 2013-14:

- Reduce consumption 5% or more over the average consumption for the last 3 years at each district location

Objective B: Well-maintained and safe facilities that enable focused and effective teaching and learning, and that are repaired and updated in an architecturally sensitive and fiscally responsible manner.

Indicator 1: A capital plan that extends to 2025.

Milestone 2012-13:

- Identify priorities and projects within phases for the capital plan,
- Support public engagement, and
- Gain BSE approval for the first phase

Indicator 2: Feedback from parents, students, administrators and teachers on quality of facilities and solicitation of facility needs.

Milestone 2012-13 and 2013-14:

- Improved stakeholder satisfaction rates, as measured by surveys regarding cleanliness and condition of facilities.

DRAFT 2013-14 BUDGET CALENDARTentative (subject to change)**

<u>Date</u>	<u>Activity</u>
Monday, September 24, 2012	BOE meeting <ul style="list-style-type: none"> • BOE requests for Budget Analyses • Capital Plan Discussion
Monday, October 15, 2012	BOE meeting: <ul style="list-style-type: none"> • Capital Plan Discussion • Comprehensive Maintenance Plan
Monday, November 19, 2012	BOE meeting: <ul style="list-style-type: none"> • Receive baseline data (10/15 reports): <ul style="list-style-type: none"> ○ Enrollment projections (ASSA) ○ Free/reduced lunch eligible ○ Transportation (DRTRS) report; ○ Comp. Maintenance Plan • Receive 2011-12 CAFR and MD&A (audit report) • Discussion: CHS capital improvements
Tuesday, November 27, 2012	Community Forum – CHS Capital Plans
December XX, 2012	Board of School Estimate/FF&T meeting
Monday, December 17, 2012	BOE meeting: <ul style="list-style-type: none"> • Present requested Budget Analyses • Enrollment Projections (demographer)
<i>December 21-31 Holiday Recess</i>	
January XX, 2013	Board of School Estimate/ FF&T meeting
Wednesday, January 9, 2013	Superintendent's State of District Address
Wednesday, January 28, 2013	BOE meeting: <ul style="list-style-type: none"> • Budget Discussion • Capital Improvement–CHS Addition
<i>February XX, 2013</i>	<i>Budget Community Forum</i>
February XX, 2013	Board of School Estimate/ FF&T meeting
Monday, February 25, 2013	BOE meeting: Budget Discussion (tentative to adopt preliminary 2013-14 budget to be submitted) CHS Addition: Approve bond request to go to BSE

<i>Thursday, February 28, 2013</i>	<i>Notice in News Record of BSE meeting to approved bonds</i>
<i>Tuesday, February 26, 2013</i>	<i>Governor's State Budget Message</i>
<i>Thursday, February 28, 2013</i>	<i>State Aid Notices</i>
<i>Monday, March 4, 2013 (if necessary)</i>	<i>Additional Board of Ed meeting: Discuss and adopt preliminary 2013-14 Budget to be submitted to the Executive County Superintendent and the BSE.</i>
	<i>Last date to submit 2013-14 Budget to Executive County Superintendent (March 4th Each year pursuant to 18A:7F-5, 18A:7F-6)</i>
<i>Tuesday, March 12, 2013 (not more than 15 days after BOE approval; 7 days after Advertisement)</i>	<i>BSE Workshop: - to establish understanding of 2013-14 proposed Budget - approve bonds for CHS addition</i>
<i>Thursday, March 14, 2013</i>	<i>Proposed Budget advertised in News Record (notice published at least 4 days prior to public hearing date)</i>
<i>Monday, March 18, 2013</i>	<i>BOE meeting: BOE adopt Bond Resolution</i>
<i>March 27, 2013</i>	<i>BSE Public Hearing and Action to levy 2013-14 school tax (public hearing must occur between March 22 and March 29; Action required not later than April 8th).</i>
<i>April 8 - 12 Spring Recess</i>	
<i>Tuesday, April 16, 2013</i>	<i>BOE Election (3rd Tuesday in April pursuant to N.J.S.A. 19:60-1)</i>
<i>Monday, April 22, 2013</i>	<i>BOE meeting: BOE Reorganization (Any day of the first or second week following the annual school election) Adopt 2013-14 Budget and Action by BSE Award contract for CHS Addition</i>
<i>Monday, May 13, 2011</i>	<i>BOE meeting:</i>

*** All dates following the introduction of the preliminary budget are estimates and depend upon NJDOE guidance and requirements. Historically, issuance of state aid figures and CAP calculations follow the Governor's budget address and thus budget submission and approval deadlines may be extended.*