



LONG-RANGE BUDGET PLANNING

Information & Outreach Update

November 21, 2022

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


 NORTHERN OZAUKEE SCHOOL DISTRICT Long Range Budget Planning Information & Outreach Plan <small>[UPDATED_221103]</small>	SEPTEMBER 2022		OCTOBER 2022				(10.31.22)	NOVEMBER 2022				DECEMBER 2022			
	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
Strategic Planning & Key Dates															
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															
Community Outreach															
Staff Information - The Plan, Key Facts & Learning [All Staff]															
Parent Information - Key Facts & Learning [PTR, Booster, Organizational, Club]															
Community Leaders Forum - Key Facts & Feedback			PLAN	DEVELOP	DEVELOP	DEVELOP	11.2.22								
Community Survey - Survey Content Development, Awareness & Participation					SURVEY TOOL	DEVELOP	DEVELOP	DEVELOP	DEVELOP	PRINT	MAIL		SURVEY WINDOW		FINAL REPORT
Material Development															
Back to School Picnic - Long-Range Budget Planning - Display Board															
Community Leaders Forum - Resource Handouts															
Information Display Board(s) - School & Community Per Plan Activities															
Survey Awareness & Participation - Staff, Parents & Community Outreach															
NOSD/Principal Newsletter - Long-Range Budget Planning, Event Notice, Survey Awareness & Participation															
Notes:															



COMMUNITY LEADERS FORUM

NOSD COMMUNITY LEADERS FORUM
Long-Range Budget Planning | November 2, 2022
NORTHERN OZAUKEE SCHOOL DISTRICT

COMMUNITY LEADERS FORUM | SUMMARY



Event Overview

On November 2, 2022, the Northern Ozaukee School District and School Board hosted a Community Leaders Forum on school funding. Superintendent, Dave Karrels and Director of Business Services, Josh McDaniel shared facts, key budget challenges, and financial goals, and a commitment to engage taxpayers in proactive solutions to address long-range budget deficits.

Twenty-five invited community members participated, including:

- Parents and non-parents/former parents
- Municipal and civic leaders
- Business owners
- NOSD staff

Meeting Goals:

- Build understanding for the **fundamentals** of Wisconsin public school funding.
- Create clarity for the **facts** of NOSD revenues, expenses, and key budget challenges.
- Collect community input on **future** planning initiatives.

Key Topics Covered:

- The proactive approach being taken by NOSD to engage with long range budget planning.
- The impact of the Revenue Limit on declining enrollment districts (76% of districts declining over the last 10 years).
- The consequence of stagnant per-pupil funding at the state level and rising expenses.
- The effect of NOSD cuts totaling \$1.75M from operational budgets since 2019-20.
- The current \$300,000 budget deficit.
- The relationship of NOSD mill rate and property value.
- The need to explore all options for additional efficiencies and reductions and potential to re-allocate existing revenues to address projected deficits.

To view the comprehensive presentation, please click [here](#).

NOSD COMMUNITY LEADERS FORUM
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Community Feedback:

Q1: Given the significant reductions and interest savings opportunities the District has already implemented, what additional steps could be considered to address the 5-year forecast for budget deficits?

Participants did not recommend or condone the following, but offered ideas that have yet to be implemented. Some participants expressed concern for the impact of these ideas as well as the impact of budget cuts needed to balance budgets related to teaching, learning and ability to serve the broad needs of students.

- Opportunities to share services or further explore costs related to school mergers.
- Consider an alternate school calendar or 4-day school week.
- Explore how the community housing development can grow in our town and village.
- Explore opportunity to reallocate current funding with no change to taxpayer's mill rate.

Q2: How can the District communicate these concerns and collect feedback from our community?

- This informational meeting regarding school finance was excellent. Continue these types of meetings with various community stakeholders.
- Provide key facts and graphics to support (participants) sharing of information with community members.
- Back up long range budget planning information on the website.
- Send out a survey to all residents in the district boundaries to inform them of NOSD funding needs and potential solutions.

Next Steps:

- A web page will be established to house all long range budget planning information and activities.
- The District will develop an all-resident mailing and survey to support opportunities for learning and to collect feedback to inform budget priorities and planning.
- A variety of open community presentations and forums will be planned and communicated for January, February, and March of 2023.





COMMUNITY SURVEY



Dear Families and Community Members,

We have a lot to be proud of in Northern Ozaukee!

- ✓ Our students' focused expectations as the District's most recent state report card.
- ✓ Programs & Partnerships with local businesses continue to grow and support technical education.
- ✓ We've been awarded more than \$870,000 in grants from the Bruce King Foundation.

These accomplishments would not be possible without the ongoing support we receive from our committed staff, dedicated parents, and the greater Northern Ozaukee community. *Thank you!* There are challenges ahead. For the past two years, the State of Wisconsin has not provided a 1% increase in funding on a per student basis. At the same time, expenses for utilities, healthcare, transportation, fuel, and technology continue to increase.

Over the past four years, the District cut more than \$1.75 million from the operating budget. We are concerned that additional cuts will negatively impact our students and ability to retain high-quality staff.

We need your help! Our plans going forward must reflect the needs of our students and the priorities of taxpayers.

Please take this survey before December 12th

Option 1: To reduce mailing expenses, please go online –

Go to the survey website: www.Feedback2000.com



Enter your survey code:

Option 2: By paper – if you do not have internet access, please return the survey to any school office, or mail it to School Preferences, PO Box 607, Skaneateles, WI 53106.

Additional Surveys: The survey code can be used only once. To obtain additional surveys for other adults in your household, please call the District Office at 262.692.2488.

Para recibir la encuesta en español, vaya a www.Feedback2000.com, ingrese el código de arriba, haga clic en el enlace que se encuentra en la página superior derecha.

Thank you for taking the time to read the information and complete this brief survey. To learn more about our budget, visit www.nosd.edu/budgetplanning.

Sincerely,

David Harris
Superintendent

Local Funding Sources

There are two types of referendums voters can approve to provide districts with additional funding:

1. A **capital referendum** asks voters to approve issuing debt (taking out a loan) to pay for major building projects, such as renovations or new construction. Northern Ozaukee School District voters supported this type of referendum in 2018 to update facilities.
2. An **operational referendum** asks voters to approve funding above the annual revenue limit to maintain class sizes, programs, and student services. In the last 20 years, more than 300 districts across the state (approximately 73%) have pursued this type of referendum. The Northern Ozaukee School District **has never secured funding** from this type of referendum.

Budget Challenges

The Northern Ozaukee School District faces several financial challenges:

- It has more school districts across Wisconsin, our student enrollment has declined. Because state funding is tied to enrollment, the fewer students we have, the less money we receive.
- For the past two years, the state has not increased the amount of revenue school districts are allowed to receive on a per-student basis.
- Expenses for utilities, insurance, transportation, fuel, and technology have increased.
- It has become more difficult to attract, retain, and compensate high-quality staff.
- Federal ESSER funds helped us balance the budget. This funding will soon end, which puts the programs and staffing supported by these dollars in jeopardy.

To balance the budget, the District cut more than \$1.75 million over the past four years by:

- ✓ Reducing administrator, teacher, and support staff positions.
- ✓ Reducing employee benefits.
- ✓ Reducing bus routes.
- ✓ Increasing class sizes.

Even with these cuts, the District is projecting significant budget deficits over the next five years. Therefore, the District plans to explore a \$1.9 million annual operational referendum to:

- Provide reasonable class sizes.
- Provide resources and jobs for struggling students.
- Maintain both soft and "hard" courses to better prepare students for jobs and careers in our area.
- Address increasing costs for utilities, insurance, transportation, fuel, and technology.
- Provide salaries and benefits that are competitive with other schools and local businesses.
- Maintain the buildings and grounds.

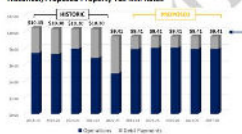
Funding Support

The Northern Ozaukee School District has maintained a remarkably consistent property tax mill rate over the past four years. This property tax allowed us to pay debt early, raising over \$1.5 million in interest expenses. This year, the tax mill rate has dropped to \$9.42.

The District's goal is to maintain a consistent mill rate to help our community members, families, and local businesses plan their budgets. Approval of an operational referendum is required to reallocate funds previously used for preparing debt -> operational funds that maintain most current programs and services.



Historical/Proposed Property Tax Mill Rates



Would you support a \$1.9 million operational referendum to help maintain most programs and services for each of the next five years? Approval would not increase the property tax mill rate over the current level.

- Definitely yes
- Probably yes
- Unclear
- Probably no
- Definitely no

Comments/questions/suggestions:

Cost-Cutting Options

If the referendum is not approved, further cuts will be needed. Community feedback will help determine the priority for potential cuts. The District and School Board do not endorse any of the following but must consider all options to reduce expenses and balance future budgets.

- Should the District start staff to increase class sizes and decrease student support services? Yes No No opinion
- Should the District reduce course offerings (such as technical education, ability to earn college credits, and career preparation)? Yes No No opinion
- Should the District reduce athletics and extracurricular offerings? Yes No No opinion
- Should the District delay technology upgrades and/or reduce student access to technology? Yes No No opinion
- Should the District delay curriculum updates (textbooks, classroom materials, equipment, etc.)? Yes No No opinion

Respondent Information

What is your age? 18-24 25-34 35-44 45-54 55-64 65+
Is your primary residence in the Northern Ozaukee School District? Yes No Not sure

To which municipality do you live?
 Town of Belgium Town of Fredonia Village of Fredonia
 Village of Howling Town of Saukville Village of Saukville
 Do not live in the District Other

Are you an employee of the Northern Ozaukee School District? Yes No
Do you have children attending a school in the District? Yes No

How would you like to receive school/district information? (Mark all that apply)

- School website Automated phone notification Parent/teacher organizations
- District meetings Meetings at school School board meetings
- School newsletters Openline Press Email
- Online social TV Twitter Radio
- Facebook Text messaging Skyward Family Access
- Other

On a scale of 0 - 10, how likely would you be to recommend the District to a friend or family member?

0 1 2 3 4 5 6 7 8 9 10
Extremely Unlikely Neutral Extremely Likely

Thank you for your participation! We sincerely value your time and input.

Mailing to all residents in November!

www

NOSD WEBSITE | Budget Planning



www.nosd.edu

Be INFORMED

The Northern Ozaukee School District is working with the community to build understanding for how budgets are managed through state and local funding under the Revenue Limit, awareness of NOSD's 2022-23 Budget, and projections of growing deficits in the absence of proactive solutions. Our goal is to engage residents in planning initiatives in order to make informed decisions that uphold our educational mission and reflect our community's values.

This webpage contains resources for learning including an **Information & Outreach Plan** that guides our work, a summary of the **Community Leaders Forum**, **FAQs**, and key **resource reports**. Additionally, all residents will receive a newsletter in late November with a brief **Community Survey**. It will contain important background information about this work and a request for feedback. A link to the survey will be posted under quick links soon.

We encourage you to engage in the learning, participate in the Community Survey, and, if you have questions – please contact us!

Dave Karrels, Superintendent
Josh McDaniel, Director of Business Services

Quick Links

-  [Info & Outreach Plan](#)
-  [Community Leaders Forum](#)
-  [Resources & Reports](#)
-  [FAQs](#)



NEXT STEPS

INFORMATION & OUTREACH PLANNING