

Future Planning and Financial Outlook



2018-2023

 ASA PACKER ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 CALYPSO ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 CLEARVIEW ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 DONEGAN ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>
 FARMERSVILLE ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 FOUNTAIN HILL ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 FREEMANSBURG ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	
 GOVERNOR WOLF ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 HANOVER ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 JAMES BUCHANAN ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 LINCOLN ELEMENTARY SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>
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 BROUGHAL MIDDLE SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 EAST HILLS MIDDLE SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 NITSCHMANN MIDDLE SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	 NORTHEAST MIDDLE SCHOOL
 FREEDOM HIGH SCHOOL		 LIBERTY HIGH SCHOOL <small>BETHLEHEM AREA SCHOOL DISTRICT</small>	



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MEMORANDUM

January 2018

TO: Board of School Directors

FROM: Dr. Joseph J. Roy, Superintendent of Schools

SUBJECT: Five-Year Plan and Financial Outlook

MISSION

The Bethlehem Area School District, in partnership with the home and community, is committed to providing a safe and supportive environment in which each student will attain the knowledge, skills, and attitudes necessary to become a productive citizen and lifelong learner in our technologically demanding and culturally diverse society.

The Bethlehem Area School District's *Roadmap 4.0 to Educational Excellence* identifies academic goals and data indicators that guide our mission to educate the whole child. *Roadmap 4.0* informs the strategic initiatives and five year planning described in this document by describing common language and program focus that guide the improvement efforts of the District and each of its 22 schools.

Student experiences with trauma, as well as the cumulative impact of poverty, present significant challenges. However, they also present an opportunity for BASD to build a student support system to complement the instructional systems we are building focused on Reading by Grade 3, college and career readiness and personalized learning.

Limitations on our ability to meet the challenges of trauma and poverty are driven primarily by our elected state officials' political choices regarding public education funding, a failed charter school system, a diversion of public dollars to private/parochial schools and a pension system, all of which are in need of repair.

Policy choices by the federal and state governments, combined with Act 1 restrictions on local districts create structural deficits each year for the district. The district's natural, year-to-year growth in revenue does not keep pace with the year-to-year growth in mandated and operational costs. At the same time, expectations for educational performance continue to rise as the skill demands of the 21st century, global economy rise.

BASD possesses many assets to confront our challenges. BASD's *Roadmap 4.0* provides clear direction for district initiatives aimed at overcoming our challenges and building on our strengths. Our small neighborhood elementary schools encourage strong relationships with parents, teachers and students and allow our teachers to truly know the strengths and needs of individual students. We are fortunate to have strong community loyalty to the Bethlehem Area School District. The citizens of our district are committed to our success.

Financially, our fund balance coupled with a more sustainable budget structure provides financial stability for the district. The long anticipated completion of the new Nitschmann Middle School project continues our district's commitment to modernizing facilities. The robust and comprehensive curricular and extracurricular offerings provided for our students are among our greatest assets. The implementation of full day kindergarten combined with our Reading by Grade 3 initiative represent critical investments by BASD in an area we know will yield positive student outcomes.

The following documents identify critical financial issues the Board and Administration will face over the next five years. The world of public school finance is in a state of upheaval, as a result, it is important to note that the budget projections are based on the best available information at the current time.

JJR:acv



Roadmap to Educational Excellence – Strategic Initiatives 2017 -2018



Context

- The Bethlehem Area School District's *Roadmap 4.0 to Educational Excellence--One Child at a Time* provides a framework for excellence that guides our mission to educate the whole child. The current 4.0 version of the *Roadmap* recognizes that educational excellence is achieved *through* equitable access to learning opportunities for all students. We define access as providing each student what he or she needs to be successful, understanding that each child has different strengths and needs.



Mission Statement

- The Bethlehem Area School District in partnership with the home and community is committed to providing a safe and supportive environment in which each student will attain the knowledge, skills, and attitudes necessary to become a productive citizen and self-directed, lifelong learner in our technologically demanding and culturally diverse society.



Purpose

- Eliminate race and family income as predictors of school success by guaranteeing equitable access to opportunities for personalized learning and growth.



Strategic Initiatives

- A strategic initiative is a “multiplier” that significantly increases the capacity of the District and enhances the probability of accomplishing our mission and goals. A single strategic initiative improves organizational performance across several *Roadmap 4.0* goals. Each of BASD’s core departments’ (Educational Programs, Information Technology Operations, Facilities/Transportation, Human Resources, and Finance) strategic initiatives are described below.



Strategic Initiatives - Superintendent

- **Communications & Marketing**
 - Metric: Implement the BASD Marketing Plan
 - Metric: Increase BASD student enrollment/Reduce losses to charters
- **Advocacy**
 - Metric: Number of parents completing Parent Advocacy Training
 - Metric: Increased involvement in state & national policy opportunities
- **Excellence Through Equity**
 - Metric: Completing ETE Action Plans
- **Collective Impact & Community Partnerships**
 - Metric: Number and quality of strategic plans w/ partners (arts, reading, community schools, health services, parent job training, etc.)



Strategic Initiatives - BASD Education Programs

- **ELEMENTARY (in addition to ESSA measures)**

Each student will read at grade level by the end of Grade 3.

- DIBELS Annual End-of-Year Composite Score (success at grade level)
- Grade 3 Reading Proficiency on the 2020 PSSA
- Grade 3 & 4 Reading Proficiency on the 2021 PSSA
- Grade 3, 4, and 5 Reading Proficiency on the 2022 PSSA



- **SECONDARY (in addition to ESSA measures)**

Each student will learn and grow in a personalized manner. He/She will navigate a *BASD Career Pathway* as to be ready for a college or a career upon graduation (achieve at least one of the following).

- Pass All 3 Keystone Exams
- Complete a 4-year signature program in a BASD Pathway
- Score a 3+ on an AP Exam
- Earn a B- or better on a Dual Enrollment Course at a local university
- Pass a NOCTI Exam
- Complete a 30-hour, pathway-specific job shadow or internship



Strategic Initiatives - Information Services Department

- Continue to **develop and mature IT Governance practices** to ensure consistency and efficient delivery of information systems and technology services throughout the District.

Metric measure:

- Reports of service desk ticket turnaround time



- Develop a **digital “hub”** to enable the centralized access of all e-learning and administrative computing resources throughout the District.



- Metric measure:

- Usage report by Application

Strategic Initiatives - Information Services Department (cont.)

- Develop a **consistent brand** for delivery of public-facing web content and services, including integration with social media platforms and other third-party services.

- Metric measure:
 - Sources of Incoming Traffic



- Develop a district **electronic asset sustainability program** to ensure the regular and timely refresh of computing equipment across all grade levels and schools.

- Metric measure:
 - Device Age Reports



Strategic Initiatives - Information Services Department (cont.)

- Identify both primary and secondary data sources across all systems and **implement appropriate business intelligence tools** to provide a consistent resource for District and school-level decision making.

- Metric measure:
 - Data Source Usage Report



Strategic Initiatives - Human Resources

Maximize both the contribution and satisfaction of the District's human resources through continuing **organizational development** in support of *Roadmap 4.0*.

Build and sustain a positive work climate through proactive labor and employee relations and communications. Employees who understand and support organizational vision, mission and departmental goals and how they contribute to them are more productive.

Develop leadership capacity throughout the District with knowledgeable, well-trained and confident employees at all levels who understand the scope, possibilities and limits of their roles and are able to get more done in less time and with minimal supervision.

Update district policies to reflect current legal requirements and district mission and standards.



Human Resources Metrics

Labor/Employee Relations

- Grievances
- EEO Charges
- Employee Turnover
- Status of CBA's



Staffing & Employment

- Applicant Pools – Numbers and Quality
- Vacancies/New Hires by Labor Group
- Number of Educators Fully Certified
- Substitute Fill Rates
- Number of Student Teaching Assignments



Employee Benefits

- Trends
- Workers Compensation Claims

Employee Benefits – Why Work for Us?



Human Resources Metrics (cont.)

Student Enrollment

- BASD Population By School/Trends
- Charter School Enrollment
- Fraudulent Residency Investigations



Strategic Initiatives - Facilities & Transportation

- Foster a Culture of **Conservation**
 - Metric: Energy intensity – KBtu/SF
- Improve Transportation **Efficiency**
 - Metric: Cost Per Mile
- Improve **Cleanliness**
 - Metric: SPP – Sanitary Performance Profile
 - Metric: Percentage of Work Completed in 7 Days
- Foster a Culture of **Safety**
 - Metric: Worker Comp Claims By Cost/Type
- Complete Nitschmann Middle School Project
 - Metric: “On Time, Within Budget”



Strategic Initiatives-Business & Finance

Initiative #1:
Personnel
Development &
Process
Improvement

Upgrade Financial,
Payroll & Personnel
Accounting Systems



Initiative #2:

Expand the availability of financial
information in public documents for
improved public transparency

Prepare a
Comprehensive
Annual Financial
Report



Prepare Meritorious
Budget Submission



Informing Long Range Budget Decisions: Educational Programs

There are numerous opportunities to build and extend successful educational programs in the BASD over the next five years that will help students achieve higher levels of performance. Beyond more frequent testing and higher standardized test scores, *improved BASD student performance means stretching students to their potential and helping them achieve career and college readiness after high school.* Long range district planning must support that broader notion of school improvement and engage students in their own personalized educations.

The ***BASD Roadmap to Educational Excellence 4.0*** emphasizes student performance in four key areas: **core learning, stretch learning, student engagement, and personal skill development.** These areas complement each other in producing relevant educational programs and fully engaged students. Additionally, ***Roadmap 4.0*** identifies ten (10) evidence-based frameworks that guide key initiatives within the Educational Programs Department:

Core Learning

- Reading at Grade Level By Grade 3 / Comprehensive Literacy Plan
- Career Pathways

Stretch Learning

- Personalized Learning
- Advanced Placement Equity & Excellence

Student Engagement & Personal Skill Development

- United Way Community Schools
- Restorative Practices
- Leader in Me
- No Place for Hate

Additionally, two overarching frameworks affect all components of Roadmap 4.0

- The Danielson Framework for Teaching
- Excellence Through Equity

The BASD will place additional emphasis on effective instruction and the equitable distribution of educational resources aligned to the **CORE LEARNING** components *Roadmap 4.0*.

- The greatest challenge and the top academic priority of the BASD is to have all students reading at grade level by the end of Grade 3 (RBG3). The **elementary school** program will place additional emphasis on district-supported programs and regional collective impact efforts that:

- (1) Support and align Pre-K programming to RBG3 goals and strategies.
 - (2) Expand parent education offerings to align to RBG3.
 - (3) Meet the basic needs of BASD students and families that allow them to access needed educational opportunities.
 - (4) Provide sustained training and job-embedded coaching to all professionals dealing with BASD elementary students in the most current reading pedagogy and assessment.
 - (5) Implement the *Wonders* reading series at the elementary level.
 - (6) Support the use of meaningful and timely data to vigorously monitor the progress of learners toward RBG3 goals.
 - (7) Improve and extend technology *DIBELS Amplify* in reading assessment and instruction.
 - (8) Align afterschool and summer programming to RBG3 goals and strategies.
 - (9) Enlist the support of community organizations, namely *Lehigh Valley Reads*, in support of the BASD's RBG3 goals.
- The **middle school** program will improve and extend the elements of the Teaming model. Emphasis will be placed on developing more thematic and rigorous assessment and instruction aligned to problem-based learning (Quadrant D), service learning, and applied literacy/communication skills. The BASD facilitates student learning in a ubiquitous technology environment that includes learning management systems, digital content, student portfolios, and student-led conferences. The middle level will begin developing a common Middle School Program of Studies and a common Middle School Schedule across the four buildings.
 - The **high school** program will continue its evolution in developing graduates that are career and college ready. That process includes supporting students in a ubiquitous technology environment who can:
 - (1) Identify areas of personal strength and interest.
 - (2) Set personal goals and strategic learning plans.
 - (3) Select and navigate college and career curricular paths in STEM, Arts & Humanities, Health & Human Services, Business, Finance & Law, and High-Need Vocational-Technical Occupations.
 - (4) Experience more rigorous, relevant, and consistent assessment of student performance that include service learning, blended learning, job shadowing, and internship programs in support of career and college goals.
 - (5) Learn in modern formats that include digital content, learning management systems, blended instructional formats, student portfolios, and modern presentation technologies.
 - (6) Transition to and from high school in support of academic success and improving the graduation rate.

STRETCH LEARNING helps students be more motivated, engaged, and successful citizens in an interconnected and competitive world.

Each student will put himself/herself “in the driver’s seat” of his/her own personalized learning paths. Whether it is in the arts, sciences, or vocational/service sector **every graduate should complete a personalized plan that will successfully advance his/her post-secondary plans to their years in high school.** The BASD will expand both excellence and access to stretch learning programs such as:

- *Advanced Placement*
- Dual Enrolment in College Courses
- On-Line and Blended Learning
- High-Demand Vocational-Technical Certifications

Science and technology remain key components of the BASD's core mission, and there remains a need to extend integrated, multi-year STEM programming (including Project Lead The Way) to the BASD to prepare students in for careers in science, technology, engineering, and mathematics. The BASD will need to embrace and include a new generation of more powerful and mobile technology into its programs, and move toward a 1:1 computing environment. Every student and teacher needs to use hardware, software, digital content, integrated data systems, and open-source information to collaborate with others to create and communicate new knowledge.

An appropriate education includes opportunities in the arts, music, and the humanities that not only to prepare students in those fields, but also engage students in the school and Bethlehem community. The BASD will maintain, expand, and modernize its Arts programs (K-8) to align to the *Kennedy Center for the Performing Arts' Any Given Child* program. Students will advance their study of Spanish to the elementary grades, take formal world language courses earlier in the middle school and high school sequence, and explore a wider range of world language-based courses (American Sign Language) in high school.

Roadmap 4.0 also emphasizes **STUDENT ENGAGEMENT** and **PERSONAL SKILL DEVELOPMENT** to produce committed students of personal character. The district plans to systematically promote Leader in Me (K-5), Restorative Practices (6-12), and No Place for Hate (K-12) that create and monitor more safe/successful school environments as well as self-directed students.

The BASD will pursue all educational initiatives in a manner that promotes excellence through equity. Equity is a commitment to ensure that every student receives what he or she needs to succeed. Using a combined program evaluation and a strategic planning methodology, BASD stakeholders will develop a *BASD Excellence Through Equity Plan* that will create plans and guide actions needed to make opportunities to learn and grow accessible to all students.

The BASD will eliminate race and family income as predictors of school success by guaranteeing equitable access to opportunities to learn and grow.

The BASD will develop a comprehensive, data-informed plan to address escalating incidences and levels of student trauma.

The BASD aims to recover students lost to charter school by more publicly sharing Roadmap 4.0 goals, successful programs (such as BASD Cyber), and robust community partnerships with the broader community. We believe that all students can and should find their educational home in the BASD!

Bethlehem Area Vocational-Technical School (BAVTS) vision:

To ensure that positive student achievement, growth, and development are the main focus in all educational and student services programs. This is done by embedding recognized industry and academic achievement standards into all aspects of the learning process and by making sure all students progress through their chosen CTE programs toward related high wage, high skill jobs, military careers, or post secondary education placements.

BAVTS will ensure that all purchased, leased, or donated resources are sustainable and cost effective and that these resources and program inventories are closely aligned to annual enrollment and instructional needs. BAVTS ensures support services and facilities are designed to fit both student and staff needs and fully support a positive student learning and workplace environment.

There is a demand by local students to attend BAVTS and complete our programs of study. High quality, engaging instruction energizes students to achieve at high levels on academic and industry-based assessments.

Bethlehem Area Vocational-Technical School Accomplishments:

NOCTI SCORES: Since 2012 the overall score for our students' performance on NOCTI testing has risen from 84.4% to 93.8%. This is nearly a ten percent increase in overall test scores.

ATTENDANCE RATES: Since 2013, BAVTS has maintained an attendance percentage greater than 90%. The lowest attendance rate reported in 2016-2017 was 87% and the highest was 96%.

ENROLLMENT INCREASE: Enrollment trends at BAVTS between 2012-13 and 2017-18 show that we are experiencing a growth pattern with 101.6% to 103.6% capacity rates over the three-year period. This is well above the PDE recommended 90% or better capacity rate. As of October 1, 2017, our capacity rate for the current school year is above 94%.

INDUSTRY CREDENTIALS: BAVTS has increased its overall Industry Credential count from 114 earned across all programs in 2012-13 to 250 earned school-wide in 2016-17. For the current school year, all programs have been charged with adding at least one additional credential to their program.

Bethlehem Area Vocational-Technical School Goals:

Goal #1: Establish a system within the school that fully ensures professional development is based on sound research and promising practices, is focused on the needs of professional employees, is comprehensive, and is implemented with fidelity in order to meet the specific needs of students.

Goal #2: Establish a system within the school that fully ensures barriers to student learning are addressed in order to increase student achievement, completion rates and/or graduation rates.

Goal #3: Establish a system within the school that fully ensures teachers and administrators meet on a regular basis to use multiple data sources to reflect on the progress of student learning as it relates to the effectiveness of professional practice.

Goal #4: Establish a system within the school that fully ensures school staff members use academic standards-aligned assessments to monitor student achievement and adjust instructional practices across all classrooms.

Child Care

The Bethlehem Area School District has been offering affordable, quality child care to parents for over 30 years. The District currently has 13 DHS licensed sites at our elementary schools. The PA Office of Child Development and Early Learning has recognized many of the District's child care sites by awarding them Keystone STARS designations for high-quality child care.

During the 2018-2019 school year, the child care office and school sites plan to increase collaborative efforts with the District's designated United Way Community Schools. This partnership will assist staff members in providing opportunities for children in BASD's child care to participate in various activities. The child care department will also emphasize collaboration within and between child care and other district programs.

The child care department will continue to participate in the Keystone STARS program. The District's goal is to increase participation in the Keystone STARS program by continuing to move up one level so that all eligible sites are a level three or four. STARS initiative will be used to increase the use of technology available at our sites and to build capacity among our supervisors and assistants. The initiative has started the Revisioning process. This distributes funds to sites with STAR 2 or higher designation through an add-on to the Child Care Works subsidy reimbursement per child/daily rate. 2017-18 is the first wave of this impact on funding for high quality child care programs.

2018-2019

- Increase collaborative efforts with the district's Community Schools to provide opportunities for children in BASD's child care to participate in activities
- Emphasize collaboration within and between child care and other district programs
- Investigate a technology-based fee collection system through a collaborative effort with the district's business office and IT department
- Continue professional development efforts regarding Google Chromebooks that were purchased with grant funds
- To offset rising PSERS contributions, health insurance costs, and additional contractual benefits, a fee increase is tentatively being planned. If implemented, this will be the first fee increase in four years.
- Increase participation in the Keystone Stars program by continuing to move up one level so that all eligible sites are a level three or four.
- Evaluate the child care program's technology equipment and software through collaboration with the business office and IT department.

2019-2020

- Encourage all child care assistants to earn early childhood credits.
- Encourage all child care supervisors to pursue a BA degree in education.

2020-2023

- All child care supervisors will provide evidence of coursework taken toward the completion of a Bachelor's degree.
- Continue to attract and recruit highly qualified Child Care Assistants/Leads with Early Childhood college credits.

Early Learning

The Bethlehem Area School District is proud to offer universal full-day kindergarten in our 16 elementary schools. We want each child's experience filled with fun and exciting activities that will begin them on the path of successful learning experiences and personal development. Our kindergarten students come from a wide variety of backgrounds and experiences, which is what makes each of them unique and special. Although children go through similar stages in the learning process, we understand that children develop at different academic, social, and emotional rates. Our full-day kindergarten classrooms offer support based on each individual child's needs. Additional information can be found at the following link: <http://www.beth.k12.pa.us/District/Kindergarten/>

During the last two school years, the District's focus at the primary level was in the area of literacy. All kindergarten and grade 1 teachers received formal LETRS® (Language Essentials for Teachers of Reading and Spelling) training on Modules 1, 2, and 3, and additional modules will continue to be added in subsequent years. All kindergarten teachers also received small-group phonology and phonics instruction that was explicit, systematic, and multisensory. Intensive MTSS support was also provided as well. Training, modeling, coaching, and support will continue, particularly in the primary grade levels where the District just adopted a new core literacy series/program.

While the District will continue its work at the primary grade levels, we also recognize the need to work with our outside Pre-K partners, Pre-K parents/guardians, and Pre-K students. As a result, the following events will occur each school year:

<u>Dates</u>	<u>Events</u>	<u>Description</u>
August	Incoming Kindergarten Play Date/Orientation	Event for registered, incoming K parents/guardians and students
	BASD Pre-K Counts Orientation	Event held at Donegan, Marvine, and Calypso only
September	Kindergarten Literacy Night	Evening event for all local Pre-K and/or child care providers to learn about the BASD's literacy work, professional development, and curriculum
October	Pre-K Parent and Provider Visitation Day	Daytime event held during BASD Education Week for any interested Pre-K parents/guardians and/or Pre-K providers
November and December	Fall Pre-K Open House	Evening Open House events held at each individual elementary school for Pre-K parents/guardians, their child, and Pre-K providers
January	Kindergarten Registration begins	Parents/Guardians can obtain a registration packet at the school, by contacting the Early Learning Office, or by completing the online request form.

	Pre-K Parent & Family Literacy Session #1 Topic: Print Awareness	a 60-90-minute workshop held at each elementary school
February	Pre-K Parent & Family Literacy Session #2 Topic: Letter Recognition	a 60-90-minute workshop held at each elementary school
March	Spring Pre-K Open House	Evening Open House events held at each individual elementary school for Pre-K parents/guardians, their child, and Pre-K providers
	Pre-K Parent & Family Literacy Session #3 Topic: Vocabulary Building	a 60-90-minute workshop held at each elementary school
April	Pre-K Parent & Family Literacy Session #4 Topic: Early Language Awareness	a 60-90-minute workshop held at each elementary school
May	Incoming Kindergarten Family Welcoming Day	Daytime event for all registered, incoming K students and their parents/guardians
	Pre-K Parent & Family Literacy Session #5 Topic: Phoneme Awareness	a 60-90-minute workshop held at each elementary school
	BASD Pre-K Counts & Head Start Transition Day	Event held at Donegan, Marvine, Calypso, and Lincoln only
June	Pre-K Parent & Family Literacy Session #6 Topic: Letter Sounds	a 60-90-minute workshop held at each elementary school

Grants Office

The Bethlehem Area School District is very fortunate to receive funding from a variety of federal, state, and local grants. Although funding is never certain, listed below is a brief description of some of the main funding sources that are anticipated for the 2018-2019 school year and beyond. This list is not inclusive, but it does provide an overview of the main grants that will be applied for during the upcoming school year.

During the 2018-2019 school year, the Bethlehem Area School District's grants office is anticipating over \$4,000,000 in federal Title money. **Title I** funds will be used for teacher salaries and benefits, administrative costs, supplies, parent involvement programs, and mandated set-asides at the elementary and middle school level. **Title II** funds will be used for salaries and benefits for class size reduction teachers and staff development opportunities focused on strategies to close student achievement gaps at the elementary and secondary level. **Title III** funds will be used to provide supplemental educational programming for English Learners and immigrant students at the elementary and secondary levels. **Title IV** funding will be used in the areas of safe and healthy students, well-rounded education, and effective use of technology.

At the State level, the District is anticipating grant funding in several key areas. The **Pre-K Counts grant** provides funding for four pre-kindergarten classes in the District, which are located at Calypso (1), Marvine (1), and Donegan (2) and service a total of 80 students. This grant is up for renewal/reapplication. Money from the **Basic Education Funding Accountability Plan** will be used toward the implementation of full-day kindergarten. Funding from the State's **Keystone STARS** grant will be used to improve the quality of early learning and recognize child care providers who exceed state health and safety certification requirements. STARS regulations and guidance is also in the process of changing, so the District is awaiting these updates. The District is also planning to apply for \$25,000 in **Safe Schools** funding, with a tentative focus on expanding Restorative Practices at the secondary level. PDE's **Division of Food and Nutrition** provides schools with assistance in purchasing food service equipment to improve energy efficiency, improve food safety, expand participation, and enhance nutritional quality. The **Marvine Family Center** grant received a two-year extension last school year, so the District will begin investigating options regarding how to move forward in this area as we get closer to the end of this extension.

At the local level, the District is hopeful that a number of grants will be approved for the 2018-2019 school year. UGI has provided funding annually to assist schools with the **Reading is Fundamental (RIF)** initiative. This funding was always designated to purchase books for all BASD first grade students. The **Lehigh Valley Community Foundation grant** provides programs and services designed to build character and leadership in students from K-12. The Foundation provides funding to schools interested in implementing the Leader in Me™ program. If BASD is awarded with funding for the 2018-2019 school year, it will be used to pay a portion of the implementation cost. The **Foundation for the Bethlehem Area School District** also provides up to \$25,000 for Teacher Innovation Grants and Service Learning Grants.

In support of the BASD mission and Roadmap to Educational Excellence, the Special Education Department is committed in educating ALL students with disabilities and develop productive relationships among teachers in general and special education, related support staff, families, and community partners.

The Individual Disabilities Educational Improvement Act (IDEIA) of 2004 requires every state to develop a State Performance Plan (SPP). The SPP describes how the state will improve educational outcomes for students with disabilities within 14 target areas and are reported through the Special Education Data Reports (SEDRs). The Special Education Department receives the data report on a yearly basis comparing the district to the state performance targets. This assists the district in identifying areas of strengths and needs of improvement. The special education department needs to continue to close the achievement gap, drop-out rate, and suspension rate of special education students. According to the most recent SEDR, the district continues to maintain a consistent percentage in educating students within the least restrictive environment with typical peers despite their disability, 2012-2013: 71.5% to 2013-2014: 75.6% to 2014-2015: 76.4% to 2015-2016: 75.1% to 2016-2017: 74.1% (80% or more in Regular class). This category percentage continues to be higher than the state percentage. This slight decrease is attributed to the increase in students with more significant complex medical and educational needs.

To close the achievement gap, special education teachers must acquire knowledge of PA Standards and how it relates to the student's instruction and disability. By providing quality supports, services, and instruction to students unique learning styles, students will be better prepared to participate successfully in the general education curriculum with rigor and high expectations. To assist administrators and teachers in working with students who demonstrate more significant needs in the general education classroom, the special education department meets regularly to discuss what skills teachers feel are needed and provide the appropriate staff development.

The department continues to provide staff with appropriate strategies through the mandated process of Child Study/MTSS process, functional behavior analysis, positive behavior support plans, and school attendance improvement plans to address academic, behavioral, and emotional needs of students. The Elementary SAP/MTSS process was restructured to streamline the process to include all student referrals. This new process is legally compliant, defensible, and provides resources to assist teachers in meeting the student's needs prior to evaluation. To prevent inappropriate identification of students requiring special education supports and services, the department is working closely with building administrators and teachers on strengthening the efficiency, effectiveness, and fidelity of core instruction and interventions through a multi-tier support system to address the needs of at-risk students. Elementary special education staff is intricately involved with the district's Reading By Grade 3 initiative with training and implementation. School Psychologists are more actively involved in team-based meetings to consult and remediate areas of concerns prior to evaluating for special education services. With the change of thinking on how we address students' needs, buildings are diagnostically assessing students' strengths and weaknesses through effective goal setting, data collection, and implementation of interventions in relation to the curriculum/standards for ALL students as well as reducing the number of students requiring evaluations and reducing over-identification. As curricular expectations increase in the regular education with rigor and high demands, this is also true for special education. In order to meet these demands, the department continues to implement the Unique Curriculum within the Multi-disabilities and Life Skills Support Classrooms (K-12) to increase the academic rigor which is aligned to the core standards in English/Language Arts and Mathematics with thematic based unites in the area of Sciences and Social Studies. Special Education teachers continue to provide a continuum of services from itinerant to full time support through a variety of instructional approaches.

With the increase of inclusive practices, BASD has seen a strong growth in providing students with disabilities with a less restrictive environment in which to learn. A new approach that has also been positive to raise expectations while maintaining high levels of support is “Collaborative Consultation”. This approach has allowed teacher flexibility to provide the appropriate level of supports to students and teachers. Each building now provides supplemental learning support to students, which has decreased the number of students needing to attend another school to receive the appropriate level of support.

In the area of Gifted Education programming, the focus continues to provide support through a model of collaboration, consultation, and/or direct instruction in the regular education classroom to stretch, accelerate, and individualize the student’s area of giftedness while providing gifted thematic units of study and the identification of giftedness. There has been an increase in student participation within the program decreasing non-participation in the program.

A multitude of professional development workshops are offered to teachers and teacher assistants throughout the school year to assist in providing high rigor and high supports to meet to student needs. The department has offered over 50 trainings which includes but not limited to: Gifted Education, Core Instruction, Alternate Eligible Content, Autism, DIBELS, Non-Violent Crisis Prevention/TACT II, progress monitoring, Transition Planning, Writing measurable goals aligned to core or alternate standards, SDI: Accommodations/Modifications, and Behavioral Strategies (FBA/PBS). The department is working with the transportation department to provide de-escalation techniques and skills to bus drivers and monitors to implement with difficult students.

With the rise of behavioral and mental health concerns, the department continues to provide mental health services at all levels, which has allowed students to access the learning environment successfully. With the success of the Emotional Support program at the high school level, the model has been expanded to the middle school level. The special education department continues to partner with community agencies to provide mental health services to students and their families through Pinebrook Family Answers, Children’s Home of Reading, etc. The department in partnership with student services assist with behavior and MH challenges by training staff members to better understand how to implement positive supports/services, trauma sensitivity, case managing, and accessing community resources.

The department conducts monthly data review meetings with the primary purpose of assessing the drop out, graduation, and suspension rates. Weekly discipline reports along with positive behavioral approaches have allowed the special education department to monitor and be proactive with building administrators in dealing with discipline issues. The department has seen a decrease in the number of students having multiple suspensions. The department continues to participate in a project with the Department of PDE and the Bureau of Special Education in addressing the graduation and drop out rate of special education students. With the implementation of strategies; i.e.: check and connect, the district has seen an increase in the graduation rate and a decrease in the drop out rate of special education students. The special education department is closely working with the secondary schools to individualize the student’s chosen pathway towards graduation.

The Special Education department has focused on maintaining and building positive relationships with all stakeholders. Parent communication is being expanded to include transition programs to ease the progression from early intervention to elementary to middle to high to post secondary. Transition plans are more individualized, specific, and evidenced based.

The Special Education continues to revise procedures due to program changes in order to maximize reimbursement for allowable services within the ACCESS program. This fund assists in funding necessary equipment and services for special education students: i.e.: curriculum materials, mental health/counseling, services.

As the Special Education Department addresses the areas stated above, it will focus on a “results driven accountability” framework that strengthens and provides alignment with general education initiatives while meeting the mandated SPP targets. By continuing to be responsive to ALL students needs, students will become stronger learners, which means higher academic achievement, graduation/drop-out rate, and suspension/expulsion rate of special education students, as well as servicing the students within the least restrictive environment.

In alignment with the Bethlehem Area School District's Roadmap to Educational Excellence, the Office of Student Services and Minority Affairs (OSSMA) partners with schools, families, and the community to support all students through their educational journey. Through various supports and services, the OSSMA works collaboratively with all stakeholders to give students the behavioral and academic services they need for success.

The 5-year plan of the OSSMA involves a comprehensive and integrated, developmental K-12 program through guidance, nursing, character development, mental health and behavioral services using various district and community services. Using the District Equity through Excellence plan, which is part of the Roadmap, all programming and services over the next five years will be assessed through an equity lens to develop equity-related responses and initiatives. This will include a program evaluation as well.

The Community School model has been a productive way for the BASD to provide children and families with the supports and services they need for success in school and in their families. It is a partnership between the United Way, local businesses and universities and our district, as well as other community organizations that helps to integrate academics, youth development, family support, health and social services and community development to improve student learning, create stronger families and a healthier Bethlehem community. We now have six Community Schools. Last year, Northeast Middle School and Thomas Jefferson were assigned an Americorp VISTA (Volunteers In Service to America) to lay the foundation for a Community School. Mid-year Freemansburg Elementary School was also assigned a VISTA.

Mental health and behavioral supports continue to be a critical need at all levels. Pinebrook Family Answers continues to provide social services and case management to Liberty High School. Due to funding issues, the District reduced guidance staff at Fountain Hill Elementary School and Broughal Middle School. Recognizing that needs still exist, we have contracted with Communities in Schools of the Lehigh Valley (CISLV) to provide specific interventions and supports for both schools. This comes in the form of individual and group counseling and case management. We have also added a Restorative Practices (RP) Coach to Broughal Middle School to support teachers and increase classroom use of RP strategies.

Over the last several years, BASD has been implementing a strategic plan to have all 16 elementary schools trained in the philosophy and framework of Leader In Me (LIM), which is based off FranklinCovey's 7 Habits of Highly Effective People. We have accomplished this task and have added a middle school. Nitschmann Middle School began training last year and is currently our only middle school using LIM principles. As planned, NIMS opened their brand new school as our first LIM middle school.

Alternative Education is a primary function of the OSSMA. This involves programming for students expelled from the district and placement of at-risk students struggling behaviorally before they reach expulsion. Last year, we reopened our in-house alternative program and renamed it the Evening Alternative Program (EAP). Due to funding constraints, there is no longer an online program; however, it is taught by school district teachers with our own curriculum. We are still preparing students for return to the high school or to receive their diploma and enter post secondary options.

The Framework for Citizenship (formerly known as the Code of Conduct) is another area under OSSMA. It is a framework to assist in the promotion of good citizens and community minded students through positive learning opportunities to grow in leadership and character. The Code of Conduct has existed since the late 1990s. Last year, through the District Equity through Excellence plan, a review of the Code took place last year and the following frameworks and philosophies were imbedded: Restorative Practices (RP), Leader In Me (LIM), and Positive Behavior Interventions and Supports (PBIS) as all were already being used to help model and teach appropriate behaviors as well as consequences for inappropriate behaviors.

Lastly, the OSSMA will continue to review district policies and procedures through an equity lens and make suggested revisions. Due to the update in the law of Attendance and Truancy, the Office is currently working on an updated attendance and truancy policy.

As practice, the OSSMA will continue to review data trends and policies needs and will make recommendations to the Superintendent and the School Board as needed.

In support of the BASD mission and Roadmap to Educational Excellence, the Health Services Department is committed to providing health services to all students by partnering with students, families, community agencies and health care providers to give students, families and staff the services they need for optimum health and wellbeing.

The five-year plan involves a comprehensive program using various district services supplemented by community services focused through collective impact and equitable services that support student academic achievement and align with the Roadmap.

The community model supports our efforts and aligns us with OSSMA. In partnership with St. Luke's, the Bethlehem Health Bureau, Moravian College and United Way as well as other community organizations we work to create health care opportunities that address student needs. The department works to provide evidenced based health care and prevent duplication of services so that all students have opportunities to access the available programs.

Mental and behavioral health needs are a priority. With the support of special education, curriculum and guidance E-SAP/MTSS was developed to assist in identifying at risk students. This program is now in all 16 elementary buildings. The process of training BASD in the SAP process is ongoing. A similar model for the secondary schools is being reviewed. Data collection is a priority in this Google based system.

Health services is working closely with special education and student services to introduce trauma informed practices in the health rooms. In addition, health services is using a collective impact model working with guidance on initiatives including Challenge 5. The department will support Challenge 5, to support student attendance and resolve health needs that may present issues surrounding school attendance. The department will work with OSSMA and guidance offering a team approach to assist student and parents.

Physical health remains a priority. The department continues to work with St. Luke's to provide dental, medical and vision services to our families. The Adopt-a School initiative targeted 6 schools resulting in mass screenings and intense follow up on health referrals. We will continue our partnership with the Bethlehem Health Bureau working to meet new state immunizations requirements.

Health services is also focusing on the needs of staff assisting with flu and shingles vaccines for staff. Several learning opportunities are available on line for staff including; severe allergy response, asthma and trauma concepts. CPR classes and first aid classes continue to be offered for all staff.

As we move forward toward strengthening our efforts the following are key areas that have been identified as needs to continue to improve our services.

- Leadership commitment
- Technology updates and support
- Collective Impact strategies
- Strengthening our partnerships

Facilities and Transportation Five-Year Forecast – Opportunities and Challenges

FACILITIES

The district's facilities are in good condition overall and able to meet the educational needs of the district and community. Over the next five years, it will be important to balance the resources necessary to preserve the investment the district has made in its facilities while at the same time looking to recapitalize and improve the oldest facilities. Additionally, the next five years represent an opportunity to continually evaluate the performance of existing personnel, processes, agreements and organizational structures required to meet the educational and operational needs of our 21st century facilities.

Between 1991 and 2001, the district invested over \$96 million in 18 different buildings. From 2005 to 2011, the district invested an additional \$184 million to renovate both high schools and replace two middle schools. In 2012, The Board authorized \$55.2 million to build a new Nitschmann Middle School, which opened in August 2017. It has been over 25 years since the most recent round of renovations started, so building systems designed to last 20-30 years will be coming due for attention over the next five years. Additionally, other facilities and parts of facilities that have not yet been renovated require future capital planning efforts. These include Fountain Hill, East Hills, Freedom, William Penn, Thomas Jefferson, and the Education Center.

With the daunting challenge of funding much needed capital projects, the district cannot afford to lose sight of required preventive and recurring maintenance needs at all facilities. These proactive and low cost (compared to capital expense) maintenance items extend the life of the existing facilities and building systems. One opportunity to meet this challenge is to continue building a capital reserve account to fund one-time maintenance and repair costs that will extend the life of a facility. The biggest challenge to building a capital reserve account is identifying a recurring revenue source to replace the project funds used year after year to sustain the fund into the future. Other funding strategies that must be weighed against other funding priorities include increased general operating budget investment in "summer" projects or borrowing funds to tackle some of the long standing, higher cost projects that can't be funded with operating dollars. The capital project funding challenge is not specific to Bethlehem, but it will continue to exert pressure on the BASD budget with each passing year as our buildings and systems continue to age.

One successful cost saving effort over the last 7 years has been the energy management program. Energy management efforts have yielded a cost savings of over \$10.5 million during this time, but as more savings are squeezed out of the energy budget, and our buildings are operated more efficiently, the challenge will be finding fewer and fewer dollars to save. In the future, district energy management efforts will continue the successful three-pronged approach to aggressively reduce consumption; intelligently procure utilities; and invest in energy efficient upgrades. The biggest challenge in this initiative is changing the organizational culture to embrace conservation.

Fostering a culture of conservation district wide creates a multiplier effect that will benefit both the educational and financial goals of the district. The opportunity to complete energy efficient upgrades yields a high return on investment; however, the challenge is obtaining scarce competing resources for the upfront investment to save more money.

Another opportunity and challenge lies in improving the cleanliness of the learning environment. Studies show a strong correlation between cleanliness and student achievement, so continued improvement in this area has a direct impact on the success of the Roadmap to Educational Excellence. In our efforts to establish the high expectations needed to support the Roadmap, there are key supports needed for success. One of those big supports is increased training for the custodial staff. A long standing but challenging to implement opportunity has been the development of a custodial training program that extends beyond the current in-service schedule. A key ingredient in such a training program includes individual ownership of personal development outside of the workday. Just as teachers need to take college classes on their own time to earn more money and stay relevant, custodians need to stay current and remain relevant by earning credits and certifications at a Facilities Training Academy. Challenges exist in the collective bargaining agreement that may hinder such a program, but our district can only benefit by investing in our people. The collective bargaining agreement is currently in negotiations, so the opportunity exists to address this need at the bargaining table. An additional support and opportunity lies in obtaining the current technology, tools and equipment used by a 21st century cleaning operation. With added demands on every custodian's time, we need to rely more heavily on the tools, technology and equipment that improve productivity and expand each custodian's coverage in the buildings. The obvious challenge in purchasing new equipment is the budget pressure to keep pushing funds toward the core mission. Expanded training opportunities and improved cleaning equipment are key opportunities with considerable challenges that will occupy much of the department's energy in providing the high levels of support needed to match the higher expectations required by the Roadmap to Educational Excellence.

From a district-wide perspective, the safety of all staff and students is among the highest priorities in the district. Within the realm of workplace safety and occupational health, fostering a culture of safety is an opportunity we cannot afford to miss. By educating staff about workplace safety, addressing known physical safety issues and focusing on accident prevention, the district keeps its most important resources at work supporting the Roadmap while at the same time reducing expenses. Ensuring that our students and staff are able to go home every day in the same condition they arrived has a huge multiplier effect by reducing lost work time, increasing employee attendance and maintaining employee productivity. During these challenging budget times, it is difficult to spend over \$1 million annually on worker's compensation premiums. Fostering a culture of safety will not only keep people at work, but represents a six-figure savings opportunity in insurance premiums alone from year to year that could be reinvested into the classroom.

TRANSPORTATION

The district's transportation department is among the largest district owned and operated fleets in the state. The fleet of 125 buses transports over 9,500 students to and from school each day and logs almost 1.2 million miles annually (6,400 miles/day). Over the next five years, the biggest opportunities and challenges facing the transportation department include: keeping drivers behind the wheel; staffing; driving out operational inefficiencies; recapitalizing the aging bus fleet; and managing the increasing demands on resources to transport more kids to more non-pub and charter locations.

One of the biggest challenges facing the entire transportation industry is finding qualified bus drivers to replace the retiring workforce and keeping them behind the wheel. This challenge has multiple cascading effects that make the already challenging job of student transportation even more difficult. On top of the driver shortage, the management team in transportation is understaffed to meet the needs of the growing logistical challenges created by more charter schools and growing special education transportation requirements. Opportunities to confront these challenges include renegotiating the collective bargaining agreement to provide both structure and flexibility that incents drivers to come to work; providing a compensation plan that attracts drivers to drive for Bethlehem instead of the competition; and providing additional supervision in the office to manage the operation. Adding support staff in light of the current budget environment is real challenge; however, in this critical support department affecting over half the district students and their families on a daily basis, the need for additional support must compete among the highest staffing priorities in the district.

Despite the day to day challenges, the department must continue to focus on opportunities to streamline existing processes and improve efficiencies within the complex logistics of student transportation. Incremental changes to centralize and reduce the number of bus stops, including increased bus stop walking distances, will continue with the overall goal of reducing the number of buses required to deliver students. A continuing challenge is managing the community's expectations for bus service. Over the years, the community has come to expect a level of bus service that is no longer sustainable in the current budget environment. The impact of fewer bus stops and longer bus rides will need to be balanced with the community's tolerance for change and the value of the financial savings. Over the last several years, the department has been successful in eliminating several buses that were ultimately all needed to transport charter students. Efforts to create more efficient bus routes must continue to keep pace with the growing charter school enrollments and increasing driver shortages, mitigating the cost impacts on the district.

Over the next five years, a continuing challenge will be maintaining investments in bus replacements. The good news on this front is after investments by the Board to lease 20 and 10 new buses in 2012 and 2013 respectively, those lease payments will be ending in 2017 and 2018 leaving room in the budget for additional leases. During budget discussions each year, the need to continue these bus replacements must not be overlooked. An opportunity over the next five years, as previous leases come to an end, is to level out the number of bus replacements during this time to 8-10 per year so there are fewer buses to lease each year, but maintain that number every year for the next five years.

Another challenge facing the transportation department is increasing non-public and charter school enrollments. Over the last several years as non-public and charter school enrollments have grown, so have the requirements to deliver more students within 10 miles of the district borders as required by state law. Beyond the district's 22 schools, the transportation department delivers students to 50 additional charter, non-public and parochial schools located not just within the district, but also within 10 miles of the district's boundaries. The charter, non-public and parochial schools account for over 40% of the miles driven by district buses. Opportunities for added supervision, improved routing efficiency and continued efforts to recover charter students will help manage this challenge into the future.

In support of the BASD Mission, and in concert with the Board, staff and community, many challenges are facing the financial success of BASD schools and public education within Pennsylvania. Several issues are specific to our local schools and community while many other significant challenges are resulting from state or national concerns or mandates.

As we consider the five-year budgetary projections which show static or marginally increasing revenues combined with the natural expenditure growth from programmatic mandates, cost of living, contractual obligations, aging facilities, healthcare and PSERS increases, a structural deficit is clear in that the natural growth of our tax base limited by Act 1 is not keeping pace with the natural growth in existing costs. While savings yielded through ongoing review of operating budgets and savings in core personnel contracts and services has allowed resources to be reallocated to key instructional programs, limited revenue growth will not be adequate to sustain the existing programs without material change to the key cost drivers of mandates and systemic changes.

In response to the sluggish revenue growth and ongoing taxpayer appeals, the Board has taken a proactive approach to fair and equitable assessments in both counties by reviewing properties that appear to be significantly undervalued to current market value where the anticipated increase in assessed value would generate additional tax revenue above a predetermined value. This process, called municipal or reverse tax appeals, is permitted when uniformly applied to challenge a property's assessed value in the same fashion as the taxpayer. By evaluating all properties that are materially under assessed, we will restore equity to taxation thereby increasing revenue and the proportionate burden on the average homeowner to support their public schools. We have been successful in negotiating representative and equitable assessments in twenty-two parcels that were contested generating \$4.9 million additional annual revenue for operational needs.

This revenue effort, however, is offset by ongoing taxpayer initiated real estate assessment appeals, which have reduced the overall tax base and revenue over the past several years due primarily to the change in the Common Level Ratio. This is a state determined ratio that compares recent sales transactions as an indicator of current market value to the assessed value. This factor tends to increase the longer it has been since a countywide reassessment. Lehigh County has completed a countywide reassessment effective with the 2013 tax year, which reset this base value to 100% of current market values. As a result, BASD has equalized the millage rate assessed for school taxes in Lehigh County creating different tax rates for our two counties. This has a budgetary impact on BASD tax revenue in future years as the mandated rebalancing limits the ability to generate the full index revenue.

While development in the BethWorks TIF zone of South Bethlehem have been tremendous, the true economic impact will not be realized until 2020. In the interim, we will continue to monitor all new development in that region and surrounding areas, first with the Sands Retail Shops along with the LERTA industrial development which are expected to continue with future expansion in the next few years. Ancillary growth within and adjacent to this area will provide additional resources as the overall tax base expands.

Additional growth is anticipated in this same area as well as at the former Martin Tower property with the development of expanded retail and residential centers proposed in a City Redevelopment Improvement Zone (CRIZ). While all future employment income taxes are restricted by the CRIZ terms, future real estate tax will be payable under the terms of the existing TIF agreement increasing future revenue.

We will continue to look for alternative sources of revenue from all areas including increased involvement and fundraising with the Bethlehem Area Education Foundation, outside marketing, donations, grants, and fees for services to sustain our valuable educational and student programs. Additionally, to help offset the ever increasing cost of charter school tuition payments, we will actively pursue the growth of our BASD cyber and hybrid learning opportunities to attract and retain students who desire an alternative to the traditional classroom setting within BASD. This will continue to be a significant challenge however as more incentives are offered to alternative and private schools encouraging growth in new charter school opportunities with further diversion of sizable education funding away from our local public schools. The flawed funding formula for charter schools exponentially increases this concern as annual increases are compounded by the previous year's charter tuition increase as well as the full expense for BASD's retirement contribution to PSERS which is rising dramatically each year through the peak of 36.32% of payroll in 2022. The only true resolution to this continued funding increase is through legislative action to amend the tuition formula for statewide charter education. Advocacy through the legislative process may help to educate our representatives to the burden that is placed on local school districts faced with choosing between funding this steep increase for a few students while sacrificing education programs for the overall majority of public school students.

People are the largest expense in public schools, which rely upon core staff to teach as well as maintain the schools to provide the high quality educational services to our students and community. With this high reliance on personnel comes a high cost associated with compensation and benefits. We will need to work proactively on the cost of total compensation as we address upcoming collective bargaining agreements for changes in healthcare plan designs including employee cost sharing. This will be increasingly more urgent with the timelines mandated by the Affordable Healthcare Act that include fees and penalties annually leading up to the sizable Cadillac Tax in 2020 for healthcare programs exceeding a pre-established cost per employee. Through the Bethlehem Area Employee Benefit Trust we have reduced our administrative costs through a statewide consortium of self-insured Healthcare Trusts while providing added financial security of stop loss insurance for catastrophic claims. Collectively we have also leveraged our market share to acquire a lower cost prescription benefit management program that includes more aggressive discounts off the average wholesale price for medications and increased formulary rebates to reduce plan costs. These efforts have allowed us to hold rates constant in 2017-18 with planned rate reduction in 2018-19. The inherent structure of an employee healthcare trust also provides for greater involvement in the benefit decisions and shaping employee behavior that will ultimately add to the ownership of the plan and its operation generating cost saving programs that are a win-win for all.

The next highest staffing cost is PSERS, which is projected to rise as high as 36.32% of payroll during this next five years climbing steadily to \$22.1 million in increased cost to the budget. Clearly, this type of increase in any expense will become the focus of debate and pose a risk to all other educational programs. Several options can be considered to address this increase, first of which is to maximize the Act 1 exception for PSERS excess costs above the annual index. While this only passes the burden to local taxpayers, absent any other solution, it remains the

final resort statewide to fund this mandated cost. Locally, we have also shifted a portion of available annual budgetary surplus to an assigned fund balance for future PSERS increases. This option allows the funding to be phased in more gradually but ultimately the millage necessary to fund this annual recurring cost must be built into the tax base in order to be sustainable going forward as the use of one-time fund balance in any form for recurring expenses provides only a temporary patch and is not sound fiscal management. Finally, the only true resolution to this PSERS funding rate increase is through legislative action to amend the code driving the funding formula for the statewide pension system. Advocacy through the legislative process may help to educate our representatives to the burden that is placed on local school districts faced with choosing between funding this steep increase or sacrificing student programs.

Designating funds to help mitigate the PSERS increases is due to the improved overall financial health of BASD. While we must continue to be proud of the courageous decisions that resulted in achieving the targeted fund balance of 6% as of June 30, 2017, we cannot lose sight of the significance of maintaining this level for proven financial stability within the financial community. Our ongoing experience with Standard & Poor's clearly evidenced that simply reaching the target is not sufficient for bond ratings. It is clear that BASD must prove that we can continue to maintain this stability for the long term and not fall prey to the temptations of the past to spend down the fund balance to avoid the tax levies needed to sustain ongoing financial commitments.

This is even more evident where both Moody's and S&P have withdrawn their ratings of BASD and many other PA public schools relative to the PA Intercept program that guarantees school bond payments due to the Commonwealth's inability to adopt an annual operating budget, thereby providing no financial support for our public schools and other state programs. Specifically, they cited the state's history of late budget adoptions with only three on time budgets in the last 14 years; three of which exceeded 100 days. Without our strong tax base, sound fund balance levels and stable financial condition, weathering this type of funding delay would be detrimental to maintaining a seamless educational system for our students.

While the Board has been diligent in systematically reducing the overall debt burden, there are still not sufficient resources available to pay our debt obligations if called at once. The financial community is well aware of the financial condition of the Commonwealth, the history of reduced state funding and the looming pension increases. This imbalance presents great temptation to spend down the newly acquired fund balance, which would undermine our ability to continue the planned reduction of variable rate debt for improved overall financial health.

Understanding these expectations, however, should not deter our need for capital improvement planning. Although we have a higher than average debt burden, the result is that BASD has outstanding facilities most of which have been renovated or replaced over the past decade. This investment in our community and its public schools adds much value to the BASD tax base by the increased marketability of residential homes due to our great public schools. This investment, however, must be maintained regularly to avoid deterioration and a loss of investment. While it is not advisable to draw down the fund balance, there is no need to have the unassigned balance continue to grow beyond its current proportion. Sound financial planning must include prioritization of any annual budgetary surplus to be considered for transfer to the Capital Reserve Fund to allow for ongoing preventative maintenance on our facilities to insure they will last for our children's children.

Using the Capital Reserve Funds wisely affords us the resources to systematically finance various projects further outlined in the Capital Improvement Plan that include renovations to BASD Stadium, roof replacements, security and HVAC system upgrades.

We are proud of the newly dedicated Nitschmann Middle School. Demolition and site work continues on schedule and on budget that will have students enjoying their new school and athletic fields in September 2018. Traditional borrowing to finance a construction project was funded within the annual Act 1 index and approximately \$3.5 million from Capital Reserve savings. The timeline for this Nitschmann project has been carefully managed to utilize the delayed BethWorks TIF revenue in 2020, thereby reducing the restrictions of Act 1.

Finally, we cannot lose sight of the need to plan for the regular replacement of aging and obsolete equipment. Annually, we must evaluate the need for investment in recurring equipment cycles such as school buses, preventative maintenance, technology, band uniforms, etc. Acknowledging that resources are limited and demands many, continued failure to fund this replacement equipment puts our students' safety at risk and hinders their continued educational success. We will review all possible methods to finance these ongoing needs balanced together with the mandated obligations for the benefit of our students along their road to academic excellence.

**Five Year Plan Decision Points
December 2017**

CATEGORY	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
5-Year Budget Projections	Exp \$271,832,434 Rev \$271,832,434	Exp \$284,021,388 Rev \$284,017,995 Gap \$ -3,393 Less PSERS & Charter Impact \$4,077,134 Net Surplus \$ 4,073,741	Exp \$293,904,665 Rev \$292,184,939 Gap \$ -1,719,726 Less PSERS & Charter Impact \$4,106,900 Net Cumulative Surplus \$ 6,460,915	Exp \$307,090,566 Rev \$304,767,061 Gap \$ -2,323,505 Less PSERS & Charter Impact \$3,687,800 Net Cumulative Surplus \$ 7,825,210	Exp \$321,331,747 Rev \$312,881,889 Gap \$ -8,449,858 Less PSERS & Charter Impact \$3,994,628 Net Cumulative Surplus \$ 3,369,980	Exp \$335,235,816 Rev \$321,088,745 Gap \$ -14,147,071 Less PSERS & Charter Impact \$4,367,446 Net Cumulative Gap \$ -6,409,645
	Monitor Growth in Charter School Costs & Find Alternate Delivery Options to Retain Students					
	Mitigate Loss from Assessment Appeals					
	Annually evaluate need for investment in recurring equipment cycles such as school buses, preventative maintenance, band uniforms, technology, etc					
	Monitor Development within the BethWorks TIF Region for Taxable Revenue Growth					
	Research and Implement Alternative Revenue Sources including BAEF, donations, grants, external marketing, fees for service, etc.					
PSERS	32.57%	33.43%	34.79%	35.26%	35.68%	36.32%
	Determine Annual Budget Surplus for assignment annually by June 30 to fund a PSERS Rate Stabilization Reserve to help mitigate the impact of the PSERS rate increases as prioritized with capital needs and legislative efforts.					
Healthcare	Evaluate Impact of Federal Healthcare on Cost					
				Implementation of Cadillac Tax \$10,200 Single \$27,500 Family		
	Implement Lowest Cost Prescription Benefit Management Discuss Plan Design Considerations for Cost Saving/Sharing NIMD- IMD-BEA	Discuss Plan Design Considerations for Cost Saving/Sharing Teacher Assistants	Discuss Plan Design Considerations for Cost Saving/Sharing			
Fund Balance – Funding of Capital Reserve Fund	Determine Annual Budget Surplus for Transfer to Capital Reserve Fund annually by June 30 to fund ongoing capital improvements					

**Five Year Plan Decision Points
December 2017**

CATEGORY	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Nitschmann Project Timeline	Aug 2017 – Occupy new building	Aug 2018 – Complete site work improvements				
Facilities			Dec 2019 – Natural Gas contract expires		July 2021 – Electricity contract expires	
Transportation		July 2018 – Replace 10 buses*	July 2019 – Replace 10 buses*	July 2020 – Replace 10 buses*	July 2021 – Replace 10 buses*	July 2022 – Replace 10 buses*
* Subject to annual budget approval						
CBA Expirations	June 2018 – Clerical – Custodial/Maint - IMD– NIMD	June 2019 – Teachers - Food Service – Bus Drivers – Teacher Assistants				

Human Resources

The Human Resources function in the Bethlehem Area School District continues its development in order to most effectively lead and support expanding organizational strategies and goals, Roadmap 4.0 and ever-increasing state mandates.

Organizational goals in future years requiring support from HR include:

- Six collective bargaining agreement renewals, beginning with the custodial/maintenance and clerical contracts in 2018 and continuing into 2019 with the BEA, Paraprofessionals, Food Service/Hall Monitors and Transportation in 2019.
- curricular program additions and changes, such as elementary Spanish, digital literacy and Reading By Grade 3.
- increased focus on equity initiatives
- talent development and succession planning for anticipated administrative retirements
- management training and development for all A&S personnel
- greater productivity from staff through improved employee training and development
- cost control in the employee benefits arena
- maintaining labor market competitiveness in all areas, but particularly with substitute teachers.

Prime examples of recent and continuing state mandates within the realm of HR are the requirements regarding educator and administrator evaluations under Act 82, including teacher specific student growth scores, the renewal of employment clearances every five years, training requirements around child abuse awareness, suicide awareness and PIAA coaching training. We also provide annual mandated state reporting on educator and principal evaluations, PIMS staffing, equity plan, and civil rights reporting.

The following factors speak to the particulars of our district that provide for HR leadership and management challenges beyond most other districts and many private organizations:

- We are one of the largest employers in the greater Lehigh Valley.
- We have 25 locations in a large and diverse district, the sixth largest in Pennsylvania.
- We are governed by a complex and ever-changing system of federal and state regulations, as well as board policy, school code, Collective Bargaining Agreements, and Act 93 regulations.
- We have many different groups of employees represented by six collective bargaining agreements and two “meet and discuss” agreements, requiring periodic renewals through state-mandated negotiations processes.
- The particulars of these various agreements have historically prevented an organization wide approach to most human resource issues including job placement, compensation, medical benefits, paid holidays, paid time off, disability payments, etc. We have made strides in desired alignment with recent agreements.
- We continue to maintain in-house programs for operational functions such as food service, transportation, and childcare.

- We require large substitute employee labor pools.
- While we enjoy certain benefits from having a long history and many long service employees, this fact can and often does present impediments to needed change. A strong sense of “past practices” is a significant challenge for management when implementing and/or succeeding prior administrations.
- The demands and expectations on the part of the state and society generally of school district personnel along with the lack of adequate state funding to support those demands and expectations are stretching our human resources to their limit. This requires increasing creativity to meet objectives and greater leadership and attention from management to maintain focus and a positive work climate.

The Society for Human Resources Management (SHRM) has identified six major disciplines within HR work. These are:

- Strategic Planning and Management
- Workforce Planning and Employment
- Human Resources Development
- Total Rewards (Compensation and Benefits)
- Employee and Labor Relations
- Risk Management

Below is a brief summary of significant objectives over the next few years under each discipline.

Strategic Planning and Management

We have implemented department restructurings to better position the various district functions and departments within functions to support district goals. These changes are providing greater focus and/or supervision in areas that needed to do so, including custodial and maintenance, energy management, early education, K-12 literacy, instructional technology, IT customer support, health services, employee benefits, student services, service learning and human resources. We recently selected two new supervisors for the business office and reorganized the reporting structure. On the docket for future consideration is Transportation services and STEM programming. We will continue to assess organizational design and structure, making adjustments as necessary to best support district goals and maximize organizational talent.

In 2016 we completed the PSBA job evaluation and salary survey for instructional Act 93. The results were implemented in 2017. Each year PSBA provides us with market movement data for both Act 93 groups, which we use to adjust the salary ranges. We will work with PSBA to conduct complete reviews for both groups at appropriate intervals. Next up is a full redo for Non-Instructional Meet and Discuss to be completed in 2018, which was last done in 2014.

We are intentionally increasing alignment of contractual provisions in all of our collective bargaining agreements during contract negotiations. We have negotiated deductible health care plans in recent contract renewals and aligned the plan specifics for the first time. This has resulted in cost savings. We now have ONE medical plan for the district with the only difference being lesser co-pays for hourly employees. Over the next five years we must continually monitor benefits costs, promote wellness programs and consider plan design and/or employee cost share changes to continue to control costs in this area.

HR has provided the organization with a project-planning template to better identify resources and manage cross-functional projects supporting the BASD roadmap and strategic priorities. We now need to become more disciplined in its use to assist us in developing realistic expectations of our capacity to produce excellent results.

Each year, we must produce the following out of district reports: Annual Teacher and Principal Evaluation Survey (PDE); PIMS Professional and Support Staff (PDE); EEO-5 (DOL); Quarterly BLS salary report (DOL); the IU 20 data collection of district demographic and salary information. We also assist in the preparation of the District Equity Report and the Civil Rights Data Report (OCR). We must monitor compliance with Act 48 and Act 45 as well as level 2 teacher certifications.

We have developed other HR metrics that will assist us in meeting our department objectives and provide the organization with helpful HR data.

HR should also develop mechanisms to improve communication within the district to include identifying information gaps about district priorities and achievements to insure that employees are in a position to represent us accurately in the community.

Workforce Planning and Employment

We have established a district philosophy and approach to hiring teachers with centralized processes and clear standards. The work continues to refine the details with regards to candidate screening, interviewing and selection. In 2016 we implemented plans to identify staffing needs and begin hiring processes sooner than previously. We have intentionally sought ways to increase the number of diverse applicants and candidates. We will continue to explore these possibilities. A growing challenge is sourcing teachers in particular certifications, which are secondary science, world languages, Family and Consumer Science, Special Education, and speech/language therapy.

The program revisions in elementary specials, i.e. Spanish and digital literacy in place of AI and Library, will be challenging as we assign staff for the 2018-19 school year

We have been updating job descriptions as positions become vacant or as we engage in the PSBA job evaluations and salary surveys for Act 93 positions. There are some positions in support areas lacking updated job descriptions and this will be a focus over the next two years.

We will work with line management to develop a more effective department onboarding process for newly hired support staff within the next year.

We will be developing better standards for exiting through resignation, including exit interviews/surveys. The goals here are to obtain feedback on employee experiences while working here and to influence what former employees have to say about us in the community.

Each month, HR will continue to identify employees who need to update their clearances to be compliant with the new standard of having updated clearances every five years. We will be conducting periodic audits of school records for volunteers. This process is working well.

As has been discussed, finding substitute personnel will remain a challenge for the foreseeable future. We have renewed our contract with STS and have improved our fill rates. We will continue to monitor and schedule semi-annual substitute job fairs.

Human Resources Development

Each year we publish a detailed booklet entitled “Educator Effectiveness Guidelines” which updates the processes associated with the various details of Act 82. In 2016 we implemented the Teacher Specific Rating on the evaluation form, which requires the district to make certain decisions around attaching student performance data to particular educators. It remains to be seen if recent changes in federal education law (ESSA) will result in any changes to Act 82 mandates.

Working through the community college in 2015, we implemented the first district sponsored leadership development program for support staff administration. We must build upon this successful program and develop plans for this group of leaders as we do our principals. We must include more non-academic leadership development for our instructional administrators as well. We support membership in professional organizations for our leaders. We must find more time and ways for them to follow through on their learnings from these memberships and utilize the expertise of these organizations in our work.

We are engaged in state mandated child abuse awareness training for all district employees. Suicide awareness training is being added in early 2018 as per state mandate. Last year we established in-service meetings for school secretaries, which have been well received. This effort will continue through partnering with Child Accounting and IT. We have not conducted harassment prevention training in a number of years and must develop plans to do so. In 2016 we worked with line management in the support departments to conduct a needs analysis regarding employee training needs, including skills based training pertinent to particular jobs. In 2017 we were unable to advance in this area but it remains an objective for 2018 and beyond.

Total Rewards (Compensation and Benefits)

As we negotiate contracts, establish wage rates and amend benefits plans, we are collecting more comparable market data. These efforts need to continue. We are keeping abreast of substitute wage rates in the Lehigh Valley region and will produce survey results in early 2018.

Having changed to a deductible PPO medical plan beginning in 2015 for some employees required detailed communications to employees as they navigated deductibles for the first time. We have now established deductible plans for all groups.

We are exploring the potential of offering a “narrow network” optional plan through St. Luke’s.

In addition to more frequent communication devices around wellness, we have initiated some formal wellness offerings, including an all staff picnic/health fair and a targeted program at Freemansburg elementary school. We are exploring additional approaches to wellness and perhaps an incentive plan through an employee wellness contract model. We have partnered with St. Luke’s for discount memberships to their exercise facilities and will look to expand this to more employees.

ACA (Affordable Care Act) reporting is a major deliverable for the benefits function each year beginning in 2016. This is a significant labor-intensive endeavor conducted by our benefits specialist.

We will conduct a review of the current Tuition Loan Program practices. This includes developing an online database to better manage the program and investigating more effective options for collecting on delinquent accounts.

Other than the BEST Awards for teachers and the retirement luncheon, we do not have established district sponsored recognition programs. This will be a focus in the next couple of years.

Employee and Labor Relations

We have positive working relationships with the various unions and their leadership and must maintain open and frequent communications with them to maintain these working relationships. We are addressing performance management issues, but require more training for supervisors. We have updated systems for documentation, however, that work continues.

The schedule for the next period of CBA negotiations is:

- Teachers – begin January 2019
- Clerical – begin January 2018
- Custodial/Maintenance – begin January 2018
- Transportation – begin January 2019
- Food Service – begin January 2019
- Educational Support Personnel– begin January 2019

In partnership with BEA, we adopted a successful interest based bargaining approach to the last contract negotiations. Our plan is to use the same approach for the next BEA contract negotiation.

Each year we produce total rewards statements for every BASD employee. These statements give detail around both salary and all benefits, which the district provides or contributes to, such as social security and PSERS.

Risk Management

We have addressed and settled some long-standing workers' compensation cases and are aggressively moving forward with return to work/light duty assignments.

As we move forward in strengthening a safety and wellness culture within the district, the following four key focus areas have been identified in collaboration with our workers compensation insurance carrier. We will develop plans and programs to assist our employees in remaining healthy, safe and well through work around these four areas.

- Leadership and commitment
- Knowledge and capacity
- Accountability and ownership
- People and partnerships

Child Accounting in BASD main responsibilities include supervising the registration process, reporting membership to the state for reimbursement, reconciling tuition invoices from charter and other LEAs, invoice other LEAs for tuition, and develop enrollment projections and other enrollment reports.

Other areas of responsibilities include supervising the issuance of work permits and answer questions from families or employer on Child Labor Law, maintain educational records and transcripts, report homeless student to the state, settle disputes of residency, determine school assignments within the district and supervise the Home Education Program.

Our plans for the upcoming years include:

1. Implement online registration
2. Go paperless with annual back to school forms
3. Continue providing reports to management for data analysis from projections to enrollment reports to other district needs
4. Continue cross training to provide support as needed within the department
5. Continue co-facilitating at secretary in-service training meetings
6. Continue to aggressively pursue fraudulent residency claims through both leveraging in-district personnel and contracting with private investigators.



INFORMATION SERVICES

The Information Services Department has made significant improvements across the district's technology systems and infrastructure over the last few years. All of this work, amid resource and financial constraints, supported the ongoing implementation of the "Roadmap to Educational Excellence 4.0". Stabilization of the wireless and internal networks became the initial focus, as it impacts every student, teacher and administrator. Once that foundation was laid, consolidation of physical server resources through virtualization and implementation of numerous cloud-based services helped to increase system reliability and efficiency while reducing overall cost of ownership.

In the coming years, ISD will continue to focus on improving process efficiency, maintaining up-to-date technology, and reducing costs associated with a large enterprise environment. The added challenge of increasing digital resources demands requires tighter integration between the instructional and information technology resources. ISD must continue to balance user requests, district needs, and a constrained budget while keeping pace with a rapidly changing technology landscape. Through an increasing focus on staff development and enterprise solutions, ISD can deliver economically sustainable and efficient solutions to the BASD students, faculty, and staff.

The K-12 technology landscape continues to change at a faster rate than ever before, requiring nimble resources able to quickly respond to new technology and processes. This effort requires a continuing commitment to staff development across the district, both for the personnel supporting the end users and for the end users themselves who must then implement the technology in their daily classroom environments. This integration must be an ongoing shift in culture, operation, and direction to provide the competitive edge to the district that it should.

BASDNet, the district's consolidated digital network, continued to expand beyond a simplification of credentials. Instructional application and systems can now share information between eSchoolPlus (BASD's Student Information System), Active Directory (the gold source for user login information) and Schoology (the district's eLearning platform). This three-legged stool sits atop the revamped network infrastructure to provide a robust platform for future growth.

Technology at BASD will continue to evolve and adapt, requiring continual adjustments to the plan. Each of these changes requires strong commitment from the instructional and support departments within the district. Accomplishing these will help position BASD for future growth and development.

CORE TECHNOLOGY (WIRELESS, NETWORK, SERVER)

BASD made significant improvements in its district-wide wireless capabilities over the last few years. The project included a redesign and upgrade of the core network and switch environment, leveraging the district's leased dark fiber to provide high-capacity data links between each building. In addition, the district enabled two high-speed Internet links ensuring redundant capacity for online services. However, these core upgrades only solve part of the challenge. The other half of the equation focuses on the district's data center and centralized computing services.

BASD maintains a primary data center at Freedom High School. Capital improvements coupled with the continued rollout of virtualization technologies helps to reduce environmental costs while

at the same time improving system efficiency. Through an expansion of the Cisco UCS blade system coupled with Nimble's economical centralized storage system, the district was able to build a modular "private cloud". This approach allows for staggered upgrades of the individual virtual cluster components without requiring downtime or large one-time investments.

The current virtual environment supports over 100+ "virtual servers," each of which would take up space, power, and HVAC capacity in a traditional physical environment. The total power usage by the data center has been reduced by nearly 50% through these initiatives, supporting the goals of increased efficiency while reducing overall cost. In August 2017, the new Nitschmann Middle School opened and included a secondary data center, providing true data and system resiliency within the district's borders.

ASSET SUSTAINABILITY

While the improvements in the district's core network addresses one of the major technology weaknesses, having devices capable of leveraging this new wireless infrastructure are also important. The introduction of Chromebook technology brings economical devices that can serve as a foundation for a regular asset refresh program. This is important to ensure the availability of updated technology for both students and teachers in support of the district's goal to enable online and blended learning. Historically, the district's approach relied almost exclusively on higher-power and consequently higher-priced devices that exceeded the basic student and faculty needs, making an economical refresh cycle impossible to maintain.

In 2017, a subset of faculty was introduced to Chromebooks as their primary instructional device. This required additional training and support, but provides a common platform that is scalable with built-in redundancy and portability. This change also aligns the district's hardware platforms towards to the cloud-based systems in the future. In doing so, the district realizes a reduction in financial liability for more powerful devices that exceed the requirements to support many of the cloud and web-based systems used in the classroom. It also positions BASD for a 4-5 year regular technology refresh cycle.

SERVICE DESK AND TECHNOLOGY GOVERNANCE

The Service Desk is a central point for reporting, resolving and managing technical incidents. The Information Services Department uses this system and support staff to ensure staff and student productivity. Metrics from the system paint a picture of technology stability and can project trends ahead of system and hardware failures. Governance on project prioritization and resource scheduling must remain a priority given the personnel, financial, and time constraints across the district.

Technology governance plays an important role in ensuring that technology decisions consider the larger district/enterprise view. Service Level Agreements (SLAs) set the expectation to the faculty and administration for issue response and resolution. BASD continues to embrace online learning through its partnership with Schoology's Learning Management System (LMS), and the use of other online systems such as McGraw-Hill's Wonders, Pearson's Envision, and IXL. Each of these systems has a specific set of technology requirements that may overlap but require functional equipment and connectivity to access. The district must operate as an enterprise going forward to ensure every student has equitable access to the technology they need when they need it.

APPLICATION AND SYSTEM INTEGRATION

The district's technology roadmap is based on three key pillars:

- Active Directory - authoritative source for authenticating a user's rights to access applications and electronic resources
- eSchoolPlus - the district's Student Information System (SIS) and authoritative source for student data and information
- Schoology - the district's Learning Management System (LMS) and authoritative source for eLearning content

These three critical systems form a foundation from which all other applications, systems, and services must link. This becomes an integral part of future planning across the district's grade levels. The introduction of BASDNet standardized both student and faculty user credentials, including facilities for self-service reset and administration. Continued integration of these three key systems will allow the district to build new technology capabilities while maintaining the existing core environment at a financially sustainable rate.

The district must continue with a forward-thinking approach to technology systems. Academic and curricular programs increasingly bring an electronic component, and ISD must work with district leadership to ensure that these programs fit together with the existing technology framework. In addition, by leveraging these authoritative data sources, the district will move towards business intelligence as a critical tool for equitable decision making in support of the Roadmap to Educational Excellence 4.0.

