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Inside This Issue

Fiscal disparities pool increases after 3-year decline

by Dana Schroeder

The pool of commercial-industrial (C-I) tax base shared by Twin Cities area communities increased this year for the first time since 1992, reversing a three-year trend of declines. The pool grew by 7.6 percent, from $241.3 million last year to $259.6 million this year. The declines over the past three years had been caused by declines in C-I values and court-ordered reductions in value on office buildings in downtown Minneapolis and on the I-494 and I-694 strips.

Property taxes paid by the shared pool of tax base grew by 12.9 percent, from $325.3 million in 1995 to $367.1 million this year, nearly reaching the 1994 shared pool tax level of $369.1 million. The taxes paid by the shared pool had declined by nearly 12 percent in 1995—only the second time the shared tax amount had decreased during the history of the tax-base sharing program. The other decline was in 1977.

The tax-base sharing program—enacted in 1971 to help reduce disparities in tax-base wealth in the metro area—requires communities to contribute 40 percent of the growth in C-I tax base value since 1971 to a shared pool. That pool is then distributed back to communities in the metro area, based on their relative shares of population and market value. (See accompanying story on page 6.)

The shared tax base now accounts for 27.6 percent of the total C-I tax base in the metro area, up from last year's 26.3 percent, but down from the peak of 30.0 percent in 1994.

According to a recent report by the Minnesota House of Representatives Research Department, the slump in C-I values in the region may be over. C-I property values, especially those of office buildings, have increased for both 1995 and 1996 assessments—which affect tax years 1996 and 1997, respectively. For tax year 1996 the value of the region's C-I tax base increased by $24.3 million, or 2.6 percent, to $941.2 million. The region's total tax base increased by $117.0 million, or 5.7 percent, to $2.182 billion.

Despite these increases in value, court-ordered valuation reductions

Continued on page 5

Group narrows search to 3 sites for truck/train facility

by Donna Lindberg

Representatives of area railroad companies, the Minnesota Department of Transportation and the Metropolitan Council have recently identified three possible locations for a new multi-user truck and train intermodal shipping terminal facility in the Twin Cities. Intermodal shipping involves shipping goods in large containers that are moved from trucks (for the short haul) to trains (for the long haul). The terminal would have the capacity and facilities to ship, load, unload and store containers and truck trailers for several railroads.

One potential site is in Cottage Grove along Highway 61 near the 3M Cottage Grove facility. The two other possible locations are in Rosemount: one is west of the Koch Refinery and north of County Road 42; the second is south of County Road 42 and west of Highway 52 on property owned by the University of Minnesota and Dakota County. Plans are that the terminal would also anchor a large industrial park housing businesses attracted there because they use or offer intermodal services. The industrial park would bring jobs, expand the tax base in the host community and buffer the terminal area from other land uses.

The new intermodal terminal is the brainchild of the Minnesota Intermodal Railroad Terminal Study (MIRTS), a public/private partnership made up of the Burlington Northern/Santa Fe Railroad, CP Rail System, Union Pacific Railroad, the Minnesota Department of Transportation and the Metropolitan Council. MIRTS was formed three years ago to evaluate the need for new or expanded intermodal terminal facilities in the Twin Cities metropolitan area.

"The private/public partnership part of MIRTS is a new concept in land use and transportation system planning," said R. John Anderson, MIRTS project manager. "Planning will be done by the people who will actually use the facility and those directly affected by the project will be involved at every stage of the decision-making process."

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Real power, real money at schools can make difference

Viewpoint

by Lyle Wray

Last summer's Citizens League statement, *Choose Reform, Not Declining Quality*, recommended reforms to get better value for the state's spending on its major commitments, including elementary and secondary education. Since then, politicians and the media have been preoccupied with the school voucher issue, and that has diverted attention from the need for other important education reforms.

One of the most significant of these potential reforms would allow parents and teachers to manage schools by delegating substantial money—and authority—from school districts to the schools themselves. This "school-based funding," along with true management at the school site level, shows promise that real empowerment can make a difference.

For example, in a 1994 review the U.S. General Accounting Office (GAO) found that site-based management allowed teachers and school administrators to change instruction and budgeting in ways that better met the needs of their students. The GAO concluded that the changes would have been difficult, if not impossible, in a traditional system—however many superficial trappings of empowerment may have been applied to an essentially centralized authority.

Funding and management at the school level has been in place for many years in the public school district in Edmonton, Alberta, my home province (and also the site of the largest shopping mall in North America—purely coincidental, I'm sure!). There, in a system with more than 205 schools, more than 6,800 staff and 80,400 students, about 80 percent of district revenues are allocated to school sites. Since the system was put in place 20 years ago, school sites have assumed more and more autonomy in deciding how their budgets are spent.

One important ingredient in Edmonton's success has been the presence of aggressive state-level measurement and local discretionary student performance measurement. When authority is delegated, it's especially important to ensure that students are actually making progress. It's also important to measure the distance that schools are able to take their students in learning, rewarding not just the schools whose students do well, but the schools that help students achieve the greatest improvement. To do this as Edmonton has done would require that Minnesota actually move along to develop state- and local-level performance assessments that can be communicated meaningfully to parents, educators, students and employers. We have a long way to go on that road.

Teachers and administrators who have done true site-based management emphasize how important it is for the school site to have real control of budget, personnel and instruction. Only when a substantial portion of the revenue is under site control, as in Edmonton, will the exercise be taken seriously. To be fair, if schools are to be held accountable for student performance, they must have real decision-making authority over these important educational ingredients. Past efforts in which the site got only token responsibility—notably Chicago and Dade County, where only about three percent of revenues went to school sites—have not been very successful. The Legislature should take heed of these lessons as it considers various approaches to school-based funding and management.

Site-based management is no panacea, as the GAO cautioned. It offers the most promise as part of a broader reform agenda. In Minnesota, for example, we should also be working on making public school choice real, such as by lifting the caps on the number of chartered schools, strengthening the Postsecondary Options initiative, and making sure that open enrollment is truly open.

Minnesota should experiment boldly with options to free teachers, parents and administrative staff to make decisions about how education services are delivered at their public school site. Giving public school sites more control over their finances and operations not only gives schools the best chance at serving their students and families well. Empowering schools in this way also gives them a fair chance to compete successfully if the Legislature should decide to widen school choice to include non-governmentally operated schools. No single education reform will be a panacea for the many challenges facing K-12 education. But this one deserves a real test in Minnesota—and the sooner the better.

Lyle Wray is executive director of the Citizens League.

School-based funding 'will never work until you let go'

Edited excerpts of remarks by Mike Strembitsky, director of High Performance Management, National Center on Education and the Economy, Washington, D.C., and former superintendent, Edmonton (Alberta) Public Schools, to the Citizens League on Jan. 24.

Editor's note: Edmonton has about 80,000 students enrolled in 200 schools. As superintendent there, Strembitsky developed and implemented a system that allows schools to control the majority of educational expenditures and to make decisions on teaching methods.

Most of us were convinced that nothing would ever change. Once we got started, we could not believe how far we'd come in such a short time.

Under the old setup, everything that came to a school was free or you couldn't get it. Now, all of the sudden, we had tied an economic unit to it. People realized that if they didn't take one thing, they could take something else they needed more in that school.

We involved parents, students and staff. We did not mandate how that money was to be spent.

Schools over a period of time were very different. Two high schools, the same size: one has one assistant principal, the other has four. One school in one year went from four full-time counselors to one full-time counselor. The school got better results the year they went to one counselor rather than four.

The following year that same staff decided to go back to four counselors, even though they had better results. They felt the price they were paying to get those results, they were no longer willing to pay.

The biggest con job that people give you is that they're not trained to do this. Of course they're not trained to do it; they've never done it. Give them a chance to do it.

We wanted some information as to how the district was working. We took measures in eight areas. We wanted to know about student performance, about student attitudes, about staff performance and staff attitudes. We also cared about how the parents felt. We cared about how the community felt. We wanted to look after the physical assets and equipment and how the finances were controlled. We made that information public for every school.

We found that if you wanted to change a school, there was one ingredient more than anything else that changed the school overnight: the principal.

One of the most difficult things was to let go. You are superintendent; you are supposed to be responsible. How can you possibly let it go? How can you possibly have 200 schools, everybody doing their own thing and it comes together?

The answer is, It will never work until you let go and until you have the right measures and indicators of where it's working and where it's not. Are there disasters? Far fewer, and the school staffs take on the ownership of them.

Editors give school voucher proposal poor grades

On Balance

"Education is not filling a bucket but lighting a fire."—W.B.Yeats

Rochester Post-Bulletin said (Jan. 18) vouchers would not improve public education and that pressures could easily build to e[illegible] an experimental program, possibly even to cover the cost of building private school facilities. **Duluth News-Tribune** said (Jan. 17), "Taking public money to private schools goes too far in the effort to provide school choice." It said (Jan. 30) the Legislature should make sure the state's existing public school choice programs are working well—since only a small percentage of students use them—"rather than add another in the form of vouchers." **St. Paul Pioneer Press** said (Jan. 16) vouchers will not be the "salvation" of the public or private schools or of poorly performing students. "For our money, improving public schools and expanding the current range of options including charter schools, postsecondary options and open enrollment makes more sense than private school vouchers." **Star Tribune** said (Jan. 31) the voucher proposal deserves "early burial" and is a "misguided reform." Compared to "serious needs," such as a longer school year and day and graduation standards, "vouchers are cheap, political and inconsequential." **Mankato Free Press** said (Jan. 12) the Legislature must stop the "wrong-minded" voucher plan.

Duluth News-Tribune said (Jan. 31) Sen. Gene Merriam's bill to require at least 95 percent of a school district's general fund to go directly to individual schools "goes too far too fast." It said teachers and administrators are probably not prepared to handle large budgets at schools and that district administrators can better assure economies of scale. **Red Wing Republican Eagle** said (Jan. 11) teacher pay should be linked to students' performance. "It's only logical in a world that more and more is driven by performance."

St. Cloud Times said (Feb. 3) broadening the sales tax to include clothing in order to expand state funding of education "is an idea whose time has come." It warned, though, of the danger that the sales tax could become "a significant tax increase, rather than the swap for property taxes portrayed by supporters." **Star Tribune** said (Jan. 31) trading a state sales tax increase for lower property taxes "should look better and better to legislators grown weary of constituent complaints about climbing property taxes." **Worthington Globe** raised questions (Jan. 31) about the plan and called for it to be "carefully scrutinized."

Star Tribune said (Feb. 7) allowing voters to turn elected officials out of office through recall "would be detrimental to the health of responsible representative democracy. It would give legislators a tempting excuse to avoid policing themselves." **Worthington Globe** said (Feb. 1) the recall idea has merit, but said the proposal before the Legislature "doesn't go far enough." It said it had "lost confidence" in the House's ability to deal with ethics cases "in a consistent, swift and nonpartisan manner...It's time to give power to the people to make their elected members of the Legislature accountable to them—not their peers."

St. Cloud Times said (Jan. 22), "The time has come to consider a one-house—unicameral—legislature for Minnesota." The paper said moving to a one-house system would eliminate conference committees, which "have become the real makers of too much legislation." **Duluth News-Tribune** said (Jan. 18) the unicameral proposal deserves serious study first and then should be put to voters in the fall of 1997. After a Senate committee killed the proposal to put the idea on the ballot, the paper called it (Jan. 25) "just the latest case of lawmakers refusing to seriously consider changes in how they do business." **Free Press** said (Jan. 19) there is no evidence Minnesota would be better off with a unicameral system and suggested every-other-year sessions instead.

Rochester Post-Bulletin said (Feb. 1) the state should experiment with the use of mailed ballots in selected special elections to see how voters respond and whether any problems result. "It is hard to object to a process that encourages greater voter participation, costs less and does not increase the likelihood of fraud or other voting irregularities." **St. Cloud Times** said (Feb. 4) the success of Oregon's vote-by-mail election "makes a good case for expanding the use of mail voting in Minnesota." It warned, though, that voting by mail should not "be viewed as a cure for political apathy." **Free Press** agreed (Jan. 26) that mail voting should be given a try.

The Minnesota Journal

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Housing, jobs, education, safety are key

From the State of the City Address by Minneapolis Mayor Sharon Sayles Belton on Feb. 7.

In my last State of the City address I said...we should concentrate on the four factors that make the biggest difference in people's lives: housing, jobs, education...and safety.

After extensive community discussion, the Minneapolis School Board decided to create a system of community and magnet schools. For the first time in years, parents of this year's kindergartners will be able to choose to send their children to a community school near their home...

The State Board of Education still must approve a waiver allowing us to proceed with this plan, and we encourage it to do so quickly...

We need economic development throughout our city, not only downtown...Our goal is to begin implementing the plan for Lake Street redevelopment by July 1 and launch the commercial revitalization of our South Minneapolis neighborhoods...

I am asking the planning Department and the MCDA to make Upper Riverfront Redevelopment, in North and Northeast Minneapolis, a top priority...

I am asking the Police chief and City Coordinator to recommend how to...close down crack houses, rehabilitate or tear down the boarded buildings around our schools and parks and help...create real drug-free zones...

I ask the Minneapolis School Board to consider changing the hours school is in session, so that children can stay safely in school until their parents come home from work.

It is no secret that illegal drugs are driving much of today's crime...We do know that a certain amount of public assistance funds wind up in the hands of drug dealers. I am asking Hennepin County to review the cases of clients convicted of drug charges to determine if there is mismanagement of public funds, and if there is, to provide future assistance mostly in the form of vendor payments for rent, utilities and other necessities, instead of cash...

This year we will face four issues that have enormous impact on the role the city, the state and the region will play in the global economy... expansion of the Convention Center...location of the airport... transit... location for the new ballpark.

MIRTS

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Intermodal shipping is not new. It is an important component of the region's transportation infrastructure. It is more economical for transports over 500 miles and can take many "long haul" trucks off the highways, thereby reducing congestion, road wear, energy use and air pollution. Nationally, intermodal shipping has been growing rapidly as a transportation mode of choice, currently making up about 15 percent of all U.S. shipping. Use is growing at eight percent annually.

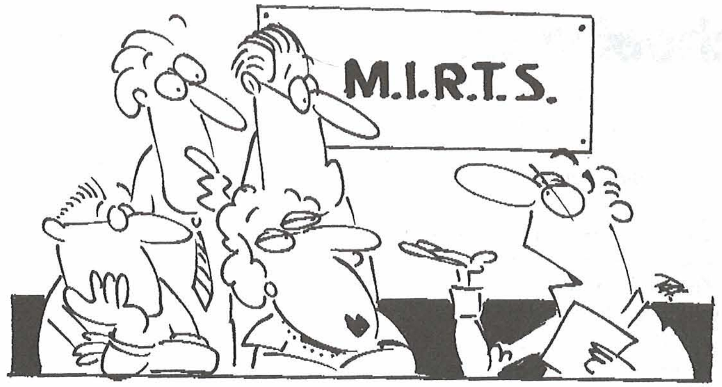
Need for new terminal

A study MIRTS completed last year concluded that the region needs to more than double its intermodal terminal capacity. According to the study, intermodal shipping demand will continue to grow steadily over the next 20 years. The current 250,000 container lifts per year (a lift is any movement of a cargo container by lift equipment on or off a rail car) at the existing Twin Cities terminals will increase by about 5.6 percent annually to the year 2002, then grow at a slower rate of 2.8 percent per year to 530,000 lifts in the year 2012.

The Twin Cities currently has two intermodal terminals: the Burlington Northern/Santa Fe Hub in the Midway area of St. Paul and the CP Rail terminal in northeast Minneapolis. These terminals are working at or near capacity and are becoming bottlenecks to an efficient, flexible intermodal shipping system.

The two existing terminals have a "theoretical capacity" of 338,000 lifts a year. However, "practical capacity" is estimated to be about 80 percent of this theoretical capacity, or 270,400 lifts. The Burlington Northern Midway yard, where volume grew 29 percent from 1990 through 1994, reached its practical capacity in 1994. The CP yard in Minneapolis, the second busiest terminal in the country on the CP system, is expected to reach its practical capacity in 1997.

Both sites are less than ideal, since trains must be split in two to fit into the facilities and zoning limits expansion options. The St. Paul site does not allow the 1,000-foot setback required by city ordinance between the area of operations and neighboring residential property. Operational improvements that could be made at the sites would expand their combined practical capacity to 348,000 lifts. That would accommodate projected growth at the CP yard through 2012, but only through 1997 at the Midway yard—where zoning more seriously limits improvements that can be made.



"How's this for a story line? 'The Terminal': Truckers, railroads, public agencies find happiness in a joint facility..."

Union Pacific is the main competitor of the newly merged Burlington Northern and Santa Fe railroads. Union Pacific has no terminal facility in the Twin Cities, but wants to establish a regional hub for transport to the Gulf Coast and California.

MIRTS supports consideration of interim improvements at the region's current facilities. However, MIRTS will continue to move forward with implementation of a new multi-user intermodal terminal as the most effective way to serve demand in the region over the long term.

Shared facilities and services—switching of rail cars, terminal operation, rail care and container maintenance service and loading and storage tracks—will allow terminal tenants to save capital and operating costs. And use of emerging communications technology for managing the flow of containers through the facility and monitoring the arrivals and departures of trains becomes more feasible with a shared facility.

Site selection

The MIRTS study demonstrates the need for a new multi-user intermodal terminal facility large enough to meet the Twin Cities' intermodal shipping needs to the year 2012. For the past year, MIRTS has been conducting a search for the best possible site locations in the seven-county metro area. The group identified 18 sites with enough land for a terminal and then developed a set of criteria for an ideal terminal location. These criteria include:

- 165 acres to accommodate 7,000 feet of track, plus 585 acres for a 1,000-foot buffer around the site;
- Topography that is level or correctable with grading;
- Location within three miles of a major highway not needing significant capital improvements;
- Site accessible to intermodal shippers throughout the region;
- Location within five miles of an existing, two-way rail line;
- Relocation of existing users feasible with minimal cost and time loss.

Based on these criteria, MIRTS was able to narrow possible terminal locations from 18 to five. These included single sites in Cottage Grove, Jordan and Shakopee and two sites in Rosemount. The other 13 locations were eliminated, based on limitations such as rail access, congestion and clearance; highway access; existing land use and land topography.

Once the five best locations were identified, MIRTS consulted with staff from the three local railroads and with the 15-member MIRTS Advisory Committee, made up of local manufacturers, shippers, municipalities, academics, transportation professionals and potential users. The group identified the best sites as two in Rosemount and one in Cottage Grove. The Jordan and Shakopee sites were considered too far from the main rail corridors and a single track going west. It was determined that terminal at these locations would require extensive improvements.

Next steps

MIRTS plans to complete the following steps within the next year:

- Continue the site-selection process and identify the preferred site;
- Recommend a permanent organizational structure to develop and operate the facility;
- Begin to define the cost and operations needed to develop a multi-user terminal;
- Research, identify and recommend funding sources;
- Identify investors in a multi-user terminal.

Now that possible terminal locations have been identified, MIRTS will meet with all affected citizens or groups—cities, businesses and any other organizations interested in the proposed terminal—before a final site is selected.

If MIRTS decides a new, multi-user intermodal terminal is feasible, the group will invite cities and private developers to develop and operate it. Over the next several months, MIRTS will prepare a business plan and operating plan for the terminal. MIRTS should make recommendations for an acceptable intermodal terminal site by next fall. By that time, the group will know the best location for the terminal, the best way to operate it, how much it will cost and who's going to pay for it.

"Proceeding with the MIRTS recommendations represents a unique opportunity to achieve benefits for the railroads, the shippers and the public that will never be realized if each railroad develops its own facility," Anderson said.

Donna Lindberg is the MIRTS public affairs coordinator at the Minnesota Department of Transportation.

Disparities

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still remain an important factor in the size of the fiscal disparities pool. These abatements—which can affect multiple years' valuations—are reflected in the tax-base sharing pool in the year following the court decision. According to the House Research report, court-ordered abatements reduced the shared pool by $36 million in 1995 and by $16 million in 1996. A number of significant court cases are still pending and could hold down the size of the pool for the next few years if they are decided in favor of the property owners.

An important note: Because Minnesota taxes different types of property at different rates, tax base (officially known as *tax capacity*) is expressed as a proportion of market value. For C-I property the tax capacity is three percent of the first $100,000 of a property's market value and 4.6 percent of the remaining market value. An office building assessed at a market value of $1 million for tax purposes adds $44,400 (that is, .03 x $100,000 + .046 x $900,000) to a community's tax base, or tax capacity. So the dollars of C-I tax base discussed here represent only a small portion of the dollars of market value of C-I property in the metro area.

Net gainers, losers

The Citizens League's 22nd annual tax-base sharing analysis shows that most of the 187 metro-area communities (Sunfish Lake is ineligible to participate because it excludes C-I property) are net gainers under the program: 145 received more tax base from the shared pool this year than they contributed. The other 42 were net losers. Among the 58 communities over 9,000 population, 36 were net gainers and 22 were net losers.

St. Paul was once again the top net gainer under the program, with a net gain of $25.3 million in tax base, up from its net gain of $21.6 million last year. The second largest net gainer was Minneapolis, which posted a net gain of $3.8 million in tax base, down from its net gain of $7.3 million last year.

This was the second year in a row Minneapolis was a net gainer under the program, after being a net loser for a number of years. Because of its large C-I tax base, Minneapolis made the largest contribution of any community to the shared pool—$38.8 million in 1996, or nearly 15 percent of the total shared pool. But it also received back the largest amount of tax base from the pool—$42.5 million, or 16 percent of the pool.

St. Paul made the third largest contribution to the pool, at $13.8 million—five percent of the shared pool. (Bloomington made the second largest contribution—$24.8 million, or about 10 percent of the shared pool.) But St. Paul, because of its relatively low tax base per capita (at $582, ninth lowest among the 58 cities over 9,000 population) and its large population, received back almost three times as much as it contributed—$39.1 million, or 15 percent of the pool.

On a per capita basis, though, St. Paul—with a net gain of $93 per capita—ranked sixth highest among the 35 large-city net gainers, while Minneapolis—at $10 per capita—ranked 33rd.

The five largest net tax-base contributors to the program in 1996—all Hennepin County suburbs—include *Bloomington*, $18.3 million; *Eden Prairie*, $8.5 million; *Minnetonka*, $8.4 million; *Plymouth*, $6.9 million; and *Edina*, $6.1 million. Eagan and Burnsville, which were in the top five last year, moved to sixth and seventh places, respectively.

TABLE 1:
TAX-BASE SHARING DATA BY COUNTY, PAYABLE 1996

	1996 commercial-industrial tax capacity	Net gain or (loss)	Net gain or (loss) per capita
ANOKA	$ 60,326,717	$ 14,025,295	$ 53
CARVER	16,578,782	670,349	12
DAKOTA	109,586,929	(5,399,200)	(18)
HENNEPIN	539,467,184	(38,533,751)	(36)
RAMSEY	160,312,511	22,501,196	46
SCOTT	16,404,172	1,118,496	17
WASHINGTON	38,527,108	5,617,615	33
TOTAL	$941,203,403	$0	$0

SOURCES: Minnesota Dept. of Revenue, Minnesota House Research

The top five net contributors are also among the top seven net donors on a per capita basis in 1996, ranging from *Bloomington* in first place at $211 to *Plymouth* in seventh place at $120.

In addition to St. Paul and Minneapolis, the other top net gainer cities include—as last year—*Coon Rapids,* $3.5 million; *Richfield,* $3.0 million; and *South St. Paul,* $2.8 million.

But the net gainers look different on a per capita basis. Only *South St. Paul* (first at $135), *St. Paul* (sixth at $93) and *Richfield* (eighth at $85) fall among the top 10 net gainers per capita.

On a countywide basis, Hennepin County made by far the largest net contribution of tax base to the program in 1996—$38.5 million, up from last year's amount of $26.9 million. Its net contribution on a per capita basis ($36) was twice that of the only other net contributor county, Dakota County ($18). Dakota County's net contribution was $5.4 million, down from its contribution of $7.6 million last year. Ramsey County netted the most shared tax base in total dollars ($22.5 million, up from $16.1 million last year) and Anoka County the most on a per capita basis ($53). (See Table 1.)

Reducing the gap

The tax-base sharing program significantly reduces the gap in C-I tax base among the wealthier and poorer communities in the metro area.

- In the 58 metro-area cities with populations above 9,000, the 1995 C-I tax base *after* sharing ranges from a high of $769 per capita in Bloomington to a low of $161 per capita in Prior Lake—a ratio of about five to one. (See Table 2, page 7.) *Without* tax-base sharing, the range would be $980 per capita in Bloomington to $56 per capita in Champlin—a ratio of nearly 18 to one.
- Comparing communities of all sizes in the metro area, the ratio of high to low in C-I tax base per capita *before* sharing is 171 to one, with Rogers the highest and Carver County's San Francisco Township the lowest. *After* sharing the range is reduced to 33 to one, with Rogers still the highest and Woodland the lowest.

The sharing also reduces—although less dramatically—disparities among communities in *total* property tax base.

- In cities over 9,000 population, total property tax base per capita *before* sharing ranges from $1,831 (Edina) to $464 (North St. Paul)—a ratio of four to one. *After* sharing the high and low cities remain the same, but the ratio is reduced to three to one.
- Among all metro-area communities, the ratio of high to low in total property tax base per capita *before* sharing is 12 to one, with Woodland the highest and Hamburg the lowest. *After* sharing the high and low cities remain the same, but the ratio is reduced to eight to one.

While tax-base sharing reduces disparities in tax base among communities, it does not greatly reorder their tax-base wealth. Since only a portion of tax base is shared, the wealthiest communities before sharing generally remain that way after sharing, as do the poorest communities.

- The five communities over 9,000 population with the smallest C-I tax base per capita before sharing are *Champlin*, $56; *Lino Lakes,* $84; *Andover,* $89; *Mound,* $95; and *Prior Lake,* $98. While their per capita tax bases increase *after* sharing, these same five cities remain in the bottom five.

Likewise, the wealthiest cities in C-I tax base per capita generally remain that way even after tax-base sharing. The cities over 9,000 population with the highest C-I tax bases per capita *before* sharing are *Bloomington*, $980; *Golden Valley,* $798; *Roseville,* $773; *Shakopee,* $764; and *Eden Prairie,* $715. Eden Prairie falls to ninth highest after sharing, while the other four cities remain at the top.

- The same is true in looking at *total* property tax base per capita. The wealthiest five cities over 9,000 population before sharing remain in the top six after sharing;

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Disparities

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the poorest five cities before sharing remain among the bottom seven after sharing.

The last two columns of Table 2 compare the growth in C-I tax base per capita between 1971 and 1996 *with* sharing with the growth that would have occurred *without* sharing. Without sharing, the growth among communities over 9,000 population would have ranged from a high of $832 per capita in Bloomington to a low of $41 in South St. Paul—a ratio of 20 to one. *With* sharing, the growth ranges from a high of $620 per capita in Bloomington to a low of $78 per capita in Savage—a ratio of eight to one.

Tax impact

The most noticeable impact of the tax-base sharing program is on city taxes and county taxes. If a city is a net gainer, its city tax rate will be lower than it would be without the sharing program (assuming the city would levy the same amount of taxes). And if a city is a net loser, its city tax rate will be higher than without the sharing program.

Sometimes the sharing can result in higher city taxes, but lower county taxes (or vice versa) in the same community. This can happen, for example, when a city that is a net loser (like Fridley) is located in a county that is a net gainer (like Anoka County).

As the House Research report points out, the impact of tax-base sharing on school taxes—which make up about half of total property taxes—is largely offset, because the majority of school taxes are equalized, meaning each district's tax rate is the same, regardless of its tax base.

The first column in Table 2 shows the percentage change in each community's tax base due to sharing. Among the cities over 9,000 population that are net gainers, *sharing results in tax base increases* ranging from less than one percent

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Legislature taps shared base, considers expanding pool

The 1971 fiscal disparities act—officially known as the Charles R. Weaver Revenue Distribution Act in honor of the late Anoka legislator who authored it—was designed to lessen differences in tax base among Twin cities area communities. It allows all communities in the seven-county metro area to share part of any commercial-industrial (C-I) tax-base growth in the region, no matter what its location.

The idea for the law grew out of a 1968 Citizens League committee studying tax disparities. Warren Preeshl, a member of the committee and then a school board member in Burnsville, came up with the tax-base sharing idea. But Ted Kolderie, then the League's executive director, has said that it was Weaver who contributed the "essential political perception" that went into the law: that the Twin Cities area could never have regional planning within a system of purely local public finance.

Here's how the program works:

- Communities contribute 40 percent of their C-I tax base growth since 1971 to a regional pool. (Excluded from this base is the airport, property within tax-increment finance districts established before Aug. 1,1979, and property in the city of Sunfish lake, which is ineligible to participate because it excludes C-I development.)

- Each community then receives back a portion of the pool based on its relative shares of population and tax base. Communities with relatively poor tax bases per capita receive more from the pool than they contribute. Those with relatively wealthy tax bases per capita contribute more than they receive.

- There is a one-year lag in the C-I property values used to figure tax-base sharing: for taxes payable in 1996, the amount of tax base shared is based on C-I property values from the 1995 tax year. The shared amounts are then deducted from and added to the 1996 tax base.

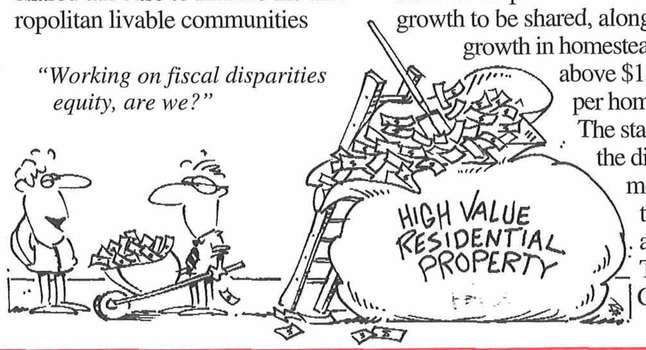
Changes to law

On two occasions the Legislature has placed a "surcharge" on the shared fiscal disparities pool to help finance special projects—in effect, using the shared pool as a regional tax base:

- **Mall of America surcharge.** A 1986 law places a surcharge on the pool for property taxes payable from 1988 through 1999. The surcharge, which is given to the city of Bloomington, covers the interest paid on bonds sold by the city for highway improvements to the Mall of America site. Bloomington will be required to repay the supplemental distributions over the 10-year period from 2006 to 2015.

- **Livable Communities surcharge.** Following this precedent, the 1995 Legislature tapped the shared tax base to finance the metropolitan livable communities fund, which is available to communities that elect to participate in the local housing incentives program established under the law. The Metropolitan Council will receive $4.3 million in 1996 and $5 million in each year after that from this special surcharge.

"Working on fiscal disparities equity, are we?"



Perhaps the most significant proposed recent change to the program actually passed both houses of the Legislature in 1995 but was vetoed by Gov. Arne Carlson. The bill, sponsored by Rep. Myron Orfield (DFL-Minneapolis), would have expanded the shared tax-base pool to include the growth in value of all residential homestead property over the first $200,000 in market value per homestead. Orfield introduced a similar bill again in 1996, but in early February he decided to withdraw his request for a hearing on the bill.

Orfield said he decided not to pursue the bill this year because of the governor's opposition but will bring it back next year. He believes the Twin Cities' tax-base sharing law is not "comprehensive enough" to reduce competition for tax base and to make land-use planning easier. He has drafted a model tax-base sharing statute for national use that calls for 60 percent of C-I tax base growth to be shared, along with all growth in homestead value above $150,000 per homestead. The statute keeps the distribution mechanism the same as in the Twin Cities' law.

Tom Luce, an assistant professor at the University of Minnesota's Humphrey Institute and author of a recent report on tax-base sharing, believes Orfield's approach would improve the equity results of the sharing program. The current program takes "generally a positive approach," he said, and is "well designed to reduce incentives for localities to compete for tax base and reduce inefficiencies. It's not as strong on equity as it might be."

Luce notes in his report that Minneapolis—despite its high expenditure needs as a central city—was a net contributor under the tax-base sharing program during much of the 1980s and through 1994. And developed inner suburbs, many of which were beginning to show signs of social and economic stress during the 1980s, have tended to contribute at a higher rate per capita than developing outer suburbs. "Clearly," Luce states in his report, "growth in commercial-industrial tax base since 1971 is an imperfect indicator of overall fiscal needs."

He said the equity effect of the program could be improved in two ways: expanding the sharing to include residential tax base, as Orfield has proposed, or redesigning the way tax base is distributed to focus more explicitly on communities' expenditure needs, rather than just their tax-base capacity.

In principle, he said, redesigning the distribution to focus on needs would be preferable, but that approach is more complicated and more difficult politically than expanding the base to include residential property.

Disparities

Continued from page 6

in Woodbury to 27.0 percent in South St. Paul. Seventeen of the 36 gainer cities showed tax base increases of more than 10 percent due to sharing.

Among the net loser cities over 9,000 population, sharing results in tax base declines ranging from less than one percent in Maple Grove to 13.2 percent in Bloomington. Four cities—Bloomington, Shakopee, Eden Prairie and Minnetonka—lost more than 10 percent of their tax base due to sharing. But it's important to note that even with this large contribution to the shared pool, all four of these cities posted gains in total tax base over last year even after sharing. The gains ranged from 4.1 percent in Minnetonka to 8.6 percent in Eden Prairie.

An analysis in the House Research report shows what would have happened to 1995 property tax bills in selected cities if fiscal disparities had been eliminated. The first figure for each city shows the impact on homes and the second figure the impact on businesses:

- *Increases*: 1.3 and 2.7 percent in *Minneapolis*; 6.0 and 8.4 percent in *St. Paul*; 7.0 and 7.1 percent in *South St. Paul*; 6.0 and 6.6 percent in *Columbia Heights*; 5.0 and 3.9 percent in *Lino Lakes*.

- *Decreases*: 4.8 and 6.5 percent in *Bloomington*; 5.0 and 7.1 percent in *Burnsville*; 4.2 and 8.9 percent in *Eagan*; 4.8 and 1.6 percent in *Shakopee*; 4.1 and 4.0 percent in *Eden Prairie*.

The report calls these effects "smaller than expected" and cautions that effects would generally be greater in other years, since the shared tax-base pool was uncharacteristically small that year.

Dana Schroeder is editor of the Minnesota Journal. *Steve Hinze of the Minnesota House of Representatives Research Department helped supply the data for this analysis. Copies of the November 1995 House Research report on fiscal disparities are available by calling 612-296-6753. Copies of Tom Luce's December 1995 monograph on regional tax-base sharing are available by calling 612-625-7362.*

TABLE 2: PER CAPITA COMPARISONS FOR TAX-BASE SHARING#

Community (Above 9,000 population)	% change in 1996 NTC**with sharing	Net gain or (loss)	1996 NTC with sharing	1996 C-I*** with sharing	1996 C-I without sharing	1971-96 C-I growth with sharing	1971-96 C-I growth without sharing
Andover	12.46 %	$ 77	$ 698	$166	$ 89	$155	$ 77
Anoka	12.45	77	699	328	251	252	174
Apple Valley	4.58	35	789	222	187	194	160
Arden Hills	-9.58	(118)	1,113	594	712	399	517
Blaine	4.34	27	652	325	298	305	278
Bloomington	-13.28	(211)	1,380	769	980	620	832
Brooklyn Center	-2.95	(24)	795	471	495	398	422
Brooklyn Park	5.23	36	721	335	299	305	269
Burnsville	-9.28	(105)	1,026	474	579	311	416
Champlin	22.14	110	608	166	56	152	42
Chanhassen	-0.57	(8)	1,362	474	482	440	447
Chaska	-7.18	(71)	916	423	494	370	441
Columbia Heights	22.50	109	592	262	154	223	114
Coon Rapids	9.79	58	651	261	203	232	174
Cottage Grove	14.82	79	611	225	146	153	74
Crystal	17.03	88	608	259	170	223	135
Eagan	-9.51	(110)	1,047	427	537	283	393
Eden Prairie	-11.72	(192)	1,450	523	715	372	565
Edina	-7.16	(131)	1,700	538	670	368	499
Fridley	-6.92	(70)	941	547	617	431	501
Golden Valley	-8.63	(125)	1,324	673	798	488	613
Ham Lake	8.27	55	716	240	185	210	155
Hastings	10.71	64	662	275	211	228	164
Hopkins	0.65	6	954	447	441	296	290
Inver Grove Heights	1.82	14	773	303	289	255	241
Lakeville	3.07	24	797	239	215	194	171
Lino Lakes	12.07	78	721	161	84	138	60
Little Canada	-2.11	(17)	809	353	370	312	329
Maple Grove	-0.25	(2)	835	273	275	225	227
Maplewood	-9.60	(106)	995	574	680	393	498
Mendota Heights	-7.06	(104)	1,375	410	514	334	438
Minneapolis	1.17	10	888	502	491	370	360
Minnetonka	-11.11	(166)	1,331	496	663	451	618
Mound	11.28	73	716	167	95	128	55
Mounds View	9.95	58	644	300	242	283	225
New Brighton	4.05	31	791	288	257	253	222
New Hope	0.70	6	820	389	384	334	328
North St. Paul	23.14	107	571	224	117	196	88
Oakdale	11.90	68	644	218	150	195	127
Plymouth	-8.93	(120)	1,227	449	570	357	477
Prior Lake	8.86	62	767	161	98	141	79
Ramsey	10.34	63	674	200	137	176	113
Richfield	13.79	85	703	285	200	236	151
Robbinsdale	19.34	101	625	244	143	212	110
Rosemount	-5.08	(52)	966	439	491	259	311
Roseville	-8.47	(110)	1,188	663	773	516	626
Saint Louis Park	-3.44	(38)	1,056	500	538	371	409
Saint Paul	16.00	93	675	358	265	255	162
Savage	3.82	29	800	250	221	78	48
Shakopee	-11.96	(146)	1,073	618	764	537	682
Shoreview	2.90	23	806	208	186	191	168
South St. Paul+	27.03	135	634	314	179	176	41
Stillwater	1.37	11	776	306	295	260	249
Vadnais Heights	-4.11	(38)	885	349	387	315	352
West St. Paul	2.69	20	768	311	290	258	238
White Bear Lake	10.01	61	672	256	195	231	170
White Bear Township	4.04	30	780	200	170	183	153
Woodbury	0.13	1	1,006	248	246	174	173

\# Population figures are Metropolitan Council estimates for 1971 and 1994.

* The net gain or (loss) is the difference between the amount of tax base a community contributes to the sharing pool and the amount it receives back from the pool.

** NTC is total net tax capacity—a community's total valuation as computed for tax purposes—for taxes payable in 1996. This figure includes value in tax-increment finance districts.

*** C-I is commercial-industrial net tax capacity. This figure includes value in tax-increment finance districts.

\+ South St. Paul began contributing for the first time in 1992, as a result of a 1991 law change. Its contribution was 40 percent of its C-I growth since the 1989 assessment year.

London bus system may hold lessons for Twin Cities

Metropolitan Council Chair Curt Johnson has been stressing the need to rethink the Twin Cities bus system from the ground up—an argument that's increasingly persuasive since the transit strike nondisaster showed how little the present system matters to the metro area as a whole.

We recently ran into some information from the Urban Mobility Corporation on London's bus experience that caught our attention. London's experience was the subject of a recent Internet conversation (dial alt-transp digest@flora.ottawa.on.ca and ask for "alternative transportation mailing list").

Since a 1984 act of legislature, about half of London's bus system has been put out to competitive bid. Until recently, the remaining service was provided by 10 companies comprising the public London Buses Limited, a subsidiary of London Region Transit (LRT).

Apparently, London Buses has now been sold off to private operators and the network contracted out on a route-by-route basis. LRT has kept control of the network itself, specifying route frequencies and performance standards—and holding operators accountable for them—and providing such infrastructure as bus stops and network ticketing.

The result, according to the cyberchatters, is that operating costs per mile are down, revenue per passenger-mile is up and government subsidy is down 81 percent, after accounting for inflation.

The good news for London riders is that service has improved, largely because deregulation freed the companies up to use mini- and midibuses that carry fewer passengers but run more often. And bus stops are conveniently located. —*Janet Dudrow.*

Take Note

Nuggets we found after chopping and sloshing through thick public affairs ice and slush.

Annexation, schmannexation. Often, cities and neighboring towns will fight to the death over the annexation of a few parcels of land. Many may find it interesting that a huge consolidation (by Minnesota standards, at least) is being considered in St. Cloud.

Recently, the entire Township of St. Cloud was annexed to Waite Park and St. Cloud. The Minnesota Municipal Board has since ordered the two cities to conduct a consolidation study. Why? To better plan and prepare for future growth, according to Christine Scotillo, executive director of the Municipal Board.

Scotillo said in a phone conversation that if the Municipal Board recommends in favor of a consolidation, it must be approved first by the councils of both cities, and then passed by voters in each city. Denial by any of the four parties will likely stop the consolidation. However, if a council votes down the consolidation, residents of that city can organize a referendum vote on the issue and override its own council in favor of the consolidation.—*Ron Wirtz.*

Agenda: Kids. This legislative session may be the Year of Kids. Bills to help children are pouring in, at a time when public officials want to improve what Gov. Arne Carlson called in his State of the State message "a credibility gap," and legislators want to repair an image damaged by ethics problems.

The governor is calling for $20 million for children's after-school centers and other programs to keep young people from getting into trouble and help those who do. Atty. Gen. Hubert H. (Skip) Humphrey has a kids' agenda that includes a school-based program where uniformed police officers teach seventh and eighth graders to resist pressure to join gangs and deal in drugs. Two Minneapolis DFLers, Sen. Jane Ranum and Rep. Jean Wagenius, have introduced bills providing for full-day kindergarten. There are bills for more computers in schools, summer jobs and more "school-to-work" apprenticeship programs.

Tax reform, a unicameral legislature and other controversial issues may get nowhere, but it looks as if everybody likes kids this election year.—*Betty Wilson.*

From the Brandl-Weber report, worrisome signs of changing demographics and, maybe, changing priorities: In 1987, the state spent about 50 percent more on postsecondary education than on health care. In 1995, Minnesota spent almost 60 percent more on health care than on postsecondary education.—*J.D.*

Minnesota has historically been known for its high, progressive income tax rates. A recent comparative analysis of individual income tax burdens among the 50 states shows that Minnesota improved the tax burdens (again, comparatively) for all but the richest individuals and households.

Conducted by the state Department of Revenue, the study compared individual tax burdens in 1991 and 1994. Minnesota improved (or, in this case, lowered) its ranking among basically all married and single tax filers earning less than $50,000. Among single and married filers making $75,000 to $100,000, the state ranking stayed about the same.

For those making $200,000, it was a different story. In just three years, the state raised its rank by at least two spots across the board, moving to fifth highest tax burden for married filers, fifth highest for single filers, and sixth highest for head of household filers.—*R.W.*

A table is worth a thousand words: One unpretentious table in the JOBS NOW Coalition's report on its 1995 "job gap" study tells a powerful story, albeit not the one the study was focusing on. The study concluded that the state's economy is producing too few "livable wage" jobs.

The study developed minimum family budgets for various sizes and configurations of families, then calculated the hourly gross wages that would be needed to support those family budgets.

The surprising part of the table: A single parent with two children living in the metro area must gross $12.66 per hour to support a minimum household budget of $22,836, which includes the full cost of formal child care. But in a two-child family with two parents—only one of whom works for pay—the wage-earning parent need make only $11.90 per hour to support a minimum budget of $21,132. The minimum budget is lower, even though there are more people, because the family is not paying for child care.

Job seekers' struggles to find appropriate jobs—and the economy's ability to generate good jobs—are fitting subjects for policymakers' attention. But another conclusion that could be drawn is that, if the goal is to improve the economic welfare of low-income families, public policy should support the successful formation and maintenance of two-parent families.—*J.D.*

"Take Note" contributors this month include Citizens League staff members and Betty Wilson, a free-lance writer and former Star Tribune *political writer.*

Minnesota Journal
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Citizens League Matters

February 20, 1996

News for Citizens League Members

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The Citizens League promotes the public interest in Minnesota by involving citizens in identifying and framing critical public policy choices, forging recommendations and advocating their solution. As an open membership organization, it is distinguished by the use of volunteers in developing innovative policy solutions. The suggested dues for membership are $50 for individuals and $75 for a family membership. Other categories are also available. For more information on membership please call 338-0791.

The Citizens League cure for cabin fever

Legislative Network Breakfasts look at issues

Citizens League Legislative Network Breakfasts offer a great opportunity to keep abreast of activities at the Capitol. They are intended as an informal setting in which people can talk to one another and hear from policy makers about issues that are of concern to the League. If you are interested in getting beyond the headlines, and hearing firsthand from the policy makers and others who have the most recent information about Minnesota politics and policy, then this forum is for you.

This year the Legislative breakfasts will highlight three issues of long-time interest to the League—education reform, transportation/transit and state budget reform—as well as a wrap-up session featuring legislative leaders from both parties and both houses. Here's the schedule:

Feb. 23; Education Reform, featuring *Rep. Larry Pogemiller* and *Rep. LeRoy Koppendrayer.*

March 8; Transportation, featuring *Sen. Carol Flynn* and *Bill Schreiber,* MNDot.

March 22; Fiscal Reform, featuring *Sen. Gene Merriam* and *Rep. Dave Bishop.*

April 12; The Session in Reveiw, featuring *Rep. Phil Carruthers* and *Sen. Dean Johnson. Sen. Roger Moe* and *Rep. Steve Sviggum* have also been invited.

All the Legislative Network breakfast meetings are at the University Club of St. Paul, 420 Summit Avenue, St. Paul. Call the League at 338-0791 for more details.

Mind-Openers join the information revolution

The Citizens League will be joining the information revolution with its next Mind-Opener series beginning in March.

The past year or two has created a huge groundswell of interest in technology and what it means for our daily lives, whether at work or play.

The recent passage of the federal telecom bill is expected to produce dramatic changes in our everyday use of technology. We thought this was the perfect time to get League members in tune with this important legislation, as well as with new technologies that are changing the way we do things.

The series will feature discussions on the federal telecom bill, long-distance learning, e-democracy, the impact of the Internet on our daily lives and emerging business opportunities.

Mark your calendar for March 5, 12, 19 and 26 and watch your mail for more information about speakers and location.

3rd Annual Health Care Forum set for February 21

A distinguished group of health care experts will analyze the impact of Congressional Medicare changes on providers, health plans and consumers in Minnesota at the Citizens League's third annual Health Policy Forum on Wednesday morning, February 21, from 7:30 - 11:45 at the Doubletree Grand Hotel at the Mall of America.

The forum, co-sponsored this year by the Institute for Health Care Integration, will feature a keynote address by **Dr. John Wennberg,** Director of the Center for Evaluative Clinical Sciences at Dartmouth Medical School.

Following Dr. Wennberg's address, **Susan Foote,** Senior Vice President of Apco Associates in Washington, DC, will provide a detailed analysis of the bills in Congress and their likely implications for Minnesota.

A panel of Minnesota health care leaders will discuss the impact of Medicare changes on hospitals and health plans, as well as what Medicare can learn from employer purchasing initiatives and state health care initiatives for seniors.

A second panel will describe the likely impact of the bill on the Minnesota market and analyze the business opportunities it creates.

1996 Public Affairs Directory now available

The Citizens League Public Affairs Directory contains the names, addresses and telephone numbers of government, education, communications and public affairs officials in Minnesota, with a special emphasis on metropolitan officials.

The Directory contains nine sections covering everything from the Capitol to local organizations. There are more than 1200 listings of elected and appointed officials, organizations and others involved in public affairs.

The Public Affairs Directory is a must for anyone who is interested in the who and where of public policy. Highlights include:

- Federal government listings, including Congressional delegation and executive agencies.

- Metropolitan Legislators, maps of the seven-county metropolitan area legislative districts and Legislative staff.

- The Governor's office and other state departments.

- Metropolitan Council members and staff, and the Metropolitan Commissions.

- County governments, including commissioners and staff.

- Municipal governments, including Minneapolis and St. Paul City Council and staff and mayors and city administrators for metro cities and townships.

- K-12 education organizations, including state board of education, Minneapolis and St. Paul school boards and superintendents of suburban school districts.

- Post-secondary education, including post-secondary boards and private colleges and universities.

- Other listings include local newspapers, radio stations and television stations, chambers of commerce, environmental, general purpose, health, social and community service organizations, housing and community development agencies and labor organizations.

The Citizens League Public Affairs Directory is published every other year. To order, please use the form below and mail or fax to the League office, or call the League office at 338-0791.

Unique higher education opportunity

The Minnesota State Colleges and Universities (MnSCU) will fill four positions on its Board of Trustees this spring. MnSCU is the new statewide system of community colleges, state universities and technical colleges. With over 150,000 students and 62 campuses, it serves about three-fourths of all public college students in Minnesota and receives almost $1 billion from state funds, tuition, federal, private and other funds.

The Trustee openings represent a unique opportunity to nurture and guide a new institution. Candidates need a statewide perspective, vision, experience in transforming an organization or enterprise, and courage. Interested persons must apply by February 28, 1996. For application materials, contact Barbara Patterson at (612) 296-9002.

Hello, Gayle speaking

That friendly new voice you hear on the phone belongs to Gayle Ruther, who has joined the Citizens League staff as our Receptionist/Research Secretary.

Gayle comes to the League with over five years of experience in the non-profit environment. Most recently she was the secretary for the Minnesota Private College Fund.

Prior to that Gayle spent several years as the development assistant for The Raptor Center at the University of Minnesota, an organization devoted to the rehabilitation of injured birds of prey and public education regarding the role these animals play in our ecosystems.

Gayle and her husband John live in Grant Township where they are shepherding 25 white-tailed deer through the winter. Gayle has two daughters - Juliana, a junior at Southwest State University majoring in Elementary Education and Elizabeth, a senior at Mahtomedi High School who will be attending the U of M-Duluth this fall.

1996 Citizens League Public Affairs Directory

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