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CONNECTING Educators and Students to Civic Learning Opportunities





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The views of these articles are the authors' and don't necessarily reflect the viewpoints of the WASB.

DPI Releases Estimated 2026-27 General Aids

In July, the Wisconsin Department of Public Instruction released an estimate of the general school aids each public school district will receive for the 2026-27 fiscal year. Based on the estimate, 59.9% of Wisconsin's 421 school districts (252 districts) are projected to receive less general aid for 2026-27 than they did in 2025-26, while 38% (160 districts) are estimated to receive more and nine are expected to see no change. In addition, 92 districts are estimated to receive a 15% decrease in aid, which is the maximum decrease allowable under the state's hold harmless aid provision. On Oct. 15, 2026, the DPI will certify general school aid amounts based on 2025-26 actual data.

With no increase in the state's general school aid appropriation included in the 2025-27 biennial budget, school dis-

tricts will continue to operate without additional state general aid in the next fiscal year. The general aid appropriation remains at \$5.58 billion for the third consecutive year, leaving the state to redistribute the same level of funding among districts through Wisconsin's equalization aid formula. Prior to this biennium, the last time general aid appropriation did not increase was in 2017-18.

General school aids are the largest form of state support for Wisconsin public schools, offsetting local property taxes under state-imposed revenue limits. A district's general aids can increase or decrease due to changes in funds available from the state as well as changes in any of the three local factors comprising Wisconsin's general equalization aid formula: property valuation, enrollment and shared costs.

The department's July 1 aid estimate does not include per pupil categorical aid, which will be based on student membership from the 2026-27, 2025-26 and 2024-25 school years (third Friday in September count). Per pupil aid will be paid in March 2027 and, under current law, it will continue to be paid at the \$742 per pupil level. □

STAT OF THE MONTH

59.9%

Percentage of Wisconsin school districts projected to receive less general aid for 2026-27 than they did in 2025-26.

Source: The Department of Public Instruction

Wisconsin DPI Exploring Statewide Math Plan

In Wisconsin, 41% of fourth graders and 37% of eighth graders tested "proficient" in math, according to the National Assessment of Educational Progress test.

According to a June 2 news release, the Wisconsin Department of Public Instruction is working with the Midwest Comprehensive Center to develop a "statewide math plan, designed to support districts in implementing high quality mathematics programming."

Wisconsin Public Radio reported that the Midwest Comprehensive Center, a regional group through the U.S. Department of Education, will spend several months working with DPI, school districts, higher education faculty and community partners to develop the plan.

"This plan should not be viewed as guidance coming from the department," said Tacara Lovings, who heads DPI's office of strategic initiatives. "But it is about presenting a vision for mathematics, for instruction, and a plan that helps lay out that roadmap and a set of resources or technical assistance that the Department of Public Instruction can provide."

Portage Schools Creating In-House Mental Health Clinic

With a new \$41,000 grant from the WEA Foundation, the Portage Community School District plans to create an in-house clinic providing students with mental health support, according to Wisconsin Public Radio.

The clinic will serve as a centralized location, providing students with an open door and quick access to support and treatment.

Serving about 2,100 students in Columbia County, Portage Community School District is among the districts that have seen an increase in student mental health needs since the COVID-19 pandemic. The state Office of Children's Mental Health's 2024 annual report found that anxiety, depression and suicidality are increasing.

According to WPR, Steve Goldberg of the WEA Member Benefits Foundation says that 25% of students have a diagnosed mental or behavioral issue, "but only half of them have received treatment for that issue in the past 12 months."

The WEA Foundation provides grants to urban and rural districts, including supporting mental health initiatives in 22 Wisconsin districts. □



A Distinct Honor and Privilege

It is not unusual for me to begin this column with comments of a personal nature. However, this month's personal note is more personal than most.

For nearly 20 years, I have dedicated my professional work to advancing and promoting the cause of public education in Wisconsin. It has been my distinct honor and privilege to have served as WASB executive director for the last three of those years.

At the June WASB Board of Directors meeting, I announced that I would be retiring on Feb. 1, 2027.

I have enjoyed serving the WASB and its members. School board members are wonderful people, and the work you do is both important and essential. I have also enjoyed meeting and getting to know many of you personally. Before my time as executive director ends, I hope to greet you in person during the WASB Fall Regional Meetings in September and October and at the 2027 State Education Convention in Milwaukee in January.

I look forward to gathering with you all one last time to celebrate the incredible work you all do to support students and public education. It's been an honor to be part of this mission.

On a lighter note, I hope each of you is having an enjoyable summer and finding opportunities to relax and refresh yourselves.

It was a pleasure to see many of you at the WASB's Summer Learning Symposium in Stevens Point in mid-July. It was a great opportunity to enhance your learning and recharge your enthusiasm as you prepare for the new school year.

A special thank you to all school

boards that renewed their membership in the Wisconsin Association of School Boards. We value and appreciate your membership, and we are committed to continually improving the WASB to meet the needs of school boards throughout Wisconsin.

To the many school board members who completed the WASB member survey earlier this summer, thank you. Your feedback is invaluable as we work to better serve you and, ultimately, the students you represent.

We are currently reviewing the survey results and expect to share what we learned in the coming months, including during my Fall Regional Meeting remarks.

To strengthen your ability to advocate for your schools, the WASB Government Relations team recently published a revised WASB Advocacy Toolkit and continues its "Setting the Record Straight" campaign aimed at clearing up misinformation about public education. The GR team also updated Part 9 of the WASB Finance 101 webinar series, addressing issues affecting the funding and economics of schools.

I want to recognize the service of two WASB directors with long and rich histories of service to their local boards and dedication to their communities.

We were deeply saddened in late June to learn that WASB Region 2 Director Randy Erickson, of Prentice, had tragically passed away. Randy, who was in his second term on the WASB Board of Directors, served on the Prentice School Board for more than 20 years, including 10 years as its president. [See page 27]

At the end of August, WASB Region 1 Director Linda Flottum

will retire from the Turtle Lake School Board, on which she served for more than 30 years. As a result of her resignation, Linda will no longer be eligible to serve as a WASB director. Linda also served on the CESA 11 Board of Control. Read her Q&A in the May 2026 issue of School News.

Notices of both vacancies have been mailed to board presidents and superintendents. The vacancies will be filled with an interim appointment lasting until the respective Fall Regional Meeting. There will be director elections at the Regions 1 and 2 meetings.

The State Education Convention is beginning to take shape. We are pleased to announce that Dr. Adolph "Doc" Brown will be our keynote speaker on Jan. 21, 2027. Brown is known for celebrating, appreciating and educating his audience. Learn more on page 25.

Thank you to those districts that submitted breakout session proposals for the convention. Your presentations help make the convention the great networking and information sharing event that it is. We received 199 proposals this year and appreciate your interest in sharing your story. A WASB staff member will reach out to you by mid-September about your proposals.

Speaking of mid-September, a reminder that resolutions are due to the Policy and Resolutions Committee by Sept. 15. Anyone interested in serving on that committee should contact your regional director soon. Read more on page 28.

Thank you for all you do. Here's wishing you a great end to your summers. ■



Connecting Educators and Students to Civic Learning Opportunities

By Libby Falck

School boards have a critical role to play in ensuring educators get access to strong professional development and that students have meaningful opportunities to develop civic skills.

Ask a room full of high schoolers about an issue they care about, and most will have something to say. Ask them how a bill becomes a law or what rights the First Amendment protects, and the room is likely to get a lot quieter.

That gap between caring about public life and feeling equipped to participate in it is illustrated in the data. On the most recent National Assessment of Education Progress civics exam, eighth graders averaged just 150 out of 300 points, with only 22% scoring at or above Proficient. This challenge continues into adulthood: A 2025 Annenberg Public Policy Center survey found that 18% of U.S. adults cannot name a single First Amendment

right, and 30% cannot identify all three branches of government.

Educators want to close this gap, but many say they don't yet have what they need to do so. A 2020 RAND survey of social studies teachers found that only one in five felt very well prepared to support students' civic learning, and between one-third and one-half had received no training in civic education at all. Teachers also reported real uncertainty about whether their civic instruction was landing with students, along with gaps in materials and ongoing professional development.

Given Wisconsin's highly localized approach to social studies instruction, school boards have





a critical role to play in ensuring educators get access to strong professional development and that students have meaningful opportunities to develop civic skills.

■ **A statewide partner in civic education**

The Universities of Wisconsin’s Office of Civic Engagement serves learners across the UW system, empowering individuals statewide

to engage more deeply in democratic life through dialogue, collaboration and knowledge development. OCE works across all 13 UW campuses in a variety of capacities, one of which focuses on building stronger connections between higher education and K–12 systems. Its goal is to ensure that educators throughout Wisconsin have access to consistent, high-quality support for civics instruction. Two programs anchor

that K–12 work today: a statewide K12 teacher seminar series and the Wisconsin Civics Games for high school students.

■ **Supporting educators through the “Teaching the Founding” seminar series**

One of OCE’s central initiatives is “Teaching the Founding,” a statewide teacher seminar series funded through a three-year U.S. Department of Edu-

cation grant. The program brings K–12 social studies educators together for in-person, scholar-led professional learning that is deeply grounded in primary sources, such as the Declaration of Independence, the Constitution and the Federalist Papers.

Educators don't just listen to lectures — they work with scholars and with each other to figure out how this content can come alive in the classroom. Time is built in for discussion, reflection and adaptation, so teachers leave with material they can use with their own students.

For example, 23 Milwaukee-area educators took part in a July seminar on Thomas Jefferson and the origins of the Declaration of Independence. Teacher participants worked through primary sources, including the Declaration itself, Jefferson's correspondence and related founding-era texts to examine both the philosophical foundations and historical context of the document. From there, they collaborated in small groups on lessons and discussion strategies, leaving with classroom-ready material rather than just notes.

This responds to a real gap: Many educators have few opportunities to continue their learning of history and civics once they've entered the profession. Most teacher preparation programs embed pedagogy extensively but may leave less room for deep, content-specific knowledge. This correlates with the trends from national teacher surveys: too little training, too little confidence and not enough time set aside for ongoing professional development.

The OCE Teaching the Founding seminar series fills that gap directly, giving teachers structured time, expert guidance and a network of peers to draw on. By hosting sessions at all 13 UW campuses, the program reaches educators in every region of the state, including rural districts that might otherwise have little access to this kind of training.

Civic education is a collective effort that depends on schools, higher education and communities all rowing in the same direction.

OCE's role is to make that collaboration easier by offering practical, accessible entry points for both educators and students.



■ Engaging students through the Wisconsin Civics Games

OCE now also leads the Wisconsin Civics Games, a dynamic statewide competition that empowers high school students to become informed community members and future leaders. Teams compete in a quiz-style format covering government, history and civic knowledge. Through a fast-paced, team-based experience, students develop essential real-world skills, such as critical thinking, communication, collaboration and leadership. Students don't just learn civics, they experience it.

For many students, it's a different avenue to engage with civics, rather

than a textbook or a test. It reinforces what they're learning in class while giving them a chance to apply it in a setting with real stakes and excitement. Teams prepare together, building collaboration skills alongside content knowledge. The state-wide competition then brings teams together from across Wisconsin, building a shared sense of purpose among students who might not otherwise cross paths.

Teams that advance to state get to compete in the state's capitol, meet Wisconsin representatives and have a chance to win a \$2,000 scholarship to a UW school.

Programs like this do double duty: They raise the visibility of civic education in a school and community, and they give students a tangible way to see themselves as participants in civic life, not just observers of it. They're also visible, easy-to-promote examples of what civic learning looks like beyond the classroom.

■ Why this matters for school boards

For school board members, three things stand out.

Instructional quality. Civics is a subject where content knowledge and facilitation skills make a visible difference in the classroom. Programs like the OCE Teaching the Founding Seminar Series connect teachers with subject-matter experts and with each other to strengthen what happens in the room with students.

Widespread access. Because the seminar series and WI Civics Games run through the Universities of Wisconsin system, smaller and more rural districts can participate in professional learning and student programming that would otherwise be out of reach. That's a meaningful lever for boards outside Wisconsin's largest population centers.

Return on partnership. These programs are already funded and



LEARN MORE AND SHARE

Seminar Series: wisconsin.edu/civic-engagement/k12-civics-seminars

Wisconsin Civics Games: civicgames.com

running. A board's main lift is awareness — making sure social studies staff know the opportunities exist and have support to participate. That's a low-cost way to expand what a district can offer.

Looking ahead

Civic education is a collective effort that depends on schools, higher education and communities all rowing in the same direction. OCE's role is to make that collaboration easier by offering practical, accessible entry points for both educators and students, rather than asking each district to build programming on its own. As the seminar series and Civics Games continue to grow, the opportunity for districts (especially smaller ones!) to plug into a statewide network will only get stronger.

A call to engage

Share these opportunities with your social studies educators and encourage them to take part in upcoming seminar sessions and the WI Civics Games. Participation

connects teachers with high-quality content, a statewide network of peers and professional learning that pays off directly in their classrooms — and it gives your students a chance to engage with civics in a way that they will remember. These

initiatives bring the Wisconsin Idea to life, connecting learning with communities across the state. ■

Libby Falck is the K-12 manager at the UW System Office of Civic Engagement. She can be reached at libby.falck@wisconsin.edu.

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Investing in **Expertise**

A Call to Strengthen Wisconsin's School Business Offices

By Mike Barry and Dr. Danielle Bosanec

Board members tell us that being “blindsided” by a severe financial crisis is one of their greatest worries in governing the school district. After all, board members bear ultimate responsibility for financial stewardship of the district. Unfortunately, the present state of school funding in Wisconsin provides reason enough for board members to be concerned.

Nearly 40% of Wisconsin school districts operated at a deficit in 2024-25 due to a combination of inadequate revenues, declining

enrollment and rising costs. What's more, many school districts are funded with temporary, non-recurring revenue authority that will soon expire. Additionally, the school business office is under pressure to generate up-to-the-minute state financial reporting, manage complex federal grant regulations, and even lead community presentations to explain the next school funding referendum, among many other responsibilities.

Despite these pressures, only half of Wisconsin school districts employ

a licensed school business administrator. Instead, many rely on a dedicated, but often overworked, accountant to assist the district administrator — both of whom may lack the specialized training and support required to steer through today's perilous school finance terrain.

The result is a perfect storm of risk exposure for school boards. A wise school board will make sure that qualified, well-trained, well-supported professionals are leading the business office. This is no longer

optional when annual operating budgets have no margin for error. We believe investing in the school business office is not a luxury. It is essential to maintaining financial viability and building community trust.

How is your school board assessing this risk exposure?

■ Elevating the profession through standards

Every school district needs a competent business operation, but how is that defined? It begins with clear, consistent standards of performance in school business management. Standards define the “right way” to conduct business operations, which every school district should know and practice.

To address this, the Wisconsin Association of School Business Officials developed the Wisconsin School Business Officials Standards, organized around the F.I.S.C.L. Framework:

- Financial Management
 - Budgeting, forecasting and resource allocation
- Improvement – Strategic planning and continuous learning
- Sustainable Operations
 - Long-term stability and operational efficiency
- Communication – Transparent stakeholder engagement
- Leadership – Ethical practice and professional integrity

The 42 school business standards articulate what high-quality financial leadership should look like in every Wisconsin school district, large or small. These standards provide clarity. They help school boards and staff reflect on current practice, set goals, support hiring practices and guide professional learning.

Taking these standards a step

further, WASBO is collaborating with the Wisconsin Department of Public Instruction to adopt these standards to provide consistency

The 42 Wisconsin School Business Officials Standards are centered on...

Financial Management

Budgeting, forecasting and resource allocation

Improvement

Strategic planning and continuous learning

Sustainable Operations

Long-term stability and operational efficiency

Communication

Transparent stakeholder engagement

Leadership

Ethical practice and professional integrity

across licensure preparation programs and set expectations for all school districts.

Learn more by visiting wasbo.com/standards.

■ Elevating the profession by expanding learning pathways

Establishing professional standards is an important first step, but standards alone are not enough. Learning pathways are needed for business office staff to master the skills necessary to meet these standards.

Half of Wisconsin school districts depend upon a bookkeeper/accountant in the lead financial role, usually because the district is too small and resources are too limited to justify a school business administrator. In these districts particularly, the bookkeeper/accountant role is an incredibly important contributor to school district success. Despite their importance, there has been little formal training and support available for this uncelebrated role.

WASBO is on a mission to remedy that. For school districts that have a bookkeeper/accountant in the lead accounting role, WASBO is here for you. Our goal is to ensure that business services are up to standard in every school district. To that end, we have created certification pathways that are affordable and accessible no matter the size of the school district.

At the center of this work is WASBO University (Go Debits!), which provides practical peer-to-peer courses leading to certification in key business office functions, including Wisconsin School Business Official, Accounting, Payroll, Accounts Payable, Human Resources, Project Management & Innovation, and Wisconsin School Risk Management. These are the critical skills that every school district requires. These certifications clarify expectations, provide structured professional growth and offer all districts — especially those unable to recruit licensed school business administrators — a reliable way to meet professional standards.

Along with the certification program, WASBO is exploring a new non-administrative school business specialist license. Our goal is to have a licensed school business profes-

sional in every school district, either through the traditional School Business Administrator license (#5008) or a new non-administrative alternative, which could be a better fit for smaller school districts.

Certification and licensure are more than just a credential. They are a signal of competence, consistency and commitment to continuous professional growth. When school boards invest in the business office, they help ensure a high level of business office performance and lower the risk of financial failure.

How is your school board ensuring that the district's financial leaders have the credentials, training and ongoing development required to succeed?

The school board's influence

School boards have a powerful influence on district financial health. The expectations boards set directly influence stability, transparency and long-term success. When professional financial leadership is a board priority, the impact reaches far beyond the budget document. The return on investment for strong financial leadership is substantial. Revenues are maximized and expenditures are efficiently managed. Community trust grows with financial reporting that is accurate and consistent. Long-term planning gains stability. Referendum conversations are grounded in credible, data-informed forecasting. Operational risks are mitigated before they become a crisis.

In short, when school boards commit to the expertise of their financial leaders, they strengthen both the district's fiscal future and public confidence.

So, what should school boards consider doing?

To get started, school boards should:

- Know and understand the capacity of your school business office.
- Use professional standards to inform hiring and performance expectations.
- Require licensure or certification pathways for school business personnel.
- Invest in professional development for school business staff.

Why this matters for students

At first glance, school business management may seem distant from the classroom. In reality, every well-constructed budget directs resources wisely and promotes stability. Every well-planned capital project creates safe, modern learning environments. Every accurate strategic forecast helps to serve students effectively.

Strong financial systems enable strong educational systems. Business officials create the stability that allows instructional leaders to focus on teaching and learning. They ensure public resources are managed with

integrity and provide the foundation districts need to innovate and grow.

A shared responsibility

Wisconsin's school districts are traversing an increasingly hazardous financial landscape with no margin for error. Inadequate revenues, declining enrollment and rising costs will not ease in the near term. Given these constant financial pressures, school boards must determine if their business office capacity aligns with current demands.

By utilizing professional standards, accessing new learning pathways and investing in meaningful professional learning for business office staff, Wisconsin school boards can ensure that every district has highly qualified financial leadership.

Will your school board commit to the level of financial leadership required to sustain your district's future? ■

Mike Barry is the executive director of WASBO and Dr. Danielle Bosanec is the WASBO director of professional development. Barry can be reached at mike.barry@wasbo.org, while Bosanec can be reached at danielle.bosanec@wasbo.org.

WASBO at the Summer Learning Symposium

WASBO's Mike Barry and Dr. Danielle Bosanec spoke directly to education leaders on July 11 during the WASB's Summer Learning Symposium at the Holiday Inn Stevens Point – Convention Center.

Their breakout session highlighted WASBO's efforts to elevate expectations by encouraging certification and licensure for all lead business officials, while Barry also joined WASB Consultants Todd Gray and Roger Price for a session titled "What Is Your Audit IQ."

Visit [WASB.org/summer-learning-symposium](https://www.wasbo.org/summer-learning-symposium) to find out more about the event, and please join us at the 2027 Summer Learning Symposium next July in Stevens Point.

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*If you submitted a breakout session proposal, expect
an email from WASB staff by mid-September.*





Advancing Construction Safety for School Projects

By Molly Haack

Creating safe environments during school construction projects is critical not only for workers, but also for students, staff and the surrounding community.

“Each employee is challenged to be better tomorrow than they were today and encouraged to play an active role in making sure everyone, from trade partners to clients, goes home safely to their families each day,” C.D. Smith Construction President Justin Smith says.



Justin Smith

Today, safety is being strengthened through a combination of thoughtful planning, active oversight and emerging technology.

■ Utilizing AI to enhance oversight

While nothing replaces experienced professionals walking a job site, observing conditions and engaging directly with crews, artificial intelligence provides an added layer of protection. It acts as a second set of eyes, helping identify potential risks

that might otherwise go unnoticed.

Using AI-powered tools, project teams can perform walkthroughs. The captured data is analyzed to flag potential safety concerns with a high degree of confidence. Each observation is tied to established safety standards, including OSHA requirements and company-specific protocols.

Clear, automated reports are then shared with safety teams and project leadership, allowing for quick, informed decision-making.

■ Pre-planning for safety

The foundation of a safe project is built well before construction begins.

“THE GOAL IS SIMPLE:

Identify and address potential hazards before they impact workers, students or staff.”

— Joe Pausha, C.D. Smith Construction

During pre-planning, teams identify high-risk activities, coordinate schedules to minimize conflicts and establish clear safety expectations.

For active school environments, this step is especially important. Planning may include separating construction zones from occupied areas, managing traffic flow during arrival and dismissal times, and scheduling higher-risk work when students are not present.

By addressing these factors early, projects can reduce disruptions and significantly lower risk.

“On any job site, it is everyone’s responsibility to put safety first,” C.D. Smith Construction Safety Director Joe Pausha says. “If you see something unsafe, take corrective action, speak up and make the necessary corrections to ensure the safety of everyone on site.”



Joe Pausha

safe work environments and practices.”

■ Safety steps

- Plan safety from the start — Every project begins with detailed risk assessments, clear safety protocols and coordination to minimize hazards before work begins.
- Protect occupied environments — Active school sites are secured with controlled access, barriers and carefully planned traffic flow to safeguard students, staff and visitors.
- Leverage AI for smarter oversight — 360-degree site walkthroughs and AI analysis identify potential risks
- Act quickly on risks — Safety teams review findings in real time, address issues immediately and use cross-project data to proactively prevent incidents.
- Make safety everyone’s responsibility — From school leadership to field crews, every team member is empowered and expected to identify hazards, communicate concerns and uphold safety standards.

“Safety is unquestionably our number one priority with zero tolerance for ‘good enough’” says Smith. ■

Molly Haack is a senior marketing specialist at C.D. Smith Construction. She can be reached at mhaack@cdsmith.com.

■ Maintaining safety during construction

Once construction is underway, safety requires continuous attention. Job-site conditions evolve daily, making regular monitoring essential.

Project teams conduct ongoing site walks, maintain open communication with crews and enforce strict safety protocols. Technology like AI supports this effort by providing consistent, objective insights, but it is most effective when combined with active, on-site leadership.

“The goal is simple: identify and address potential hazards before they impact workers, students or staff,” Pausha says. “We assign safety inspectors and dedicated field personnel on each project to ensure



C.D. Smith Construction project managers visit classrooms to instruct students on safety.

Leading Through the Fog

ADDRESSING INITIATIVE FATIGUE

By Amy Almond and Daniel Bashore

In school districts across the country, a familiar refrain echoes through administrative offices and classrooms: “Another initiative?” From curriculum overhauls to technology rollouts, the pace of change in education has accelerated. While innovation is essential, the cumulative weight of overlapping initiatives is taking a toll — not just on teachers and staff but on the leaders tasked with steering the ship.

This phenomenon, known as “initiative fatigue,” is increasingly recognized as a systemic challenge. It’s not merely about too many projects; it’s about the emotional and operational strain of constant change, especially when leaders are both driving transformation and living through it.

■ The dual burden of change leadership

Superintendents, principals and board members often find themselves in a paradoxical position. They are expected to champion change — articulating vision, securing buy-in and managing implementation — while simultaneously grappling with the same uncertainties and disruptions as their teams. This dual role can lead to empathy fatigue, decision paralysis and a breakdown in trust.

Recent feedback from education leaders underscores this tension. “We’re asking our staff to adapt, but we’re also navigating our own shifting ground,” one administrator noted. “It’s exhausting.”

■ Reframing change: The power of a clear narrative

To combat initiative fatigue, experts recommend anchoring each change effort in a clear, compelling story. The “change story” framework — used by leadership consultants and increasingly adopted in education — offers a structured way to communicate the what, why, how and when of change.

This approach encourages leaders to:

- Define the rationale behind the initiative.
- Identify stakeholder impacts, from staff to families to the broader community.
- Clarify implementation plans, decision-makers and timelines.

6 Steps for Effective Succession Planning in Schools

By Teri LeSage and Amanda Erickson

Leadership transitions in schools are inevitable.

Whether due to retirements, career changes or unexpected departures, these shifts can create uncertainty for staff, students and families. A well-designed succession plan ensures continuity, stability and confidence during these changes — safeguarding the mission and values of the institution. Succession planning isn't just about filling positions; it's about preparing people and processes to sustain excellence. Here are six practical steps to guide schools in building a strong succession strategy:

1 Start with a clear vision. Begin by defining what leadership success looks like for your school. Consider the qualities, skills and values that align with your mission and long-term goals. For example, if your school emphasizes community engagement, future leaders should demonstrate strong communication and relationship-building skills. A clear vision provides direction for identifying and developing future leaders.

2 Identify critical roles. Not all positions carry the same level of impact. Pinpoint the roles that are essential to your school's operations and culture — typically administrative leaders, department heads and key decision-makers. Additionally, consider positions where there is only one person with the necessary knowledge and skills to perform the job, or where their skill set and institutional knowledge bring a unique advantage to the position, as these roles may also be essential. Ask: If this role were vacant tomorrow, what would be disrupted? Knowing which roles are mission-critical helps focus planning efforts.

3 Assess current talent. Evaluate the strengths and development needs of your existing team. Use performance reviews, feedback and leadership potential assessments to identify individuals who are well-suited to assume more significant roles. This process should be transparent and focused on growth, not competition. Consider creating individual development plans for those with leadership potential.

4 Develop leadership skills. Leadership readiness doesn't happen overnight. Create opportunities for professional development that build leadership capacity. This might include mentoring programs, cross-functional projects or leadership workshops. Encourage emerging leaders to take on stretch assignments that broaden their perspective. Investing in growth ensures that when transitions occur, your team is prepared.

5 Document processes and knowledge. Institutional knowledge often resides in the minds of experienced leaders. Capture critical procedures, contacts and decision-making frameworks in accessible formats — such as shared digital folders or manuals. A strong knowledge base reduces disruption when leadership changes happen and helps new leaders hit the ground running.

6 Review and update regularly. Succession planning is not a one-time exercise. Revisit your plan annually to reflect changes in staffing, strategy and school priorities. Continuous improvement keeps your plan relevant and practical. Consider incorporating succession planning into your strategic planning cycle to make it a part of your school's culture.

Why it matters

Schools thrive on stability and trust. By proactively planning for leadership transitions, you protect your institution's culture, maintain operational continuity and reassure your community that the future is secure. Succession planning is an investment in resilience — ensuring that leadership changes strengthen rather than disrupt your school.

Teri LeSage and Amanda Erickson are managers at Wipfli. LeSage can be reached at teri.lesage@wipfli.com, while Erickson can be reached at amanda.erickson@wipfli.com.

- Set expectations for engagement and feedback.

When shared transparently, a change story becomes more than a communication tool — it becomes a trust-building mechanism.

■ Building change-resilient organizations

Beyond storytelling, resilience in the face of change depends on four foundational elements:

1. Trust and psychological safety: Leaders must foster environments where staff feel safe to express concerns, ask questions and admit uncertainty.
2. Adaptability: Institutions that embrace flexibility — adjusting plans based on feedback and evolving needs — are better equipped to sustain momentum.

3. Supportive culture: A culture that prioritizes well-being, collaboration and mutual respect can buffer the emotional toll of change.

4. Clear communication: Consistent, transparent messaging reduces confusion and resistance, enabling smoother transitions.

These elements are not just theoretical — they are observable in districts that weather changes effectively. In one recent case, a superintendent used the change story framework to guide a districtwide shift in compensation models. By aligning messaging across leadership levels and engaging stakeholders early, the initiative gained traction and minimized disruption.

■ From fatigue to focus

Initiative fatigue is not an inevitable consequence of progress. It is a signal call for intentionality, empathy and strategic clarity. For education leaders, the path forward lies not in avoiding change, but in leading it with purpose.

By embracing tools like the change story and cultivating organizational resilience, administrators and board members can transform change from a source of burnout into a catalyst for growth. In doing so, they not only support their teams, they also strengthen the very foundations of their institutions. ■

Amy Almond and Daniel Bashore are managers at Wipfli. Almond can be reached at aalmond@wipfli.com, while Bashore can be reached at daniel.bashore@wipfli.com.

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‘A Convenient Extension of the School Day’

How one rural district created a free before- and after-school childcare program to support local families.

By Brock Fritz

When the school day ends, many School District of Niagara students take the bus, suit up for community sports practices or jump into a car in the busy parking lot. Others stay in the school thanks to a free before- and after-school childcare program designed to support families and provide a safe, welcoming environment for students in grades 4K through 5.

“Our program offers families peace of mind, knowing their children are cared for in a structured setting while parents and guardians fulfill their work or school commitments,” Niagara District Administrator Nate Burklund says. “Through enriching activities, supervised play and a nurturing atmosphere, Badger Care supports both student growth and family needs beyond the regular school day.”

The rural district on the Wisconsin-Michigan border created Badger Care in 2002 to support families with working parents or parents continuing their education.

“We understand how important it is to have reliable, high-quality care before and after the school day, and we are committed to making that support accessible to our families,” reads the district’s Badger Care webpage.

“Badger Care was established to meet the needs of working families and parents pursuing their education,” Burklund adds. “By offering a safe, supportive and structured environment, the program provides children with a place to learn, play and grow while their parents complete their workday or attend classes.”

While the number of students varies from day to day, up to 125 students utilize Badger Care. The busiest days are Monday, Wednesday and Friday, when 4K students are in session. Daily attendance typically ranges from 64-90 students.

“Our program continues to grow, and its success is a reflection of the strong partnership between our school and families,” the website reads. “You will find a welcoming atmosphere where students feel safe, supported and part of something special. BadgerCare is more than childcare. It is an extension of the Niagara school community, built around care, connection and support for our families.”

Interested parents must complete a registration form before each school year. Once in the program, parents sign their children in and out on school days. The program, open to students who are already in the Niagara Public School System, runs from 6-7:30 a.m., then again from 3:05-6 p.m.

“Our hours of operation are designed to meet the needs of working families,” Burklund says. “Parents can conveniently drop off their children before the school day begins and continue on to work or school knowing their child is in a safe and supervised environment. After school, families benefit from the flexibility of our extended hours, which help eliminate the need to rush from work to pick up their child immediately after dismissal.

When Afterschool Is Out of Reach, Kids Miss More Than Activities

By Daniel Gage

I have visited many after-school and summer programs across Wisconsin, from large urban sites to small rural schools, and what I've seen has stayed with me. I've watched students immersed in creative writing, acting and robotics. I've observed staff working one-on-one with kids navigating intense emotional challenges. And I've seen the smiles on middle schoolers' faces as they reconnect with trusted mentors at the end of the school day. These programs provide crucial support to kids, families and entire communities.

The access gap

And yet, for many Wisconsin families, these opportunities remain out of reach. According to the “America After 3PM” report, nearly 275,000 Wisconsin children who would participate in after-school programs are not enrolled because none are available. Four in five children who could benefit from these supports are missing out. Parents cite cost, lack of transportation and a simple lack of local programming as the biggest barriers.

The benefits

Parents overwhelmingly rate their children's after-school programs as excellent or very good, reporting that they keep kids safe, build social skills and support mental wellness. Research in Wisconsin shows that students who participate in extracurricular activities are less likely to report anxiety or depression and more likely to feel a sense of belonging.

Out-of-school time programs often provide the space for deep, long-term mentoring, a powerful protective factor in a young person's life. While teachers are often stretched thin during the academic day, out-of-school time staff can focus on the relational side of development.

The cost of instability

When funding is unstable, it undermines the connections that make these programs transformative. Recently, a Boys & Girls Club director shared the human cost of budget constraints: they were forced to reduce a veteran staff member to part-time. This didn't just trim a budget; it severed a multi-year mentorship. When that bond was broken, several youths stopped attending entirely.

The opportunity to act

Public support for these programs is strong and bipartisan. Families across Wisconsin want safe, enriching opportunities for their children. We can ensure that every young person in Wisconsin has a place to belong when the school bell rings.

Daniel Gage is a consultant with the Afterschool Alliance and Wisconsin Out of School Time Alliance, focusing on advocacy and outreach. He co-founded the Wisconsin Partnership for Children and Youth, a coalition that promotes afterschool and summer programs as vital for healthy youth development and future citizenship.



**“Our district serves as the hub of our community,
and we believe that maintaining strong partnerships with families
is essential to fulfilling our mission.”**

— Nate Burklund, Niagara District Administrator

Badger Care remains open until 6 p.m., providing families with reliable and convenient childcare throughout the day.”

Badger Care, which has been funded through Fund 80 since its implementation, seeks to extend the school day while offering students:

- A safe and supervised environment.
- A healthy snack each day.

- Dedicated time for homework or quiet activities.
- Opportunities to build friendships and connect with peers.

“Our district serves as the hub of our community, and we believe that maintaining strong partnerships with families is essential to fulfilling our mission,” Burklund says. “By working closely with parents and

guardians, we reinforce our commitment to supporting not only our students but also the families and community we serve. Programs such as Badger Care demonstrate our dedication to meeting the needs of working families and strengthening the connection between our schools and the community.” ■

Brock Fritz is the WASB director of communications and editor of the Wisconsin School News. He can be reached at bfritz@wasb.org.

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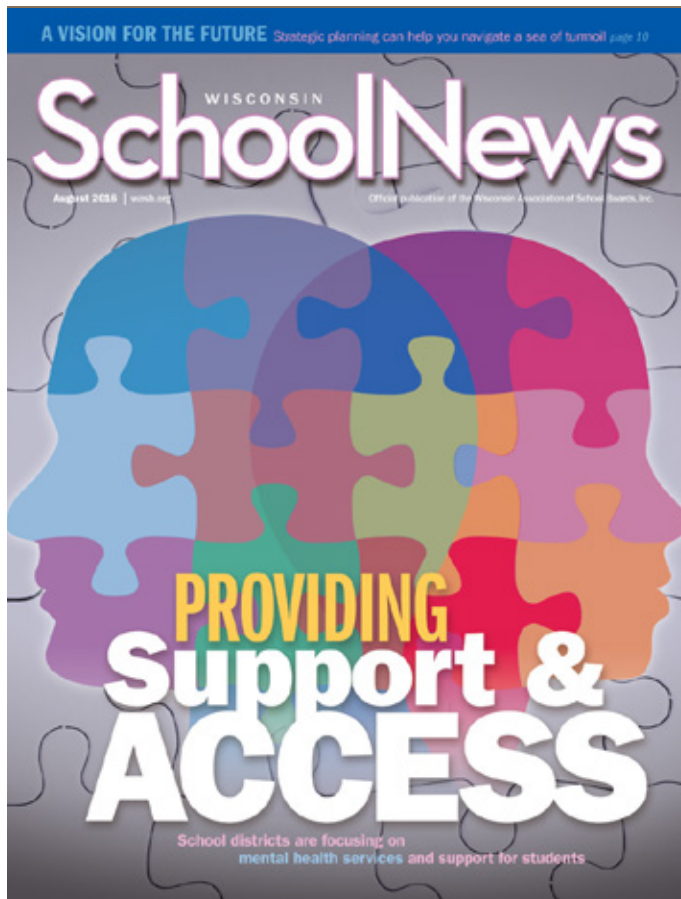
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TEN-YEAR LOOK BACK

“ **An estimated one in five children and adolescents experience a significant mental health issue that impairs their functioning in the community, at home or in school.** ”

According to a report published by the Wisconsin DPI on the growing concern for youth mental health.



◀ **The August 2016 issue of Wisconsin School News** explores how three school districts raised awareness and built support for mental health initiatives in their communities. The issue also features insights from two former Wisconsin superintendents and a former school board president, who discuss how strategic planning can help you navigate a sea of turmoil to improve your district's decision-making process. In addition, readers will learn from 10 schools who share strategies for leveraging social media to strengthen community engagement, as well as gain a better understanding of the natural gas marketplace.



LOOK AHEAD TO 2027

Wisconsin State Education Convention

JANUARY 20-22, 2027

BAIRD CENTER, MILWAUKEE

SEE PAGE 27 FOR PRELIMINARY INFORMATION



HEATHER BARON

SCHOOL DISTRICT OF LODI BOARD PRESIDENT

Heather Baron has served on the Lodi School Board since 2022 and currently holds the role of board president. A lifelong member of the Lodi community, she and her husband are proud School District of Lodi alumni.

Together, they own and operate a painting business and have raised four children, all of whom graduated from Lodi schools.

Baron recently spoke with Wisconsin School News about what inspired her to run for the school board, the importance of community surveys and student representation, and how the district is using the summer months to prepare for the upcoming school year.

WSN: What do you enjoy about Lodi?

Heather Baron: I moved to the Lodi area when I was in fourth grade and have loved it here since day one. We have the small-town feel while still being close to a bigger city like Madison. I couldn't have asked for a better place to grow up and raise our family. The people who live in Lodi are so supportive and will always step up for one of our own.

What made you interested in running for a school board position?

HB: I have always been involved in my children's school activities. I coached for many years and I loved volunteering in the classroom, helping and running different activities, but I never thought I would run for school board. That changed when COVID happened. Seeing my kids suffer and knowing that other kids were even suffering more, it broke my heart. I also didn't like seeing some of the trends and I feared that Lodi would follow suit. I figured it was time to "put my money where my mouth was." I was



a write-in in 2021 and did not get elected, which was a blessing in disguise. I was still fired up and, for lack of a better word, mad about COVID. It was probably one of the most frustrating times of my life. So, I put my name on the ballot the next year and focused on more school issues. There are so many negatives that came out of COVID, but it did make me realize how passionate I am about the School District of Lodi.

Your district conducted a community survey during the spring. How did that survey help your board learn how to better serve the community?

HB: It was extremely helpful. We wanted to know what was important to our community when it came to our curriculum, our teachers and staff pay, and our facility upgrades. We have a referendum coming up, so the survey gave us a better idea of what people will support. Luckily, our community is extremely supportive of our district, but everyone has their limits. It gave us a pathway of how much to ask for in the referendum. Obviously, we will not be able to make everyone happy, but we're hoping we have found a happy medium for most.

You recently presented about student board representatives at the Summer Learning Symposium. Why do you think it's important for boards to have a student rep?

HB: The Lodi School Board has had a student rep for many years. Not only is it a great opportunity for our



I'm grateful for the Lodi community trusting me.



My favorite part is seeing the joy that our district brings and seeing what our kids are doing, whether it's the little ones excited about the 100th day of school or older kids taking classes they are passionate about. Or seeing the teachers come into our curriculum meetings and hearing the enthusiasm in their voices.

students, but it's extremely helpful for our board. The whole point of why we have a board and why our school district exists is for our students, so having them give us perspective is a must.

What do you find most rewarding about serving as your district's board president?

HB: I love it. I never knew I could be this passionate about something other than my family. I'm grateful for the Lodi community trusting me. My favorite part is seeing the joy that our district brings and seeing what our kids are doing, whether it's the little ones excited about the 100th day of school or older kids taking classes they are passionate about. Or seeing the teachers come into our curriculum meetings and hearing the enthusiasm in their voices. Also, seeing how supportive and invested our community is. It's a beautiful process and it makes you believe in the theory of changing the world through your own little community.

In May, your district was one of three winners of the Time for Kids: A Recipe for Health Earth Day Contest. What did that recognition mean to you?

HB: I was sick for our Earth Day celebrations, but I still experienced it through people's excitement and joy when they talked about it. Every

student got to plant a tree in our school forest. I love that our students will get to go back to the school forest for the rest of their lives and know they were a part of it. The Saturday after Earth Day, community members were invited to plant trees. There were over 2,000 trees planted. It was another example of Lodi coming together as a community.

What has your board done this summer to prepare for the upcoming school year?

HB: Our administration is always striving for excellence. They are working with their staff on curricula, organizing team meetings, hiring new staff and preparing them. This summer is a little different for our board since we have the referendum coming up, so we are constantly talking about that. Teachers might not be in the classroom day after day, but they are putting lots of time and effort into preparing for the next school year. I knew that they all worked hard, but seeing it as a board member, I'm in awe of how hard they work and how much they care about our students.

What's something you're looking forward to in the 2026-27 school year?

HB: I'm excited to be able to put even more time toward my school board president role. My youngest

graduated this year and we are soon-to-be empty nesters. I tell my kids that they should be grateful for my board role, so I can obsess over something else besides them. I'm also a little nervous and excited about being part of the referendum process. It's been nerve-racking and has consumed a lot of my thoughts, but it's important and I've loved learning about the process.

What's an area that you're looking to grow your knowledge in during the next school year?

HB: I'm hoping to learn more about school finance and the school funding process. It's going to be a huge job because that is what I have tried to understand since getting on the board. With a little more time to devote to the board and the referendum process this year, it has motivated me to learn more. The government school funding process is not working and needs to be improved. We can't keep putting all of our funding on our taxpayers, and I just think kids deserve a better process. ■

FALL REGIONAL MEETINGS

Join your peers at the 2026 WASB Fall Regional Meetings! Fall Regional Meetings will be held in every WASB region across the state this fall, providing members with an opportunity to connect with area board members, celebrate accomplishments and hear the latest updates from the association. Regions 1, 2, 3, 6, 8, 12, and 14 will vote on a WASB regional director.

All meetings will begin at 6 p.m., with registration and networking followed by a 6:15 dinner and 7 p.m. programming. Each pre-meeting workshop will begin at 4:30 p.m. The member fee is \$43 for the meeting (\$42 in regions 6 and 9), which includes dinner, and \$79 for the pre-meeting workshop. Register for both and receive a \$10 discount. Visit WASB.org for more details and to register.

● Times and Locations

Region 1*: Oct. 6 | Hayward, The Steakhouse & Lodge
Region 2*: Oct. 7 | Minocqua, Norwood Pines Supper Club
Region 3*: Oct. 22 | Green Bay, Rock Garden / Comfort Suites
Region 4: Sept. 30 | Eau Claire, The Florian Gardens
Region 5: Sept. 29 | Rothschild, Holiday Inn Wausau-Rothschild
Region 6*: Oct. 1 | West Salem, West Salem High School
Region 7: Oct. 21 | Neenah, Bridgewood Resort & Hotel
Region 8*: Oct. 20 | New Holstein, Altona Supper Club
Region 9: Oct. 14 | Fennimore, Southwest Tech
Region 10: Oct. 13 | Baraboo, The Wisconsin Hotel & Conference Center
Regions 11 & 15: Oct. 15 | Brookfield, Sheraton Milwaukee Brookfield Hotel
Region 12*: Oct. 28 | Sun Prairie, Hilton Sun Prairie
Region 13: Oct. 27 | Burlington, Veterans Terrace
Region 14*: TBD | Milwaukee, MPS Administration Building
Online Virtual Meeting: Nov. 5 at 12 p.m.

(Zoom link to come via email)

*Denotes regions with elections for WASB Board of Directors

Prior to each Fall Regional Meeting, WASB consultants and staff counsel will host a 4:30 p.m. workshop in the same facility in which the meeting will be held. This year's workshop covers Wisconsin's open meetings law:

● Wisconsin's Open Meetings Law — Understanding and Navigating Closed Sessions

This session provides a practical, in-depth look at Wisconsin's Open Meetings Law with a special emphasis on the rules, requirements and common pitfalls surrounding closed sessions.

Attendees will learn when a closed session is legally permissible under the statutory exemptions, how to properly notice and convene a closed session, and what must be discussed in open session before going behind closed doors. The session will also cover some tips for taking minutes related to closed sessions and address some of the challenges and options associated with taking official action on matters addressed in a closed session. This workshop also includes governance advice on how school boards should approach sensitive discussions and maintain confidentiality.

Whether you are a school board member, district administrator or executive assistant to the district administrator, this session will equip you with the tools to conduct closed sessions lawfully and effectively.

Register now — and secure your spot.

An online workshop for all members will be held at 12 p.m. on Tuesday, Nov. 3, on Zoom.



2026 Summer Learning Symposium

Left to right: WASB board members Larry Dux (Pewaukee, Region 15), Sandie Anderson (Wild Rose, Region 10) and Bob Green (Middleton-Cross Plains, Region 12) attend the 2026 Summer Learning Symposium, held July 10-11 in Stevens Point. See more photos and a recap of the event at WASB.org/summer-learning-symposium.



Business Honor Roll Nominations

DEADLINE: AUGUST 7

School boards can submit the names of up to five local businesses that have been helpful to their school district over the past year. Tell us who they are and what they have done for your schools, and we will help you promote your business partnerships.

Nominated businesses will be posted on the WASB website, and several will be profiled in the December issue of Wisconsin School News. Districts will be provided a sample press release and personalized certificate to give their businesses. Visit WASB.org to nominate a business by Friday, Aug. 7.

Upcoming Webinars

■ LEGAL WEBINAR: PUPIL EXPULSIONS (Two Parts)

PART 1: EXPULSION OVERVIEW

WEDNESDAY, SEPT. 9 | 12 p.m.

PART 2: THE HEARING PROCESS

TUESDAY, SEPT. 15 | 12 p.m.

This two-part webinar presentation covers state and federal laws relating to pupil expulsions. The first part of the presentation will provide a roadmap for considering the expulsion of pupils and how to avoid common pitfalls when doing so. The second presentation will focus on procedures for administrators as well as for boards that conduct their own expulsion hearings by running a mock expulsion hearing. In addition, the presentation will also include an Expulsion Overview Guide with sample notifications and hearing procedures.

This webinar is complimentary, and no registration is required. They will be recorded and placed on the "Online Events" page.

■ RECURRING WEBINAR

■ WASB LEGAL AND LEGISLATIVE VIDEO UPDATE

AUG. 19, SEPT. 16, OCT. 21 | 12 - 1 p.m.

Each month, WASB staff counsel and government relations staff address current topics of interest to WASB members. The topics are typically driven by recent developments affecting schools in the state Legislature, Congress, governmental agencies and the courts.

This webinar is complimentary, and no registration is required. Visit WASB.org for more information. The Zoom link will be sent via email in the days leading up to each webinar.

School Safety Training Discounted for WASB Members Only

The WASB is excited to announce a valuable new school safety training opportunity made possible through funding from the WASB Insurance Plan. WASB members can now send up to 12 people per district, including one spot reserved for a board member, to receive hands-on safety training at Northcentral Technical College's Community Safety Simulation Center in Merrill at a substantial discount — more than half off non-member prices.

Using state-of-the-art 360' surround-sound screens and a real-time interactive response approach, individual participants are placed into hyper-realistic, immersive scenarios. From a disgruntled parent in the district office to a fight on a school bus or a student in mental health crisis, each situation unfolds while colleagues watch from an adjacent room.

Debriefing as a group immediately after each scenario brings an appreciation for how a variety of different tactics might have been employed to de-escalate challenging situations.

The cost of this training is normally \$1,500 through the end of calendar year 2026 and will rise to \$2,000 on Jan. 1, 2027.

However, through an agreement with Northcentral Technical College, the WASB is able to offer this training opportunity to WASB member districts at the reduced price of \$625 per six-hour session.

This discount will be available to districts who are WASB members at the time they complete the training from June 1, 2026 through Aug. 31, 2027. Up to 12 individuals from a WASB member district can receive this subsidized six-hour long training. A space will be reserved in the training session to allow a school board member to participate if they wish to be part of that group.

While we are only able to provide one subsidized session per district, if a WASB member district wishes to send a second group of administrators, staff or board members to experience this training, they will receive the discounted price of \$1,250 during the period from June 1, 2026, through Aug. 31, 2027.

For more information, contact WASB Director of Member Services Ben Niehaus at bniehaus@wasb.org or 608-512-1706.



**SCAN TO
LEARN MORE**

SAVE THE DATE: JAN. 20-22

2027 State Education Convention

January 20-22 | Baird Center, Milwaukee, WI

More than 3,000 public school leaders, educators, exhibitors and advocates will gather in Milwaukee Jan. 20-22 to network, learn, grow and shape student achievement and public education throughout Wisconsin. The theme for 2027 is: Leading Today, Shaping Tomorrow.

The event is co-sponsored by the Wisconsin Association of School Boards, the Wisconsin Association of School Business Officials and the Wisconsin Association of School District Administrators.

2027 EDUCATION TOUR SITE

Join peers on a shuttle to Fairview School on Thursday, Jan. 21, for the 2027 Education Tour, the Wisconsin State Education Convention's only off-site experience.

For \$10, attendees step inside a K4–8 school leading the way in STEM, with a comprehensive Project Lead the Way program, hands-on learning in robotics and coding, and a strong focus on arts and whole-child development.

**The Education Tour location is subject to change. Please check with WASB Director of Events Amy Qualmann at aqualmann@wasb.org to confirm the time and location.*

CALL FOR PROPOSALS

Get involved in the 2027 Wisconsin State Education Convention! The convention, scheduled for Jan. 20-22 in Milwaukee, is your opportunity to highlight your innovative programs and talented students. The WASB is now accepting proposals for the School Fair, student art exhibit and the student video team. School Fair proposals are due by Sept. 18, 2026. Student art exhibit and student video team proposals are due by Nov. 15 and Nov. 20, respectively. *Submit your proposal at [WASB.org/convention](https://wasb.org/convention).*

ANNOUNCING THE THURSDAY KEYNOTE

Dr. Adolph Brown | Thursday, Jan. 21

Born in the heart of the inner city, while spending summers in rural Virginia with his grandfather, Adolph was reared to be extremely hardworking and reflective. Having had a single parent mother in the housing projects, having been a Head Start student, having been the first of his family of five to graduate high school, and having had his oldest sibling and only brother murdered when he was only 11, Adolph's life and work have been a voyage of discovery beyond anything he could imagine.

Adolph is a recovering middle school special education teacher, distinguished university professor, graduate college dean and business owner. He is an educational and clinical psychologist, master teacher, humorist, author and philanthropist, donating one-third of his consultation fees to support a scholarship endowment for hardworking young people.

He has served as a legislative advocate, Virginia Head Start Association President and President of the Virginia Association of Black Psychologists. He brings his experience, focus and sense of humor to each of his endeavors. Adolph is a deep thinker, active listener and engaging presenter who was once the youngest tenured full university professor in the United States.

Adolph often gives talks to today's youth on yesterday's life lessons; as well as instructs master classes to teachers on how to reach EVERY student. He has a "head" for adults and a "heart" for kids as he facilitates over 100 ALL grade levels student assemblies a year.

Adolph now lives in Virginia with his lovely wife, Marla. They have eight kindhearted children. Many still affectionately refer to him as "the U.S. Secretary of Inspiration" following his days with "America's Promise," founded by General Colin Powell. Adolph describes himself as "just an ordinary all-around nice guy." See for yourself by chatting with him during his book signing following the Jan. 21 keynote.

Convention registration will open Monday, Nov. 2. The keynote and book signing are open to all convention registrants.

SETTING THE RECORD STRAIGHT

Public schools have always inspired strong feelings, but today's polarized climate has intensified the discussion to new extremes. As community institutions, public schools should absolutely be held accountable. Yet too often, genuine conversation is drowned out by misleading narratives and decontextualized statistics that spread quickly through social media, news coverage, and even local board and referendum meetings.

That's why public education advocates must be prepared to respond clearly and confidently. Visit [WASB.org](https://wasb.org) to view our myth-busting guide intended to equip board members, administrators and community supporters with accurate information

and effective talking points in an effort to help set the record straight. Think of these as a foundation — they become most powerful when paired with your district's own data, experiences, and stories. We encourage you to adapt them, expand on them, and use them to strengthen trust in Wisconsin's public schools.

To stay up to date with the campaign, subscribe to the Legislative Update Blog, follow the WASB's social media pages and help us amplify accurate information statewide.



RANDY ROY ERICKSON

July 23, 1958 — June 27, 2026

It is with deep sadness that we share the passing of WASB Director Randy Erickson, a dedicated colleague, leader and advocate for public education.

.....

Erickson, 67, passed away unexpectedly on June 27 at Worcester Lake in Hackett, Wis., one of the places he loved the most. He served on the Prentice School Board for more than 30 years, including 20 years as board president.

"His fair and gentle guidance will forever be remembered by who he served with and those he represented so proudly," Erickson's obituary reads.

He was also serving his second term as the WASB Region 2 director on the WASB Board of Directors.

"Randy was a friend and colleague to his fellow WASB directors and was one of the most good-humored people I have had the pleasure to work with," WASB Executive Director Dan Rossmiller said. "His pleasant manner and gentle nature will be missed. Randy made many contributions to the Prentice community, not the least of which was to bring people together and bind them in support of the Prentice School District."

Erickson, who is survived by his wife, five children and 14 grandchildren, spent 41 years with the U.S. Forest Service, including 27 years as a boundary manager of the Chequamegon-Nicolet National Forest.

A memorial service was held at Prentice High School on July 18.
Read Erickson's full obituary at nimsgernfuneral.com/obituaries/randy-erickson.



Now Is the Time to Shape the WASB's Policy Direction

Influence policy priorities by submitting board resolutions by Sept. 15



Your school board has an important opportunity each year to influence the Wisconsin Association of School Boards' policy priorities — and that opportunity is approaching quickly.

The process begins at the local level. By adopting and submitting resolutions, member school boards help shape the policies that guide the WASB's legislative agenda and advocacy efforts. Resolutions are the broad policy positions that guide the WASB's lobbying efforts. They are not themselves legislation and do not need to be tied to current legislation or statute. Whether your board wants to introduce a new policy position, amend an existing resolution, or recommend repealing one that no longer reflects today's needs, the resolutions process is your opportunity to make your voice heard.

If your board's resolution is advanced and ultimately adopted by the Delegate Assembly in January, it will become part of the WASB's official advocacy policy framework. In other words, the resolutions process is your board's chance to leave a lasting imprint on the association's legislative priorities.

The deadline to submit board resolutions is Sept. 15, and resolutions may be submitted online through WASB.org. While that date may seem comfortably distant, it often arrives quickly amid the demands of a new school year, district budgeting and other board responsibilities. Because resolutions must first be approved by your board, they need to be drafted, placed on a meeting agenda and formally adopted before the submission deadline.

To assist boards in developing resolutions, copies of the Resolutions Adopted by Delegate Assemblies book were mailed earlier this summer to all school board presidents and district administrators. This resource contains every resolution adopted by the Delegate Assembly and serves as a valuable starting point for identifying potential policy gaps or determining whether existing resolutions should be updated or repealed.

We strongly encourage your board to review the resolutions book before submitting resolutions. As your board reviews the resolutions book, be sure to consult the table of

contents and the index. One of the most common reasons the Policy & Resolutions Committee declines proposed resolutions is that an existing resolution already addresses the issue in a similar way. If that is the case, your board may instead choose to submit a resolution that amends or repeals the existing policy.

We encourage every member board to consider whether there are issues affecting your district that deserve statewide attention. If so, take advantage of this opportunity by submitting one or more resolutions. A well-crafted resolution — supported by a clear and concise rationale explaining its purpose and intent — can help shape the WASB's advocacy efforts and strengthen the collective voice of Wisconsin's public school boards.

■ WASB Legislative Agenda will be approved in November

While the resolutions help set the policy direction for the WASB, they also inform the WASB Legislative Agenda. The Legislative Agenda sets the top priorities overall for a given calendar year and gives members an

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idea of what the WASB Government Relations team (lobbyists) anticipate spending most of their time on. The 2027 Legislative Agenda will focus mostly on the development of the 2027-29 state budget, the most important piece of legislation that is taken up every two years.

We will release a draft agenda in advance of WASB Fall Regional Meetings and present it at the meetings to gather member feedback. Did we hit the mark? Are there priorities for your district that we are missing? Members are encouraged to provide suggestions to their regional director. The WASB Board of Directors will then meet in November to discuss and approve a final Legislative Agenda.

■ WASB resolution process and Delegate Assembly will evolve

We want the resolutions process and Delegate Assembly to be a productive and worthwhile process for our members who provide their valuable time to participate. To that end, the

WASB Board of Directors has asked us to continually look for ways to improve the process, and members have shared valuable feedback over the years, including ideas for improvement. We made significant changes to the Delegate materials last year in an effort to make them more user-friendly, and we received positive feedback on those improvements. Thank you to everyone who has provided feedback — whether positive or critical. We will continue to adjust and improve the resolutions and Delegate Assembly process moving forward.

■ Policy & Resolutions Committee

The WASB Policy & Resolutions Committee meets twice in advance of the State Education Convention and vets the resolutions submitted by member boards. WASB directors choose members from each WASB region to serve. If you are interested in serving, please contact your region's director. As of this writing, committee membership is still being

set, so there may be opportunities to serve this year. If you are interested in serving, we encourage you to reach out to your regional director. Even if their appointees are set for this year, they may keep you in mind for next year!

■ School Finance 101

The Government Relations team recorded a newly updated Part 9 for the School Finance 101 series. We encourage you to check out the whole series, which provides a basic overview of school finance, on WASB.org. Part 9 looks at issues affecting the economics of education. Learn about key issues impacting school board budgets, including revenue per pupil lag in state funding, special education aid reimbursement, voucher expansion, enrollment, staffing and referendums. Part 9 also explores the timeline, outlook and (anticipated) top WASB priorities for the 2027-29 state budget. ■

BUDGET ADVOCACY CHECKLIST

We urge you to contact your lawmakers by doing one of the following:

- You may still submit written comments to the JFC. Comments can be emailed to the committee at budget.comments@legis.wisconsin.gov or submitted online at legis.wisconsin.gov/topics/budgetcomments.
- Attend a local listening session held by your legislators and speak about your budget priorities.
- Invite legislators to your schools to share your budget priorities and solicit their feedback.
- Send an email or letter to your legislators outlining your district's budget priorities.

View the WASB's advocacy resources by visiting WASB.org and hovering over "Services & Resources" and "Advocacy & Government Relations." There, advocates will find information about the Legislative Update blog, Capital Chat webinars, state budget webpage, state bill tracker, Advocacy Toolkit and more. □



Methods for Calculating Employee Use of FMLA

School board members should be aware of the federal Family and Medical Leave Act and the Wisconsin Family and Medical Leave Act. Both laws provide job-protected unpaid leave for certain employees, including those with serious health conditions, those who need to care for a family member experiencing a serious health condition, and for the birth or adoption of a child. Board members typically play little role in the administration of FMLA/ WFMLA. However, board members often have an important role to play in establishing FMLA/WFMLA policies. One important choice for an FMLA/WFMLA policy is which 12-month period to use for purposes of calculating federal FMLA use. Although Wisconsin WFMLA requires the use of a January to December calendar year, employers, including school boards, can choose one of four methods for determining the 12-month period used for federal FMLA.

This Legal Comment will provide a brief overview of the federal and state FMLA; it will discuss the four methods a school board can choose to calculate the 12-month period for leave under FMLA, including the advantages and disadvantages of

each; and it will explain the process to switch from one 12-month period to another.

■ Overview of FMLA and WFMLA

FMLA provides a qualifying employee with up to 12 weeks of leave (total) within a 12-month period for any qualifying reason (including childbirth or adoption, to care for a family member with a serious health condition, or for the employee's own serious health condition). Unlike FMLA, WFMLA provides different buckets of time for different qualifying reasons and provides qualifying employees up to six weeks of leave for the birth or adoption of a child, up to two weeks to care for a parent, child, or spouse with a serious health condition, and up to two weeks for the employee's own serious health condition.

■ Options for the 12-month period under FMLA

A school board can select from four different 12-month periods to designate as the FMLA period for leave:

1. Calendar year (January to December).
2. Any fixed 12-month period, such as a fiscal year or a year starting on the employee's

anniversary date. (Such as July 1 to June 30, often referred to as a school year.)

3. A "rolling" 12-month period measured backward from the date an employee uses FMLA leave.
4. A 12-month period measured forward from the first date an employee uses FMLA leave.¹

An employer is generally required to use the same 12-month period for all employees. If an employer fails to affirmatively select one of the four methods, it must use the 12-month period that is most beneficial to the specific employee.² As a result, failure to select a 12-month period could result in the district being required to use a different 12-month period for different employees, leading to additional administrative complications. Therefore, all districts should select a method for measuring the 12-month period.

FMLA requires employers to provide employees who request FMLA leave with a Rights and Responsibilities Notice, which informs employees of the 12-month period that the employer has selected.³ Many school boards also specify the 12-month period in board policy and in the employee

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handbook.

Because employees have a limited amount of FMLA/WFMLA leave, the 12-month period that the board selects can affect whether an employee's FMLA and WFMLA run concurrently so that a single leave of absence counts against an employee's allotment of leave under both laws. The advantages and disadvantages of each option are discussed below.

■ **Calendar Year**

Calendar year is the easiest choice from a recordkeeping perspective. Because WFMLA requires use of the calendar year for purposes of leave taken under the WFMLA, using a calendar year under FMLA aligns the start date for purposes of state and federal law. This simplifies calculations of remaining leave because the amount of available leave under both FMLA and WFMLA resets on Jan. 1 of each year.

A downside of using the calendar year is that it allows employees to "stack" leave consecutively. For example, an eligible employee could use a full 12 weeks of FMLA leave starting Jan. 1, even if the employee was out on FMLA for the last 12 weeks of the previous calendar year. Thus, use of the calendar year could result in an employee being entitled to 24 weeks of consecutive leave, which could pose a greater disruption to the operations of the district.

On the other hand, an employee who uses all 12 weeks of leave early in the calendar year will not be

eligible for more FMLA leave until the next calendar year.

■ **Another fixed 12-month period**

Like the calendar method, using a fixed 12-month period has the benefit of being easily calculated by both the district and the employee taking leave. The most common non-calendar year fixed 12-month period for school districts starts on July 1 and ends on June 30 to match the school year. This allows the district to know that an employee will generally use no more than 12 weeks of FMLA leave in any school year, although WFMLA might still be available in excess of the 12 weeks if the employee has multiple qualifying events in a single school year. Under the calendar year method, depending on when the employee's qualifying conditions occurred, an employee might still be able to use 24 consecutive weeks of FMLA (12 weeks to finish one school year, followed by 12 weeks to begin the next school year).

■ **Rolling 12-month period**

This method, also referred to as the "rolling backward" or "look back" method, requires the employer to measure 12 months back from each date that an employee uses FMLA leave. The employee is eligible to use any of their 12 weeks of FMLA leave that was unused in the preceding 12-month period. This method has the benefit of preventing stacking and ensuring that an

employee never uses more than 12 weeks of consecutive FMLA leave. This makes this method an attractive option for employers.

However, it can be more challenging to administer because the available FMLA leave balance must be calculated every time an employee requests more FMLA leave, and employees may fall in and out of FMLA protection based on their FMLA usage in the prior 12 months. Additionally, the federal 12-month period will not line up with the WFMLA calendar year, which requires the employer to track FMLA and WFMLA separately. There will be times when WFMLA is available to an employee even when FMLA is not available and vice versa.

■ **12-month period measured forward from the first date of FMLA leave**

This method is calculated by measuring forward from the date the FMLA leave begins. For example, if an employee begins taking intermittent FMLA on Sept. 1, 2026, they will have 12 weeks of FMLA leave to use before Sept. 1, 2027. The next 12-month period would begin the first time FMLA leave is used after completion of any previous 12-month period.⁴ This can be administratively cumbersome. This method also has the potential to result in some stacking of leave. For example, an employee could use one week of FMLA leave starting Feb. 1, 2026, and use 11 weeks of FMLA leave in the 11 weeks ending on Jan. 31,

2027. If the employee still had a qualifying reason for FMLA leave on Feb. 1, 2027, they could use an additional 12 weeks consecutive to the 11 weeks from the previous FMLA period.

■ Process to change 12-month period

To change to a different method for calculating the 12-month federal FMLA period, the employer must give all employees notice at least 60 days before the intended change. During the 60-day transition period, an employee will receive the full benefit of their leave entitlement under whichever of the two 12-month periods provides the greatest benefit to the employee.⁵

If an employer has not previously established a 12-month period, it

must provide employees with notice 60 days prior to implementing one of the four periods. Again, during the 60-day transition period, the 12-month period that is most beneficial to the employee applies.⁶

■ Conclusion

School boards and administrators should be aware of the significant differences between the 12-month measurement period options under federal and state FMLA in order to decide which federal FMLA 12-month period the school board should utilize. While administration of FMLA can be complex, it is important that school board members have an awareness of the FMLA. This will also allow board members to make an informed deci-

sion about selecting the 12-month measurement period, recognizing the potential benefits and drawbacks to each option.

**This Legal Comment was written by Heather Curnutt & Brian P. Goodman of Boardman & Clark LLP, WASB Legal Counsel. For related articles, see Wisconsin School News: "Court Cases Illustrate the Complexity of FMLA Administration" (Nov. 2025); and "What Board Members Should Know About Leaves of Absence, Including FMLA" (Jan.-Feb. 2023).*

1. 29 C.F.R. § 825.200(b).
2. 29 C.F.R. § 825.200(e).
3. 29 C.F.R. § 825.300(c)(1)(i).
4. 29 C.F.R. § 825.200(c).
5. 29 C.F.R. § 825.200(d)(1).
6. 29 C.F.R. § 825.200(e).

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



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