Budget Planning Task FOrce

Report to Board of Education – Oct. 28, 2019

**Budget Planning Task Force Charge**

The School District of New Berlin Board of Education created a Budget Planning Task Force charged with learning about school finance, receiving information about the SDNB’s budget and current/future financial status and, ultimately, presenting budget recommendations to the School Board this fall.

The task force met six times from July to October and will forward a report to the Board of Education at the regular meeting Oct. 28, 2019. The Task Force was limited to 16 community members. District leaders served as ex-officio members, providing support and facilitation to the task force’s work. Staff that live in the district were also encouraged to apply as a community member.

**Review of Process**

**Selection**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Applicants |  | In Favor | Not in Favor | Other |  |  |  |
| 2 | Preschool | 1 |  |  |  |  |  |
| 14 | Eisenhower | 1 | 2 |  |  |  |  |
| 7 | Elmwood | 1 |  |  |  |  |  |
| 9 | Orchard Lane | 1 | 1 |  |  |  |  |
| 6 | Poplar Creek | 1 |  |  |  |  |  |
| 5 | Reagan | 1 | 1 |  |  |  |  |
| 2 | West \* | 1 | 1 |  |  |  |  |
| 3 | Non- Parent |  | 3 |  |  |  |  |
| 9 | Other |  |  |  |  |  |  |
| 2 | Staff |  |  | 1 |  |  |  |
| 59 |  | 7 | 8 | 1 | 16 |  |  |
|  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| Selection Criteria | |  |  |
| 1) | Other | Set aside applicants who did not indicate affiliation with a specific school(s); set aside nonresident | |
| 2) | Not in Favor | Select a balanced representation from those indicating not in favor of the referendum to make up 50% of the membership; 11 of 59 applicants identified as not in favor; Random selection when multiple candidates qualified; include all non-parent applicants | |
| 3) | School Representation | Group according to lowest grade of attendance; randomly select one in favor from each School Group | |
| 4) | \*West Representative | West only group did not include any in favor applicants; Random selection from lower grade group with student at West | |
| 5) | Preschool | Include one Preschool parent | |  |  |  |  |
| 6) | Staff | Include one Staff member | |  |  |  |  |

**Task Force members:** Bill Adams**,** Bob Batchelor**,** Elizabeth Clarke**,** Joe Dietrich**,** Sarah Doran**,** Brenda Duke**,** Linda Flood**,** Brian Gifford**,** Tony Goodman**,** Karen Jamiola**,** Kelli Kwiatkowski**,** Denise Meyer**,** Aryn Pipkin**,** Ronald Seidl**,** Jason Smith**,** Robert Verbos

**WASB Scope of Services**

Assist Board in evaluating applications for the committee with the goal of balanced membership, providing facilitation of the task force sessions, assisting in preparation and presentation of materials, and generally guide discussion and debate in a respectful manner to assure full participation opportunities for all members.

**Meetings**

* All meetings were posted as open meetings.
* Any materials presented or distributed were / have been made available to the public.
* Public observers – although not part of the discussion as task force members – were given opportunities to provide thoughts, ideas and general comments to the committee in writing.
* Task force members were asked to attend at least four of the first five scheduled meetings: July 11, Aug. 13, Aug. 20, Sept. 10 and Sept. 16. A sixth meeting was added Oct. 9.
* Meetings lasted approximately 2 ½ hours and were held at New Berlin West in the Idea Center (library), 18695 W. Cleveland Ave. (Note: the final meeting was held at District Office, 4333 S. Sunnyslope Rd.)
* The task force is scheduled to present recommendations at a Board of Education meeting at 7 p.m. Monday, Oct. 28.

**Resources/Data Shared**

**Investing in Wisconsin Public Schools**

* Interactive tool to foster dialogue and facilitate understanding around the complex topic of Wisconsin school finance collaboratively developed by WASBO, WASB and WSPRA to help address challenges of educating stakeholders on public school finance.

**School District Budget Cycle, Seventh Edition**

* Publication to be used as a reference guide to school district budgeting process provided by WASBO, WASB and DPI.

**District Mission, Vision, Values & Goals**

* The SDNB Strategic Plan is an active, “living document” which is continually updated based on our progress and input from our stakeholders. Presented by Superintendent Joe Garza and staff.

**History & Legal Framework**

Presentation by WASB Staff to provide an overview of the state funding system including revenue limits, aid factors, and other basic influences.

**District Budget and Historical Budget Balancing Efforts**

* A historical timeline of budget-related choices dating back more than a decade up to the most recent actions and strategies. Presented by Superintendent Joe Garza and Chief Financial Officer Patrick Miller.

**Overview of District Data**

* An overview of student, school and district achievement as it relates to the district’s College and Career Ready Data Dashboard, various state assessments, the state’s accountability report card, graduation, enrollment and more. Presented by Chief Academic Officer Dr. Kellie Sanders.

**District Financial Outlook**

* A presentation and forecast of the district’s current and future financial status, related to cost-cutting scenarios, revenue-generating ideas and other factors such as deferred maintenance, needed upgrades, roofs, asphalt, etc. Presented by Chief Financial Officer Patrick Miller.

**SDNB Staffing and Retention**

* A look at the district’s staff retention data and comparison information, including resignation rates, teacher-student rations, salary comparables, fringe benefit comparables, and more. Presented by Superintendent Joe Garza.

**Long-Range Facility Planning**

* An explanation of the district’s long-range plan, a living document, comprised of district needs and wish-list items, updated regularly as projects are completed or delayed as a result of other priorities, lack of funding, etc. Presented by Chief Financial Officer Patrick Miller.

**Consolidation Audit**

* Truncated presentation of third-party consolidation audit that investigated the due diligence validation of the district’s exploration of various consolidation options.

**Historical Data (DPI DATA presented by WASB Staff)**

**Revenue Limits**

**Equalization Aid**

**Controllable Costs**

**Ideas generated by Task Force membership Oct. 9**

* Comments and questions were received from 13/16 members
* Categories are attempt of facilitator to group like ideas
* Virtually every idea indicated a note of “Needs More Information” from at least one submitter. Thus, as ideas are considered, additional vetting and discussion likely will be necessary.
* Process to finalize ideas to be included in report to Board
  + Consensus to consider
  + Consensus to delete
  + Consolidate like thoughts
  + Prioritize
  + Rank

**Report Categories**

* Ideas with Consensus to Consider (prioritized)
* Ideas with Split Opinion
* Ideas - Don’t Consider/Low Impact
* Ideas that Need More Information
* Ideas and Thoughts to Forward to Board
  + General Ideas
  + Foundation
  + District Organization
  + Referendum

**Consensus to Consider**

**(Prioritized by Task Force – highest to lowest)**

***Idea 12: Naming rights for fieldhouses, stadiums, etc.***

**Items that Should Be Considered.**

* One-time revenue not worth effort; more advertising OK
* Yes - we need to join the trend that most pro, college, and high school teams employ
* Great Idea, and could be done as a part of the Fundraising department created
* Strongly in favor of private fundraising
* Absolutely!
* Yes, naming rights for fieldhouses, etc., fundraising campaign led/organized by the foundation.
* Yes

***Idea 13: Charge for use of school facilities by private entities ex. Soccer club unaffiliated with district using a gym for indoor practice for free***

**Items that Should Be Considered.**

* Always worth considering on case by case basis.
* Should charge groups for this space as it costs money to maintain
* Yes, including if the club says they will do some setup and take down for their activity. Wear and tear have a cost, and the school is always involved in some way.
* Yes (x3)
* Absolutely!
* This seems like it could be a meaningful revenue source if executed well.
* Look at current Board Policy omissions
* Look at competition
* Look at marketing

***Idea 6:******Summer schooling - increasing offerings; charging for programing vs. not charging and counting toward membership is the question.***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* We can get "full enough" classrooms to make the costs work. Can we market to other districts?

**Items that Should Be Considered.**

* Yes. Has more than just financial benefits
* Yes (x3)
* Increase summer school offerings to increase taxing authority and/or charge

***Idea 24: Look at outsourcing non-instructional services to a contract company***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Yes, if it would bring in $50K or more per annum
* It saves money without compromising quality!

**Items that Should Be Considered.**

* Sure
* Yes (3x)
* Independent and outside study should be done with focus on outsourcing/insourcing ALL non-teaching positions

***Idea 3: Cut more positions from the district-level office and consolidate like-minded jobs***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* This can be done with minimal impact to student outcomes

**Items that Should Be Considered.**

* OK. But this appears to already have been done. Need to appreciate importance of district staffing.
* Always a consideration in all departments including teachers and buildings. Enrollment is not turning around for us or the country. Millennials are having even less children than the Gen-X was having. Thus, less buildings are needed for sure. This is a long-term trend and not a short term, so the School Board better start to accept it.
* Yes (x2)
* Eliminate/Consolidate district office position

***Idea 7B: Each department and each school (principal) should be asked to cut budget by 3%***

* Yes

***Idea 33: Better utilize technology - more shared / virtual classes with Eisenhower and West or other school districts***

**Items that Should Be Considered.**

* This could be a big-ticket item.
* Virtual classes are going to be a part of every school's futures, and there is some subject matter that lends itself well to this (note that the teachers need special training to make this effective)
* Sure
* Yes (2x)

***Idea 20: Consider charging a fee for online credit transactions (rec department charges 5%, I think)***

**Items that Should Be Considered.**

* Yes. But probably not worth the bother
* Yes - it costs more for the district to process credit transactions, so this should be passed along to the family
* Yes (3x)

***Idea 14: Share some of our more expensive courses with other districts. I.e. invite students from Brookfield to take construction curriculum at West?***

**Items that Should Be Considered.**

* Good idea but probably won't bring in much revenue
* Love this. The construction curriculum is a great example. Great experience for students.
* Yes (2x)
* absolutely
* This seems like it could be a meaningful revenue source if executed well.

***Idea 18: High school graduation ceremony - each family gets two free tickets and can purchase up to four additional tickets at Eisenhower or unlimited additional tickets at West for $10 each (hardship waivers should be allowable); for an additional $20 per ticket, attendees can purchase an “early entry” pass to enter ceremony 10 minutes before general admission.***

**Items that Should Never be Considered**

* No. Sounds cheap to me otherwise putting damper on a great day.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Should only be considered as a "last resort." Otherwise this would be a disservice to our school families.

**Items that Should Be Considered.**

* Seems like a no-brainer - with 400 high school graduates, looking at potentially $20K/year with zero costs. I would pay the "early entry fee" for my 6 tickets - this is a high-demand, once-in-a-lifetime event.
* Yes (2x)

***Idea 9: Consider developing pathway programs to provide “elite” educational opportunities that we already provide on a larger scale to tuition kids to offset cost of program***

**Items that Should Be Considered.**

* Any fiscally sensitive activity that can increase headcount/revenue should be on the table
* This seems like it could be a meaningful revenue source if executed well.
* Yes
* Shift to an elite vocational center that offers certification programs that draw in tuition students from various counties

***Idea 5: Work to develop a vocational center that offers certification programs on larger scale (building & trades, CNA, food service, etc.) that can provide education to all districts in Waukesha County. “Waukesha County Career Center” in partnership with WCTC. Whiteside Area Career Center - great example in Sterling, IL***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Once we have an idea of facility usage, the debt out of the operational budget

**Items that Should Be Considered.**

* Needs to be fully vetted re cost/benefit analysis
* Yes (x4)
* This seems like it could be a meaningful revenue source if executed well.
* Shift to an elite vocational center that offers certification programs that draw in tuition students from various counties

**Split Opinion**

***Idea 1: Drop wage increase to 1 percent or a freeze for 2 years***

**Items that Should Never be Considered**

* Normal COLA increases should be given.
* Average pay in our district is -10% from the reported peer average and voluntary resignations % is near the top of the peer average. This would significantly impair education quality.
* No (x2)

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Needs to align with market so we don't lose good teachers
* If teachers can take a vote on this option.
* If no other reasonable options

**Items that Should Be Considered.**

* Absolutely should be considered as they are getting increase in other benefits per school board. We also do not have a problem of teachers being poached, as the data shows 80%+ that do leave, leave for promotions or other career interests.
* Yes, for a set timeframe only

***Idea 7: Cut athletic budget through combining programs or increasing participation fees***

**Items that Should Never be Considered**

* If we do not consolidate schools, consolidation of athletic teams that have high enough enrollment to run on their own as it is part of a school’s culture and identity and gives students more opportunities.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* There are small programs that could save money on coaches, etc. But combining football programs without consolidating schools doesn't make sense
* Only when a sport, art, or activity is not drawing membership that comfortably exceeds the ability for the activity to be viable
* Students wanting to participate still have opportunity to do so - i.e., we cannot reduce football, soccer, basketball
* All consolidation options should be a separate, long-term consideration.
* Not increasing participation fees

**Items that Should Be Considered.**

* Consolidation of HS programs w/out consolidating schools is great idea.
* Yes
* Each department and each school (principal) should be asked to cut their budget by 3%
* Decrease instructional/extracurricular costs through combining, and capping professional development budgets

***Idea 15: Open enrollment - pilot a program with intent to only open it for a year and not for the following year (or two maybe) so SDNB can evaluate impacts. If it’s decided that it has a positive impact, open it again.***

**Items that Should Never be Considered**

* No, this is a "wide eyed" type program where it's sometimes led to believe you get students with no extra needs, or no extra services required. We are fine with people wanting to move to NB, and they can with housing development and apartments (to include rent assisted low income available). This is a Pandora’s box.
* No

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Should only be considered if our enrollment dropped in 2019-20 more than it was in 2018-19 as more of our homes seem to be turning over to families

**Items that Should Be Considered.**

* Absolutely
* Pilot makes sense - perhaps pick a grade that can use 10-15 more students without adding more staff
* Yes (3x)
* District should consider (learning more being the first step) open enrollment (try it for a year and see if it makes sense to keep open)
* PART TIME open enrollment to generate some funds

**Don’t Consider/Low Impact**

***~~Idea 2: Don’t poach staff from other districts~~***

**Items that Should Never be Considered**

* Not as part of this process - as we need teachers, we may get them from neighboring districts
* No

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* No candidates can be found seeking us out

**Items that Should Be Considered.**

* Working harder to sell our district to potential employees and not resorting to poaching teachers from other districts with apparently excessive salary increases while covering the cost of them breaking contracts

***~~Idea 4: Eliminate early intervention~~***

**Items that Should Never be Considered**

* Pay now or pay later
* Seems like when this is done well, it's useful
* This is important but parents already pay so for budgetary reasons this would not save $ in my opinion
* No

***~~Idea 11: How much would a four-day (per week) school year save?~~***

**Items that Should Never be Considered**

* There would be a revolt from working parents - not feasible for this community
* This is a state standardized decision that effects parents work lives, personal lives, as well as local/state society in general.
* No (x2)

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Only consider if there is a substantial savings involved. Otherwise this could create an issue for families.

**Items that Should Be Considered.**

* Needs to be considered but not high priority

***~~Idea 16: Repeat~~***

***~~Idea 17: Repeat~~***

***~~Idea 19: Sell any excess property~~***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* We know we won't need it again

**Items that Should Be Considered.**

* IKE had C-2 property, called Eisenhower Woods, that someone might want to buy as a conservation offset.
* Sure
* Yes (2x)

***~~Idea 21: More activities in grade school and charge for entrance. For example: “Game Night” - students make & play games. $5 per person, plus sell food, etc.; “Movie Nights”, etc.~~***

**Items that Should Never be Considered**

* These are currently used by Home and School for fundraisers.

**Items that Should Be Considered.**

* With reasonable costs and enough volunteers, should be worth a try. Might not get enough interest to keep it going though.
* Yes (2x)

***~~Idea 22: Funding sources through special needs food service program. 3rd party for DVR~~***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* The financials make sense, but seems like an interesting idea (though I don't know much about the details)

***~~Idea 25: Can students bring their own technology and what would that save?~~***

**Items that Should Never be Considered**

* No

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* This should only be considered if there isn't an alternative option. Otherwise the district should continue to provide to ensure every student has the tools they need to learn.
* there is a standard item that students are to purchase, and funds are available to assist families who cannot afford

***~~Idea 26: Is providing transportation to all students because of lack of sidewalks required? Would creating a radius threshold of students within a 1-mile radius (for example) decrease the costs?~~***

**Items that Should Be Considered.**

* Worth considering but may not be possible.
* Is there a case to bring the addition of sidewalks in some areas to the city?
* Yes, however, consider the roads that students would need to cross if walking; walking to West doesn't see feasible

***~~Idea 31: Are there eBook / textbook subscriptions that would lower book costs and allow access to the most up-to-date materials?~~***

**Items that Should Be Considered.**

* Worth considering
* Yes (2x)

***~~Idea 43: Repeat~~***

**Needs More Information**

***Idea 8:******Cut course offerings or find alternative ways of delivering them (i.e. online courses) until budget is “balanced”***

**Items that Should Never be Considered**

* Reducing education quality should never be considered.
* Consider reputation of District

**Items that Should Be Considered.**

* Needs to be explored in depth. Lots of opportunities here to cut costs without damaging course quality/effectiveness
* Should continue to look at different ways to offer low-enrollment courses (or even if it makes sense to offer)
* Yes

***Idea 23: Would 4K for all bring any more revenue for enrollments?***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Yes, if it would bring in $100K per year
* It saves money… wouldn't think that it would
* Consider offering 4K if and only if the proposed bill passes as it would count pupils 1.0 FTE and the community/Board of Education /SDNB admin supports this. This option would be preferable to me over open enrollment as we are providing more services to our own New Berlin community. Additionally, this could serve as a recruitment and retention strategy to increase SDNB’s market share of students as some SDNB families would not be sending their students to a 4k program and then decide to keep attending that private school.

**Items that Should Be Considered.**

* Yes

**Forward to Board**

***Idea 10: Replace assistant principal positions at elementary schools with pupil services position***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* APs do more than pupil services. Also provides career growth path is best and brightest
* This can be done with minimal impact to student outcomes
* it doesn't negatively affect the students

**Items that Should Be Considered.**

* Yes
* Replace assistant principal positions with a pupil services position
* Board should continue to review

***Idea 27: Can the district categorize budget priorities? I.e. fully funded, Tier I partial, Tier II partial***

**Items that Should Be Considered.**

* Always a good idea
* This can be a recommendation but not really a budget-balancing item (more along the lines of overall transparency)
* Absolutely. The School Board made a major mistake in going to referendum right away as the shared information shows. If you look at the numbers over 5 years and take out the money, they were going to use to eliminate the debt payments in the operational budget, they asked for $3,922,128 for facility projects. They also asked for about $800,000 in additional technology projects. They could take 3 million from the surplus $ CURRENTLY exists in their accounts, plus the surplus revenue coming in for the next 2 years and pay for most of these items. If you froze straight wage increases, or dropped them to 1%, you could probably pay for it all. Then you never would have needed a referendum
* Yes
* This was my two-part thought. In short, the long-range project plan, if better organized and prioritized, provides a significant expense reduction or postponement opportunity (beyond debt burdens). Example 1 - WIFI in the track area is sitting next to new security doors. Example 2 - 75-80% of the unscheduled project budget is around paving, roofs and athletic-related items. Rolling postponements and prioritization could help meaningfully.
* Need to communicate current practices

***Idea 28: Where does the list of budget priorities come from? Approval process? Determination of priorities?***

**Items that Should Be Considered.**

* Yes
* This was my two-part thought. In short, the long-range project plan, if better organized and prioritized, provides a significant expense reduction or postponement opportunity (beyond debt burdens). Example 1 - WIFI in the track area is sitting next to new security doors. Example 2 - 75-80% of the unscheduled project budget is around paving, roofs and athletic-related items. Rolling postponements and prioritization could help meaningfully.
* Need to Communicate Current Practices

***Idea 29: What does district do to maximize Third Friday Count?***

**Items that Should Be Considered.**

* Given the amount of revenue from each student, we should increase efforts here. One idea is to have a raffle for a few free sets of Earbuds per school for everyone that attends that day.
* Yes
* Increase our 3rd Friday count

***Idea 30: How do we harness lessons learned from other districts that have faced our challenges?***

**Items that Should Never be Considered**

* Not specific and should always be done when embarking on new initiatives

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* Will this save us money long-term?

**Items that Should Be Considered.**

* Yes (2x)

***Idea 32: Are there local employers we can find to sponsor school updates? Where they recruit volunteers and purchase supplies to address maintenance and facility issues?***

**Items that Should Be Considered.**

* OK but not enough money to be saved to put much effort into it.
* Need to ask the community and local businesses for help!
* sure, and maybe through the foundation
* Yes (3x)
* Should be part of foundation work

***Idea 34: Seek opportunities to utilize volunteers and interns / students for school purposes: administrative, support, instruction / guest lecturing, teaching aids, etc.***

**Items that Should Be Considered.**

* Always a good idea but won't solve budget crisis
* Win/win to get students some real-world experience
* Sure
* Yes (2x)

***Idea 35: Early Retirement window to lower salaries, healthcare cost***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* We can get an acceptable "take rate" to justify the costs of running this offer (need to hire consultants/actuaries/etc.)
* This has some pandora's box, and I would not like this considered as we are a long way from needing to do something like this

**Items that Should Be Considered.**

* Worth considering
* Yes (3x)

***Idea 36: Many grades/teachers use different parent/teacher/child communication apps. Is there a fee for all these app programs? If so, streamline apps/programs to one or two vs. many***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* There is unnecessary redundancy - would need to be analyzed and understood

**Items that Should Be Considered.**

* Worth consideration but won't achieve much in savings.
* I like this idea in general - it's silly for parents with multiple kids to be required to have multiple apps
* Yes

***Idea 37: Advertise Youth Options (Part-Time Open Enrollment) to other districts & homeschool students.***

**Items that Should Be Considered.**

* Good idea as part of broader strategy.
* Anything that can increase headcount should be on the table
* Yes (3x)

***Idea 38: Work with state to open new revenue funds such as grants and other like programs***

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* We don't have to spend a lot of money in our efforts

**Items that Should Be Considered.**

* ABSOLUTELY!
* Yes (3x)

***Idea 39: Parent lobby day in Madison***

**Items that Should Never be Considered**

* Should not be considered as a singular district, won't move the needle
* This is just political and has nothing to do with the revenue & costs aspects we've looked at
* No

**Items that Should Be Considered.**

* Absolutely; also, with local Reps
* Yes (2x)

***Idea 40: Talk to the city to increase ease of building / create development plan with houses***

**Items that Should Never be Considered**

* Development is not the big issue, it’s the downtrend of family sizes. This is sort of a parallel issue with a loose affiliation

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* This hasn't been done? Would think this is an ongoing discussion

**Items that Should Be Considered.**

* Good idea.
* Yes
* Talk to the city about a plan that would include new neighborhoods (= more enrollments), retail, and strategic planning. It was interesting we did not have this accessible at the meeting. Is there a plan to develop the West side of town?

***Idea 41: Transparency - parents “opt in” to receive texts about dates of school board and other important meetings. Meeting notes easier to find online. Transparency=trust=working together***

**Items that Should Never be Considered**

* Not sure it saves money so shouldn't be part of this process, but always a good idea to increase transparency

**Items that Should Be Considered.**

* OK but not revenue related
* Yes (3x)

***Idea 42: Messaging is big issue. Look at more ways to be transparent about budget and cuts for public review. Not enough community members understand budget issues.***

**Items that Should Never be Considered**

* Not sure it saves money so shouldn't be part of this process, but always a good idea to increase transparency

**Items that Should Be Considered.**

* Always a good idea
* Yes (3x)

**Foundation**

***Idea 44: Seek additional planned giving opportunities through new foundation; also consider additional naming opportunities or an annual gift campaign***

**Items that Should Be Considered.**

* Yes - we need to join the trend that most pro, college, and high school teams employ
* Yes (2x)
* absolutely
* This could be a meaningful revenue source if executed well.

***Idea 45: Eliminate the Foundation - where did the $150,000 come from?***

**Items that Should Never be Considered**

* Foundation needs time to prove its worth. The first $150K is already gone.
* Guessing we're already in too deep to get out. Plus, this idea makes sense when the costs to the district end and this is self-sustaining
* No
* This is a non-recurring .03% of budget item. Our debate lasted too long.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* If the foundation does not produce revenue, eliminate
* the position doesn't hit fundraising targets

**Items that Should Be Considered.**

* Eliminate the foundation (or at least formalize a reduction of the district funding, compounding yearly)
* No taxpayer funds should be used as seed money for the foundation

***Idea 46: Formalize reduced payments to Foundation***

**Needs More Information**

* Allowed by contract?
* What does this mean? Update the foundation's contract to prove the reduction in payments until it's self-sustaining?

**Items that Should Never be Considered**

* Foundation needs time to prove its worth. The first $150K is already gone.
* This is a non-recurring .03% of budget item. Our debate lasted too long.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* We get the same services and commitment - not sure why that would happen though.

**Items that Should Be Considered.**

* Eliminate the foundation (or at least formalize a reduction of the district funding, compounding yearly
* No taxpayer funds should be used as seed money for the foundation

**District Organization**

***Idea 47: Merger of high schools could result in more “identification” of high school as a hub of the community***

**Needs More Information**

* Pros and cons regarding a sense of "community" after consolidation. Not a reason for a budget balancing committee to recommend a massive structural change.

**Items that Should Never be Considered**

* Consolidation would do far more damage than good without producing promises savings
* No

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* You need to have a non-binding referendum on this question. I believe the School board members in favor of this will get destroyed if they try this. However, only a NON-BINDING referendum could give you that answer
* All consolidation options should be a separate, long-term consideration.

**Items that Should Be Considered.**

* Merger to create one high school and one middle school should be considered.
* Yes
* I think consolidation (closing Orchard Lane, moving all K-5th grade students to the other 3 elementary schools, combining 6-8 at Ike and 9-12 at West) is a legitimate avenue to explore, but I don't like the idea that it's being explored only because of the monetary constraints we're currently facing. I think this sort of organization of the grades wouldn't necessarily be detrimental to students long-term, but it would be a big change that would affect almost ALL students and would be a culture shift for the families of the entire district.
* Realign schools to have 1 middle school and 1 high school

***Idea 48: Readjust building footprint to reflect decreased population***

**Items that Should Never be Considered**

* Population not decreasing

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* The financials make sense and we won't need to "undo" work as enrollment changes

**Items that Should Be Considered.**

* Yes
* I think consolidation (closing Orchard Lane, moving all K-5th grade students to the other 3 elementary schools, combining 6-8 at Ike and 9-12 at West) is a legitimate avenue to explore, but I don't like the idea that it's being explored only because of the monetary constraints we're currently facing. I think this sort of organization of the grades wouldn't necessarily be detrimental to students long-term, but it would be a big change that would affect almost ALL students and would be a culture shift for the families of the entire district.
* Realign schools to have 1 middle school and 1 high school
* Gradual close to Orchard Lane (or Poplar Creek, which should be considered as well) with a shift in the buildings purpose.

***Idea 49: Reduce expenses - aligning facility usage to match enrollment trends through school consolidation or temporary close facilities.***

**Items that Should Never be Considered**

* Other/better ways of reducing costs

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* I could see consolidating the K-6 schools; I am not in favor of the other consolidation choice
* All consolidation options should be a separate, long-term consideration.

**Items that Should Be Considered.**

* A well-managed organization should always be smart with usage - shouldn't just be a "the group wants it so they should have it" situation
* Yes (2x)
* Merger to create one high school and one middle school should be considered.
* I think consolidation (closing Orchard Lane, moving all K-5th grade students to the other 3 elementary schools, combining 6-8 at Ike and 9-12 at West) is a legitimate avenue to explore, but I don't like the idea that it's being explored only because of the monetary constraints we're currently facing. I think this sort of organization of the grades wouldn't necessarily be detrimental to students long-term, but it would be a big change that would affect almost ALL students and would be a culture shift for the families of the entire district.
* Realign schools to have 1 middle school and 1 high school
* Gradual close to Orchard Lane (or Poplar Creek, which should be considered as well) with a shift in the buildings purpose.

**Referendum**

***Idea 50: Dedicated referendum with money guaranteed to go to teacher salary increases beyond budgeted salary increase***

**Items that Should Never be Considered**

* No, we have a community that supports our teachers in educating our kids and that is a huge selling factor for teachers wanting to teach in New Berlin. Plus, we do give benefit, or general employment increases, and wage increases when we can do so. But a dedicated raise does not match the reality of the private sector
* Recommending a referendum takes away from the time and effort of what the task force was formed to do.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* This makes sense in the market AND the other financial issues (debt) are resolved.
* there is a communication plan to go along with it

**Items that Should Be Considered.**

* Needs further discussion. Focus on debt reduction/ capital projects needs to be considered.
* An update referendum with a specific, transparent ask is a great option.
* I am very much open to the idea of a new, different, referendum at a lower proposed dollar amount

***Idea 51: One-time, $5 million "capitol only" non-recurring referendum***

**Items that Should Never be Considered**

* Recommending a referendum takes away from the time and effort of what the task force was formed to do.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* there is a communication plan to go along with it
* seems to have put this in a bad spot. Education about the uniqueness of a prior generation's unique decision to fund new schools through the operational budget could lead to success IF focused on the debt NOT spending.

**Items that Should Be Considered.**

* Needs further discussion. Focus on debt reduction/ capital projects needs to be considered.
* Yes, yes, yes - have a clear message on where the referendum funds will go
* An update referendum with a specific, transparent ask is a great option.
* I am very much open to the idea of a new, different, referendum at a lower proposed dollar amount
* Referendum one time, $5 million "capitol only" non-recurring referendum with specifics about what it is for (roof, parking lots, etc.

***Idea 52: Would a specific non-operational referendum (if needed for priority items) be more effective?***

**Items that Should Never be Considered**

* This is not needed now with the give information, which includes the wants & needs list they provided
* Recommending a referendum takes away from the time and effort of what the task force was formed to do.

**Items that Should only be Considered if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?**

* there is a communication plan to go along with it
* seems to have put this in a bad spot. Education about the uniqueness of a prior generation's unique decision to fund new schools through the operational budget could lead to success IF focused on the debt NOT spending.

**Items that Should Be Considered.**

* Needs further discussion. Focus on debt reduction/ capital projects needs to be considered.
* Yes, yes, yes - have a clear message on where the referendum funds will go
* An update referendum with a specific, transparent ask is a great option.
* Yes
* I am very much open to the idea of a new, different, referendum at a lower proposed dollar amount

***Idea 53: Referendum on school district debt only, not operating budget as last referendum sought to work on. More money into debt reduction will open more funds over next 10 years***

**Items that Should Never be Considered**

* I think this would be a hard sell to the community

**Items that Should Be Considered.**

* Needs further discussion. Focus on debt reduction/ capital projects needs to be considered.
* Yes, yes, yes - have a clear message on where the referendum funds will go
* An update referendum with a specific, transparent ask is a great option.
* Yes
* I am very much open to the idea of a new, different, referendum at a lower proposed dollar amount