



# LONG-RANGE BUDGET PLANNING

Information & Outreach

October 17, 2022



# INFORMATION & OUTREACH PLANNING

- Introductions
- Information & Outreach Plan
- Why Engage Community?
- What Do We Need to Know to Make Informed Decisions?
- Planning Timeline
- Questions?

# NORTHERN OZAUKEE SCHOOL DISTRICT

## **MISSION | Our Purpose**

To educate young men and women to develop strong character and to prepare them for the future.

## **CORE VALUES | Our Words & Actions**

Respect. Responsibility. Integrity. Citizenship. Honesty. Teamwork.

## **STRATEGIC GOALS | Our Direction**

#2: Efficient and effective use of resources.

## **VISION | Our Future...**

To pursue excellence at all levels in our district.



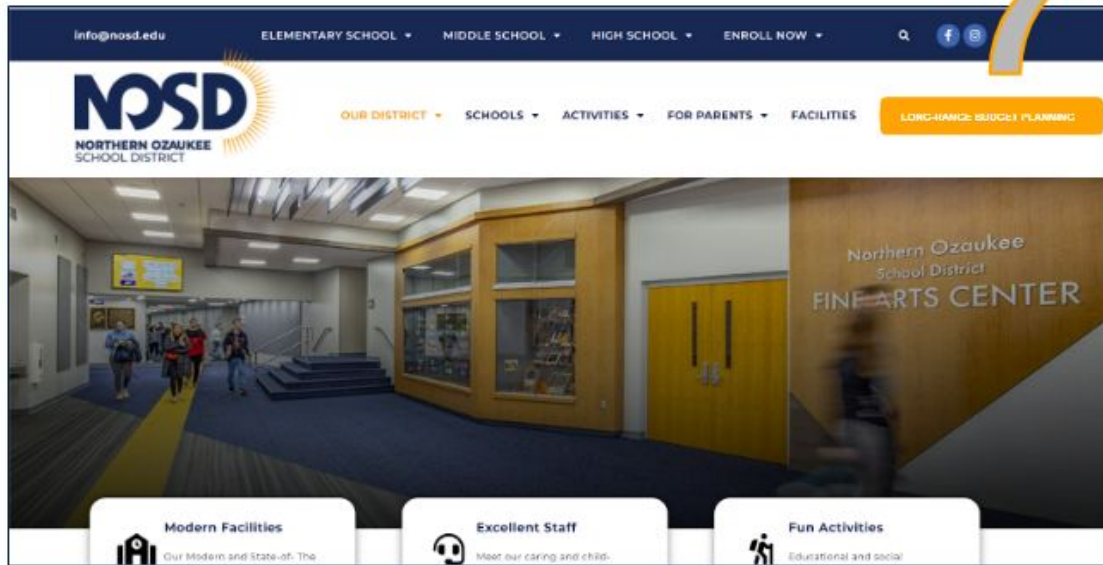
# INFORMATION & OUTREACH PLAN | FALL 2022

 <b>NORTHERN OZAUKEE SCHOOL DISTRICT</b> Long-Term Budget Planning Information & Outreach Plan	SEPTEMBER 2022			OCTOBER 2022				(10.31.22)	NOVEMBER 2022				DECEMBER 2022			
	9.12.22	9.19.22	9.26.22	10.3.22	10.10.22	10.17.22	10.24.22	11.1.22	11.7.22	11.14.22	11.21.22	11.28.22	12.5.22	12.12.22	12.19.22	12.26.22
<b>Strategic Planning &amp; Key Dates</b>																
Strategic Plan Development - Preliminary Plan Review	9.12.22		9.26.22													
School Board Workshop   Meeting: Strategic Plan Review, Implementation Update & Report [Board Packet]				[10.7.22]		10.17.22			[11.11.22]		11.21.22		[12.9.22]		12.19.22	
Core Team Planning & Implementation Meetings [Weekly - 1:30PM]			ON-SITE	REMOTE	REMOTE	ON-SITE	REMOTE	REMOTE	REMOTE	REMOTE	ON-SITE	REMOTE	REMOTE	REMOTE	ON-SITE	
- Communications to Key Stakeholders [Leveraging existing channels-Email, SM, Newsletter, Other]																
- Stakeholder Activity																
- Website Strategy & Content Development/Updates				10.10.22												
- Resource Materials Development [Event Materials, Handout, Other]																
Core Messaging, Graphics & Content Development																
<b>Community Outreach</b>																
Staff Information - The Plan, Key Facts & Learning [All Staff]																
Parent Information - Key Facts & Learning [PTR, Booster, Organizational, Club]																
Community Leaders Forum - Key Facts & Learning + Feedback				PLAN	DEVELOP	DEVELOP	DEVELOP	TBD	TBD							
Focus Groups [2-Key Stakeholder Group Mix] - Replace w/Survey																
Community Survey - Survey Content Development, Awareness & Participation					SURVEY TOOL	DEVELOP	DEVELOP	DEVELOP/TEST	DEVELOP/TEST	OPEN	OPEN	OPEN	REPORT PREP		FINAL REPORT	
<b>Material Development</b>																
Back to School Picnic - Long-Range Budget Planning - Display Board																
Community Leaders Forum - Resource Handouts																
Information Display Board(s) - School & Community Plan Activities																
Survey Awareness & Participation - Postcard Mailing - All Residents					PC-DEVELOP	PC-DEVELOP	PC-DESIGN	PC-PRINT	PC-MAIL							
Survey Awareness & Participation - Staff, Parents & Community Outreach																
NOSD/Principal Newsletter - Long-Range Budget Planning, Event Notice, Survey Awareness & Participation																
<b>Notes:</b>																

www


# NOSD WEBSITE | “Home Base”

Webpage in progress...





# COMMUNITY LEADERS FORUM

**NOSD**  
NORTHERN OZAUKEE  
SCHOOL DISTRICT

**COMMUNITY LEADERS FORUM**  
Long-Range Budget Planning | November 2, 2022

## Community Leaders Forum

- Participants
- Meeting Goals
- Topics & Informational Content
- Community Feedback



## COMMUNITY LEADERS FORUM | GOALS

- Build Understanding:
  - Wisconsin public school funding - *the fundamentals*
  - Northern Ozaukee School District budget - *the facts*
  - Northern Ozaukee School District 5-year projections - *the future*
- Engage Community Leaders in discussion to learn and gather feedback on planning priorities and expectations
- Confirm Next Steps



## COMMUNITY LEADERS FORUM | TOPICS

## WISCONSIN PUBLIC SCHOOL FUNDING - OUR HISTORY

**1993 | REVENUE LIMIT ESTABLISHED** to control rise in local property taxes.



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## REVENUE SOURCES | LOCAL PROPERTY TAX + STATE AID

The **REVENUE LIMIT** is the maximum allowable revenues from state aid and local property tax combined.

In general...

- When NOSD's state aid goes up, local property taxes go down
- When NOSD's state aid goes down, local property taxes



NSD

**NOSD PRIMARY FUNDING | PER PUPIL FUNDING**

### Primary Funding

- **Revenue Limit Per Pupil (State + Local) - 73%**
  - **Categorical Aid Per Pupil (State) - 5%**
  - Categorical Aids by Type (State) - 1%
  - Open Enrollment-In (Student's Resident District) - 7%
  - Federal Aid | IDEA-ESSA Grants (Federal) - 7%
  - Student/User Fees (Local) - 2%
  - Other (Local) - 5%
- 78%**

## ADDRESSING BUDGET DEFICITS

**NOSD will explore:**

- Cost to retain current programs, staff, and student services
- Cost to fund appropriate cost of living increases and maintain adequate benefits
- Cost to address planned maintenance and capital improvement projects
- Potential areas to reduce or eliminate operating expenses
- Opportunity to increase revenues (via referendum)

## 5-Year Budget Projections

\$100 Increases to Future Revenue Levels (starting with 2023-25 state elemental budget)											
	Revenue	Capital	Target	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
State Minimum 7.5%	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Minimum 7.5%	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5%	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2023-24)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2024-25)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2025-26)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2026-27)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2027-28)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2028-29)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2029-30)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2030-31)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2031-32)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2032-33)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2033-34)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2034-35)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2035-36)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2036-37)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2037-38)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2038-39)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2039-40)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2040-41)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2041-42)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2042-43)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2043-44)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2044-45)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2045-46)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2046-47)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2047-48)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2048-49)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2049-50)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2050-51)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2051-52)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2052-53)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2053-54)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2054-55)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2055-56)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2056-57)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2057-58)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2058-59)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2059-60)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2060-61)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2061-62)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2062-63)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2063-64)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2064-65)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2065-66)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2066-67)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2067-68)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2068-69)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2069-70)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2070-71)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2071-72)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2072-73)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2073-74)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2074-75)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2075-76)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2076-77)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2077-78)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2078-79)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2079-80)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2080-81)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2081-82)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2082-83)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2083-84)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2084-85)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2085-86)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2086-87)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2087-88)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2088-89)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2089-90)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2090-91)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2091-92)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2092-93)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2093-94)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2094-95)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2095-96)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2096-97)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2097-98)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2098-99)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2099-00)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2100-01)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2101-02)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2102-03)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2103-04)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2104-05)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2105-06)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2106-07)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2107-08)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2108-09)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2109-10)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2110-11)	1,674	174	1,848	1,674	1,848	1,674	1,848	1,674	1,848	1,674	1,848
County Target 7.5% (with 2111-12)	1,674	174	1,848	1,674							



## COMMUNITY FEEDBACK

NOSD will consider all options to reduce operating expenses and add revenue. The District and School Board are not endorsing or recommending specific cuts at this time, but must plan proactively to balance future budgets.

**Given the 5-year forecast for budget deficits, which existing programs or services should be prioritized?**





## COMMUNITY LEADERS FORUM | FEEDBACK

**What information do you need to make an informed decision related to long-range budget planning?**

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**What feedback from the community will support District planning and Board decisions?**



# QUESTIONS?

INFORMATION & OUTREACH PLANNING