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Official publication of the

## Attracting & Retaining

Ideas for overcoming today's teacher shortage





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**John H. Ashley**  
Executive Editor

**Sheri Krause**  
Director of Communications

**Shelby Anderson**  
Editor

## ■ REGIONAL OFFICES ■

122 W. Washington Avenue  
Madison, WI 53703  
Phone: 608-257-2622  
Fax: 608-257-8386

132 W. Main Street  
Winneconne, WI 54986  
Phone: 920-582-4443  
Fax: 920-582-9951

## ■ ADVERTISING ■

608-556-9009 • tmccarthy@wasb.org

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## Wisconsin's Reading Scores Trending Down

Recently released results from the 2017 National Assessment of Educational Progress (NAEP) show reading scores of Wisconsin's fourth-grade students took a dip.

Wisconsin fourth-grade students averaged 220, which is down four points from the 2015 test. Wisconsin fourth-grade black students ranked 49th, which is third from last in the nation. Results also show that 65 percent of Wisconsin students were not proficient in reading. Only 8 percent scored as advanced.

Other findings show that all of the state's minority groups, special education students, and students with disabilities scored below the national average in their peer groups.

Nationwide, results indicated a widening gap among the lowest and highest achieving students. Results showed that the bottom 25 percent of students performed worse than they did on the 2015 test while the top performing students improved. The 2017 NAEP results also found that about 40 percent of fourth- and eighth-grade students were considered proficient in math or reading. □

## Wisconsin Principals of the Year Recognized

The Department of Public Instruction and Association of Wisconsin School Administrators recognized three Wisconsin principals for their excellence in school leadership:

- **Mike Kruse**, principal at Stoughton High School
- **Justin Szews**, assistant principal at Lakeland Union High School in Minocqua
- **Scott Walter**, principal at Riverside Elementary School in the Menomonee Falls School District

Mike Kruse was named secondary principal of the year. In a letter of recommendation, school counselor Ann Cook said, "He has increased staff morale and school spirit exponentially. He demands the best, but does so in a way that is motivating and affirming."

Justin Szews was recognized as assistant principal of the year. A fellow administrator called Szews a "servant leader" who gets into the trenches. "He builds relationships with all our students and coaches them up if they are not reaching their potential. He earns their respect by being fair and consistent with school expectations."

Scott Walter was honored as elementary school principal of the year. Walter focuses staff on analysis and problem solving, partnerships, and a strong culture for learning. Through those efforts, the school "exceeds expectations" on 2016-17 school report cards and has gained the trust of parents and the community. □

### STAT OF THE MONTH

# 34<sup>th</sup>

**Ranking of Wisconsin fourth-grade students** on the reading test of the National Assessment of Educational Progress, the state's lowest ranking to date.

*Source: Wisconsin Reading Coalition*

## U.S. Behind Peers in Education Spending

The Organization for Economic Cooperation and Development (OCED) found that during 2010-14, the nation's spending on public education declined 3 percent. This may not sound significant, but, during that same time, the OCED found that average education spending in the world's developed countries increased, on average, 5 percent.

The OCED found that per-pupil spending in some nations rose at an even higher rate. For example, between 2008-14, educating funding increased 32 percent in the

United Kingdom and 27 percent in Portugal.

"Overall (U.S.) education spending has been cut quite severely in the last few years," Andreas Schleicher, who heads the OCED directorate that issued the report, told the *Hechinger Report*. "That clearly puts constraints on the environment you have for learning."

However, the U.S. still spends more per student than most other countries. The U.S. spent \$11,319 per elementary school students in 2014, compared to the OCED average of \$8,733. □



## Moving Forward

**N**ow that the dust has settled from last month's elections, I want to formally welcome our new school board members. I, along with other WASB staff and our directors, had the opportunity to meet many of you at our New Board Member Gatherings in April. If you're a new board member and weren't able to attend, I encourage you to learn more about your new role and how the WASB can support you.

To get started, visit our webpage "Basic Legal and Governance Resources for School Board Members" under the "Services & Resources" section at [WASB.org](http://WASB.org). You'll find a host of resources along with recorded webcasts.

With the April election behind us, it's time for new and experienced school board members to continue making progress. Budgeting for the next school year is underway, graduation day is just around the corner, and annual school board meetings are coming up.

As school leaders, you know that leading a public school district comes with challenges. We must remain focused on continuous improvement. Our upcoming events are geared towards helping our school leaders move their districts forward. The Spring Workshops, a special School Safety Seminar and the Summer Leadership Institute will offer

specialized training for school board members.

Provided in partnership with the state's CESAs, the Spring Workshops will consist of 12 evening workshops held throughout the state May 8-17. The workshops will take a deeper dive into the legal roles and responsibilities of board members. We encourage new board members to attend these to learn more about the laws that directly impact board service. The workshops will serve as a good refresher for experienced board members as well.

In July, the WASB will be hosting a special School Safety Seminar in conjunction with the Summer Leadership Institute in Green Bay. The first day, Friday, July 13, will focus on school safety and feature sessions on school emergency plans, security audits, crisis communication, early brain and child development, mental health issues, and more. The second day, Saturday, July 14, will be the traditional WASB Summer Leadership Institute with two tracks of programming for new and experienced members. The day will include presentations on school finance, school law, governance through policymaking, superintendent evaluations, strategic planning, and more. On Friday evening, the WASB will be hosting a dinner featuring an entertaining keynote by Jim Draeger of the Wisconsin Historical Society.

Members can register for either event or both events at a discounted rate. Learn more at [WASB.org](http://WASB.org).

As school leaders, we also must remain focused on advocacy. Our experienced school board members have provided especially strong voices for public education in recent legislative sessions. Their advocacy efforts have helped us get positive results for public education. I want to encourage new school board members to stay up to speed and be engaged on the latest education-related bills and debates taking place in the state Capitol. Our government relations team keeps school board members informed with its Legislative Update blog at [wasblegupdate.wasb.org](http://wasblegupdate.wasb.org). You can also find updates through our social media accounts. Connect with us on Twitter (find us @WASBWI) and Facebook (search for "WI School Boards") to get the latest updates.

I'm excited to have so many passionate people join our ranks as school leaders. Serving on a school board is challenging, but it can also be incredibly rewarding. School leadership is not an easy job and I thank our school board members and district administrators for all that you do for our students. As you move forward, please remember that you can find support and resources at the WASB. We are here for you. ■

As school leaders, you know that leading a public school district comes with challenges. We must remain focused on continuous improvement.





*Mineral Point Elementary School  
new teacher Jenny Singer shares  
a laugh with a student.*





# Attracting & Retaining

Ideas for overcoming today's teacher shortage | *Kym Buchanan*

**W**e need to attract more teachers into Wisconsin schools. We also need to retain them better. We can do that partially by treating them as professionals, which includes trusting them with interesting problems to tackle. In fact, the current crisis is an opportunity to revisit what we want and need from K-12 schools and thus, teachers.

## ■ The Talent Shortage

We may be witnessing one of the worst hiring seasons in a generation. There just aren't enough good teachers looking for jobs in Wisconsin.

Principals report dismay at the low numbers and tepid qualifications of applicants in some specialties. In specialties where it's been challenging to recruit historically, prospects are grimmer than ever (*e.g.*, special education, technical education). Furthermore, loyalty seems lower, anecdotally. Significant differences in compensation and other incentives compel teachers to change districts, sometimes days before the start of a term.

I have a distinct perspective on this problem. I lead one of the oldest and largest teacher preparation programs in the state at the University of Wisconsin-Stevens Point (UWSP). We recently launched our EdD in Educational Sustainability in which our students study how organizations like schools can be more resilient. I also participate in multiple organizations in teacher preparation. That includes serving on the Professional Standards Council, which advises the State Superintendent and the Department of Public Instruction (DPI). Finally, I have two daughters in local schools, and I worry about the quality of their education.

So far, we've seen many triage and low-threshold solutions. For example, districts have transitioned many substitute teachers into regular classroom teachers. (That's created a new problem: a sub shortage.) In June 2017, the DPI implemented emergency rule changes to give districts and licensing authorities more freedom.

Our School of Education is doing our part, including reducing obstacles in our traditional pathway (*e.g.*, more test waivers). We've also

We may be witnessing one of the worst hiring seasons in a generation. There just aren't enough good teachers looking for jobs in Wisconsin.

# In the 21st century, the well-paying jobs require abilities that can

obtained a grant to develop new, innovative pathways to license working professionals in our region, whether they need to complete a baccalaureate degree or a post-baccalaureate induction.

To be clear, preparation programs haven't suddenly awakened to these issues. For years, a variety of programs around the state have offered alternative, yet, robust pathways (including UWSP). What's changed is that districts are more directly recruiting candidates for these programs. Some districts are even exploring funding candidates' enrollment or incentivizing completion.

## ■ New Teachers, New Licenses

Imagine a scenario in which a principal knows that the stay-at-home parent volunteering in their building has a non-teaching BA and a dream of rejoining the workforce. Similarly, imagine a district administrator who knows that one of their best student services paraprofessionals with an

associate's degree seems ready for a classroom of their own. Both these individuals could grow through alternative pathways like ours.

This spring, the DPI is presenting further, permanent rule changes to the state Legislature (explained on page 9). Based on what our lawmakers decide, the DPI will lead a multi-year process of revising the outcomes for teacher preparation programs. The licenses we grant the UWSP Class of 2023 will look very different from the Class of 2018. In particular, we anticipate new majors/licenses with a greater breadth of content over a deeper range of grades/ages.

Let's step back for a moment and consider what those scenarios and anticipated changes say about our profession. Our ship has so many leaks that we're desperate for any patch we can find. Principals have to scramble just to achieve the basic win of filling one position, one at a time. More clearly qualified individuals will become teachers, but so might

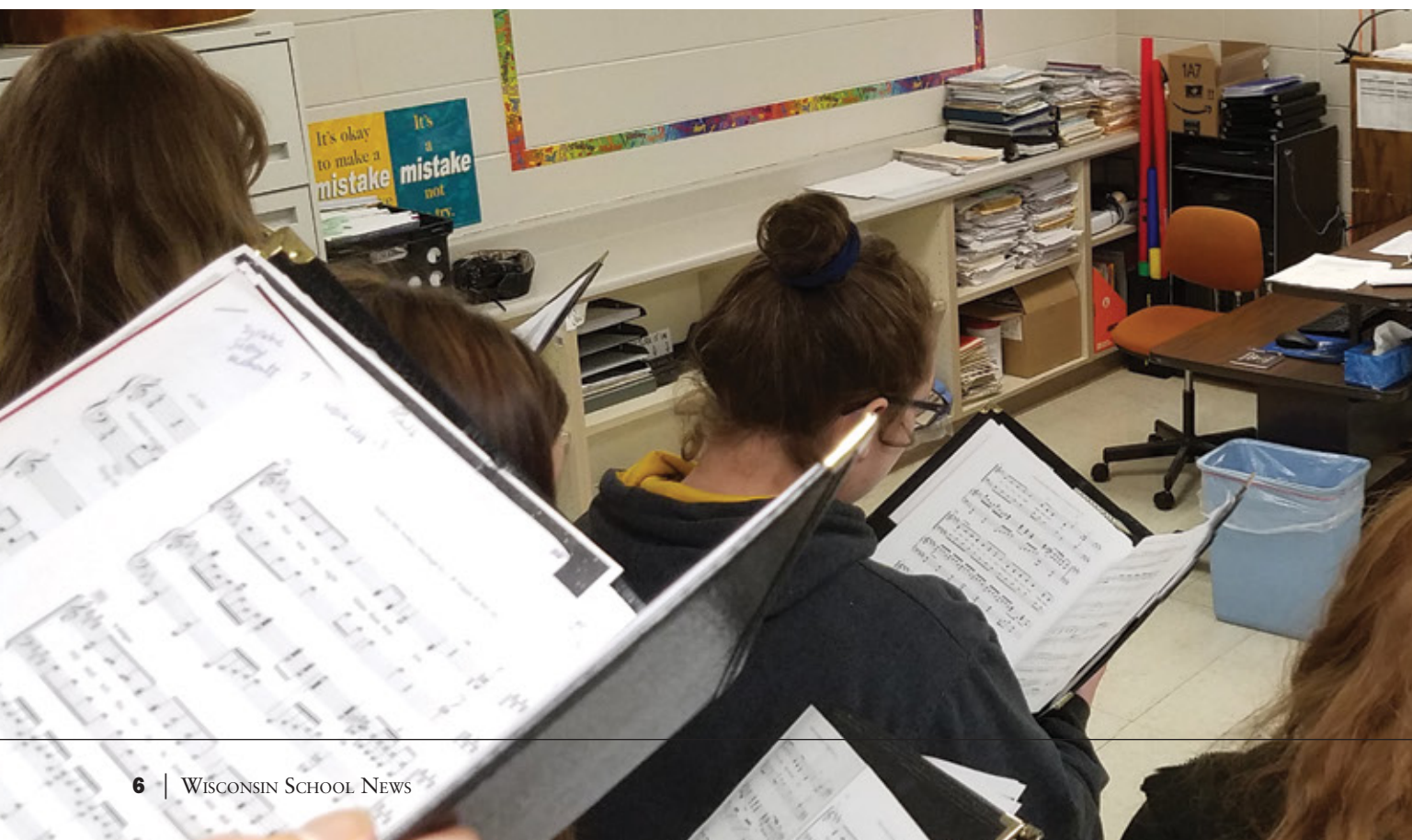
some marginally or under-qualified individuals. Schools seem just a few steps away from recruiting any reasonable adult who we can entrust with children.

## ■ The Talent Retention Challenge

I bring another distinct perspective to these issues, because I'm a scientist who studies human potential. Recently, I've been grappling with issues like how professionals find satisfaction and joy in their jobs, and how organizations can foster loyalty and growth in their employees.

We know that compensation is a key factor in attracting and retaining teachers. The talent shortage is driving up salaries, so that may help. But research and common sense show that many other factors impact employee satisfaction and loyalty. The ultimate influences on retaining a teacher may include the following.

- District and building leaders, especially those with mutual





# only be assessed by professional educators, not standardized tests.

trust and respect for teachers.

- The workplace climate, *e.g.*, positivity, a shared narrative of success.
- Having the freedom to do the work teachers regard as interesting and meaningful (*e.g.*, the intellectually fun problems that originally drew them to a discipline and which engage students).
- How teaching is regarded and talked about by politicians and society.

If we just informally audit those influences, we're in even bigger trouble. I've had countless conversations with teachers who feel confusion, frustration, and even anger because they see teaching being de-professionalized. They acutely feel a lack of trust and respect in many ways. For example, some of the public rhetoric around standardized tests implies that we can't trust teachers to effectively teach and assess students.

## ■ Pivoting to the Future

The test craze is especially ironic, because we're chasing anachronistic ideals. In the 21st century, the secure, well-paying jobs require abilities that can only be assessed by professional educators, not standardized tests. I mean abilities like empathy, cultural competence, creativity, and collaboration. In contrast, standardized tests measure abilities that are growing obsolete as automation spreads, like memorizing facts and following a script.

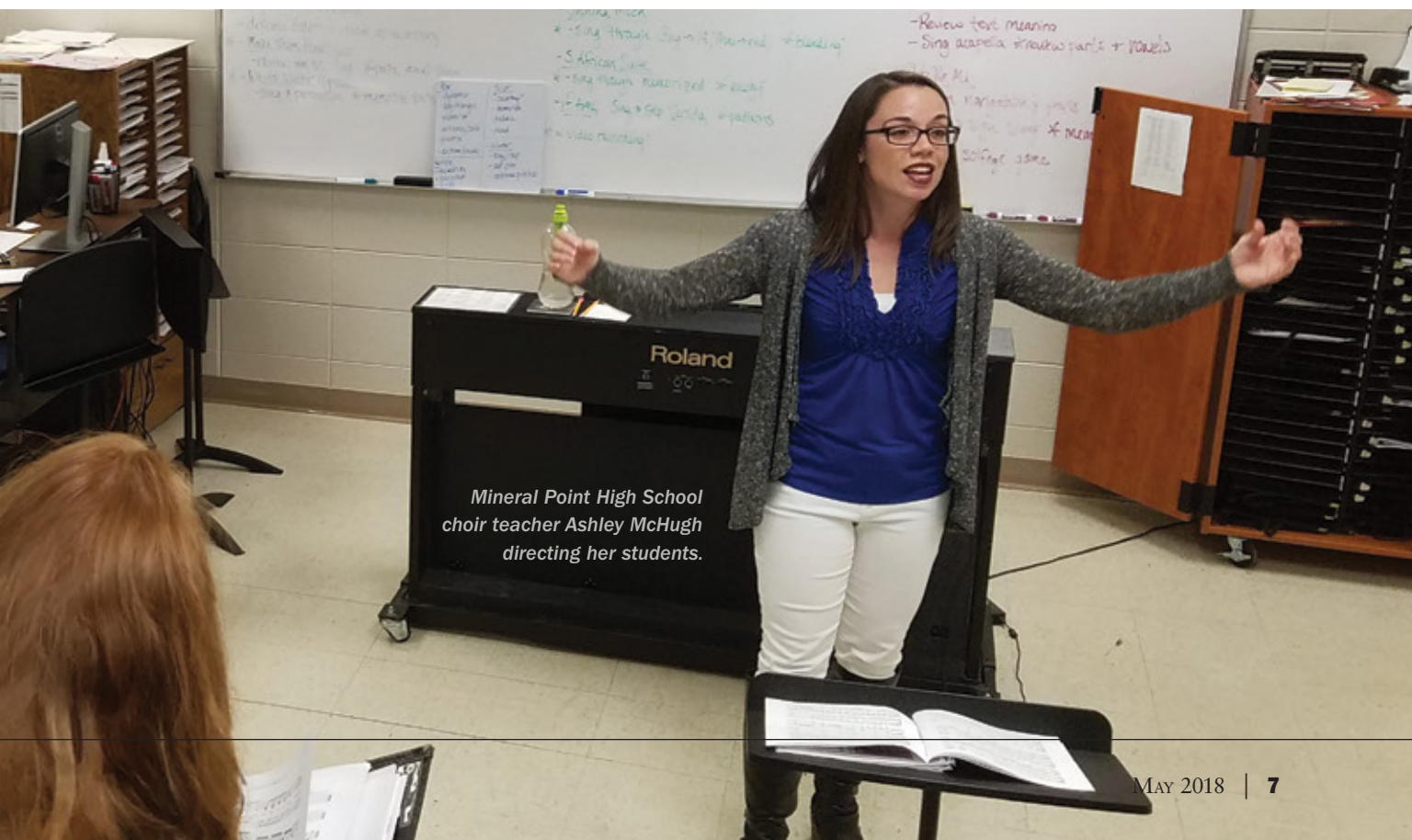
However, in that irony I find inspiration for action. If we want to retain teachers, we must give them more respect and trust. They want to teach towards meaningful outcomes, they want to feel that they're doing right by their students. Teachers would feel more respected, engaged, and impactful if they could focus more on preparing students for 21st century careers, not just the Forward Exam.

For better or worse, we're going to change preparation program

outcomes and district hiring practices. Prep programs like mine will do at least some restructuring to align with new DPI program outcomes. As districts hire during a talent shortage, at least some hiring decisions will be compromises on fit and readiness. So at least some teachers will need significant post-hire professional development.

In all that churn, perhaps the craziest thing we can do right now is rethink our K-12 student outcomes. Yet it may also be the smartest thing.

After all, in Wisconsin, education is far from alone in facing a talent shortage. The growth of many market sectors, especially high tech and health care, is constrained by talent. We need more young adults with stronger 21st century abilities. We could better serve the state by focusing on those abilities and by trusting teachers to design and assess the curriculum to match. At the same time, we'd improve teacher retention.



Mineral Point High School  
choir teacher Ashley McHugh  
directing her students.





*Mineral Point Elementary School teacher Katie Hughes works with students.*

## ■ Change Takes Resources

A commitment to pivot to more meaningful outcomes would force us to prioritize the qualifications that matter, both in prep programs and hiring. But real change takes real resources.

In any organization, leaders' time and attention are zero-sum. This means that a talent shortage steals energy from the long-term, hugely important work of leading improvement and innovation. If principals and senior teachers have to scramble just to hire junior teachers and back-stop their job performance, they don't have the capacity to pivot in the way I've described.

Prep programs like mine at UWSP already face many challenges of our own around enrollment, budget, and attracting and retaining our own talent pool. I'm not sure how my faculty would respond to a bold call to help rethink K-12 student outcomes in the midst of everything else.

But I'm certain that both university faculty and K-12 teachers are

weary of responding to one crisis after another, of just patching and jerry-rigging the status quo. We need a new strategy.

Some educators argue that the current crisis is partly manufactured by state funding and policies. Be that as it may, our best argument for more resources will always be what's best for K-12 students. That includes curriculum that better prepares them for 21st century careers. It also includes teachers who stay in the same schools year after year, forming long-term relationships with students, families, and the community.

## ■ Never Waste a Good Crisis

I've sketched an argument for a new strategy and new resources. We need to attract and retain more teachers, and we can do that partly by trusting them with interesting problems

to solve. Let's use the current crisis to revisit what we want and need from K-12 schools and teachers.

As a teacher, I try to always be ready for this question from a student: Why are we studying this? Maybe in the midst of this crisis, we can actually improve our answer to our students, and to ourselves. ■

*Dr. Kym Buchanan is the Associate Dean of the School of Education at the University of Wisconsin-Stevens Point.*

*Photo credits: Joelle Doye, communications director, Mineral Point Unified School District.*





# New Law Makes Changes to Teacher Licensure

**2017 Wisconsin Act 206** lays out changes to lifetime licensure and grants to assist high school teachers to qualify to teach dual enrollment course

In April, 2017 Wisconsin Act 206 went into effect, which made substantial changes to teacher licensure. Details on these changes are detailed below.

The Department of Public Instruction (DPI) has been maintaining a website tracking the recent changes to educator licensing. *From the DPI website...*

The proposed rule changes (based on 2017 Wisconsin Act 206) are meant to make the licensing process more understandable and increase flexibility, while maintaining high-quality staff in Wisconsin schools. Key aspects of the proposed rule are:

**Updates, clarifies and makes consistent the program approval process for both traditional and alternative route programs.** The new rule creates a standard, streamlined approach to approving educator preparation programs, while ensuring these programs provide our educators with high quality, rigorous training.

**Simplifies the licensing process.** The new rule creates a tiered approach to educator licensing, which will allow educators to obtain a license fitting their unique training and experience. Under this approach:

- Tier I licenses are of limited duration and authorization, so school districts can meet short-term or specialized needs.

- Tier II licenses are provisional licenses which allow new educators, out-of-state license holders, and other highly qualified individuals to start the progression to a life license.
- Tier III licenses are life licenses for educators.
- Tier IV licenses are optional master educator life licenses for educators who meet additional rigorous requirements for quality and effectiveness.

**Consolidates subject areas.** The new rule will provide districts and teachers more flexibility by preparing educators to teach entire subject areas instead of specialized subjects (e.g., science, social studies, music).

**Adds flexibility.** The new rule allows highly qualified license holders to add additional license areas, giving them access to new opportunities and helping school districts fill high demand assignments.

**Creates clarity.** The new rule uses standardized, simplified language and structure to make the rule clearer, more understandable, and shorter. As a result, the new rule is approximately two-thirds as long as the old rule.

For more information visit:

[dpi.wi.gov/policy-budget/administrative-rules/pi-34](http://dpi.wi.gov/policy-budget/administrative-rules/pi-34)

## MORE INFORMATION ON 2017 WISCONSIN ACT 206

This is taken from an edition of WASB's publication "New Laws."

► **Changes Affecting Lifetime Licensure.** 2017 Wisconsin Act 206 changes statutory requirements related to lifetime licensure of administrators, teachers, and pupil services professionals. The most significant changes include the following:

- The Department of Public Instruction (DPI) may issue a lifetime license to an individual who holds a qualifying provisional license if the individual has successfully completed 6 semesters of teaching, administrating, or pupil services experience, as defined by the DPI by rule. (Note: Under prior law, school districts that had employed the applicant were required to certify to the DPI that the semesters completed in that school district were completed successfully.)
- If an individual who holds a lifetime license is not regularly employed in education, as defined by the DPI by rule, for 5 or more consecutive years, the DPI is required to invalidate the lifetime license. (Note: Under prior law, the DPI was required to invalidate the lifetime license if the individual was not actively

employed by a school district for 5 or more consecutive years.)

► **Dual Enrollment Credential Grants.** This new law creates and makes a \$500,000 appropriation for a grant program to assist high school teachers in covering tuition expenses for courses taken to meet the minimum qualifications necessary to teach dual enrollment courses. The grants will be administered by the Higher Educational Aids Board. The grants may be awarded to school districts, private schools participating in a parental choice program, and to independent charter schools. The grant recipient would then provide financial assistance to teachers who are seeking to qualify to teach dual enrollment courses.

The new law defines "dual enrollment programs" as programs or courses of study designed to provide high school students with the opportunity to gain credits in both high school and an institution of higher education, including transcribed credit programs or other educational services provided by contract between a school district and an institution of higher education.

The full text of this Act can be found at:

[docs.legis.wisconsin.gov/2017/related/acts/206](http://docs.legis.wisconsin.gov/2017/related/acts/206)

# It starts in the Board Room



Experienced school leaders discuss school board governance and offer advice to new school board members

## What do you wish you knew as a new board member?

► **Patrick Sherman:** I look back at my first year in 1991 and the thing that sticks in my mind is so much wasted time and effort in disagreement. I was elected in a very turbulent time in my school district. Lines were drawn between members, meetings lasted forever, and we ended in shouting matches too many times.

What I wish I knew then is that we need everyone on the same page to move the district forward. The majority rules, so you may lose on an issue but you just have to let that issue go and move on. Do not pre-judge someone because they are on the other side. You need to respect everyone's views. Listen closely to what they have to say on an issue. When a board listens to each other and treats each other with respect,

**LAST MONTH, NEW MEMBERS** joined school boards around the state. The first couple of months of service is an important time to learn and grow as school leaders. Whether you are a new or experienced school board member, it's important to stay focused on school governance issues. In this special article, experienced school board members and former school administrators offer advice to new school board members and discuss important school governance issues.

## SCHOOL BOARD PERSPECTIVE

### WASB PEER MENTORS



**Patrick SHERMAN**  
Genoa City /Lake Geneva UHS  
WASB Peer Mentor



**Larry DUX**  
Pewaukee  
WASB Peer Mentor



# Do not pre-judge someone because they are on the other side. You need to respect everyone's views.

— Patrick Sherman

then you will move forward together as a team for the betterment of the district.

► **Larry Dux:** As a new school board member there is a lot of information that is given to you either in advance of winning the election or shortly after you are sworn in. The first thing you want to do is to meet with the superintendent and the board president to get an overview of your role as an individual board member, the role of the full board and the role of the superintendent. This will be helpful in understanding how you can be effective in your role while maintaining strong working relationships with the other board members and the superintendent.

The basics that would be covered in these overview sessions would be the structure of the school board meeting agendas, Robert's Rules of

Order, Open Meeting Law, an overview of board policies, and the board annual calendar and cycles for routine updates and budget requests. There are some topics like the school funding formulas and the specifics for your district (primary, secondary and tertiary aide) that will take time to fully understand and the district business manager will need to explain those to you. It will likely take a full year for you to become full versed in all aspects of being a school board member.

## What can a new board member do to improve their governance and leadership skills?

► **Patrick Sherman:** To improve governance skills, a new board member needs to get to know their

fellow board members and listen to their opinions. Now, of course, you do not need to agree with every opinion and the new board member may have a stronger opposite opinion. If your fellow board members see that you respect them and really listen to them, they will do the same for you in return. You then can have frank and productive discussions on your school governance.

Guess what? By being elected you are now an educational leader in your community. That thought alone should make every new school board member want to improve their leadership skills. A new board member must be willing to put in the time and work to become a more productive leader. Read, watch WASB webinars and attend WASB functions. Be educated on issues on the board agenda before the meeting. If you

## WASB PEER MENTORING PROGRAM

**T**he WASB Peer Mentoring Program is a complimentary service for school board members — new and experienced. Whether you are new to the board, new to being a board officer or just would like an additional resource, WASB Peer Mentors are available for advice, support and guidance.

Mentors are available to listen to a board member's concerns and help them identify the problem.

Mentors can support a board member in understanding his/her primary role and responsibility, including:

- **Setting** a vision for the district,
- **Ensuring** accountability for the public,

- **Setting** district policies,
- **Providing** community leadership, and
- **Developing** effective board and superintendent relationships.

If you are interested in working with a Peer Mentor, visit [wasb.org](http://wasb.org) or contact Sheri Krause, WASB Communications Director, at [skrause@wasb.org](mailto:skrause@wasb.org) or 608-512-1705.

**WASB Peer Mentors:** Diana Bohman, Tomorrow River; Larry Dux, Pewaukee; Gabe Kolesari, Hamilton; Howard Kruschke, Saint Croix Central; Patrick Sherman, Lake Geneva; Tom Steiner, Trevor Wilmot (past board member); Gary Vose, Kettle Moraine



have questions on an issue, contact the district administrator before the meeting. Never try to show up the school staff at an open meeting. Lead by example.

► **Larry Dux:** The most significant things you can do to improve your governance and leadership skills are to develop respect and trust for the work that has been done by past board members and superintendents. It is easy to be critical of their decisions, but it takes time to fully understand the reasons for the decisions that were made and the factors that were considered.

If you have concerns or issues, it is advisable to ask questions so that you can learn about the issue and the work that was done. I would also encourage new board members to take full advantage of the educational offerings like the WASB Spring Workshops, and the Summer Leadership Institute. These educational programs are structured to help improve your knowledge and skills as well as provide opportunities to network with other school board members in your region and across the state. On a personal note, I found these sessions to be very valuable in my first year as a new board member and continue to attend as a WASB Peer Mentor.

#### How can experienced school board members help new board members?

► **Patrick Sherman:** The most important thing is to be welcoming to new members. Their vote counts as much as yours does. Thank them for stepping forward to serve their community. Answer their questions even if there are lots of questions.

**It is easy to be critical of [past board members] decisions, but it takes time to fully understand the reasons for the decisions that were made and the factors that were considered.**

— Larry Dux

Listen to them like you expect them to listen to you. If you have been a board member for a number of years, it is good to have new views at the board table. Be open to some new ideas and give them a fair hearing at the board table. I believe all board members should be mentors to new board members.

Now, I have described a perfect situation and I know full well this does not always happen. That is why we have the WASB Peer Mentor program. We are available to answer your questions or just there to listen to you.

If you are a new member reading this, I welcome you to community service. I thank you for stepping forward to serve your community and I ask you to always remember to

enjoy the journey of your school board service.

► **Larry Dux:** The experienced board members on your board or from other school districts can be very helpful in providing some of the key information about the functions and roles of school board members as well as the “historical context” for past decisions. Some school boards may actually assign a fellow board member to serve as a mentor, but if your school district does not have a formal mentoring program, you can contact any of the individuals who have volunteered to serve as WASB Peer Mentors listed (*see bottom of page 11*).

## DISCOVER Go365

There's a wellness and rewards program endorsed by the WASB that inspires your school administrators and faculty to live healthier lives for themselves and their families.

To learn more,  
call Jason Shanda at  
920-343-1731 or email  
[jshanda@humana.com](mailto:jshanda@humana.com)

Go365 is not an insurance product.  
Not available with all Humana health plans.

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## SUPERINTENDENT PERSPECTIVE



**Rachel SCHULTZ**  
WASB Consultant and  
former district administrator

### How can superintendents help support new school board members?

► **Rachel Schultz:** Some new board members may not want additional help while others actively seek it. So it is up to the superintendent to determine how to respond to each person's needs. However, most new board members do not fully understand the

complexities of the organization, the number of decisions that need to be made, or the role of the board in making decisions. Therefore, the response is really quite simple — treat them like a new student.

Help them become familiar with the board meeting protocol and preparation for the board meeting. Help them understand the current goals and plans that are already in place. Explain decisions that the board makes versus those that administrators make. Guide them through local policies and practices. Encourage them to ask questions, especially before a meeting so they can better understand how the past may affect the current issues on the table. Welcome them into the office. Be open, honest, informative and friendly so each new board member wants to become part of the team. Really, it is very similar to how a teacher welcomes a new student into a classroom to make them feel comfortable and ready to participate.

### As a former school administrator, what advice would you give to new school board members?

► **Rachel Schultz:** There are two parts to the answer to this question. The first part is to look internally and make sure you know yourself. Know your own beliefs, values and the reasons why you want to be part of public education. As a member of the board, you may need to explain how you voted or why you want more information on something that is before the board. Often it's easier to express yourself in public if you have a good understanding of yourself and your reasons for becoming a school board member.

The second part is external and involves decisions and issues brought before the board. It is a series of questions to ask yourself and they are similar to the questions a journalist uses — who, what, why, when and where. Although the specific questions can vary somewhat, the typical set of



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questions could be as follows: Who is affected by this decision (students, staff, public)? Why is this decision good for our students? What is the impact on the budget? When will this decision take effect (immediately or in the future)? Where does this decision help our vision, mission, goals or strategic plan? Ask these ahead of a board meeting, at the board meeting, or to yourself. The answers often help clarify the decision that is best for the district as a whole and should help reduce the amount of emotional discord that some issues bring forth.

### SCHOOL BUSINESS MANAGER PERSPECTIVE



**Roger PRICE**  
WASB Consultant and former  
school business official

**From the school business manager perspective, what should new school board members be cognizant of as they begin their service?**

► **Roger Price:** School business/operations is concerned with a wide spectrum of disciplines including finance, facilities, technology, enterprise services such as food services, human resources management, general operations and basically anything that is outside of the instructional process. New board members should take time to understand the fundamentals of how the district functions and ensure that all the district's work is being addressed to facilitate the effective operation of the school district.

Every educational decision has an impact on the financial and operational capacity of the school district.

Communication is critical to ensure that everyone — from the school board to the district staff to the parents, taxpayers and media — understands how a decision reflects on the educational mission of the district, capacity of the district to be successful, and expectations of the community.

The school board is responsible for leading the district; for helping the community define a vision for education; for designing the structure of the organization; for defining the rules, roles and relationships it believes will move the system toward the vision; and for being accountable for the learning results of this effort. True accountability depends on open decision making, community engagement and support, and receptivity to new ideas and constructive criticism.

#### **What school finance issues are important for new school board members to understand?**

► **Roger Price:** Each district has its own unique set of circumstances that affect the district's fiscal position and flexibility.

- Revenue limits, which cap the resources available to the district, control approximately 85 percent

of the district's access to resources (property taxes and general state equalization aid), are based on historical spending, and are affected by changes in local membership.

- A district's student membership, property value per pupil, shared cost, guaranteed values, and other factors are the main criteria used to determine the amount of equalization aid a district will receive.
- In addition, changes in the revenue limit formula, allowable increases per student, and the amount of the legislative allocation to K-12 education impacts available resources to be shared among school districts.

The budgeting process is a team effort involving the school board, the superintendent, the business official (where applicable), other district staff, and the community — and each has an important role to play. It is a cyclical, continuous process throughout the fiscal year and occurs in phases that include planning; budget development; budget presentation and approval; administration of the budget; and continuous fiscal assessment. ■

### WASB CUSTOMIZED LEADERSHIP SERVICES

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The WASB Customized Leadership Services can address a wide range of governance issues and/or help districts confront specific challenges and circumstances. From developing a vision and working on board-superintendent relations to developing a master plan, the WASB is here to help.

Frequently, districts discover that what they think is one issue is actually a combination of issues that requires a multi-faceted resolution. The WASB consultants have the ability to tap into a vast array of services and experience, putting them in a unique position to bring together a team of resources to address nearly any issue.

*For more information on the WASB Customized Leadership Services, contact the WASB for a free consultation.*



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# Characteristics of Successful School Boards

The Center for Public Education reports on what makes or breaks school boards

What makes an effective school board — one that positively impacts student achievement? From a research perspective, it's a complex question. It involves evaluating virtually all functions of a board, from internal governance and policy formulation to communication with teachers, building administrators and the public.

The National School Boards Association (NSAB) Center for Public Education examined indicators of school board effectiveness. From this research, it became clear that school boards in high-achieving districts exhibit habits and characteristics that are markedly different from boards in low-achieving districts.

In the most dramatic examples, researchers compared districts with similar levels of poverty and disad-

vantage to determine factors that separate high-performing districts from those with low performance. In many cases, these differences included the approaches taken by local school boards.

So, what do these boards do? Following are eight characteristics.

## 1. High Expectations, Clear Goals

Effective school boards commit to a vision of high expectations for student achievement and quality instruction and define clear goals toward that vision. Effective boards make sure these goals remain the district's top priorities and nothing else detracts from them. In contrast, low-achieving boards showed limited awareness of school improvement initiatives.

The research identified five specific district leadership responsibilities that positively correlated with student achievement:

- establishing a collaborative process to set goals;
- establishing nonnegotiable goals that all staff must act upon in at least two areas: student achievement and classroom instruction;
- having the board align with and support district goals;
- monitoring goals for achievement and instruction;
- using resources to support achievement and instruction goals.

## 2. Shared Beliefs and Values

Effective school boards have strong shared beliefs and values about what is possible for students and their



ability to learn. The same is true of the school system and its ability to teach all children at high levels.

In high-achieving districts, external pressures like poverty, lack of parental involvement and other factors were described as challenges to be overcome, not as excuses. Board members expected to see improvements in student achievement quickly as a result of initiatives.

In low-achieving districts, board members frequently referred to external pressures as the main reasons for the lack of student success and expected it would take years to see any improvements. Their reasons for pursuing change often were simple ones — to meet state mandates and avoid sanctions and a desire to not “have the lowest test scores” in the state.

### 3. Accountability and Focus

Effective school boards are accountability-driven, spending less time on operational issues and more time focused on policies to improve student achievement. Researchers found that high-performing boards focused on establishing a vision supported by policies that targeted student achievement.

In low-achieving districts, governance was characterized by factors such as micromanagement by the board; confusion about the appropriate roles for the board member and superintendent; and interpersonal conflict between the board president and superintendent. Other

factors included board member disregard for the agenda process and a lack of respect for the chain of command.

### 4. Strong Collaboration, Communications

Effective school boards have collaborative relationships with staff and the community. They also establish a strong communications structure to inform and engage both internal and external stakeholders in setting and achieving district goals.

In high-achieving districts, school board members could provide specific examples of how they connected and listened to the community. Board members received and shared information from many different sources, including the superintendent, curriculum director, principals and teachers.

By comparison, school boards in low-achieving districts were likely to cite communication and outreach barriers. Staff members from low-achieving districts often said they didn’t know the board members at all.

### 5. Data-Driven Toward Continuous Improvement

Effective school boards are data savvy. They embrace and monitor data, even when the information is negative, and use it to drive continuous improvement. Board members in high-achieving districts identified specific student needs through data and justified decisions based on that

## A DOZEN DANGER SIGNS

While the Center for Public Education study on successful school boards did not specifically focus on ineffective boards, following are 12 characteristics of such boards. Ineffective boards:

- Are only vaguely aware of school improvement initiatives and are seldom able to describe actions being taken to improve student learning;
- Focus on external pressures as the main reasons for lack of student success, such as poverty, little parental support, societal factors or low motivation;
- Make negative comments about students and teachers;
- Micromanage day-to-day operations;
- Disregard the agenda process and chain of command;
- Are left out the information flow and have little communication with the superintendent;
- Are quick to point to communication and community outreach barriers as reasons for poor student performance;
- Look at data from a “blaming” perspective, describing teachers, students and families as major causes for low performance;
- Have little understanding of the importance of staff development for teachers;
- Are slow to define a vision;
- Do not hire superintendents who agree with their vision; and
- Participate in little professional development together as a board.



data. Board members regularly sought such data and were not shy about discussing it.

Board members in low-achieving districts tended to greet data with a “blaming” perspective, describing teachers, students and families as major causes for low performance. In these districts, board members frequently discussed their decisions through anecdotes and personal experiences rather than by citing data. They left it to the superintendent to interpret the data and recommend solutions.

## 6. A Commitment to Aligning and Sustaining Resources

Successful school boards align and sustain resources to meet district goals and recognize the need to support high priorities, even during times of fiscal uncertainty. They saw it as their responsibility to provide professional development for teachers, administrators and other

staff despite budget challenges.

In addition to providing funding for professional development, board members were highly engaged in the process. They could cite specific examples of activities and describe how they linked to teacher training and board or district goals for students.

In low-achieving districts, however, board members said teachers made their own decisions

on staff development based on perceived needs in the classroom or for certification. Board members knew there was a staff development budget but were unsure if there was a staff development plan. In fact, the study noted board members frequently made disparaging remarks about staff development, calling it an ineffective strategy.



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**Successful school boards** take part in team development and training, sometimes with their superintendents, to build shared knowledge, values and commitments for their improvement efforts.

## 7. United Leadership

Effective school boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust. In successful districts, boards defined an initial vision for the district and sought a superintendent who matched this vision. They continually refined the vision through effective communication between the board president and superintendent and among board members.

In stagnant districts, boards were slow to define a vision and refine it over time. They often recruited a superintendent with his or her own ideas and platform who would develop solutions without board involvement. This proved to be a barrier to the board and superintendent being in alignment. In addition,

such boards frequently did not hold their superintendents accountable for goals.

## 8. Ongoing Professional Development

Successful school boards take part in team development and training, sometimes with their superintendents, to build shared knowledge, values and commitments for their improvement efforts. High-achieving districts had formal, deliberate training for new board members. They also often gathered to discuss specific topics.

Low-achieving districts had board members who said they did not learn together except when the superintendent or other staff members made presentations of data. They did not see professional

development as a priority.

The studies included in this report make it clear that school boards in high-achieving districts have attitudes, knowledge and approaches that separate them from their counterparts in lower-achieving districts. In an era of fiscal constraints and an environment focused on accountability, boards in high-performing districts can provide an important blueprint for success. In the process, they can offer a road map for school districts nationwide. ■

*This article was reprinted with permission from the Center for Public Education, an initiative of the National School Boards Association. To access the full report on which this article is based, visit [goo.gl/CDmrZ6](http://goo.gl/CDmrZ6).*

*This article first appeared in the Journal, a publication of the Ohio School Boards Association.*



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Waterford Union High School  
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# Making Time for Wellbeing



**Daily physical activity** is an opportunity for the average school to become a high-performing school

In the past few years, teachers have seen shifts that affect how they spend time with their students. Making room for conversations about safety, bullying, mental health, and wellbeing during the day may not be new to teachers, but many agree it has certainly become more of a focus. And some districts may be having conversations about what they can do — for students and teachers — to support overall wellbeing.

Last year, a study published in *Pediatrics* by researchers at the Norwegian University of Science and Technology reported that, “children, like adults, reap physical and mental benefits from being active,” including fewer symptoms of depression.

Tonje Zahl, the study’s lead author advises, “The focus should be on physical activity not just for the here and now benefits such as improving blood pressure, heart rate and other physical benefits, but for the mental health benefits over the long term.”

Perhaps districts can be inspired by Kelley Ransdell, a Kentucky superintendent who is going on her fifth year with Anchorage Independent School District. She’s a huge advocate for leading change around health and wellbeing awareness within her district, and is credited with having the greatest success with her employee wellness rewards program, Go365, out of all 173 school districts in the state. Ransdell has found the program to be well

worth her time and the district’s dollars.

“My coworkers and our students are my priority,” she explains. “I care about each and every person’s health and wellness. By eating healthy and exercising, staff members positively impact our students’ learning experience. It starts with us. We are setting a powerful example for our students that will help them develop their own lifelong healthy behaviors.”

A study from Lund University in Sweden published last year advocates for weaving activity into the school day. According to Jesper Fritz, the study’s lead author, “Daily physical activity is an opportunity for the average school to become a

**The school day of the future** may very well look much more active with both students and teachers reaping the benefits.





high-performing school.”

But how does a teacher find time in the day for physical activity? Some teachers are making it part of their curriculum through an initiative called SWARM (Students With Active Role Models). Integrating physical activity and academics or with other school-based events enables teachers

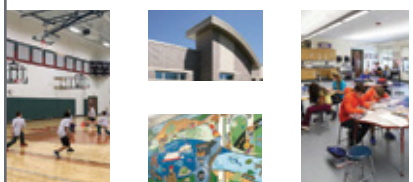
to earn rewards through Go365 while working on their students’ and their own wellbeing.

The school day of the future may very well look much more active with both students and teachers reaping the benefits. Katherine Hendy, client engagement consultant for Ransdell’s and other school

system teams says, “I hear from teachers that they don’t have enough time. But when they learn about the program — how it addresses all aspects of their wellbeing, not only allowing them the opportunity to work on their own health goals, but also providing a sense of purpose, security, and belonging to a community — they hear about their coworkers’ successes, and they make the time.”

When asked what she thinks other school districts need to know about advocating for wellbeing time, Ransdell shares, “Honestly, the most important thing to know – and what surprised me — is that it works! Participation in Go365 truly does motivate and empower staff to live a healthier lifestyle.” ■

*For more information about how to fit wellbeing on your district’s priority list, email [go365.national@humana.com](mailto:go365.national@humana.com) or go to [go365.com/for-business](http://go365.com/for-business).*



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## New Challenges and Opportunities

*2018 WASB President Mary Jo Rozmenoski has been a life-long advocate for youth*

It was great to connect with so many of you at our 2018 Joint State Education Convention in January. For those of you who I didn't meet and for our many new school board members, I'd like to introduce myself.

I've spent the majority of my professional career working on behalf of youth at Head Start. Through Head Start, I worked directly with families in north-western Wisconsin with the goal of reducing barriers to success.

After more than 30 years at Head Start, I became a justice council and community services coordinator for Jackson County. In that work, I focused on establishing collaborative relationships among the public and private sectors to create and evaluate alternatives to incarceration for non-violent, addiction-related offenses and ensure that offenders provided meaningful community service and found paid employment.

Today, I'm happy to continue working on behalf of area youth as president of the Black River Falls School Board, member of the CESA 4 Board of Control, and president of the WASB. In addition, I work part time for Western Technical College and as a respite care provider for a young woman with whom I've worked with for more than 30 years.

I'm also very proud of the work

I've done as an organ donor advocate. In 2005, my husband and I lost the younger of our two children — 23-year-old Dustin — to a tragic traffic accident. We immediately honored his choice to be an organ and tissue donor. Successful transplants included his heart, liver, pancreas, both kidneys, and corneas.

Later that year, I worked with the woman who had received Dustin's liver to begin advocating for organ donation. Since then, we have spoken to medical professionals, first responders, students in driver education programs, media and community members, reaching more than 10,000 people nationwide.

This year, I look forward to new challenges and opportunities serving as president of the WASB. I am prepared to meet the challenges and am motivated and energized, along with you, to keep the WASB moving forward by constantly coming back to our grounding statement of "Supporting, Promoting and Advancing Public Education."

I want to say thank you to all my fellow board members, education professionals, community and family members and students for adding value and confidence with the common thread we share — each one of us cares and supports excellence in education. There is no right answer to all of the challenges we face together.

The answers lie in the work and commitment of working together and within our own local school boards of education to engage all our stakeholders.

Schools cannot respond to all the challenges alone. When we actively come together, participate in initiatives, and demand excellence in public education, we are strengthening our capacity as individuals to improve the quality of our communities.

As May 2018 gets in full swing, there is no greater honor and reminder for a school board member of why we do what we do than to be present at our local graduation ceremony. As the graduates walk across the stage, having completed requirements set forth by our districts and with the skills and resources necessary to build their lives through continuing education, public service and careers, they are walking into a wide open future of opportunities.

I look forward to participating with you at the many professional development opportunities throughout the year that the WASB offers. ■

*Mary Jo Rozmenoski is the president of the Wisconsin Association of School Boards, president of the Black River Falls School Board, and a member of the CESA 4 Board of Control.*

I am motivated and energized to keep WASB moving forward by constantly coming back to our grounding statement of "Supporting, Promoting and Advancing Public Education."



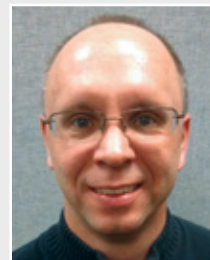
## HUMKE TO SERVE AS REGION 9 DIRECTOR

**Mike Humke, a member of the Dodgeville School Board**, was appointed by the WASB Board of Directors to serve as Region 9 director. He will serve as an interim director until the WASB Fall Regional Meetings. Humke takes over for Wanda Owens of the Barneveld School District who has stepped down from the WASB Board of Directors and did not seek re-election on her local school board.

Humke has served on the Dodgeville School Board since 2007 and is the current president. He is a member of the CESA 3 Board of Control and serves as the chairman. He has also served on the WASB Policy & Resolutions Committee.

He works for the Wisconsin Department of Transportation (WISDOT) as a photogrammetrist (a map designer). He has been at the WISDOT for 23 years. Prior to WISDOT, he worked for the Defense Mapping Agency in Washington D.C. and Northern Virginia.

Humke graduated from University of Wisconsin-Madison in 1990 and lives in Dodgeville with his wife, Lisa, who is an art teacher. They have a daughter who is studying Theatre Arts at UW-Parkside.



## *A Special Thank You to Wanda Owens*

**The WASB would like to thank Wanda Owens** for her service on the WASB Board of Directors. Wanda served as WASB Region 9 director for 10 years. In 2015, she was the WASB President. She served two stints on the Barneveld School Board from 1984 to 2001 and 2004 to 2018.



## Policy Consulting Services

Want help... **Creating** a new or revised policy? **Clarifying** a policy's wording? **Ensuring** your policies meet legal requirements? **Updating** your policy manual?

The WASB Policy and Legal Services staff can help. We provide customized policy consulting services to meet local needs.

**Contact the WASB today.**



# 2017-18 Legislative Session Wrap-up



The state Legislature has concluded its business for the 2017-18 legislative session.

All in all, it was a very positive session for K-12 public education in Wisconsin, which saw the addition of more than \$740 million in funding for public schools over the two-year state budget cycle, with the inclusion of the school safety funds.

Let's look back on the major proposals dealing with K-12 education that were signed into law.

## ■ 2017-19 State Budget

- Increases **per-pupil categorical aid** by \$200 in 2017-18 and an additional \$204 in 2018-19.
- Fully funds the **sparsity aid program** under current eligibility criteria and adds a feature whereby a district that qualified for sparsity aid in one year but did not qualify the following year would receive 50 percent of its prior year allocation.
- Increases funding for the **high-cost pupil transportation aid** program by \$5.2 million per year, expands eligibility and adds a feature whereby if a previously qualifying district becomes ineligible for aid, the district would receive an amount equal to 50 percent of its prior year allocation.

- Limits when **school district referenda** can be held to only on regularly scheduled election days (spring and partisan primary and general election dates) and limits school districts to two referenda questions per year.

- Ends the ability of school districts to utilize the **energy efficiency revenue limit exemption**.

- Increases the family income eligibility limits for entry into the **statewide voucher program** from 185 percent of the federal poverty level to 220 percent of the federal poverty level.

## ■ Low-Revenue Ceiling/ Sparsity Aid

- Increases the **low-revenue ceiling** from \$9,100 per pupil to \$9,400 per pupil, beginning in the 2018-19 school year, and increases the low-revenue ceiling by \$100 per pupil each school year thereafter until it reaches \$9,800 per pupil in the 2022-23 school year.
- Increases the payments to each school district eligible for **sparsity aid** from \$300 per pupil to \$400 per pupil, beginning in the 2018-19 school year.

## ■ School Safety Grants

- Creates a \$100 million grant

program for school safety-related expenditures, including facility upgrades and staff training. The package also includes new requirements for school safety plans and reporting to law enforcement by school staff who hear students make threats of violence in or targeted at a school.

## ■ Summer School Funding

- Expands the online summer or interim session classes that qualify for state aid to include classes the school board determines fulfill either the statutory graduation requirement in health education or its own requirements for graduation.

## ■ Narcan in Schools

- Protects certain school employees from civil liability for administering an opioid antidote (Narcan) in an emergency.

## ■ Prohibiting Aiding and Abetting Sexual Abuse

- Specifies in state law that it is immoral conduct for a DPI licensee to assist a school employee, contractor, or agent to obtain a new job in a school or school district if the licensee knows or has reason to believe

All in all, it was a very positive session for K-12 public education in Wisconsin, which saw the addition of more than \$740 million in funding for public schools over the two-year state budget cycle, with the inclusion of the school safety funds.



that the person committed a sex offense against a student or a minor.

### ■ **Nomination Papers and 2nd Class Cities**

- Restores local control over the signature requirement for the nomination of candidates to the school board in school districts that contain territory lying within a 2nd class city.

### ■ **Board Member Salary Refusal**

- Authorizes a school board member or school board member-elect to refuse the position's salary without a tax penalty.

### ■ **TB Screening for School District Employees**

- Maintains requirement for a physical exam, but requires only the completion of a tuberculosis (TB) screening questionnaire instead of a chest x-ray or TB test conducted by a physician as a condition of school district employment.

Bills that failed to pass this legislative session included more referendum restrictions, electronic publication of school board meeting proceedings, local control of the school start date, voucher transparency, the so-called “teacher protection act,” and a competitive bidding mandate among others. See the WASB Legislative Update blog for more information.

Altogether, the WASB Government Relations Team registered in support of 58 bills, in opposition to 23 bills, and as neutral or monitoring for 10 bills. ■

## **How does the WASB take a position on bills?**

**T**he simple answer is positions taken by the WASB are determined by our member school boards.

This is accomplished through a member-driven process that ultimately results in resolutions adopted by the WASB Delegate Assembly each January at the State Education Convention.

These adopted resolutions form the official positions of the WASB and guide the development of our Legislative Agenda. Adopted resolutions are in effect for perpetuity unless amended or repealed and are compiled in the Resolutions Book, which is updated annually.

### ■ **Resolutions Process**

- The process begins with individual member school boards submitting their recommendations to the WASB in the form of board resolutions. The deadline for boards to submit their proposed resolutions is the preceding September 15.
- These member suggestions are then reviewed and considered by the Policy and Resolutions Committee which is appointed annually and comprised of a least one school board member from each WASB region and from each type of school district (*i.e.*, common, unified, K-8 and UHS) operating in the state.
  - The committee meets twice in the fall and, in addition to member board submissions, may consider issues based on current events or brought forward by committee members. The committee recommends which resolutions will be brought before the Delegate Assembly.
  - The final decision on resolutions rests with the Delegate Assembly, which is comprised of one representative from each WASB member school board and CESA board of control. It meets annually in January at the State Education Convention where resolutions are approved or rejected by a majority vote of the delegates present.
  - There is also a procedure to allow “emergency resolutions” that deal with a concern that arises between Nov. 1 and the time of the Delegate Assembly and could not have been presented earlier due to the emergency nature of the subject to be considered during the Delegate Assembly.
  - An “emergency resolution” must be presented to the Policy and Resolutions Committee at its meeting the night before the Delegate Assembly by an active member or by the WASB Board of Directors. If it is recommended by that committee for presentation to the Delegate Assembly the following day and two-thirds of the Delegates vote to consider the resolution, the emergency resolution is debated by delegates.

Your board can help to shape the WASB's policy positions by offering a proposed resolution. Begin by reviewing the existing resolutions in the Resolutions Book. Are the existing resolutions silent on a particular issue? Can you identify resolutions that need to be updated or repealed? Your board can adopt and submit a resolution to address whatever the concern may be to start our member-driven process. □

# School Safety Seminar and Summer Leadership Institute

**N**ew this year, the WASB will be hosting a special School Safety Seminar in conjunction with the Summer Leadership Institute, July 13-14 in Green Bay.

The first day will focus on important and timely school safety and student wellbeing topics, including:

- Early Brain and Child Development
- School Emergency Response Plans
- School Mental Health
- School Security Audits
- Dealing with Digital Threats, Internet Safety, and Smart Phone Apps
- Crisis Communications
- School Safety Grants

The second day will be the traditional WASB Summer Leadership Institute with two tracks of programming for new and experienced members. Sessions include:

- Key Work of School Boards



- Financial Forecasting
- The Basics of Wisconsin School Board Laws
- Evaluating the Superintendent
- School Board Governance through Policymaking
- Basic Strategic Planning and Strategies for Plan Deployment and Monitoring
- Fundamentals of Wisconsin School Finance
- All In? Using Self-Assessment as a Process for Developing Effective School Board/Superintendent Teams
- WASB Legislative Update

In addition, on Friday evening (July

13), the WASB will be hosting a dinner featuring a keynote by Jim Draeger of the Wisconsin Historical Society. Draeger, the State Historic Preservation Officer, will join us for an entertaining look at his national award-winning book “Bottoms Up: A Toast to Wisconsin’s Historic Bars and Breweries.” Beginning with inns and saloons and tracing the rise of megabreweries and the emergence of microbreweries, the book tells the story of how Wisconsin came to dominate brewing and the place that bars — and beer — hold in our social and cultural history. ■

*For more information, visit [wasb.org](http://wasb.org). Event details will be released soon.*

## Upcoming WASB Webinars

The WASB hosts a series of webinars throughout the year on legal, policy, and other important school leadership topics. Here is a look at the upcoming webinars from the WASB.

### Hiring Teachers

May 9, 1:30-2:30 pm

This presentation will inform you about the general hiring process of teachers, including state requirements. It includes information about the purpose of position descriptions, the posting of vacancy notices, application forms, the interview process, and reference checks. You will also learn about state and federal laws as they relate to employment discrimination.

*Presenter: Bob Butler, Associate Executive Director and Staff Counsel*

### Annual and Special Meetings

June 13, 12-1 pm

This presentation will review the notice requirements for annual and special meetings, cover meeting agendas and procedures and discuss the division of powers between the annual meeting and the school board in common school districts.

*Presenter: Barry Forbes, Associate Executive Director and Staff Counsel*

**Please note:** These and all previous webinars are recorded and available on demand. WASB members can purchase any webinar and watch when their schedule allows. Upcoming live and pre-recorded webinars are listed on the WASB Webinars page at [wasb.org](http://wasb.org).



# Spring Workshops

*A foundation in school board governance for new and experienced school board members*

To be effective leaders, school board members must be cognizant of their legal roles and responsibilities. In this workshop, an experienced WASB school attorney will take a deeper dive into the key areas of Wisconsin law, including:

- Open meetings,
- Public records,
- Conflicts of interest, and
- A board's power and duties.

Participants will gain a greater confidence in understanding the state and federal laws that directly impact service on a school board and how the implementation of those laws influences effective board governance.

The workshops will provide a foundation for new school board members to begin learning their role and serve as a helpful refresher for experienced board members.

The workshops will be held in the evening (6-8:30 pm) at the 12 CESA offices across the state. The event

## Spring Workshops

- May 8 – CESA 1, Pewaukee  
CESA 12, Ashland
- May 9 – CESA 3, Fennimore  
CESA 11, Turtle Lake
- May 10 – CESA 6, Oshkosh  
CESA 10, Chippewa Falls
- May 15 – CESA 4, West Salem  
CESA 5, Portage
- May 16 – CESA 2, Whitewater  
CESA 8, Gillett
- May 17 – CESA 7, Green Bay  
CESA 9, Tomahawk

includes a dinner and the in-depth workshop on the “Legal Roles and Responsibilities of School Boards.” The agenda is the same in each location.

For a detailed description and to register, visit [wasb.org](http://wasb.org). ■



## WASB Peer Mentoring Program

*Have a board member who would like more guidance and support?*

The **WASB Peer Mentoring Program** is a complimentary service for school board members – new and experienced. Whether new to the board, new to being a board officer or just would like an additional resource, WASB Peer Mentors are available for advice, support and guidance.

**Contact the WASB today learn more.**



WASB Peer Mentoring Program | 877-705-4422 | Visit [wasb.org](http://wasb.org)

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## Rehiring Annuitants

All teachers are mandated by state law to be enrolled in the Wisconsin Retirement System (WRS) administered through the State of Wisconsin's Department of Employee Trust Funds (ETF) if they meet participation eligibility, and educational support staff may be enrolled if their district has filed a resolution to participate in WRS. The WRS retirement funds are subject to regulation by the Internal Revenue Code as a 401(a) plan.<sup>1</sup> One of the areas in which 401(a) plans are regulated is the rehiring of plan participants who are receiving retirement benefits ("annuitants"). State law also regulates the rehiring of annuitants.<sup>2</sup> These state law provisions were amended by legislation designed to tighten the rules governing rehiring annuitants.<sup>3</sup> This legislation increased the required minimum break-in-service period from 30 to 75 days and, for district employees who retired on or after July 2, 2013, provided for the automatic suspension of these employees' annuities if they are hired to work in a position that meets current WRS participation standards ("WRS position"). This *Legal Comment* will review the rules on rehiring WRS annuitants and examine common scenarios involving districts and rehired annuitants.

### ■ "Good-Faith" Termination of Employment.

In order to qualify for a benefit distribution from WRS under the Internal Revenue Code's requirements for 401(a) plans, there must be a "good-

faith" termination of employment. A "good-faith" termination from WRS requires a minimum break in service. Under state law, the earliest date that an annuitant may return to a WRS position is the later of (1) the day after the effective date of the retiree's annuity, or (2) the 76th day after the annuitant retires from a WRS position ("75-day break-in-service period").<sup>4</sup> Teachers employed under a 9- or 10-month contract are considered terminated as of the last day they are required to perform district-related work rather than the last day of the contract's fiscal year (June 30). In addition, a "good faith" termination must meet all of the following conditions:

- The employee must cease to render compensable services, *i.e.*, does not receive wages, contributions to retirement plans, or any other item of value from the district;
- The employee and district must comply with the district's policies for voluntary termination, including, when appropriate, the filing of a letter of resignation;
- As of the termination date, the district must have no rights to any future services to be rendered by the employee that might meet the qualifications for WRS coverage for which compensation has or will be paid. No agreement for future services can be entered into prior to the employee's termination. This restriction includes emeritus programs, where com-

pensation in any form is a condition for future services. A contract between an annuitant and a district for future employment with respect to a WRS position entered into during the minimum break-in-service period may lead ETF to investigate whether the termination was done in good faith. This is not, however, an issue with respect to a contract entered into during the 75-day break-in-service period for future employment with a different WRS participating employer that is not a WRS position;

- The employee must be treated consistently with the status of a former employee;
- The terminated employee must have no authority to act as a representative of the district and must not exercise any authority/control over district employees; and
- The employer must have paid the employee any accumulated benefits that are customarily paid to employees at the time of termination.<sup>5</sup>

### ■ Rehiring Annuitants Who Terminated All WRS Covered Employment Prior To July 2, 2013

Districts may hire, or in the case of the same district rehire (collectively "rehire"), an annuitant in a WRS position if his/her termination met the "good faith" standards and the

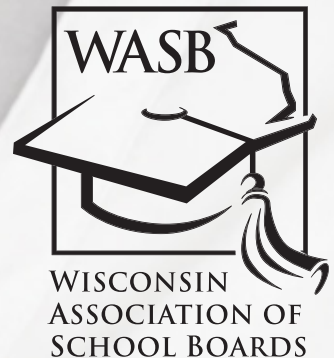
In order to qualify for a benefit distribution from WRS, there must be a "good-faith" termination of employment.



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75-day break-in-service period. The rehired annuitant may elect to suspend receipt of his/her annuity and again become a WRS participating employee or elect to continue receiving his/her WRS annuity and not be a WRS participating employee.

The WRS participation standards for annuitants who terminated all WRS covered employment prior to July 2, 2013, require an annuitant's position to be expected to last at least 365 consecutive days, and the annuitant must be expected to work at least one-third of full-time employment. For WRS eligibility purposes, annuitants who terminated all WRS covered employment prior to July 2, 2013, and are rehired by a district in a position in which the annuitants are expected to work at least 440 hours per fiscal year are considered to be working one-third of full-time.

If a rehired annuitant in a WRS position elects to continue receiving his/her WRS annuity and not be a WRS participating employee, neither the annuitant nor the district is required to make statutory contributions to WRS on behalf of the annuitant. However, the annuitant may elect to suspend his/her WRS annuity and participate in WRS at any time, at which point both the annuitant and the district are required to make statutory contributions to WRS on behalf of the annuitant. Independent contractors are not WRS eligible, and therefore, an annuitant that returns to work as an independent contractor with a district is not permitted to re-enroll in WRS and make the statutory contributions to WRS.

### ■ Rehiring Annuitants Who Retired On or After July 2, 2013

A district from which an annuitant retired may not rehire that annuitant during the 75-day break-in-service period, even if the new position is not a WRS position. Other districts may not hire that retired annuitant

during this period if the position is a WRS position, but may do so if the new position is not a WRS position.

The WRS participation standards for annuitants who retired on or after July 2, 2013, require an annuitant's position to be expected to last at least 365 consecutive days, and the annuitant must be expected to work at least two-thirds of full-time hours. For WRS eligibility purposes, annuitants who retired on or after July 2, 2013, and are rehired by a district in positions in which the annuitants are expected to work at least 880 hours per fiscal year are considered to be working two-thirds of full-time.

An annuitant who retires on or after July 2, 2013, and who is hired in a WRS position (expected to last 365 consecutive days and 880 hours per fiscal year) does not have the option to choose whether to be a participating WRS employee. Instead, such an annuitant's WRS annuity is automatically suspended when he/she is hired in a WRS position, at which point both the annuitant and the district are required to make statutory contributions to WRS on behalf of the annuitant. The suspension of an annuity simply delays payments, but does not impose any sanction or penalty on the annuitant. An annuitant that returns to work in a WRS position as an independent contractor will have his/her annuity suspended, but will not be permitted to re-enroll in WRS or make statutory contributions to WRS because independent contractors are not WRS eligible.

### ■ Scenarios

Based upon these rules, the following are examples of common situations involving the rehiring of an annuitant.

**1.** A nine-month teacher with a contract running from July 1 through June 30 submitted a WRS retirement application and planned to retire the day after the current school year. The teacher completed

all classwork and grading duties on June 15 and was no longer obligated to report to the district. Is the June 15 termination date valid?

**Answer:** Because the teacher fulfilled all contractual obligations to the district on June 15, that date is the teacher's termination date.

**2.** A nine-month teacher signed a contract for the upcoming school year. The current school year was completed on June 15 and the teacher finished all classwork and grading duties on that date. The teacher decided not to return to teaching the following school year and submitted a letter of resignation effective August 1. The teacher requested that the district submit to ETF a termination date of June 15. Is the June 15 termination date valid?

**Answer:** Because the teacher entered into a contract for the upcoming school year, the district had a "right" to the teacher's services until the effective date of the resignation, so the valid termination date is August 1.

**3.** An annuitant retired from a WRS position on or after July 2, 2013, is rehired by the same district after having satisfied the 75-day break-in-service period, and is expected to work 800 hours per fiscal year for 365 consecutive calendar days.

**Answer:** Because the annuitant is expected to work less than 880 hours per fiscal year (two-thirds of full-time), the annuitant is entitled to keep his/her annuity and will not become a WRS participating employee requiring contributions to WRS, even though the position is expected to last 365 consecutive calendar days. However, following the one-year anniversary of employment, the hourly criterion must be monitored on a day-by-day basis, and if the 880 hours per fiscal year criterion is reached in the preceding rolling 12-month period, the annuitant's WRS annuity will be suspended, and the annuitant will again



be a WRS participating employee.

**4.** An annuitant retired from a WRS position on or after July 2, 2013, is rehired by the same district after having satisfied the 75-day break-in-service period, and is expected to work 2,000 hours per fiscal year on a 364-day contract as an interim administrator beginning on August 25.

**Answer:** Because the annuitant is not expected to work 365 consecutive days or more, the annuitant is entitled to keep his/her annuity and will not be a WRS participating employee. However, if the annuitant is expected to return for the following year, the WRS eligibility criteria will be met upon hire, or if the annuitant is still an employee on the 365th day, the WRS annuity will be suspended, and the annuitant will again be a WRS participating employee.

**5.** An annuitant retired from a WRS position on or after July 2, 2013, is rehired by the same district after having satisfied the 75-day break-in-service period, and is expected to work 1,500 hours on a 195-day contract spanning from August 25 through June 10 as a long-term substitute teacher. The annuitant is then contacted in August of the subsequent year by the same district to serve in a different long-term substitute position and is expected to work 1,600 hours on a subsequent 195-day contract spanning from August 25 through June 10.

**Answer:** Upon commencement of employment in August of the subsequent year, the annuitant will have met the WRS participation standards. The annuitant's WRS annuity will be suspended, and the annuitant will become a WRS participating employee. However, the answer in this scenario is different if the annuitant is hired in the subsequent school year by a different district to serve in a long-term substitute position, regardless of

the number of hours the annuitant is expected to work, as long as the position is only for a school year that will not last 365 consecutive days or longer. Each employment relationship with a different district is treated separately and not combined.

**6.** An annuitant retires from a WRS position on or after July 2, 2013, is rehired by the same district after having satisfied the 75-day break-in-service period, and is expected to work 1,500 hours on a 195-day contract spanning from August 25 through June 10 as a long-term substitute teacher. The annuitant is then contacted on June 25 of the subsequent year by the same district to become a regular contracted teacher and is expected to work 1,500 hours on a 195-day contract spanning from August 25 through June 10.

**Answer:** As of June 25 of that subsequent year, the annuitant is expected to work at least 365 days and 880 hours in a WRS position. Therefore, as of that date, the annuity will be suspended, and the annuitant will again be a WRS participating employee.

**7.** An annuitant retires from a WRS position on or after July 1, 2013. After having satisfied the 75-day break-in-service period, the annuitant contracts with the same district from which the annuitant retired and with other districts for which the annuitant has never worked, and works in multiple districts throughout the school year as an available per-diem substitute teacher.

**Answer:** Because the annuitant's new position in any given district is not a WRS position, the annuity is not suspended, and the annuitant does not become a WRS participating employee. Moreover, because the annuitant's new position is not a WRS position, the annuitant is not required to satisfy the 75-day break-

in-service period with respect to the districts which are not the employer from which the annuitant retired. However, per diem substitute teachers are subject to the 880-hour limitation on a rolling twelve-month basis for each separate employer for purposes of determining whether their annuities are suspended.

## ■ Conclusion

In a time when districts are increasingly turning to retirees to fill vacancies, it is important for districts to know and understand the federal and state laws governing the hiring of retirees. This requires districts to determine when the retiree retired from employment from a WRS position, assess the applicability of and calculate, if necessary, the 75-day break-in-service period, and assess its expectations with respect to the number of hours and days the rehired annuitant will work. Depending on this assessment, the rehired annuitant may be required to suspend his/her annuity and become a WRS participating employee again. This would require both the annuitant and the district to make their respective contribution to WRS. This could be a potential disincentive for the district in rehiring that person, but could also potentially provide more overall compensation to the annuitant. Because of the complexity and fact-specific nature of this assessment, districts are advised to consult with legal counsel and ETF in these situations. ■

## ■ End Notes

1. 29 U.S.C. s. 401(a).
2. Wis. Stat. s. 40.26.
3. 2013 Wis. Act 20.
4. Wis. Admin. Code s. ETF 10.08.
5. Wis. Admin. Code s. ETF 10.08(2).

*This Legal Comment was written by Michael J. Julka, Steven C. Zach, and Brian P. Goodman of Boardman & Clark LLP, WASB*

# The Changing Role of Financial Advisors

## SERVICE ASSOCIATE Q & A

**Q.** *What are some of the bigger school finance challenges that school districts are currently facing?*

**A.** Services and training to address student mental health needs and building security are competing more actively for budget dollars than in the past. Balancing these types of costs with allowable revenue authority, increasing operational costs and public expectations makes for a challenging annual budget exercise.

**Q.** *Have there been recent changes in your field that school boards need to be aware of?*

**A.** Yes, significant changes. Pursuant to the Dodd-Frank Wall Street Reform Act, the U.S. Securities and Exchange Commission (SEC) approved a rule change concerning the activities of financial advisors who also underwrite municipal bonds. This rule change prohibits municipal securities dealers from acting as a financial advisor to a school district on a new bond issue and subsequently acting as an underwriter on the same issue, even if they have resigned in writing as the financial advisor. In effect, the underwriting firm must make a definitive choice in the earliest stages of an issuance process to either be the financial advisor or the underwriter of the issue.

The SEC also provided more regulatory restrictions on firms that provide both financial advisory and municipal bond underwriting services. For example, if such a firm underwrites a district's bonds, the types of advice underwriters can provide a district is very limited. Furthermore, it requires the firm underwriting the

bonds to maintain its duty to the investor, not to the district issuing the debt. The bond purchaser's interests are in direct conflict to that of the school district issuer; issuers want low interest rates and investors want high interest rates and favorable sale terms.

Regulatory changes have fundamentally changed the municipal bond industry for all participants — school district issuers, underwriters and financial advisors. Because independent financial advisors do not purchase bonds, they always have one fiduciary responsibility — representing the best interests of issuers of municipal debt. Independent advisors thereby avoid the conflicts of interest addressed through the new regulatory reforms.

**Q.** *If you could give one piece of school finance advice to school boards what would it be?*

**A.** There are ways to maximize the bidding pool on your bonds to help you get the lowest interest rates when issuing debt. An independent municipal advisor provides the following benefits:

- A fiduciary duty to the school district issuing the debt,
- Objective advice to maximize advantages to the issuing school district,
- Free flow of information from all industry sources,
- Candid evaluation of underwriting proposals,
- Perspective to the long-term best interests of clients, not simply a single sale, and
- Confidence that a school district has a professional resource working solely on its behalf.



**Jerry Dudzik** is vice president of Springsted Incorporated



**Q.** *In addition to public finance services, Springsted offers referendum assistance services like scientific random sample survey services. What is this service? How does it help prepare school districts going to referendum?*

**A.** Springsted's survey tool offers districts the opportunity to gather community feedback through use of our scientific, random-sample survey tool. Our methodology — making sure that the sample interviewed closely mirrors the demographics of the community as a whole — has consistently produced reliable results. Surveys can be designed to measure customer satisfaction, gather feedback on a strategic or comprehensive plan, guide budget planning, or determine the feasibility of a referendum when an election is required to raise operating money or to issue debt. The results of these surveys provide valuable information to inform and improve the decision-making process. ■

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Regulatory changes have fundamentally changed the municipal bond industry for all participants — school district issuers, underwriters and financial advisors.



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## **2018 WASB SPRING WORKSHOPS**

### ***TRAINING FOR NEW AND EXPERIENCED BOARD MEMBERS***

**With a focus on effective governance and a board's legal roles and responsibilities, the 2018 Spring Workshops will provide training by WASB attorneys for new and experienced board members in 12 locations throughout the state.**

#### **Agenda:**

- 6 pm - Dinner
- 6:30-8:30 pm - Legal Roles and Responsibilities of School Boards



**MAY 8 - CESA 1, PEWAUKEE  
MAY 8 - CESA 12, ASHLAND  
MAY 9 - CESA 3, FENNIMORE  
MAY 9 - CESA 11, TURTLE LAKE  
MAY 10 - CESA 6, OSHKOSH  
MAY 10 - CESA 10, CHIPPEWA FALLS**

**MAY 15 - CESA 4, WEST SALEM  
MAY 15 - CESA 5, PORTAGE  
MAY 16 - CESA 2, WHITEWATER  
MAY 16 - CESA 8, GILLET  
MAY 17 - CESA 7, GREEN BAY  
MAY 17 - CESA 9, TOMAHAWK**

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