

School District “MASTER PLANNING”

Make sure your district has a clear sense of self-awareness before going to referendum

Roger Price

Planning for a referendum begins long before the question is put on the ballot. Successful referendums are the result of long-range planning, partnership building, and carefully assessing your district’s needs. In this special article, Roger Price, a consultant with the WASB Organizational Consulting program, discusses the types of analysis and district assessments a district should take to develop fiscally responsible financial and facilities plans — plans that are essential to have in place before a district decides whether or not to go to referendum.

Education faces several significant challenges in the decade to come. The impact of technology, environmental issues, changing demographics and societal expectations will shape what resources are available and how they will be deployed. Adding the reality of already aging and, in many cases, outdated facilities, educational leaders are faced with how best to direct limited resources.

Schools are a community asset and the facilities provided are often the cultural center for the residents of the communities. It is a district’s obligation to its community to conduct an objective assessment and analysis resulting in long-term, fiscally responsible plans.

Whether a district is seeking a referendum for operational funds or a referendum to add or improve facilities, the same careful planning and

forethought is needed. Similarly, an investment in facilities should be managed as any other part of the financial picture. The return on investment should be measured in terms of how the plans and investment furthers the mission and vision of the school district.

Decisions cannot be made serenidipitously or with unchecked influence of special interest groups. Clearly understanding its current state, estab-

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WASB organizational consultants work as partners with the school district to build and strengthen trust between school board members and administrators as they work to provide excellence in education. For more information about their full range of services, visit the WASB website —wasb.org.

- **Louis Birchbauer, Ph.D.**, has dedicated 35 years to working with Wisconsin public school districts. He has a strong educational background, including a Ph.D. from the University of Wisconsin-Madison, which complements his experience. Dr. Birchbauer served as superintendent for nearly 30 consecutive years in the districts of Cambria-Friesland, Mosinee, Germantown, and Greenfield.

- **Al Brown, Ed.D.**, has served Wisconsin school districts and students for more than 35 years as a teacher, principal, and superintendent. He earned his doctorate degree from Bethel

University in Minnesota. Governance, leadership, collaboration and school district reorganization are subjects of current interest. Currently, he also serves as an education consultant for CESA #11 in the area of educator effectiveness and educator professional evaluation.

- **David Carlson, M.A.**, has 35 years of experience in public education at both the local school district and state levels. He has been a junior high classroom teacher, a K-12 principal and a superintendent in three school districts. He retired from the Department of Public Instruction as Director of the School Financial Services Team. His education includes a bachelor’s degree in English and political science and a master’s degree in curriculum and instruction.

- **Mary DeYoung, Ph.D.**, has dedicated more than 30 years working in Wisconsin public school districts. She earned her doctor of philosophy degree from the Educational Administration program at the University of Wisconsin-Madison. Dr. DeYoung has worked as a regular and special education teacher, school business manager, and district administrator.

- **Roger Foegen, M.S.**, has served Wisconsin school districts

Learn More

The WASB Spring Academy, May 3 in Wisconsin Dells, includes a special track of sessions addressing a wide range of referendum topics and issues:

Financial and facility assessments;

Referendum legal and policy considerations

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lishing plans that are achieved through systematic, comprehensive, and analytical processes, and communicating the priorities will maximize the ability of the district to assure maximum student achievement and excellence.

■ The Process — Master Planning

The master planning process includes four major components that establish the foundation for determining short-term and long-term goals and plans. The process includes a needs analysis, an academic/strategic plan, a comprehensive facilities assessment, and a financial assessment. These four components are then integrated into a master plan with subsequent implementation strategies.

1. Needs Analysis — When starting your master plan, school leaders should begin with a general overview that examines where the district is now (discovery), where the district wants to be (dream), and what is in the way of closing the gap between where your district is and where you want it to be (gap analysis). During this portion of developing your master plan, the district

should engage with internal and external stakeholders. Make sure you know what your community's dream is for your district.

2. Academic/Strategic Plan

— The goal of the academic/strategic planning process is to gather information that can help inform your district's future actions 5 to 10 years into the future. The academic/strategic plan needs to examine your district's projected demographics, economic trends, education trends, and even the prospective world of work of your graduates. Another piece of the plan is understanding labor market issues related to recruitment, compensation, and benefits.

The academic/strategic plan should highlight trends that will most significantly affect how the district will meet the educational needs of its students and the training needs of the district's staff. It should also build a model for future programming and outreach activities by making recommendations on how to maximize the effectiveness of the district's delivery options (such as virtual schools and other options).

3. Facilities Assessment

(Comprehensive) — The facilities assessment includes assessment of all owned and leased properties to ascertain the extent of deferred maintenance, remaining facility life, and renovations needed. It should also evaluate:

- transportation and parking issues;
- future land uses including outlying properties;
- academic facilities and support facilities;
- sports and recreation facilities, athletic fields, open space, landscaping, general infrastructure (water, sewer, surface water management);



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for 40 years. Mr. Foegen earned both his master's degree in educational administration and his Sixth Year Degree in educational leadership from Winona State University. Mr. Foegen serves as an adjunct professor at Viterbo University and is the superintendent practicum/capstone coordinator in the field of educational administration.

▪ **Roger Price, RSBA**, has spent his career of 35 years involved in all aspects of educational operations and business management in K-12 and higher education. He earned his master's degree in education administration from the University of Wisconsin-Madison and his master's in school business management from the University of Wisconsin-Whitewater. He received the Wally Zastrow (lifetime achievement) Award from the Wisconsin Association of School Business Officials (WASBO). Mr. Price serves as an adjunct professor at the University of Wisconsin-Whitewater.

▪ **Dennis Richards, Ph.D.**, has devoted over 35 years to working with Wisconsin school districts, including serving as superintendent in Washington-Caldwell, Albany, and Black River Falls. He has a Ph.D. in educational administration from the University of Wisconsin-Madison. He also served as president of the Wisconsin Association of School District Administrators (WASDA) and the Wisconsin Interscholastic Athletic Association (WIAA).

▪ **George Zimmer, Ed.D.**, has provided instructional and administrative leadership in Wisconsin for over 35 years. His background is in cultural diversity, leading research-based education practices, and practical systems analysis. He received his doctorate of education in educational leadership and policy studies, from Loyola University of Chicago. Dr. Zimmer is an adjunct professor at Concordia University of Chicago. □

- energy management, including utilities costs and efficiencies;
- intergovernmental coordination; and,
- capital improvements.

A good deal of this information may already exist. If not, then time and resources will need to be allocated to collect it. The assessment needs to include processes to organize, understand and communicate the data in a truly transparent manner.

4. Financial Assessment — Considering that the goal of a master plan is to provide the district with long-term, fiscally responsible plans, a thorough and honest review of the district's current financial state is crucial. The financial assessment includes your district's:

- operational budget and levy projections;
- capital improvement plan;
- technology improvement plan;
- maintenance investment plan;

- analysis of debt; and
- determination of roles of legal (bond counsel) and financial advisors.

■ Drawing it all Together — The Master Plan

With the needs analysis, academic/strategic plan, facilities assessment, and financial assessment complete, it's time to bring it all together for your master plan.

The Master Plan establishes the framework for implementing what the district needs to do in order to meet its goals and objectives. This will include identifying project priorities, sequence, relationships, and costs. Additionally, a process to perpetually update the Master Plan needs to be put into place.

The plan should be written in a manner to capitalize on the school districts strengths and mitigate any shortcomings. It should include a clear direction that mirrors the overall vision of the district, clear principles

that guide development of specific projects, goals for the next 5, 10 and 15 years, protocols for measuring and celebrating success, and specific policy statements that would reflect the board's commitment to the plan.

■ Here to Help

Completing or updating a master plan is an arduous process, yet it is crucial to a district's success. The WASB Organizational Consulting Services can assist in this process in various ways from facilitation, conducting assessments, process education, or any other manner that would assist in the ultimate goal to assure maximum student achievement and excellence in education.

A culture that recognizes the internal skills and work already in place and marries them with targeted external expertise should lead to a more transparent process and the identification of real needs. ■

Price is an organizational consultant with the WASB. Contact the WASB for more information or to schedule a consultation.

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