

WISCONSIN SchoolNews

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Official publication of the Wisconsin Association of School Boards, Inc.

Business HONOR ROLL 2022

School districts and businesses partner up
to support and create opportunities for students

*The School District of Random
Lake partnered with Krier Foods
to open the Ram Way Cafe.*



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Federal Funding Brings Electric School Buses to 15 Wisconsin School Districts

The federal government recently awarded 15 Wisconsin school districts grant money to buy 65 electric school buses, Wisconsin Public Radio reported.

The Clean School Bus program will fund the purchase of more than 2,400 low- and zero-emissions buses for nearly 400 districts nationwide.

The Environmental Protection Agency prioritized districts in rural areas and those that serve tribal students.

With a \$4.7 million grant, Minocqua J1 School District is the top recipient in the state, receiving funding for 12 electric vehicles.

"I think you're seeing a lot of things moving to electric," Minocqua District Administrator Jim Ellis told WPR. "It's just in its infancy, if you will, so I think we'll see how it goes. And it's exciting to be a part of that process."

The buses will likely not be in place until the 2024-25 school year and Ellis said his district will probably keep diesel buses as backup during the winter. □

DHS Invests \$8.3 Million in School Health Services

The Wisconsin Department of Health Services announced \$8.3 million in funding to support K-12 school health service staff in the state.

The funding can be used for hiring new nurses and health coordinators, retention bonuses, professional development and extending the hours of existing health staff.

Funding for this initiative comes from the Centers for Disease Control and Prevention and aims to support state and local public health infrastructure. □

REPORT: State Special Education Funding Declines

Wisconsin school districts are shifting more financial resources to special education as state reimbursement rates struggle to keep up with increasing costs, according to a report from the Education Law Center.

"In general, what we see is schools need more funding than they're getting," Mary McKillip, co-author of the report, told Wisconsin Public Radio.

School districts are spending \$1.25 billion on special education costs beyond funds reimbursed from the state. The money being used to cover the difference is coming from districts' general funds serving all students.

The cost of special education services has progressively increased. During the 1980-81 school year, districts spent \$161 million on

special education. By the 2020-21 school year, spending increased to \$1.6 billion.

During that time, the state cut back on the percentage of reimbursement. Forty years ago, the state reimbursed approximately 67% of the cost of special education services. The reimbursement rate declined to a low of 24% during the 2017-18 school year.

The report also found schools in high-poverty and majority-minority race districts face higher unfunded special education costs because they tend to have higher percentages of students with disabilities.

"When we underfund special education, we're also underfunding the rest of our learners as well," Executive Director for the Office of the State Superintendent Tom McCarthy told WPR. □

STAT OF THE MONTH

\$1.25 billion

School special education costs unfunded by state of Wisconsin, 2019-20

Source: Education Law Center

Wisconsin's Education Gap Persists

In the first national assessment of students since the pandemic, Wisconsin had the widest score gaps between Black and white students of any state, reported the Milwaukee Journal Sentinel.

Simultaneously, Wisconsin scores statewide climbed in the rankings. While the state's 2022 scores declined since the last national assessment in 2019, most states saw sharper drops. The U.S. Department of Education's

National Assessment of Educational Progress, also known as the "Nation's Report Card," was administered to schools between January and March 2022. It tested fourth and eighth graders in reading and math.

Wisconsin scores continued to surpass most other states, ranking in the top 10 in math for fourth and eighth grades, and in reading for eighth grade. Fourth-grade reading continued to be the state's worst area. □



From Many Voices, One Vision

The election is over, and there are some new faces in the state Legislature. But your mission to educate children — and our mission to advocate for local control of schools — has not changed at all.

What does this mean for your students?

Research has shown, and your own experiences have borne out, that a school board working in a trusting partnership with district leadership as a team is the most effective model for student success.

Unity works because you're all pushing in the same direction toward a shared goal: What is best for your students.

The same principle holds true when it comes to making your voice heard at the Capitol.

Your government relations staff are working hard in Madison, though they are a few voices among hundreds of lobbyists.

That's where you come in. School board members connect their communities to their schools, and they are in a unique position to help connect lawmakers to their schools.

For too long in our state, policymakers and education leaders have lacked a coherent, common vision for public schools that they could unite upon.

What are the elements of such a vision?

First, it must focus on the needs of students and prioritize student

learning at all 421 school districts, rural and urban, large and small.

The WASB advocacy efforts will focus on those policies that will help all our districts in their mission. Be wary of policymakers that try to sow division among our many school districts with their many needs.

The WASB's resolutions and positions have resonance; they represent your collective voice while respecting local control and the uniqueness of each member.

Second, it's not a partisan agenda. You ran, as our member survey results attest, with a desire to serve others.

School board members set the WASB agenda through the resolutions you adopt and the guidance they provide. It is not a partisan agenda; it is your agenda. And we need to convince policymakers it should be their agenda, too.

Finally, it must be tied to your students and their parents.

You see firsthand the connection between your budget and what happens in the classroom. What could you do with a budget that gives you more spendable resources?

How could you improve student achievement? What kind of initiatives have you not been able to execute because of a lack of resources?

It is also important to fight back against the narrative that public schools do not value parental input and engagement. Make sure you

educate your state lawmakers about your efforts to keep parents informed about, and engaged with, their children's learning.

As I write this, we are deep into planning for the 2023 State Education Convention, with the theme of "Unity. Community. Opportunity."

When the Founding Fathers stitched together a single nation from the threads of 13 independent colonies, they gave it a motto: "E pluribus unum," or "out of many, one."

There are many of you, many voices for public education. Let's take this opportunity to try to unite those voices as one for the good of our students.

The convention is an excellent opportunity for school leaders to come together as a community to teach each other the best ways to provide opportunities to students.

The Delegate Assembly, held during the convention, gives us another opportunity to refine our resolutions and further our shared agenda for public education.

As the election fades and the hard work of governing begins, I ask that we come together to learn from each other and to combine our voices to promote a common vision that helps all our students meet their potential.

Please visit our newly redesigned convention website, WASB.org/convention, to learn more and register. ■

There are many of you, many voices for public education. Let's take this opportunity to try to unite those voices as one for the good of our students.

WASB

Business HONOR ROLL 2022

by Sierra Linton

EACH YEAR, THE WASB INVITES SCHOOL BOARDS across the state to nominate local businesses to be recognized for their efforts to support public education in their communities.

This year, **39 school districts nominated 131 businesses** that provided a wide range of services and support for their local schools and students.

The WASB is proud to share just a few of these local stories. The complete 2022 Business Honor Roll list is available on the WASB website.

Nominations for the 2023 Business Honor Roll will open May 1, 2023.





Waterford Graded School District
MILWAUKEE WOODWORKS

Westby Area School District

WESTBY CO-OP CREDIT UNION

It's early morning, and bookkeepers and tellers are setting up their workstations. However, this is no ordinary bank branch. We're in the cafeteria at Westby Elementary School and this is Westby Co-Op Credit Union's first in-school branch: Buck's Branch.

Buck's Branch is fully operated by fourth graders. These students apply for a job, participate in an interview and complete a training program.

The student volunteers handle all branch transactions with WCCU staff present to oversee operations and confirm accuracy and confidentiality.

Elementary students and staff are encouraged to make deposits during the hour Buck's Branch is open before school each Tuesday.

"It promotes financial education," said Randi Strangstalien, WCCU Credit Union project manager. "These kids bring anything in from 50 cents to their birthday money; these deposits aren't necessarily anything large. They get excited about being able to make that deposit and being able to do it right at school."

Students fill out deposit slips and bring their money in deposit pouches. The money is counted by a teller,

balanced by a bookkeeper and entered into the account by a computer operator.

In addition to these positions, a student marketing team works with WCCU to manage a prize table, create signage and produce a commercial.

For every 500 deposits made at the school, the students receive a \$250 donation to their student activity fund from WCCU.

Not only does Buck's Branch provide opportunities to learn and participate, but it's also providing all students with important financial experiences.

"It's been an awesome experience for our kids to have not only the life skills of learning to save and see how delaying gratification pays off in the end, but also to be responsible and learn this is how a credit union works," said Westby Area School District Administrator Steve Michaels.

This year, a Westby Area High School student who is also a WCCU employee is helping oversee Buck's Branch. "Having that partnership at the high school level was part of the vision of this program, being able to give high school kids more opportunities as they work as tellers," Strangstalien said.

WCCU recently acquired a mobile branch with the goal of expanding their in-school branches.

Waterford Graded School District

MILWAUKEE WOODWORKS

What makes something an heirloom?

For Milwaukee Woodworks owner Allen Tomaszek, it's something that's handmade and passed down from generation to generation.

"Every kid's woodworking project or piece of art they created in school in some ways has those same qualities," Tomaszek said.

Helping new generations find a passion for woodworking is part of the reason Tomaszek partnered with the Waterford Graded School District and Fox River Middle School.

When staff members Connor Harris and Brad Singer started the Fox River Middle School Fab Lab in 2020, they needed a wood provider for class projects. They originally reached out to Milwaukee Woodworks just for pine, though Tomaszek offered several more distinctive — and, typically, much more expensive — varieties of wood at a low cost.

"I think [the students] appreciate the different varieties of wood that they have," said Singer, Fab Lab coordinator. "They get to experience working with soft woods all the way to hard woods. They really are building skills



School District of Random Lake
KRIER FOODS

that they can use later in life.”

The surging prices of industrial lumber during the pandemic didn't affect Milwaukee Woodworks as much as others. Because Tomaszek produces his own lumber and had a sizeable stock of lumber when the pandemic hit, he was able to provide the wood at pre-pandemic costs.

Thanks to all the different species of wood provided by Milwaukee Woodworks, the students can make a large variety of projects as well as items to sell in their online store. When students finish their class projects and have extra time, they can create extra projects such as clocks, keepsake boxes, benches and Cribbage boards. Those projects are sold in the fab lab's online store, with all the sales going back into their budget for materials.

At the start of each school year, Tomaszek personally delivers the fab lab's lumber order.

“It's not often you have a vendor or someone you work with who when we reach out to them, they will drop what they're doing to make sure you get what you need as soon as you can,” said Connor Harris, Fab Lab coordinator.

For Tomaszek, his partnership with the school comes down to growing a community passionate about woodworking and helping give students the chance to craft their own heirlooms.

“It's a great program,” Tomaszek said. “I think it helps kids understand there's more to their community and their environment than they might get exposed to if they were to just go to a store.”

School District of Random Lake **KRIER FOODS**

The School District of Random Lake's vision statement is “providing tomorrow's leaders with a distinct advantage.” Referred to as the Random Lake Advantage, the district focuses on strong classrooms, strong culture and strong community connections.

The school district's relationship with Krier Foods exemplifies their focus on strong community connections.

The beverage company helps in so many ways — including internship opportunities, co-ops, job fairs and creating an outdoor environmental classroom — that District Administrator Michael Trimberger struggled to narrow down the district's relationship with Krier Foods into a short



Students also sell school apparel in the Ram Way Cafe.

“The students are learning so much from working hands-on and **learning real life business activities.**”

—Steve Wills, business and information technology teacher and cafe program manager

Business Honor Roll nomination.

From this community connection came the Ram Way Cafe, a full-service coffee shop in the Random Lake High School. The cafe is run by 12 student employees and is open daily from 7:30 a.m. to the end of the school day.

“It’s a lot of fun, but it’s a lot of work at the same time,” said Steve Wills, business and information technology teacher and cafe program manager. “The students are learning so much from working hands-on and learning real-life business activities. This is one of the most rewarding projects I’ve ever done in my 20 years of teaching.”

The coffee shop’s offerings include hot and cold coffee and espresso drinks, teas, lemonades, smoothies and donuts. Its popularity has only grown since officially launching in November

2021. Currently, the coffee shop does about 150-175 orders per day.

Students are receiving both classroom and work experience through the project.

“They are loving it, from the learning about soft skills — how to approach customers, selling techniques, along with being entirely responsible for cleaning the cafe,” Wills said. “They are also learning inventory.”

Wills contributes the success of the cafe to Random Lake’s partnership

with Krier Foods.

“We wouldn’t be able to even consider this without community business to support us and help us get started to get the equipment ready to go,” Wills said. “Krier’s expertise in food service and beverages has helped a lot, given us some great ideas of what to do and who to contact. It helped get this off the ground and without them we would not be as far as we are right now.”

Krier Foods Marketing Manager Nicole Depies said, “We love being able to support the people that live in our community. It’s very important for us to let the people of our community know that we’re here, we care and we’re a resource for them. Our focus is to provide the best for the students and that’s all that we really care about at the end of the day.”



Middleton-Cross Plains Area School District
**LATINO ACADEMY OF
WORKFORCE DEVELOPMENT**

Middleton-Cross Plains Area School District

LATINO ACADEMY OF WORKFORCE DEVELOPMENT

The partnership between the Middleton-Cross Plains Area School District and the Latino Academy of Workforce Development started with the goal of recruiting more Latino employees to the school district.

“We have been partnering with them to get more bilingual staff to our district,” said Shannon Valladolid, the district’s director of information and public relations. “We are seeing a shift in more Spanish-speaking families, the number keeps growing. We want our staff reflected in the numbers of our Hispanic population, so students are more comfortable, and they see themselves represented in our staff.”

When the Latino Academy hosted a career fair last June, the district used this opportunity to help recruit

employees and ended up hiring five career fair participants.

The partnership continues to grow. “We’re also working with Latino Academy to see how our structures and onboarding policies are able to be represented in Spanish as well,” Valladolid said. “We want to make sure when our staff come here, they feel supported in their native language.”

Looking toward the future, the pair is working on offering GED and commercial driver’s license programs in Spanish.

Middleton-Cross Plains hopes that offering GED programs to staff members gives them the opportunity to grow within the district. Additionally, the Latino Academy is looking to help the school district hire native Spanish speakers.

“There is quite a big wave of immigrants who are coming with university degrees,” said Julio García, Latino Academy director of education. “If we are able to redirect all those skills, possibly into a teaching

position for a Spanish program, those are skills that are arriving in the community that are needed, we just need to make the connection.”

The Latino Academy recognizes the struggle so many schools are having filling job vacancies.

“What we would like to accomplish is to help employers, like the school district, obtain the employees that they need,” García said. “There is a huge need.”

For the Latino Academy, the importance of this partnership is mutually beneficial.

“Without their partnership and partnerships like the one that we have with them, the Latino Academy cannot move forward,” said Margarita Avila, the director of workforce development at Latino Academy. “We need employers like them that are committed to support the mission of the Latino Academy to make sure that we continue supporting our students and our community in general.”

Mineral Point Unified School District

MINERAL POINT PUBLIC LIBRARY

Schools and public libraries are both centerpieces of a community, so the partnership between the Mineral Point Unified School District and Mineral Point Public Library seems only natural.

“I think the school and the library both have the same vision, which is helping the people in our community as much as we can,” said Diane Palzkill, Mineral Point Public Library director.

On Wednesdays, Mineral Point schools dismiss early for collaborative time between staff. The library has hosted Wednesday afternoon programming for years to help students stay productive during this time.

“The library is connected to the opera house so they can show movies

on Wednesdays, there’s book clubs, Lego clubs, crafts,” said Micki Uppena, elementary school librarian.

The Wednesday programming has proven extremely popular with elementary students. “Pre-COVID, our building was packed. We have three levels and we actually had to have staffing on every floor to manage everything,” Palzkill said.

As for the staff at Mineral Point schools, having the support of the library is a valuable resource.

“You know, even just as simple as helping each other proofread things or another set of eyes to go over a grant application or program idea,” Uppena said.

Their latest collaboration involves VRctica, a collaborative project involving UW–Madison that brings virtual reality experiences to rural communities. The school district and library both received an Oculus Quest 2 VR headset as part of the project.

The project focuses on sharing research currently being done by scientists in the Arctic and Antarctic polar regions.

“The software is still in the trial basis,” Palzkill said. “They haven’t released it yet, but they’re going to let us use it and work on that with programming. It’ll be a fun program with [the school district] and we’re excited about that.” ■

Sierra Linton is the WASB communications and marketing specialist.

Thank you to the school districts that nominated businesses for the 2022 WASB Business Honor Roll. The full list is available at WASB.org.



If your district is interested in reviewing sample policies on encouraging school-business partnerships, contact the WASB.

“I think the school and the library both have the same vision, which is helping the people in our community as much as we can.”

— Diane Palzkill, Mineral Point Public Library director



WASB Business Honor Roll

Has a local business been particularly helpful to your district this year?

Starting May 1, 2023, nominate them for the 2023 WASB Business Honor Roll!

Selected businesses and partnerships will be given statewide recognition and highlighted by the WASB.

To nominate a business, visit the Business Honor Roll page on WASB.org (under Communication Services).

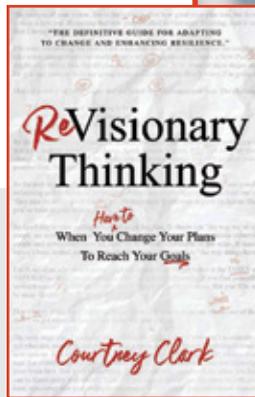
Deadline: **August 13, 2023**



WASB Business Honor Roll | 608-257-2622 | 877-705-4422 | Visit wasb.org

THE POWER OF RESILIENCE

Navigating the detours on the path to your goal



The following excerpt is from *“ReVisionary Thinking: When You Have to Change Your Plan to Reach Your Goals,”* by resilience expert and 2023 State Education Convention Friday keynote Courtney Clark.

As young children, many of us learn how to set goals. As we grow, we’re taught how to work toward our goals. We’re encouraged to put in effort, to try our best, and to never give up.

But we’re not often taught what happens if life throws a roadblock in our path. We dedicate significant effort to going for the goal, but we spend little time learning strategies for what to do when the goalposts move. With a single-minded commitment to a goal and few skills to adapt, it’s no wonder we get frustrated when change happens.

When unexpected situations force us to change our plans, it’s human nature to resist that change. Why? Because we created those original plans so that we could be successful. We want what we want because we think it’s the best way to get where we’re going. Life plans have a tendency to feel “sticky” because letting go of them feels like letting go of our

goals. But that’s not always the case.

Growing up, I wanted to be an actress. Starting in elementary school, I performed in plays and musicals, took voice lessons, and even muddled my way through some dance classes. I was convinced that I was going to end up a Broadway star. I believed in my dream so much that I was willing to skip birthday parties and family vacations to go to rehearsals.

My dream started to come true my senior year in high school. While I was starring in one of the school plays, an envelope arrived. I had been accepted to study acting at the competitive New York University musical theatre program. I moved to New York City and took four years of classes with some of the best teachers in the country, preparing to

be a stage actress.

And then ... My senior year of college, something changed. It happened slowly. My friends and I had started auditioning for shows, both in New York and regionally. Some of my friends handled the rejection with grace and poise. But I felt every rejection acutely. I hated the underlying feeling that there were always 100 other actresses right outside the door who could sing higher than me, kick higher than me, look prettier than me. I hated feeling replaceable.

That spring, I was walking along 14th Street, thinking about how real life as an actor involved more time trying to get a role than it did actually performing in a role. I was mentally wrestling with whether I

could come to grips with my dislike of rejection and get excited about auditions. As I turned to walk along the park at Union Square, this thought popped into my mind:

I don't want to be famous. I want to be important. And that's different.

When I was a child, being famous and being important felt like the same thing. We look up to athletes, actors, entrepreneurs, or politicians. We admire the people we see on TV or read about in magazines. I thought that being famous would make me important. But I realized — it doesn't have to be that way.

In that moment, when I realized that being famous and being important aren't the same thing, my entire career plan shifted. I was weeks away from graduating with one of the most coveted acting degrees in the world, but I just couldn't be an actress anymore. Acting had been my plan, but the life of an actor wasn't the life that I wanted. If what I really wanted in life was to feel like my contributions were important, being an actress wasn't the only — or even the best — way to accomplish that. I needed to change my life plan to enable me to reach my real goal. So I did.

It's a common story: we set our goals based on our desires at a certain point in our life. And society tells us that we shouldn't give up on our dreams or else we're quitters. But most of us reach a point in life when our plans don't seem to be working for us. So we have to choose either to change our plans or to fight for something that doesn't serve us.

■ The science of letting go

I wanted to understand how people deal with adapting when their plans aren't working out, so I commissioned a study on the topic. My research team and I interviewed over 1,000 people about

their ability to navigate change and their feelings about having to switch up their game plans when faced with a challenge. We asked the participants whether they feel like they can “learn as they go” in life when a project or situation is unfamiliar. Only 26% of respondents indicated having a strong belief that they could take in new information and learn while in the middle of a challenge. That means almost three-fourths of respondents DIDN'T feel like they could learn as they go and instead preferred to fall back into old patterns and habits.

Those old patterns and habits are like a story. A story we've told ourselves over time and repeated again and again until we become convinced that it culminates in a happy ending. We cling to the story we've written for our lives and won't let go. This “life plan” is part of the reason why people reject change.

Resilient people can let go of a story that no longer serves them — a story that no longer makes sense. To be truly resilient in the face of change and challenges, we have to be less committed to a specific version of life and instead be willing to rewrite the story.

But we can't even start to rewrite our new story without first throwing away the old story. The old story has a tendency to creep back in and

cloud our thinking. It can happen to individuals but also to organizations.

Increasing your tolerance for ambiguity is possible. Below are two strategies for doing so.

■ Strategy 1: Recall what worked in the past

First, think about past experiences when you were heading into an unknown situation. If you struggle to start your list, remember that as children we faced unknown situations with much greater frequency than we do in adulthood. Kids walk into a new classroom with a new teacher every single year! Children try new sports and activities regularly. They make new friends or say goodbye when old friends move away. Teenagers pack up all their belongings and go off to college. They go to their first dance, or on their first date. Young adults start their first job and pay their first bill. Every time you do something for the first time, you're heading into the unknown and facing ambiguity. In fact, children may be better at

letting go of the plan than adults are, maybe because they do it more often! (More on that later in this chapter.)

Being able to point to a list of times you successfully



Letting go of the plan isn't the same as letting go of your goals.

Being forced to change your plans doesn't lessen your chances of success.

navigated an ambiguous situation is a good first step. Next, think about what actions you took in those situations that helped you get through it. Did you keep an open mind? Did you control your anxiety? Did you befriend and lean on someone else going through the experience? Remembering the strategies that worked for you in the past is a good tactic, because each person is unique.

Ultimately, remind yourself that

each of those ambiguous situations was ultimately resolved. It was unknown and uncomfortable in the beginning, yet at some point your path became clear. Whether the end was enjoyable or successful (and I hope many of them were!), the situation didn't stay a mystery forever.

Strategy 2: Differentiate between plans and goals

Another way to get more comfortable with ambiguity is to realize that letting go of the plan isn't the same as letting go of your goals. Being forced to change your plans doesn't lessen your chances of success. It may change your methods of success or your timeline. Or it may change the type of success you achieve. That's what happened for me.

When I left the world of performing arts, I thought it was for good. I put my creativity and communication skills into action in another

way, working in public relations for corporations and nonprofit organizations. I gave TV interviews and built community engagement and marketing plans. But one day someone said to me, "I love the passion you have when you talk. You'd be a great motivational speaker." That moment shifted everything for me.

Now I'm back to using the performing skills I developed at NYU, but in a completely different way than I ever expected. This isn't the version of success I dreamed about when I was 12, but it's still success. In fact, I could argue that it's even better success, because I'm able to run my own business and create my own opportunities in a way that I'm not sure I would have been able to do in a traditional acting career.

There's always more than one route to your goals. You just have to be willing to find the best path for you. ■



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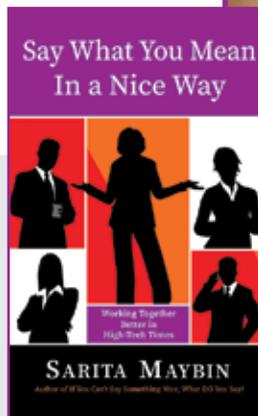
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YOU'RE NOT THE BOSS OF ME

How to pull rank when you have no rank to pull

The following excerpt is from Sarita Maybin's book, *"Say What You Mean in a Nice Way."* Maybin will be the keynote speaker at the Thursday general session of the 2023 State Education Convention.



Alone we can do so little; together we can do so much. — Helen Keller

Growing up as the oldest of four children, I was frequently reminded by my two younger sisters and my brother: “You’re not the boss of me!” If you are the oldest in your family, you can probably relate to that plight. I learned early on to downplay my bossy-big-sister tendencies, treat my siblings as equals and invite their input — on most days.

I invoked some of the Do’s and Don’ts discussed earlier in this book. “I would prefer” replaced “You better” and “I need” replaced “You never.”

Similarly, when I became a young supervisor — while still a graduate student — working in university administration, I discovered that I frequently needed to gain the coop-

eration of others, even though I was not their boss.

I needed staff from other departments to participate in my programs, expertise from other teams to help complete projects or occasionally someone to cover the phones when our office was in a staff meeting.

And I sometimes found myself needing to communicate concerns to someone in a senior position and realized — yikes! — this person is the boss of me! Much like my friend I mentioned in Chapter 1 who sent the angry email, there are times when we may need to give some not-so-nice feedback to someone who supervises us.

As a woman in one of my audiences so perfectly put it: “How do

you pull rank when you have no rank to pull?”

I am a fan of phrases and there are a whole lot of them that we can use when we are “pulling rank” or asking for cooperation from our peers, our supervisors and even our family members. Many of these phrases are in the form of input-seeking questions.

Here are a few of my favorites:

Would you be willing to? Would it be possible to? Would it work for you to...?

I know what you’re thinking: What if they say NO, I would NOT be willing to. It would NOT be possible. This will NOT work for me.

Plan B: Whip out the W.I.I.E.M.: “*What’s in it for me?*” As you can



imagine, people want to know why it would benefit them to cooperate with you. Examples when seeking cooperation from your supervisor or co-workers might be:

- *I would appreciate the extra time on the project so that I can do a more thorough job.*
- *If you'd be willing to, I'd be eternally grateful. And I'd owe you one!*
- *If I could get this report to you next week instead of Friday, then I would be able to gather more information for you.*

Another Plan B approach — which is sometimes best as a Plan A — is using open-ended questions such as:

- What are your thoughts about...?
- How would you feel if we...?
- I'd love your input on...

■ **Boss lady**

I still vividly recall my regular run-ins with a colleague when I was

a department director during my university administration days. I won't be naming names here and I wonder if she would even recognize herself if she were to read this book.

At any rate, the problem started when I began hearing from my student staff that she was assigning them tasks and making demands. Somehow, she thought she was the boss of me AND my team, even though we were equals, each in charge of our own departments. Although our departments had to work together on certain campus-wide programs, she was NOT my boss.

Because many of the staff members on my team were students, they were not equipped with the business acumen to defend themselves against the demands of a department director. As such, I assured them I would handle it. It was my responsibility to have the uncomfortable conversation with my colleague to clarify and set boundaries. It has been many years since this lady and I worked together, but I remember using phrases that sound like these:

- *I would appreciate you coming to me directly if you need assistance from my staff.*
- *I'm concerned that it's confusing for my student leaders when you make requests of them that are not coming from me as their supervisor.*
- *Please let me know next time if you need help from my staff so that I can prioritize their assignments and allow them to assist you.*

You can probably hear my Evil Twin yelling in the background: "You're not the boss of ME!" And saying some other things that cannot be printed in this book.

■ **Is the customer always right?**

The toughest "boss" of all is our customer. Whether you work for yourself as I do, or work for someone else, the common denominator is the customer. And we've all heard the adage: The customer is always right.

It seems customers are frequently making demands, wanting everything ASAP, and acting like they are the boss of me. We could easily be worn to a frazzle as we attempt to accommodate customer requests. As such, we must figure out how to set boundaries by figuring out how to say what we mean and mean what we say — in a nice way.

In my keynotes I frequently share what I call a "guilt-free" yes. It's a way to say YES and do it with parameters. That way you can comply with the request being made while not going into stress overload in the process.

These three key words/phrases allow you to say yes with less stress:

If ... When ... As soon as.

Here are examples of how you could use them with your customers:

- *If you're willing to wait until Monday, I can get you a more detailed report.*
- *When you submit the necessary information, I'll be able to finish your order.*
- *As soon as I finish the project I'm working on, I'll get started on your project.*

You may recall my mention of "please" and "thank you" to humanize our online communication in an earlier chapter. Those magic words work well in person too.

We could easily follow up the comments above with:

- *Please let me know if that works for you.*

- *Thank you for ordering from us.*
- *Thank you so much for your patience.*

By the way, all the boundary-setting strategies discussed in this section about customers can also work with bosses, colleagues and others we work with but don't supervise.

Valuing volunteers

Speaking of those with whom we work but don't supervise, volunteers are an excellent example. If you're like me, you may have joined volunteer organizations, whether that be a social club, a community organization or professional association — and served in leadership roles.

Even if you are in a leadership role in a volunteer organization, you are technically not the boss of anyone. Yet, it's important to make requests, ask for commitments and — hopefully — get cooperation.

Communicating the W.I.I.F.M. — “What's in it for me?” — mentioned earlier in this chapter, becomes even more important when you're in a volunteer setting.

During my university administration days, I spent many years chairing campus committees and taking on leadership roles in professional associations such as American College Personnel Association (ACPA) and serving on the Board of the National Orientation Directors Association (NODA). In more recent years as a businessperson, my volunteer leadership roles have included President of the San Diego chapter of the National Speakers Association and Board Member of my local YMCA.

One of my favorite examples of communicating the W.I.I.F.M. was during the six years I served on the board of my local YMCA (AKA-“Y”) as Fund Raising Chair. One of the staff members came up with a wonderful ice breaker for our fund-raising season kick-off event. She asked everyone to share their “Y Word.” In other words, what does the Y mean to you? We even had t-shirts made that said, “What's Your Y Word?” and spotlighted it in fundraising email outreach.

I'm not suggesting that you do an icebreaker or even have t-shirts printed, although both are wonderful ways to do team building. I'm suggesting that when you want to gain buy-in and you're not the official boss, it's beneficial to help the other person pinpoint their reason for wanting to be all-in.

Simon Sinek says it best in his book “Find Your Why: A Practical Guide for Discovering Purpose for You and Your Team.” He reminds us that when we look at what motivates people it goes beyond them knowing the what and the how. It's the WHY that resonates with people. It addresses the why-should-we-care question. ■



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WELL, WELL!

Creating a Healthier School

Leadership in Energy and Environmental Design, a certification program for environmentally friendly construction, is a significant focus for the construction industry and many school districts. As districts plan for future construction or renovation, a new emphasis concentrates on the well-being of occupants — students, teachers, staff and visitors.

This article introduces districts to the next movement: focusing on WELL buildings. The International WELL Building Institute is devoted to transforming health and well-being with a people-first approach to buildings, organizations and communities. It provides an evidence-based roadmap for scaling health across organizations. District design professionals will be great partners in helping leadership understand how the facility recommendations create a healthier environment.

Importance of student and teacher health

A report from the Harvard T.H. Chan School of Public Health notes that by the time a student graduates from high school, they will have spent more than 15,000 hours inside a school facility.



Jody Andres Kurt Peeters
Hoffman Planning, Design & Construction, Inc.

It's likely that teachers and administrators will spend even more time in these settings if they work more than 13 years.

Districts must set the stage for great learning and solid mental and physical health for all those that frequent their school buildings. Minimizing or eliminating air pollution, mold, ambient noise, radon, asbestos and poor lighting must be central concerns.

The WELL buildings roadmap

The International WELL Building Institute introduced the WELL Building Standard, the leading tool for advancing health and well-being in buildings, communities and organizations. The WELL Building Standard™ version 2 is a tool to help districts be thoughtful about constructing and using spaces that enhance human health and well-being. WELL v2 includes a set of strategies, supported by recent scientific research, that aim to further human health through design interventions, operational protocols and policies. The creation of the standards draws on the expertise of a diverse community of WELL users, practitioners, public health professionals and building experts throughout the world.



The 11 concepts that guide WELL buildings are:

1. AIR: The WELL air concept aims to achieve high levels of indoor air quality across a building's lifetime through diverse strategies that include elimination or reduction of pollutants, active and passive building design and operation strategies, and human behavior interventions. Tangible steps in this area include attention to air quality, ventilation design, smoke-free environment, construction pollution management, operable windows, and microbe and mold control.

2. WATER: This idea encompasses aspects of the quality, distribution

and control of water in a facility. It comprises features that focus on the availability and contaminant thresholds of drinking water and targets the management of water delivery systems to prevent negative impacts on building materials and the indoor environment. Water quality indicators, moisture management, hygiene support and water conservation are topics included in the guidelines.

3. NOURISHMENT: The WELL nourishment concept requires the availability of vegetables and fruits along with nutritional transparency. It encourages the establishment of environments where the healthiest choice is the easiest choice. Examples of this include helping people

make informed food choices, consume fruits and vegetables, avoid highly processed ingredients, access quality food messaging and consume proper portion sizes.

4. LIGHT: This aspect encourages exposure to light and seeks to create lit environments that promote visual, mental and biological health. Examples include enhancing visual comfort, providing daylight exposure and outdoor views, reducing glare caused by electric lights and giving occupants lighting control.

5. MOVEMENT: The WELL movement concept fosters physical activity in routine life through environmental designs, programs



and policies to make certain that movement is integrated into the fabric of districts' culture, buildings and communities. Society's comprehension of the relationship between physical activity and health continues to develop. Many people now grasp that all movement matters for health, and that physical activity can be aggregated throughout the day for a healthy lifestyle. Examples in this section include encouraging ergonomic workstations, using stairs, cycling to school, increasing walkability, providing no-cost physical activity opportunities and discouraging prolonged sitting.

6. THERMAL COMFORT:

The focus on WELL thermal comfort promotes human productivity and providing a maximum level of thermal comfort with all building users through improved HVAC system design and control, and by meeting individual thermal preferences. Thermal comfort significantly influences the school experience and is one of the uppermost contributing factors influencing satisfaction in buildings. The indoor thermal environment also impacts a building's energy use, as cooling and heating accounts for nearly half of a building's energy consumption. Examples include ensuring that greater than 80% of occupants perceive their environment to be thermally acceptable, incorporating radiant heat and cooling systems, controlling humidity and enhancing operable windows.

7. SOUND: The WELL sound initiative aims to bolster occupant health and well-being by identifying and miti-

gating acoustical issues that harm occupant experiences. The guidelines provide detail regarding sound mapping (preventing acoustic disturbances), sound barriers, reverberation time, sound reducing surfaces, hearing health conservation and enhanced audio devices.

Districts can make a significant impact

on mental and physical well-being by increasing opportunities for restoration through spaces that restore occupants, setting the stage for optimal sleep and programming focused on mindfulness.

8. MATERIALS: This concept targets the reduction of human exposure to chemicals that may negatively impact health as buildings are constructed, remodeled, furnished and under operation. The emphasis on WELL materials supports two strategies for selecting building supplies and products. One element is to expand literacy on materials by promoting ingredient disclosure, while the second is to promote the assessment and optimization of product composition in order to diminish impacts to human and environmental health. Both strategies seek to bridge data gaps in the supply chain, supporting innovation in sustainable chemistry and expanding market transformation toward healthier, sustainable products. The concept encourages the use of low-hazard cleaning products and practices that reduce impacts

on indoor air quality and on the health of those performing cleaning duties.

9. MIND: The WELL mind aspect promotes mental health through policy, program and design strategies that address the varied factors that influence cognitive and emotional well-being. Examples include mental health promotion, incorporation of the natural environment, stress management, restorative opportunities (onsite and outside the workplace) and restorative spaces.

10. COMMUNITY: This concept supports providing access to essential health-care, building a culture of health that accommodates diverse population needs, and establishing an inclu-

sive, engaged occupant community. Examples include promoting an understanding of how building design, operations and policies impact health and well-being, emergency preparedness, occupant survey, new parent support and buildings that are accessible, comfortable and usable for people of all backgrounds and abilities.

11. INNOVATION: Innovation features pave the way for projects to develop unique strategies for creating healthier environments. Points are given in this area for projects that propose new interventions that address health and well-being in a unique way, and/or utilize previous creative ideas. Additionally, it encourages the certification process, commitment to health and well-being, and achievement of certification for green buildings.



■ Initiatives and focus areas that improve mental health

Some of the 11 initiatives are specifically aimed at the WELL mind. Districts can make a significant impact on mental and physical well-being by increasing opportunities for restoration through spaces that restore occupants, setting the stage for optimal sleep and programming focused on mindfulness. The benefits include less depression, pain, stress and anxiety. Among the documented outcomes of increased contact with nature within constructed spaces include increased attentional capacity, improved recovery from illness and stress, higher pain tolerance and enhanced psychological well-being. A variety of the above initiatives promote restorative opportunities, stress management, mental health services, physical activity, circadian lighting design and more.

Planning and design related to proper introduction of daylight into schools plays a key role in mental and physical health. For many years, it was generally accepted that daylighting was better than artificial lighting. Several years ago, it was determined that all the windows in a classroom — many with entire walls made of glass — were a distraction for students. However, windows provide views and natural light that help improve outcomes for students, as well as improve comfort and mood. When contemplating new



construction, an important strategy to maximize daylighting is positioning buildings with an east-west orientation, with windows facing south. Wise selection of window products by the design team will manage unwanted solar heat gains and losses, lighting levels and glare.

Interior baffles and overhangs represent additional valuable considerations since they provide uniform and effectively diffused lighting. Skylights present daylight from above, often permitting diffused light into the space. Tubular devices, typically known as light tubes, are another alternative to bring natural light into the interior of the building.

Of course, schools can't fully depend upon natural light. Choosing LED lighting and using it wisely can provide many benefits. Tuning LED lights to circadian rhythms sets the stage for more normal sleeping and waking cycles, while also reducing energy consumption. Blue spectrum LED lighting has been shown to make children more alert in the morning compared to dim light.

■ Improving brain function

Another core focus of WELL buildings that is especially relevant to schools is improving air quality to reduce respiratory illnesses and increase cognitive function. By limiting volatile organic compound levels and increasing outdoor air supply, schools can improve indoor air quality, resulting in higher cognitive function and test scores, and reducing

sickness and related symptoms.

Achieving high indoor air quality comes from a combination of low- or no-VOC products specified for furniture, adhesives, paints, flooring systems, carpeting and furniture, and carbon dioxide monitors. Air supply systems that use a high percentage of outside air in classrooms, offices and other areas can enhance natural ventilation and help improve indoor air quality.

Planning and design related to proper **introduction of daylight** into schools plays a key role in mental and physical health.

Heating, ventilating and air conditioning systems are important to air quality. Wise decisions will result in improved air quality while reducing energy consumption. Districts can expect to get better air quality from a new HVAC system but maintaining that over time requires regular inspection and a maintenance plan. Changing filters consistently, draining condensation pans and keeping unit ventilators free of books and paper will contribute to a healthier environment. Consistently cleaning return registers, outdoor air intakes and supply diffusers are great disciplines as well.

Cleaning products have a significant impact on the health of facility occupants. Reducing exposure to harmful cleaning substances can improve student and employee pro-

ductivity, and impact health and morale. A healthier environment also contributes to fewer absentee days for students and staff.

■ A real WELL example

Clintonville Public School District's recent middle school addition includes a variety of lighting-related features that improve health and well-being. The new school would meet WELL L01 and L02 (standards related to lighting) because every room that is occupied has natural light (L01) and provides appropriate illuminances on work planes for regular users, as required for the tasks performed in the space (L02). Additional examples of daylighting in the new facility include large glazing in the corridor. The tunable lighting gives occupants lighting control by allowing adjustment of color temperature in the nurse/sick room and special education rooms.

■ A greater level of intentionality

Districts considering their next construction project should raise their level of focus and intentionality for physical and mental health. Those that do will see a reduction in absenteeism, greater cognitive function, improved morale and much more. ■

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“If you don’t know where you are going, any road will get you there.”

— Cheshire Cat from “Alice in Wonderland,” Lewis Carroll



STRATEGIC PLANNING Demystified

by Fran Finco, Ed.D.

Strategic planning is a continuous improvement strategy school boards use to determine and achieve mid-to-long range (three-to-seven year) goals. The plan sets the tone for the governance of the school district and helps direct and inform staff, parents and the community about the purpose, vision and outcomes the district strives to reach. It also serves as a North Star to guide the improvement efforts of individual schools.

The purpose of this writing is to help the reader easily understand the stages of the strategic planning process, and to hopefully take away the fear of the unknown so boards and superintendents can embark on this necessary process.

Every school district should have a strategic plan. Why then, when board members or superintendents talk about developing a strategic plan, do people get apprehensive about starting the process? There are a number of reasons. Some board members and superintendents don’t understand the process and are reluctant to begin the unknown. Others have experienced past strategic planning efforts that were never followed with implementation and monitoring, rendering them useless. And yet others accept the status quo of the district and don’t believe strategic planning is necessary.

In reality, strategic planning is just another name for bringing people together to examine the district’s

current purpose, review data that indicates the progress toward reaching that purpose, and then create a plan that will get the district to where the group believes it needs to be in the future regarding student achievement and institutional performance.

Finalized strategic plans include:

- Clear mission and vision statements
- Goals and objectives based on data that address ways to improve academic achievement and district operations
- Strategies to help reach those goals and objectives
- Identification of who will be responsible for each strategy

- Metrics and methods that will help monitor the progress being made toward the goals

There are six simple planning and implementation phases that can lead to a stakeholder driven strategic plan. Those phases are:

1. Pre-planning: Creating the team and surveying the district
2. Establishing the foundation: Review the mission and vision
3. Examining the district's current reality
4. Writing goals and objectives (the results sought) and determining strategies
5. Completing the written plan
6. Implementing and monitoring the plan

PHASE 1: Pre-Planning – Creating the team and surveying the district

The strategic planning process starts with determining who will sit at the table to talk about the future of the district. The Wisconsin Association of School Boards suggests that strategic planning be stakeholder driven. A stakeholder is defined as a person who has a vested interest in the future of the school district.

Typically, stakeholders represent the community, parents, students, staff members and board members. Using a diverse representative group puts the future focus of the school district in the hands of a cross-section of stakeholders, reflects their thoughts and visions, and gives credibility to what should be an inclusive, transparent process. These volunteers agree to the meeting times necessary for the process and to actively participate in the discussions and decisions necessary to create a

comprehensive plan for district improvement.

After the team has been determined, a facilitator or leader of the process needs to be selected. While some districts can identify an in-house facilitator who has a working knowledge of the strategic planning process, many choose to bring in this individual from outside of the district.

A final part of the pre-planning phase is to conduct a survey to

Some board members and superintendents

don't understand the process and are reluctant to begin the unknown. Others have experienced past strategic planning efforts that were never followed with implementation and monitoring, rendering them useless. And yet others accept the status quo of the district and don't believe strategic planning is necessary.

assess community, parent and staff opinions regarding district strengths, areas of weakness and possible opportunities. These survey results are reviewed and discussed by the stakeholder group in phase 3 of the strategic planning process. Survey results may also inform future goals and objectives.

Phase 1 tasks include:

- Determining stakeholder group members
- Choosing a facilitator
- Administering the community survey
- Scheduling first meeting date, time and location

PHASE 2: Establishing the foundation – Review the mission and vision

The next phase is for the strategic

planning team to analyze the district's mission and vision statements. Clarity of these statements is critical because they will frame all the ensuing conversations and actions of the group. Some of the questions the group should examine include:

- Does the district have a mission statement? If so, does it describe the district's purpose — its moral imperative?
 - Is the group satisfied with what the mission communicates as the district's purpose?
 - Are there any changes that need to be made to the mission statement?
 - Does a vision statement exist? If so, does it reflect the product (outcomes) the district hopes to achieve five to seven years into the future?
 - Does the vision statement reflect what the stakeholders value?

Phase 2 tasks include:

- Agreeing on a mission statement
- Agreeing on a vision statement

PHASE 3: Understanding the current reality

The third phase in the strategic planning process involves the stakeholder group examining the district's current academic and operational reality. The group should review this information from a variety of different sources. It is common to look at academic achievement data, fiscal data, demographic data, the culture of the district (through responses from the community or district surveys) and facilities/grounds information. After the data is examined and discussed, the group determines the district's main areas of strength and identifies the critical issue area(s) that need to be addressed by the strategic plan.

The strategic planning process drives continuous improvement and provides the vehicle to deliver on that purpose.

Phase 3 tasks include:

- Identifying what is going well
- Identify the district's strengths
- Identify areas needing improvement
- Identifying future opportunities

PHASE 4: Writing goals and objectives and determining strategies

In this phase, the administrative team members of the planning team determine draft goals that will drive the work to improve the critical issues identified during the district data review. This group also writes objective statements that define what the results of attaining those goals would look like. Finally, they identify strategies that would be implemented in the schools and district operations that will drive the work to attain the identified goals.

The information in the strategic plan will set the road map for success. It should be communicated to all stakeholder groups and should be used by the superintendent, principals and teachers to guide the work in the schools. Board goals communicate expectations to the stakeholders, objectives identify the results to be reached and strategies and initiatives help direct the work of school staff.

Phase 4 tasks include:

- Determining three to five mid-to-long range district goals
- Deciding on the objectives that describe the success of the goals
- Determining what strategies and initiatives will be implemented to successfully reach the goals



PHASE 5: Finalizing the written plan

In this phase, the administration organizes all the work in one living document. The plan is considered a living document because it will get reviewed at least once annually, and optimally two or three times per year, so the board can monitor progress toward their mid- to long-term goals, the mission and the vision.

Phase 5 tasks include:

- Finalizing the strategic plan
- A planning team review of the plan
- Board approval of the final plan

PHASE 6: Implementing and monitoring the plan

In the implementation phase, the contents of the plan are communicated to the staff, parents and community members. The responsibility of implementing the strategic plan falls on the board and administrative team. In fact, the success of the entire strategic planning process hinges on the quality of the implementation plan. It requires the district leadership to communicate an understanding of the “why” of the plan content. It also depends on the willingness and ability

of the board and administration to keep a laser-like focus on the goals and objectives identified in the plan.

Hanover Research defines strategic planning as a strategy that “helps school districts achieve organizational alignment, connect stakeholders to a purpose, and address areas of improvement.” The process does not need to be complicated, but it does need to be purposeful.

Board and district administrator governance teams are obligated to ensure high levels of learning for all

children who enter their schools. Parents count on schools to continually find ways to help their children learn — no exceptions. The strategic planning process drives continuous improvement and provides the vehicle to deliver on that purpose.

Phase 6 tasks include:

- Communicating the plan to the stakeholder groups
- School improvement plans that reflect the identified board goals
- Determining methods to measure the goals and objectives

For more information about how the WASB can help examine your foundation documents; your mission, vision, goals and objectives; or help facilitate your strategic planning process, contact Ben Niehaus at bniehaus@wasb.org. ■

Fran Finco is a former superintendent and a search and governance consultant at the WASB.

Sources: Hanover Research — hanoverresearch.com/k-12-education/; Wisconsin Association of School Board's Approach to Stakeholder-Strategic Planning — WASB.org.



Making the Most of Our Board ‘Dash’

I recently attended a celebration of alumni from one of the University of Wisconsin System schools. As the honored alumni were greeted, some greeters wished they had done more with their lives. I also recently had the opportunity to write a tribute to a school board member who had resigned his board position for job-related reasons. These experiences caused me to reflect on the idea that each of us has a story to tell, and each of us would like to believe that we have made a positive difference in our lives and the lives of others.

Linda Ellis, author of “The Dash Poem,” challenges us to make the most of every minute, memory and opportunity. While the “dash” refers to a horizontal line between our birth and death dates, I believe it can be adapted to beginning and ending dates of many life situations, such as time in college or board service. The board service of my colleague is 2017-2022, with a dash between the two years. My task in writing his board service tribute was to capture the successes of his board tenure and note the positive differences he made on our students and community — as an individual and as part of a seven-member board.

Taking the “dash” a step forward, I have reflected on how I have spent my time as a board member. What have I accomplished to make positive differences in the lives of all our students and our community by my board service? How have I grown professionally to be the best board member I can be? How do I want to be remembered as a board member? What would I like my board legacy to be?

These questions can be addressed by individual board members and entire boards. How will our service as a board make positive differences in the lives of all our students and community? How have we grown professionally to become a highly functioning board? How do we want our board to be remembered? What would we like our board legacy to be?

Board members are the leaders of their districts’ preK-12 public learning systems, with a moral imperative to educate ALL students and make their districts better places for all of us to live, learn, work and play. Some would say that we need to model lifelong learning by paying attention to our own growth and development as board members.

A number of Wisconsin school boards annually take the School Perceptions survey, analyze the results and set goals to grow and function better together. Board

members and entire boards attend WASB professional development activities, including workshops, webinars, the WASB Connection Podcast, the Day at the Capitol and the Wisconsin State Education Convention. The WASB offers a variety of means for us to learn and grow to address the dash in the beginning and end of our board service. As a member-driven organization, WASB is open to suggestions to better meet our individual and group needs.

I encourage you to be mindful of the dash in your board service, individually and collectively. How will you and your board make positive differences in the lives of all your students and community? How will you and your board be remembered? What will be the legacy of you and your board? ■

Barbara Herzog is a member of the Oshkosh School Board, the WASB Region 7 director and the 2022 WASB president.

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WASB Connection Podcast

Are you navigating conflict and difficult conversations?

The latest episode of the WASB Connection Podcast gives you some simple tools to work better together.

We talk to Sarita Maybin, an expert on communications and Thursday, Jan. 19 keynote speaker at the 2023 Wisconsin State Education Convention.

We talk about how to say no — and yes — to others, how to give negative feedback without destroying the relationship and how to gracefully receive negative feedback.

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“And I always say it goes back to that acronym that I’m sure we’ve all heard ... WIIFM, which of course stands for ‘what’s in it for me.’ And I always say at the end of the day that’s really what makes people tick. They want to know, ‘Why should I cooperate with you; Why should I go along with your plan; Why should I care?’”

— Sarita Maybin, communications expert and Thursday keynote speaker

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■ SECURING YOUR SCHOOLS INSIDE AND OUT WEBINAR

DEC. 7 | 12 p.m.

Securing our schools is as complex as it is urgent. Members of the WASB Insurance Plan will present a complimentary webinar on securing school property and buildings. Attendees will learn about external security, including the theft of catalytic converters, and internal security, including managing visitors and securing school entrances. *No registration required. Visit WASB.org for the link.*

■ ONLINE WORKSHOP: RUNNING EFFECTIVE SCHOOL BOARD MEETINGS

DEC. 13 | 12 p.m.

All school boards conduct their business in similar meetings. However, the effectiveness of their meetings can vary widely. How a board conducts its meetings can impact the board’s success in moving the needle on student achievement. In this online workshop, an experienced WASB school attorney reviews the role of the board president in running the meeting. They also review board member roles as well as how to structure meetings to conduct an effective board meeting. *Registration is required.*

■ RECURRING WEBINAR:

WASB LEGAL AND LEGISLATIVE VIDEO UPDATE

DEC. 14 | 12 p.m.

WASB attorneys and government relations staff provide a complimentary monthly update on recent legal and legislative issues to answer members’ most pressing questions. *No registration required. Visit WASB.org for the link.*

WASB Directors Elected to 3-Year Terms

Please join the WASB in welcoming Randy Erickson of Prentice to the WASB Board of Directors and congratulating Barbara Herzog of Oshkosh, Cherie Rhodes of Slinger, Jim Bouché of Wausau and Brett Hyde of Muskego-Norway on their re-election. Sandie Anderson of Wild Rose, formerly an interim director, was also elected.

Thank you to the members in WASB regions 2, 5, 7, 10, 11 and 15 who joined us to elect their directors, who will begin

their three-year terms in January at the State Education Convention.

Our incoming Region 2 director, Erickson, is president of the Prentice School Board, where he has served since 1993. He has reached Level 5, the highest possible, in the WASB Member Recognition Program.

The WASB thanks Capt. Terry McCloskey of the Three Lakes School Board for his service as Region 2 director. □

SAVE THE DATES...

SCHOOL LAW CONFERENCE | FEBRUARY 23, 2023
DAY AT THE CAPITOL | MARCH 22, 2023

8 Board Members Achieve Level 5 WASB Recognition

Congratulations to the following school board members who achieved Level 5 recognition — the highest tier possible — this year in the WASB Member Recognition Program. Members earn points for participating in WASB activities, including attending events, serving on committees and serving as a delegate to the WASB Delegate Assembly.

- **Mike Zimmerman**, Lac du Flambeau #1
- **Bob Green**, Middleton-Cross Plains Area
- **Kenneth Harter**, Oconto Falls
- **Tom Weber**, Sun Prairie Area
- **Mark Kryshak**, Tomorrow River
- **John Bohonek**, Hustisford
- **James Bays II**, Adams-Friendship
- **Richard Fink**, Mayville



Mike Zimmerman of the Lac du Flambeau School Board is recognized by WASB Executive Director John Ashley at the Region 2 Fall Regional Meeting in Minocqua in October.



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What Does the Election Mean for Public Schools?



Divided government to continue into 2023-24 session

Perhaps the biggest news coming out of the Nov. 8 election was that incumbent Democratic Governor Tony Evers won a second four-year term.

Evers' victory prevented Republicans from capturing single-party control of Wisconsin's state government. It will also enable him to continue to use his veto pen effectively to block legislation to which he objects.

The next biggest news was that legislative Republicans added slightly to their majorities in both houses but narrowly missed capturing a two-thirds supermajority in both houses. Gaining such a supermajority would have enabled legislative Republicans to override a gubernatorial veto with solely GOP votes.

In the state Senate, Republicans picked up one seat, getting them to 22 seats and a two-thirds majority. In the state Assembly, they needed five seats to gain a similar majority. As of this writing, Republicans appear to have a net gain of three Assembly seats and thus will fall two seats short of gaining a two-thirds, "veto-proof" majority.

The Republicans' gains were not unexpected, as they were running under new district maps drawn by Republican legislative leaders that

were ultimately approved and put in place by the state Supreme Court.

On the state Assembly side, Republican Speaker Robin Vos survived both a primary challenge and a write-in effort and will return as the Assembly leader. On the state Senate side, Republican Majority Leader Devin LeMahieu will return, having secured a two-thirds supermajority in the upper house.

This sets up the potential for a divided government scenario similar to last session, featuring a strained relationship coupled with a lack of trust between the governor and legislature. Last session, this led to a situation where legislators just worked on legislation on their own and sent them to the governor to be vetoed as evidenced by the record number of vetoed bills.

Over the past two years alone, Evers has vetoed 126 Republican bills, breaking a nearly century-old record. Several of those vetoed bills would have made significant changes to preK-12 education. This includes bills that, among other things, would have massively expanded eligibility for private school vouchers, banned instruction of certain concepts, required school boards to post every bit of instructional material by grade level and subject, and created a

so-called "parents bill of rights" that would have allowed parents to sue school boards for infringing on the rights of parents outlined in the bill.

In a sense, the significance of Evers' victory is not so much for what it will let Democrats accomplish but for what it will let them prevent and how it will keep them at least somewhat relevant.

The outcome of the governor's race may also slow the push for two school systems — one public and another private — in Wisconsin.

Although Tim Michels will not be advancing his plan to expand vouchers, including increasing voucher amounts and removing income eligibility limits, it is assumed legislative Republicans will advance similar proposals. They will be prodded by several outside groups, including the newly formed Wisconsin Coalition for Education Freedom, which includes School Choice Wisconsin and its political arm, School Choice Wisconsin Action. Other such groups include the American Federation for Children, Americans for Prosperity, the Wisconsin Institute for Law and Liberty, the Badger Institute, online learning provider K-12, and the Wisconsin Manufacturers and Commerce.

That coalition plans to develop a comprehensive education agenda

The outcome of the governor's race may also slow the push for two school systems — one public and another private — in Wisconsin.

Many new faces in the Legislature for both parties (including former school board members) means **there is at least the potential for change.**

they hope to see advanced in the upcoming legislative session. Additionally, the partnering organizations have pledged to work in concert to “educate” the public about the state of education in Wisconsin, the benefits of school choice for families and what they believe a successful path to reform looks like moving forward. Expect that plan to focus heavily on expanding vouchers and other options for private education. Expect Evers to oppose it and veto it if it reaches his desk.

The WASB’s legislative agenda, adopted by the WASB Board of Directors at its November meeting, includes as 2023-25 state budget priorities:

- Providing school districts with, at minimum, inflationary increases in spendable resources and maximum flexibility to direct those dollars as needed at the local level;
- Increasing special education categorical aid with a goal to eventually reimburse 90% of prior year eligible costs; and
- Creating a categorical aid for school-based mental health services that is not limited simply to covering school district expenditures for school social workers.

Heading into the debate over the 2023-25 biennial budget, the state should have more than adequate resources to provide additional funding to schools. The state ended its fiscal year on June 30, 2022, with a record positive balance of \$4.3 billion. The report also confirms that Wisconsin has a record \$1.73 billion in its Budget Stabilization Fund, or “rainy day fund.”

Given the availability of state resources, it is a bit disheartening that state leaders have been unable to identify a common vision for what we want public education to be or achieve. Politics has increasingly become more about “who gets the credit” and “who gets the blame” than working together to solve problems.

If history repeats itself, we can expect the governor to submit a state budget for schools that will have little support in the legislature. We can expect the GOP legislative majorities to continue to push for mandates to change reading instruction statewide, a “Parental Bill of Rights,” further expansion of taxpayer-subsidized vouchers and a continued focus on so-called “culture war” issues (critical race theory, policies related to transgender students) that will have little support in the governor’s office.

Reading instruction seems to be one issue where everyone agrees we need to do better, but politics and

inflexible philosophies have thus far prevented state leaders from being able to work together to reach a consensus.

The Assembly Education Committee will have a new chairperson in January due to the retirement of state Rep. Jeremy Thiesfeldt. One potential candidate to replace Thiesfeldt is state Rep. Robert Wittke, a former president of the Racine Unified School Board. Wittke has said his focus in the next session will again be on improving reading scores in Wisconsin’s schools. Wittke has also indicated that he supports passing a “Parental Bill of Rights.”

A new legislative session provides some reason for hope. Many new faces in the Legislature for both parties (including former school board members) means there is at least the potential for change. Fresh off his reelection, the governor may look to work harder at establishing some type of working relationship with legislative leaders and vice versa.

School leaders will play an integral role in building trust with their state lawmakers to ensure that our public schools receive the support that they need from the state to navigate the challenges related to staffing shortages, high inflation, etc. The WASB will be here to support you in this role. Our students are counting on all of us to come together to work for their futures. ■



Frequently Asked Questions About School District Community Foundations

Parents of students and other community members often wish to marshal their resources in support of the work of school boards and the advancement of interests in education within their community. School boards are expressly authorized under Wisconsin law to accept gifts and grants of “furniture, books, equipment, supplies, moneys, securities, or other property, real or personal, used or useful for school research and educational purposes.” according to Wis. Stat. § 118.27(2).

One way community members can support their local school districts is through the organization and operation of a school district community foundation (SDCF). This Legal Comment will help school board members understand these foundations by addressing frequently asked questions about the organization and operation of a SDCF.

What is a SDCF?

An SDCF is an independent, non-governmental legal entity organized by one or more members of the community for a specific purpose, and the SDCF works to advance this purpose in accordance with its organizational rules and bylaws. The organizational purpose(s) of the SDCF typically include providing assistance and support to the school board and/or the educational enrichment of the students,

staff and residents of the school district. As an independent legal entity, the SDCF has the power to make and amend corporate bylaws, hold title to property, enter into contracts, incur liabilities, borrow money and otherwise engage in activities appropriate for the conduct of its business and affairs.

How is a SDCF organized?

SDCFs are most commonly organized as non-stock corporations under Chapter 181 of the Wisconsin Statutes. The following is a general overview of the process for the organization and manner of operation of a SDCF as a Wisconsin non-stock corporation.

An SDCF is initially organized by one or more members of the community serving as “incorporator.” The SDCF comes into existence as a non-stock corporation upon filing by the incorporator(s) of the Articles of Incorporation with the Wisconsin Department of Financial Institutions. Among other things, the articles must include general information about the SDCF, such as the name of the SDCF, the mailing address of the SDCF, a statement regarding whether or not the SDCF has members, and a statement regarding the purpose of the SDCF.

The rules for governance and management of the affairs of the corporation not otherwise stated in the articles appear in the corporate bylaws. Except for decisions (if any)

reserved for the members, management of the SDCF is handled by, or under the direction of, its board of directors. The board is to consist of not less than three persons. The terms of members of the board are determined by the articles or bylaws.

The board of directors and members (if any) typically hold an organizational meeting following the filing of the Articles of Incorporation. At this meeting, the bylaws are adopted, the membership of the board is established or confirmed, the corporate officers are elected and other organizational matters are addressed. After the initial meeting, the members (if any) and the directors meet annually with additional regular or special meetings held or called in such a manner as may be provided by the bylaws.

The officers of the corporation implement the decisions of the board. The bylaws designate the positions and duties of the officers. The positions generally include a president, secretary and treasurer. Depending on the size, scope of operations and needs of the SDCF, the officers of the corporation might also include a chief executive officer, a chairman of the board and/or other managerial office to assist the board and actively direct day-to-day activities. Officers are typically elected by the board of directors at the corporation’s annual meeting.

One way members of communities can support their local school districts is through the organization and operation of a school district community foundation (SDCF).

SDCFs established as non-profit organizations and operated exclusively for charitable and educational purposes can often qualify for tax-exempt status.

■ In what ways can a SDCF support the school district?

Here are some examples of ways in which a SDCF can provide support, resources and assistance to the school district and its students:

- Donate supplies, furnishings or equipment to the school district.
- Sponsor programs, lectures, school trips or similar types of educational events for the benefit of students and/or residents of the school district.
- Establish and administer a fund for the award of scholarships or educational grants.
- Provide for disbursement of funds transferred to the SDCF for administration by the school board pursuant to Wis. Stat. § 118.27(3), which requires the school board and the SDCF to agree in writing at the time of the transfer to the following:
 - The community foundation agrees to make disbursements from and of the gift or grant to the school board upon the written request of the school board;
 - The school board retains control over the manner in which any such disbursement is used;
 - The school boards' use of any such disbursement shall be consistent with the intent of the donor of the gift, bequest or endowment and with the agreement between the school board and the community foundation; and

- The school board exercises its rights over the use of each such disbursement in accordance with the law applicable to trust investments.
- Spearhead the solicitation and collection of pledges and fundraising for school district projects or purchases.
- Establish an endowment fund.

■ How does a SDCF raise funds?

Funding for the operation and activities of the SDCF can be raised in a variety of ways. Here are some examples:

- The SDCF can raise funds through dues and assessments of its members. (Since the SDCF is a voluntary, non-profit organization, this will likely not be a means of securing significant funding.)
- The SDCF can conduct or sponsor fundraising activities. For example, the SDCF could sponsor an annual golf outing, operate concession stands at school district events, or sponsor lectures or programming and charge admission fees.
- The SDCF can solicit and receive gifts, memorials and bequests from members of the community.
- The SDCF can apply for grants that may be available through government or other foundations to support particular educational projects or programming.

The measure of the power and impact of the SDCF within the community is often directly related to successful and sustained fundraising.

This, in turn, often depends on the level of commitment and effort of the members and volunteers of the SDCF.

■ Are contributions to the SDCF tax-deductible? Is income of the SDCF tax exempt?

SDCFs established as non-profit organizations and operated exclusively for charitable and educational purposes can often qualify for tax-exempt status under Section 501(c)(3) of the Internal Revenue Code. By qualifying for this status, income of the SDCF (other than any "unrelated business income") is exempt from income taxation, and contributions to the SDCF qualify as deductible charitable contributions by the donors.

In order to qualify for Section 501(c)(3) status, the SDCF must be both (i) organized exclusively for charitable and educational purposes as defined under tax rules and regulations, and (ii) operated exclusively for such tax-exempt purposes. Political campaigning and legislative lobbying by the 501(c)(3) organization is restricted. Upon dissolution, the remaining assets of the 501(c)(3) organization must be distributed for a tax-exempt purpose.

The SDCF may be required to file an application for recognition of 501(c)(3) exemption with the IRS. The SDCF may be required to provide information to enable the IRS to determine whether the SDCF is to be recognized as a public charity (rather than a private foundation). In addition to furnishing documentation confirming tax exempt status as a public charity, the SDCF may be required to file annual

returns with the IRS.

Once organized as a 501(c)(3) organization, the SDCF must be operated in accordance with its organizational documents and applicable rules and regulations of the Internal Revenue Code. Given the strict requirements under federal law for qualification and maintenance of 501(c)(3) status, and the desirability of securing such status to facilitate fundraising and minimize tax exposure, it is important that the SDCF receive professional advice and assistance with respect to its organization and ongoing operation as a tax-exempt organization.

Conclusion

The successful organization and operation of a SDCF requires strong leadership and committed participation of members of the community. The organization of the SDCF should be carefully structured and operations should be in conformity with its organizational documents and requirements of law. Professional advice and assistance should be secured as needed. Good communication between the SDCF and the school board is essential. The school board should review applicable policies that might govern its rela-

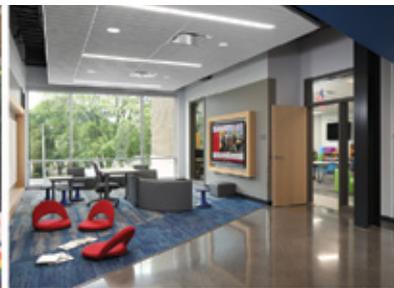
tionship with an SDCF, such as policies on facility use, outside sponsorships and student scholarships. A well-organized and operated SDCF can provide meaningful assistance and support to school boards and advance the educational enrichment of the students, staff and residents of the school district. ■

**This Legal Comment was written by Michael J. Julka, Brian P. Goodman and William L. Fahey of Boardman Clark, WASB Legal Counsel. For related articles, see Wisconsin School News: "Gifts and Donations to the School District" (Nov. 2014); and "Administration of Restrictive Scholarship Trusts" (Dec. 1978).*

Legal Comment is designed to provide authoritative general information, with commentary, as a service to WASB members. It should not be relied upon as legal advice. If required, legal advice regarding this topic should be obtained from district legal counsel.



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