



**Wednesday, March 13, 2024
Board of Education Work Session (REVISED)**

**APPLETON AREA SCHOOL DISTRICT
BOARD OF EDUCATION WORK SESSION
Scullen Leadership Center
131 E. Washington Street, Suite 1A
Appleton, WI 54911
Time: 7:30 AM**

Board of Education Work Sessions are not broadcast via live stream but are open to the public unless otherwise noticed. Any special needs or any requests for accommodations related to accessing the meeting should be sent to Kayla Malott, at malottkayla@aasd.k12.wi.us or (920) 852-5300 ext. 60111, at least 24-hours in advance of the meeting.

1. Meeting Opening

Subject	A. Roll Call
Meeting	Mar 13, 2024 - Board of Education Work Session (REVISED)
Category	1. Meeting Opening
Type	Discussion, Information, Report

2. Monitoring Reports (OE-8.1: Submit required monitoring data in a thorough, accurate and understandable fashion, according to the Board's annual work plan schedule.)

Subject	A. Monitoring Report: OE-7 Asset Protection
Meeting	Mar 13, 2024 - Board of Education Work Session (REVISED)
Category	2. Monitoring Reports (OE-8.1: Submit required monitoring data in a thorough, accurate and understandable fashion, according to the Board's annual work plan schedule.)
Type	Discussion, Information

Executive Director of Finance, Holly Burr, will present Monitoring Report: OE-7 Asset Protection

File Attachments
[OE-7 Asset Protection - Monitoring_report 2024.docx.pdf \(501 KB\)](#)

3. Report to the Board (OE-8.2: Provide for the Board, in a timely manner, information about trends, facts and other information relevant to the Board's work.)

Subject	A. Human Resources- Paid Time Off (PTO)
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Meeting	Mar 13, 2024 - Board of Education Work Session (REVISED)
Category	3. Report to the Board (OE-8.2: Provide for the Board, in a timely manner, information about trends, facts and other information relevant to the Board's work.)
Type	Discussion, Information, Presentation

File Attachments

[BOE WORKSESSION 3-13-24 Paid Time Off .pptx.pdf \(1,588 KB\)](#)

Subject	B. Human Resources Update-Recruiting/Retaining Staff
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Meeting	Mar 13, 2024 - Board of Education Work Session (REVISED)
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Category	3. Report to the Board (OE-8.2: Provide for the Board, in a timely manner, information about trends, facts and other information relevant to the Board's work.)
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Type	
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File Attachments

[BOE WORKSESSION 3-13-24 Staffing Update - Recruitment and Retention.pptx.pdf \(2,096 KB\)](#)

4. Adjourn

Subject	A. Adjournment of Work Session
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Meeting	Mar 13, 2024 - Board of Education Work Session (REVISED)
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Category	4. Adjourn
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Type	Information, Procedural
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Success for
Every Student,
Every Day



**Appleton Area School District
Operational Expectations Monitoring Report
OE-7 Asset Protection**

SUPERINTENDENT CERTIFICATION:

With respect to Operational Expectations Policy 7, Asset Protection, I certify the proceeding interpretations and indicators to be accurate and complete and reasonable.

___ **Compliant**

X **Compliant with the exceptions noted**

___ **Non-Compliant**

Compliant Indicators	Noncompliant Indicators
8	1
Total Indicators: 9	

Executive Summary/Analysis:

The interpretations and indicators, as submitted below, will provide evidence to the Board that the District's **assets** are maintained and protected. Indicators reflect legal and state department requirements, when appropriate. In other instances, indicators are informed by best practice. While monitoring will largely be accomplished through internal reporting, it will also incorporate external audits and board inspections.

Notes or exceptions, if any:

The District is meeting all requirements outlined in OE-7, with the exception of indicator 7.4.3, which pertains to disaster recovery and network penetration testing. While formal penetration testing has not been conducted yet due to the implementation of new technology, we have conducted successful small-scale disaster recovery tests. Furthermore, we have plans to undergo a penetration test conducted by an external agency during the summer of 2024.

Signed: _____ Date: _____
Superintendent

BOARD ACTION:

With respect to Operational Expectations Policy OE-7, Asset Protection, the Board finds that the organization is:

____ **Compliant**

____ **Compliant with the exceptions noted**

____ **Non-Compliant**

Summary Statements of the Board, if any:

Signed: _____ Date: _____

Board President

Document submitted: _____ Re-submitted: _____

OE-7: Asset Protection

The Superintendent will assure that all district assets are adequately protected, properly maintained, appropriately used and not placed at undue risk.

SUPERINTENDENT Interpretation:

The Board values good stewardship including the care for, use of, and protection of district property and therefore expects the superintendent to proactively ensure that this occurs.

- **District assets** shall mean all tangible personal property and intellectual property (including information technology systems) having a useful life of more than one (1) year and a per-unit acquisition cost which equals or exceeds \$10,000 unless purchased with federal dollars, then the per-unit acquisition cost equals or exceeds \$5,000.
- **Adequately protected** shall mean insured for 100% replacement value.
- **Properly maintained** shall mean serviced and repaired on a regular basis to remain in good operating condition.
- **Appropriately used** shall mean in compliance with operating guidelines established by the manufacturer.
- **Not placed at undue risk** shall mean safe from actions that would cause District assets to be harmed or damaged or create an unsafe environment.

OE – 7.1 The Superintendent will maintain property and casualty insurance coverage on district property with limits equal to 100% of replacement value.

SUPERINTENDENT Interpretation:

- **Property** shall mean facilities, vehicles, equipment, and materials with an insurable risk.
- **Casualty insurance** shall mean coverage to protect the District and its employees resulting from an accident, mishap, or disaster.
- **100% of replacement value** shall mean the ability to replace and make whole property losses experienced by the District subject to any and all deductibles.

SUPERINTENDENT Indicators of Compliance:

We will know we are compliant when:

7.1.1- Copies of invoices and payments reflect that the District purchased and received the coverage declarations for property and casualty insurance equal to 100% of replacement value.

**In
Compliance**

**Not in
Compliance**

X

SUPERINTENDENT Evidence of Compliance:

- Attached [here](#) is a summary of our property and liability insurance.

OE - 7.2 The Superintendent will maintain both Errors and Omissions and Comprehensive General Liability insurance coverage protecting board members, staff and the district itself in an amount that is reasonable for school districts of comparable size and character.

SUPERINTENDENT Interpretation:

- **Errors and Omissions insurance** shall mean protection for board members and staff who make a mistake in performing their duties in good faith and results in harm to the District.
- **Comprehensive General Liability insurance** shall mean protection for the district against claims by third parties.
- **Amount that is reasonable** shall mean in accordance with amounts recommended by insurance carrier and verified by a second carrier or consultant.
- **Comparable size and character** shall mean other school districts with a similar setting (urban/suburban), numbers of students, and demographics.

SUPERINTENDENT Indicators of Compliance: We will know we are compliant when: 7.2.1- Copies of invoices and payments reflect that the district has purchased and received the coverage declarations for Errors and Omissions and Comprehensive General Liability insurance coverage at the recommended levels.	In Compliance X	Not in Compliance
SUPERINTENDENT Evidence of Compliance: Attached here is a summary of our property and liability insurance and the Educator's Legal Liability declarations pages.		
OE - 7.3 The Superintendent will adequately protect the District against theft or misappropriation of funds by any personnel who have access to material amounts of district or school funds.		
SUPERINTENDENT Interpretation: Misappropriation of funds shall mean the unauthorized, improper, or unlawful use of funds or other property for purposes other than that for which intended. Any personnel shall mean any district employee or volunteer. Material amounts shall mean more than \$1,000, which is equivalent to the deductible.		
SUPERINTENDENT Indicators of Compliance: We will know we are compliant when: 7.3.1- Copies of invoices and payments reflect that the District has purchased and received the coverage declarations for crime coverage and the policy has been received.	In Compliance X	Not in Compliance
SUPERINTENDENT Evidence of Compliance: Attached here is a summary of our property and liability insurance and the Crime declarations pages.		

OE - 7.4 The Superintendent will protect intellectual property, information, files, records and fixed assets from loss or significant damage.

SUPERINTENDENT Interpretation:

- **Intellectual property** shall mean creations of the mind: inventions, literary and artistic works, and symbols, names, images, and designs used in commerce.
- **District intellectual property** shall mean original curriculum, teaching materials, or other documents created by district employees as part of their job for use by the District or its employees.
- **Information, files and records** shall mean paper, and electronic data on district servers, deemed critical (Finance, Human Capital, Student Support and Data, Research & Accountability) to the operations of the District.
- **Fixed assets** shall mean property and equipment having a useful life of more than one (1) year and a per-unit acquisition cost which equals or exceeds \$10,000 unless purchased with federal dollars, then the per-unit acquisition cost equals or exceeds \$5,000.
- With regard to fixed assets, **significant damage** shall mean harm or destruction requiring more than \$5,000 or more of unplanned repair or maintenance including labor, material, and equipment rental costs.

SUPERINTENDENT Indicators of Compliance:

We will know we are compliant when:

- 7.4.1-** The District receives no legal complaints that any of its employees has violated intellectual property rights or that their intellectual property has been stolen.
- 7.4.2-** Information, files, and records are backed up each night by Tech Services and there was no loss of these files and records during this fiscal year. Records are backed up on a second server that functions independently to our main server.
- 7.4.3-** Disaster recovery and network penetration testing will be performed annually. A summary report of tests showing that no security concerns were found will be made available to the Board upon request.
- 7.4.4-** The District has no significant damage to fixed assets due to circumstances within its control during the school year. Damage to fixed assets is tracked and reported by the District's Auxiliary Services Specialist for audit purposes and made available to the Board upon request.
- 7.4.5-** The District has a recovery plan for loss of information, files and records deemed to be critical to the operations of the District. A log of requests to retrieve information, files, or records is updated as needed by Tech Services staff and made available to the Board upon request.

**In
Compliance**

**Not in
Compliance**

X

X

X

X

X

SUPERINTENDENT Evidence of Compliance:

-  **OE-7 - Reporting from Technology Services**

OE - 7.5 The Superintendent may not permit facilities and equipment to be subject to improper use or insufficient maintenance.

SUPERINTENDENT Interpretation:

- **Facilities and equipment** shall mean assets having a useful life of more than one (1) year and a per-unit acquisition cost which equals or exceeds \$10,000 unless purchased with federal dollars, then the per-unit acquisition cost equals or exceeds \$5,000.
- **Improper use** shall mean inappropriate operation or treatment, or utilization in a manner or for a purpose contrary to what was intended.
- **Insufficient maintenance** shall mean inadequate or unreasonable repair, cleaning, inspection, or upkeep as recommended by manufacturer specifications as applicable.

SUPERINTENDENT Indicators of Compliance:

We will know we are compliant when:

- 7.5.1-** No person is injured in a District facility, or when using District equipment, as a result of insufficient maintenance of the facility or equipment, as shown in records kept by the District's Safety Coordinator. Such records are made available to the Board upon request.
- 7.5.2-** Worker's compensation claims filed as a result of the improper use of equipment do not exceed five claims in the school year, as shown in records kept by the District's Safety Coordinator. Such records are made available to the Board upon request.
- 7.5.3-** The District has an active safety program for investigating accidents to identify insufficient maintenance or improper use of facilities and equipment. The District's Safety Coordinator documents any occurrences, as well as the corrections that were made to ensure further accidents do not occur. This documentation is made available to the Board upon request.
- 7.5.4-** The District maintains and adheres to a long-range capital preventative maintenance plan to help guide the prioritization of Capital Projects Fund appropriations. The District's AkitaBox system generates reports that are made available to the Board upon request.

**In
Compliance**

**Not in
Compliance**

X

X

X

X

SUPERINTENDENT Evidence of Compliance:

- **7.5.1** - No records were created as no injuries were reported meeting this criteria.
- **7.5.2** - No records were created as no injuries were reported meeting this criteria.
- **7.5.3** - No injuries were sent to us as needing further investigation due to a facilities or equipment deficiency that should be corrected.
- **7.5.4** - The district's five year capital improvements plan will be presented in the spring of each year.

OE - 7.6 The Superintendent may not recklessly expose the district, the Board or staff to legal liability.

SUPERINTENDENT Interpretation:

- **Recklessly expose** shall mean to commit an offense that is grossly negligent putting the District in a legally untenable position which cost the District more than \$10,000.
- **Legal liability** shall mean litigation with another party where attorney fees are incurred.

SUPERINTENDENT Indicators of Compliance:

We will know we are compliant when:

7.6.1- The District incurs no legal costs or damage awards as a result of careless and reckless acts by the Superintendent.

**In
Compliance**

**Not in
Compliance**

X

SUPERINTENDENT Evidence of Compliance:

- The District has incurred no legal costs as a result of careless and/or reckless acts by the Superintendent. All billing for legal services is reviewed as part of the annual audit.

OE - 7.7 The Superintendent may not invest funds in investments that are not secured or that are not authorized by law.

SUPERINTENDENT Interpretation:

- **Funds** shall mean money or capital.
- **Investments** shall mean the commitment of district money or capital to the purchase of financial instruments or other assets so as to gain profitable returns in the form of interest, income, dividend, or appreciation of the value of the instrument.

SUPERINTENDENT Indicators of Compliance: We will know we are compliant when: 7.7.1- All investments are in compliance with Wisconsin State Statutes and the auditor's management letter makes no comment in regards to investments. 7.7.2- The District has only deposited funds with entities governed by Public Depository Protection Act and included in the annual Authorized Depository Resolution.	In Compliance X X	Not in Compliance
SUPERINTENDENT Evidence of Compliance: The District is in compliance with section 7.7 in that all deposits are with organizations approved with the annual Authorized Depository Resolution. Note 2-A Cash and Investments (page 31-34) of the annual Financial Statements (audit report) discusses investments and risk of all cash and investments of the District. All cash and investments are FDIC insured or secured by the investment organization.		
OE - 7.8 The Superintendent may not purchase or sell real estate, including land and buildings, or enter into a property lease without Board approval.		
SUPERINTENDENT Interpretation: Purchase shall mean to obtain ownership of an asset in exchange for money or value. Sell shall mean to surrender ownership of an asset in exchange for money or value. Property Lease shall mean a contract outlining the terms under which the District agrees to rent property owned by another party.		
SUPERINTENDENT Indicators of Compliance: We will know we are compliant when: 7.8.1- All dispositions and acquisitions of land and buildings are approved by board resolution 7.8.2- There is no finding by the independent external auditors in reference to disposition and acquisition of land and buildings. 7.8.3- All property leases are approved by the Board.	In Compliance X X X	Not in Compliance

SUPERINTENDENT Evidence of Compliance:

- District is in compliance with section 7.8.
- All real estate purchases and leases are approved at regular meetings of the board. Attached is a copy of the Item For Consideration for the [real estate purchases](#) at City Center East and the lease for space on the second floor of City Center for [Valley New School](#) for the 2023-24 school year.

OE - 7.9 The Superintendent may not act or fail to act in any manner that damages the district's public image or credibility.

SUPERINTENDENT Interpretation:

- **Damages the District's public image or credibility** shall mean placing at risk the reputation and trustworthiness of the District in the mind of the average citizen in the Appleton Area School District.

SUPERINTENDENT Indicators of Compliance:

We will know we are compliant when:

7.9.1- We have no litigation regarding careless acts by the Superintendent.

7.9.2- 70% of respondents to our annual survey express support for the direction of the District.

**In
Compliance**

**Not in
Compliance**

X

X

SUPERINTENDENT Evidence of Compliance:

- **7.9.1** - The AASD had no litigation regarding careless acts by any staff member, including the Superintendent, in the past year.
- **7.9.2** - The results of the community survey from the summer of 2023 showed that 82.7% of respondents responded "Yes" or "Somewhat" to the question, "In general, do you support the direction of the AASD?"



BOARD WORK SESSION

Paid Time Off

March 13, 2023

Julie King, Holly Burr and Dave Pynenberg

PAID TIME OFF (PTO)



1. History of Leave System & Why Explore PTO
2. PTO Workgroup & Input Process
3. What is PTO
4. Considerations and Keys to Success
5. Research and Work Completed
6. Timeline
7. PTO Questions - discussion

- 3

WHY EXPLORE PAID TIME OFF (PTO)

Where did the idea to explore PTO come from? Employee surveys, discussions at Employee Relation meetings, and HR Admin. Advisory Team

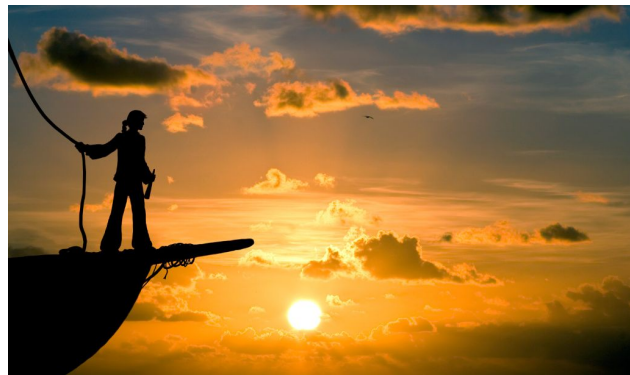
Staff/Admin Feedback - discontent with system limitations, rules for each type of leave, limited availability for days to take time, challenges with covering classrooms due to absences, and unexpected absences

1. *Better System for Staff (Recruit and Retain)*

- Offers flexibility to staff (when & what)
- Incentives for attendance and choice in the incentive
- Less complex and easier to understand

2. *Better for Students (Consistency)*

- Planned absences allow for continuity of learning for students
- Less colleague stress - taking additional students due to absence
- Substitute plans



3. *Better for Management of Absences (Coverage / Culture)*

- Planned vs. unplanned absences / Easier to cover when absences are known in advance
- Flexibility to allow time off based on sites individual coverage options

PAID TIME OFF (PTO) PROCESS



1. Formed a **representative PTO Workgroup** that met seven (7) times over last year to explore, discuss, and collaborate on a Paid Time Off (PTO) model.
2. Presented and gathered input from the **Executive Cabinet** in August
3. Presented to **Administrators** and solicited feedback in December, 2023.
4. Collaborated with our **HR Admin. Advisory Team** on the logistics of implementation.
5. The **PTO Workgroup** will be meeting on March 19th to determine next steps.

PAID TIME OFF (PTO) WORKGROUP



The Workgroup met 7 times over the past year to explore PTO as an option for AASD

1. May, 2023 - Started with understanding what Paid Time Off (PTO) is and is not, reviewed examples from other districts, discussed Pro's and Con's, and began developing questions. Divided up into research groups to connect with individuals within our employee groups from district's with PTO.
2. June 2023 - Team reported back, reviewed data, and unanimously decided to continue.
3. 9/28, 10/26, 11/15, 11/29, 12/14 - Drafted the "Why and What" section, discussed several components of PTO and needed language, shared fiscal impact, messaging for staff, and timeline.
4. *Paused for additional input and Board update.*
5. Next Meeting Scheduled for March 19th

Team Member	Role
Julie King	Human Resources
Dave Pynenberg	Human Resources
Angie Pittman	Benefits Specialist
Kathy Carriveau	Substitute / Leave Coordinator
Corey Otis	Educator / AEA President
Lauren Ott	Educator/Mentor-Induction Specialist
Stacy Wickershiem	Educator
William McClone	Principal
Melissa Sass	Educator
Shannon Paulson	School Nurse
Jeff Schad	Maintenance – Carpenter
Scott Werfal (**)	Director of Technology Services
Holly Burr	Finance

PAID TIME OFF (PTO) PROCESS



Paid Time Off: Often referred to as *PTO*, paid time off is personal time that employees take to spend out of the office (and not working) while still receiving pay for regular wages. PTO policies can be structured in many different ways depending on a given company's size, structure, and industry.

**Not Personal Time
off**

Initial PTO Research details of how it operates in a school District

Research included multiple PTO Models.

- Different buckets were collapsed (i.e. PTO instead of separate buckets for sick, emergency, personal days, bereavement, PTO ranged from 8-10 days)
- Some district had different levels of PTO for years of experience
- Models did not allow for carryover of PTO, some provided a sick leave bank accessible for FMLA leave.
- Most models included only accrued time to be transferred to the sick bank (i.e. end of year).
- There was a range from no payout, to partial payout to full payout in different forms.
 - Some PTO days have a cash value (value is subject to change based on district budget allocations).

PAID TIME OFF (PTO) PROCESS



Challenges:

- Nature of work and need for continuity of student learning = **less flexibility**
- **Limited resources** - Budget/fiscal impact, substitutes and coordination, etc.

KEY COMPONENTS TO SUCCESS:

- Clear messaging on the benefits for staff, sites, and students
- Flexibility with managing at the site on what the site can cover.
 - Guidelines and caps at the site/department level for planned PTO
 - Guidelines for administrators approving PTO for consistency
- Reward for not using PTO with options (i.e. FMLA bank, partial payout, or 403b contribution)
 - Value is subject to change based on district budget (flexibility)
- Required Emergency Planning - Ability to transfer accrued time to a FMLA bank (i.e. end of year), recommended not to incentivize staff until LTD waiting period is reached (60-90 days).

CONSIDERATIONS: PAID TIME OFF

- Would a PTO system be a benefit to employees over the current model (i.e. flexibility, value of days, workplace culture, etc.)?
- What is the operational impact? (planned absences vs. sudden)
- Is the structure fiscally sustainable?
- Are there logistical considerations? (District vs. Site)
- Will staff understand the expectations of PTO?



PAID TIME OFF (PTO) PROCESS

Information Researched

- Inventory of current system
- Reviewed sample policies from other districts
- Brain stormed pros/cons
- Thought through considerations
- Discussed components of PTO
- Reviewed data trends
- Provided cost analysis for plan
- Strategized logistics with admin team
- Began developing education plan



Intro Paragraph to Handbook - Explaining Paid Time Off (PTO):

Appleton Area School District Paid Time Off (PTO) benefit plan consolidates paid leave benefits into a single account that allows employees flexibility and personal management of time off. PTO is intended for use in situations where the employee is absent from work due to illness or medical reason, bereavement (for non-immediate family), emergencies, or personal leave. (Unused PTO may be retained in a Leave Reserve Bank (used for FMLA or other paid leaves outlined in the Handbook) and/or compensated at an established rate.

Paid Time Off (PTO) provides staff with a yearly allotment of time off as well as incentives for maximizing their time at work. PTO is designed to increase flexibility and choice. Employees are empowered to balance priorities of personal time, work, and compensation. Not only does PTO promote individual employee work-life balance, but planned PTO also allows site administrators to secure sufficient coverage, which benefits students, staff, and the entire school community. Planned PTO enables individual employees, staff, and administration to properly prepare for scheduled absences so that instruction and other district operations continue with minimal disruption.

BUDGET IMPACT OF PAID TIME OFF

Potential budget impact:

If plan includes a payout of days not used during a year.

- Payout rate and number of days is to be determined
- Calculations are based on current leave utilization and the cost would range from:
 - \$497,000 (*assuming two days at an established rate*)
 - \$982,000 (*assuming four-five days at an established rate*)



PAID TIME OFF RESEARCH AND APPROVAL TIMELINE

Dates	Group Connections	Outcome
5/11/2023	PTO Workgroup	Grounding on PTO, reviewed example, discussed pros/cons, developed questions
6/28/2023	PTO Workgroup	Debrief on Research
9/28/2023	PTO Workgroup	Began Drafting the "Why and What" - Introduction in Handbook
10/26/2023	PTO Workgroup	Draft - "Why and What"
11/13/2023	Admin HR Advisory	Update / Review recommendations / feedback
11/16/2023	PTO Workgroup	Discussed How it Works
11/17/2023	Communications - Paused	Draft message - What is PTO, Why is AASD considering it, What is the process?
11/29/2023	PTO Workgroup	Discussed allocations, potential blackout days, and bereavement
11/13/2023	Admin HR Advisory	Update / Review recommendations / feedback
12/7/2023	PTO Workgroup	Transition to PTO / Leave Reserve Bank / Payout/Conversion of PTO
12/8/2023	Executive Cabinet - Deeper Dive	Update / Review recommendations / Input
12/14/2023	Lead Learner	Update / Review recommendations / feedback
12/14/2023	PTO Workgroup	Next section - Approval Process & Logistics / Resignation or Retirements (PTO)
45309	Benefits/Wellness Team	Update / Review recommendations / feedback
2/5/2024	Admin HR Advisory	Update / Review recommendations / Discuss Admin Rollout

- BOARD PRESENTATION
- BOARD CONSIDERATION

DESIRED OUTCOMES

- **Students**

- ▷ Planned absences allow for continuity of learning for students
- ▷ Less colleague stress - taking additional students due to absence

- **Recruitment & Retention of Staff**

- ▷ Flexibility for staff
- ▷ Choice in incentive for attendance
- ▷ Simplified system that is easily understood
- ▷ Allows planning time for coverage plans

- **System Management / Sites**

- ▷ Simplified system that is easily understood
 - ▷ Less time in communications explaining the system and the rules for leave types
- ▷ Sites/Departments would be able to accommodate staff with a site vs. district approach
- ▷ PTO will not necessarily reduce absences, but improve the filling of vacancies with increasing the number of planned absences.



QUESTIONS & DISCUSSION

PAID TIME OFF (PTO)





BOARD WORK SESSION

Recruitment & Retention

March 13, 2023

Julie King and Dave Pynenberg

PAID TIME OFF (PTO)



- 1. Starting with the Why & History**
- 2. Workgroup and work thus far**
- 3. What is PTO**
- 4. Considerations and Keys to Success**
- 5. Research and Work Completed**
- 6. PTO Questions - discussion/survey**
- 7. Timeline**

Update: Retention & Recruitment

- ☐ Talent Outlook and Trends
- ☐ Non-Traditional Licensure
- ☐ Workforce Diversity
- ☐ Retention & Turnover
- ☐ Recruitment
- ☐ Goals & Future Work



Talent Outlook: Trends



Year	WI Enrollments	WI Completers	Percent WI Completers
2021	11,712	3,256	28%
2020	11,392	3,079	27%
2019	10,742	2,845	26%
2018	8,472	2,830	33%
2017	7,878	2,795	35%
2016	7,956	2,920	37%
2015	8,867	3,741	42%
2014	9,561	3,965	41%
2013	10,998	4,075	37%
2012	11,780	4,306	37%
2011	12,624	5,437	43%
2010	12,323	4,749	39%

Number Going into education is rebounding and the number of students completing education programs is declining

AASD Response Actions:

- **Provide Experiences:** opportunities for students to explore education:
 - *Student Career Fairs, Launch Events, Education Courses (Intro to Teaching and Child Development (dual credit course), CTE internship)*
- **Reduce Time and Cost of Program (Maintaining Integrity of Prg.):**
Collaboration with Education Preparation Programs (EPPs) and DWD:
 - *Universities to reduce graduation barriers*
 - *Employed during practicum*
 - *On the job student teaching*
 - *Internships*

Talent Outlook: Increasing Number of Emergency Licensed Educators in WI Shortage Areas:

Bridging the Need

Wisconsin Emergency Licenses and Emergency Permits Data –	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
Cross Categorical Special Education	236	228	461	500	652	649
Bilingual-Bicultural	96	103	248	244	242	203
Reading Teacher	81	80	143	136	137	110
English as a Second Language	63	37	72	104	114	107
Instructional Library Media Specialist	48	26	60	70	76	93
Early Childhood Special Education	24	28	62	68	77	77
Math	27	19	49	55	73	61
Spanish	31	23	36	44	59	66
Total Issued	1,126	1,075	1,913	2,158	2,659	2,248

Source: <https://dpi.wi.gov/tepd/programs/research-data/shortage-data>

Non-Traditional Licensure (Formerly Emergency)

DPI Requirements:

- Initial hire – must attest no highly qualified candidates available.
- Must hold a Bachelor's degree
- Must be enrolled in a program
- Must show progress towards licensure each year to renew (3-yr. max for Spec. Ed.)
- Could be a licensed teacher, hired outside their area

AASD Response Actions:

- Collaboration w/CESA 6
- HR Mentor & Induction Support
- HR Licensure Support / Tracking
- Special Education PST support
- Training cohort of Paraprofessionals
- PDP's & Management Structure
- Experience Based Licenses or 3-year district sponsorship and support

Category	2014-15	2015-16	2016-17	2017-18	2018-19	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Special Ed	3	5	7	13	17	17	22	22	32	38
Elementary/Middle	4	11	0	0	0	0	17	21	24	18
Family Consumer Science		0	0	0	0	0	0	3	4	2
Student Services	1	1	1	0	2	3	6	9	3	2
Marketing/Business			0	0	1	0	0	0	3	0
Alternative Education			1	1	0	4	0	3	2	2
4K	2	4	8	7	4	2	2	2	2	5
Art / Music			0	0	0	1	2	2	2	0
LMC Specialist			0	2	1	0	1	2	2	2
Reading			0	1	0	2	3	3	2	0
Science			1	0	1	0	2	3	2	0
Admin	0	2	1	0	1	1	1	1	1	4
Bilingual			0	0	1	0	0	0	1	0
Math			1	1	3	0	0	0	1	1
Tech Ed			0	1	0	1	1	0	1	2
World Language			0	0	0	1	0	1	1	1
Computer Science			0	1	0	0	2	0	0	0
EL			1	1	0	2	1	1	0	0
ELA			0	1	0	0	1	0	0	1
Health			0	1	1	1	0	0	0	0
Phy Ed			0	0	0	1	0	3	0	0
Total	10	21	20	30	31	35	60	76	83	78

Acutely Aware of the Challenges

- ❖ 50% decrease in applicants over last 7 years.
- ❖ Shortages in many of the DPI hard-to-fill areas.
- ❖ Education program trends away from traditional 4-5 year programs
- ❖ Many of the candidate applied to multiple districts.
- ❖ Less Qualified Candidates Results in:
 - Additional workload for staff
 - Alternative staffing plans
 - (typically 10 positions go unfilled annually – prioritize classroom teachers)
 - Increase of emergency licensed staff
 - Increased need for mentors, training, and supports

Diversity of Workforce & Demographics (2017-2024)

All Staff 2023-2024

Employee Group	No.	BIPOC Staff
Administrative Support	65	25%
Paraprofessional	362	18%
Administrator	69	10%
Secretary	95	11%
Maintenance	63	3%
Educator	1280	5%
Total	1934	8%

School Year	Staff Totals	BIPOC Staff	%
2023-24	1939	164	8.5%
2022-23	1934	153	7.9%
2021-22	1916	134	7%
2020-21	1871	112	6%
2019-20	1922	102	5.3%
2018-19	1903	101	5.3%
2017-18	1899	100	5.3%

Goal to increase BIPOC staff to more closely represent student population since 2017-2018:

- *Administrators - increased 2.9% to 10% (+7%)*
- *Educators - increased 2.4% to 4.9% (+2.4%) (31 to 63)*
- *All Staff - 5.3% to 8.5% (+3.2%) (100 to 164)*

AASD Response Actions:

- Expanded outreach to diversity networks & marketing
- Communicate Pathways opportunities (Para/ASU)
- Train administrators on unbiased hiring practices and mentoring/sponsoring
- Collaboration with New North K-12 DEI Taskforce
- Implement co-planned strategies with DEI Department
- Participation in events w/ U.S. Venture and Leven

RETENTION & TURNOVER

Employee Groups	2019-2020		2020-2021				2021-2022				2022-2023				2023-2024			
	RES/RET	% Turnover	RES	RET	No.	% Turnover	RES	RET	No.	% Turnover	RES	RET	No.	% Turnover	RES	RET	No.	% Turnover
Maintenance	3	6%	5	4	9	16%	2	7	9	15%	3	3	6	10%	2	1	3	5%
ASU	8	16%	7	3	10	17%	6	2	8	13%	6	1	7	11%	3	0	3	4%
Paraprofessionals	54	17%	78	16	94	24%	65	7	72	20%	52	13	65	18%	22	5	27	8%
Admin	7	10%	4	6	10	15%	10	1	11	16%	6	1	7	10%	0	4	4	6%
Educators	82	7%	91	30	121	9%	88	39	127	10%	95	41	136	10.6%	21	37	58	4%
Secretaries	9	7%	8	3	11	11%	19	5	24	24%	10	5	15	16%	2	6	8	8%
Total Resignations & Retirements	165	8.6%	193	62	255	13.6%	190	61	251	13.1%	172	64	236	12.3%	50	53	103	5.3%
			10.3%	3.3%	13.6%		9.9%	3.2%	13.1%		9.0%	3.3%	12.3%		2.6%	2.7%	5.3%	

Educator Attrition: Ending Data for 2022-2023

- Nationally - 16%
- Wisconsin - 16%
- Region - 11.5%
- AASD - 10.6% *

Resources: <https://learningpolicyinstitute.org>

Educator Resignation Trends: Years Experience

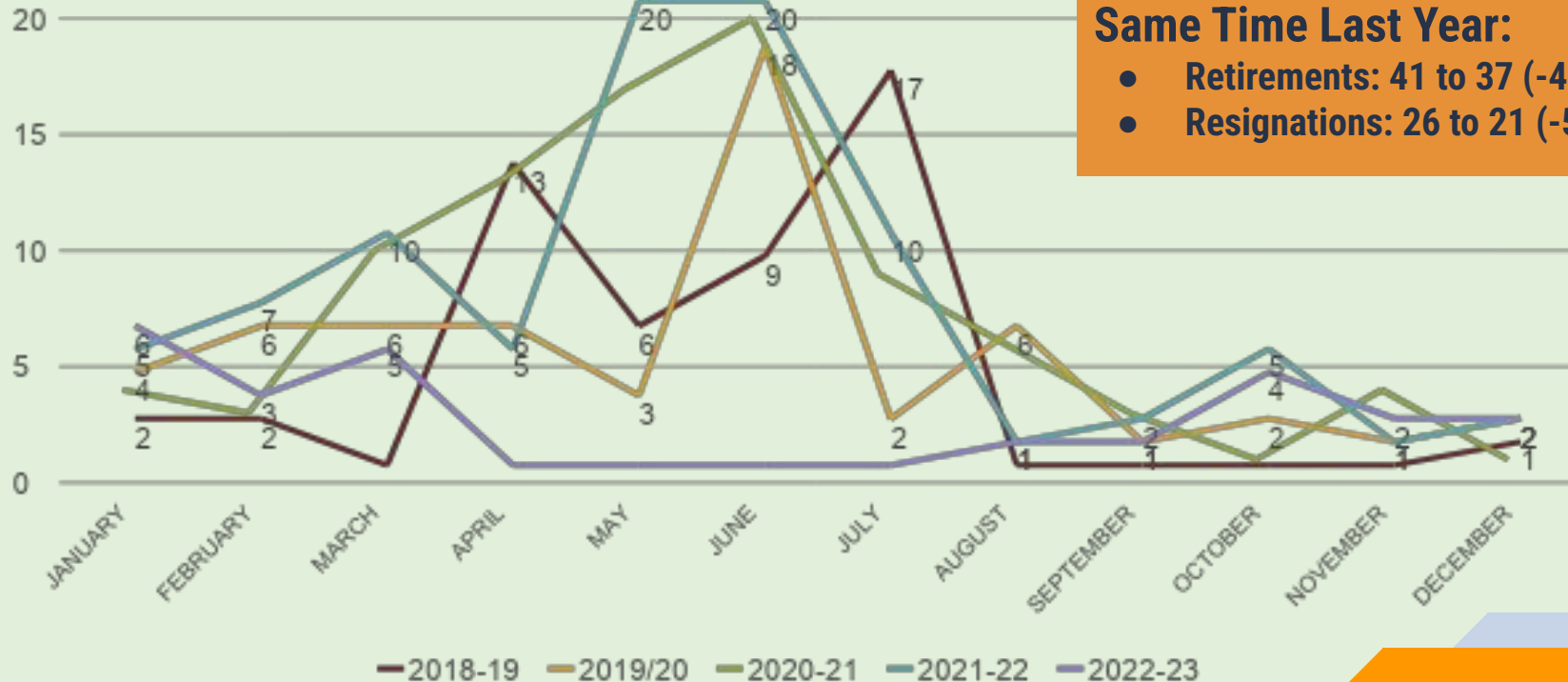
Percentage of Educator Resignations by Years of Experience

Years Exp	17-18	17-18 (%)	18-19	18-19 (%)	19-20	19-20 (%)	20-21	20-21 (%)	21-22	21-22 (%)	22-23	22-23 (%)
1-2	27	41%	17	34%	20	35%	28	31%	25	28%	26	27%
2.5-5	11	17%	13	26%	16	28%	20	22%	17	19%	20	21%
6-10	6	9%	9	18%	12	21%	31	34%	23	26%	22	23%
10+	12	18%	9	18%	12	21%	12	13%	19	22%	27	28%
Total	66		50		57		91		88		27	

Trends:

- Turnover is higher in years 1-5
- Less than national avg. of 50%

Educator Resignation Trends: Timing



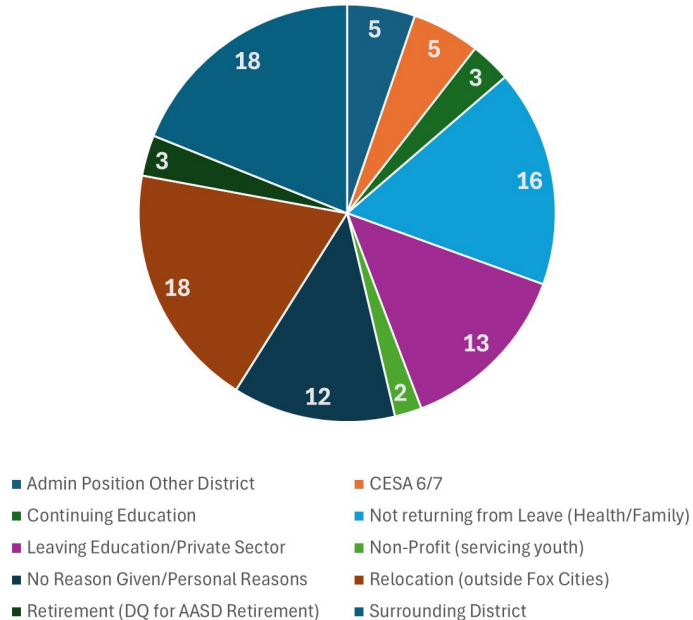
Same Time Last Year:

- Retirements: 41 to 37 (-4)
- Resignations: 26 to 21 (-5)

Educator Resignation Trends: Reasons

7.4%

Number of Educator Resignations



2022-23 Trends Continue

- **18% of resignations:**
 - Surrounding district
 - (AASD is a recipient district)
 -
- **18% of resignations:**
 - Relocation outside of Fox Cities
 - Relocation is a top reason 1-5 yrs exp.
- **16% of resignations:**
 - Not returning from leave/family care continues to be the top resignation reason (80% female)
- Position outside public education is growing – particularly educational resources

THREE AREAS OF FOCUS



RECRUITMENT		RETENTION		ENGAGEMENT	
	Competitive, Compensation and benefits		Maintain competitive, sustainable compensation		Update rewards & recognition program
	Enhance Candidate Experience		Hire great leaders Pathways to Career mobility		Increase career growth opportunities
	Refine recruitment process - speed to close		Affordable, quality benefits and wellness program		Targeted PD and Site Work Environment
	Expansion of creativity in how & where we recruit		Increase flexibility		Increased focus on DEI

RETENTION AND RECRUITMENT STRATEGIES: What's New

Retention

- ✓ Stay Interview (launch in April)
- ✓ Affordable / Convenient Care - Expanded Employee Clinic (BlueJay Clinic)
- ✓ Referral Bonus Program (in lieu of signing - compensation for spreading the word)
 - 85 Regular Employees referred since 1/1/2023 with 48 bonuses paid out as of 3/15/2024
 - 43 Substitutes referred since 1/1/2023, with 13 bonuses been paid out as of 3/15/2024
- ✓ Exploration of Paid Time Off (PTO)
- ✓ Additional Resources for Student Loan Forgiveness Programs

Recruitment

- ✓ Apprenticeships (working on an additional dual credit course agreement with FVTC)
- ✓ Expansion of Pathways Program

RETENTION STRATEGIES (and Recruitment): Support Orientation, Mentor, and Induction Support Program

Critical Role and Program:

- ✓ Welcome new staff!
- ✓ Coordinates orientation – adjusts annually based on feedback
- ✓ Serves as a resource throughout the year
- ✓ Assist in navigating technology, resources, processes, Handbook, and key communications
- ✓ Check-ins with all new educators and support staff quarterly and rounds with second year teachers
- ✓ Trains mentors and facilitates mentor matches for eligible new educators
- ✓ Serves as an ambassador at career fairs, events, and orientations.
- ✓ Organizes new educator seminars and facilitates leave / retirement savings seminars for all staff
- ✓ Collaborates on questions, concerns, or potential recovery.



RETENTION: SUPPORT, INPUT, AND FEEDBACK



- ✓ **High quality leaders** – Provide timely feedback, assist in problem-solving, and are understanding
- ✓ Professional development opportunities
- ✓ Site Administrator – re-recruitment of high performers / professional conversations and rounding
- ✓ **Input/Feedback Opportunities:** Employee Relations, Engagement Survey, Opportunity Hours. District Committees, CSIP Teams
- ✓ Passed Referendum (Reduced class sizes K-2) (Upgrade facilities)
- ✓ Dean, EMLSS/Behavioral support, Site based CLR Champions, ISC support, Instructional Coaches, Technology Integrators, Program Support Teachers, Curriculum Support Specialist Leaders
- ✓ Curriculum support and collaboration time
- ✓ Assistance with loan forgiveness programs and licensure support
- ✓ Appleton Education Foundation support

RETENTION STRATEGIES: Career Development / Apprenticeships



AASD PATHWAYS TO SPECIAL ED. EDUCATOR LICENSING

The Appleton Area School District (AASD) is offering an opportunity for current support staff to become licensed in the high-needs area of Special Education. This program has been created to develop the talent of phenomenal support staff who have the desire for all students to succeed and the drive to complete the program.

The program includes a **four week** summer session where the candidate will work in a classroom for the Extended School Year in the morning and attend seminars in the afternoon.

This unique opportunity allows our staff to learn the art of teaching and apply the skills they are learning in the classroom.



Pre-Requisites & Commitment

- » Candidates must have a Bachelor's degree from a nationally or regionally accredited college or university
- » Related experience including working with students with special needs
- » Building administrator recommendation based on observations
- » 90 days or more employment
- » Driven to complete the program
- » Commitment to accept employment offered and work for AASD for two years as a Special Education Teacher



Application Process and Selection

- » The District sponsors 5 candidates a year.
- » Candidates must submit the application for consideration by March 23
- » Candidates who meet the pre-requisites for the program will be considered.
- » Candidates will be selected for interviews **April 4th**
- » Candidates will be approved by **May 2nd**



- ✓ CTE Internship for Students
- ✓ ESSA Certification opportunities
- ✓ Pathways to Special Ed. Licensure and tuition reimbursement opportunities for support staff
- ✓ 3-year district sponsored licensure or Experience based licensure support
- ✓ Educator add-on licensure testing reimbursement
- ✓ Educator variety of roles (intervention, coach, tech. integrator, CSS, mentor, etc.)
- ✓ Aspiring Administrators Cohort
- ✓ Master's in Education Cohort
- ✓ Leadership Principal Cohort

NEW Apprenticeships -

Collaboration FVTC, Lakeland, and DWD

RETENTION: Compensation & Financial

- ✓ Consistent compensation increases over the past 6 years on a transparent Compensation Frameworks.
- ✓ Opportunities for additional compensation: Coaching/advising extra curriculars, supervision, super postings, summer school, ESY, mentoring, referral program, etc.
- ✓ Recognition for earning an approved Master's degree – up to \$5,000 annually
- ✓ Master's degree or administrative license with AASD cohort mode 1/3 the tuition costs
- ✓ **Access to loan forgiveness programs – Public Student Loan Forgiveness (PSLF) & Teacher loan forgiveness**
- ✓ Tuition reimbursement program- expanded
- ✓ Post-retirement benefit (retiree only HRA and 403b)
- ✓ Wisconsin Retirement System contributions and pension
- ✓ Educational seminars – expanding family and financial planning
- ✓ Paid holidays, vacation for eligible groups, attendance bonus



RETENTION: Benefits



- ✓ Affordable health broad network health insurance with \$0 deductible accessible to all regular employee groups that work 30 hours or more
- ✓ **Two** Employee Clinic with wellness coaching, physical therapy, and primary care services.
- ✓ Suite of voluntary benefits: short-term disability, accident, hospital indemnity, vision
- ✓ Generous leave policy – sick leave, bereavement, personal days, holiday and vacation (for eligible groups)
 - **Exploration of PTO**
- ✓ Educational seminars – expanding family
- ✓ Wellness Programming (Site Wellness Liaisons, Wellness Coordinator & Events, Wellness Coach Connecting Care Clinic, Health Risk Assessment and outreach, and EAP)
- ✓ Flexibility - Job Share opportunities, requested reduction of contract/hours, leaves of absence or partial leaves of absence

RECRUITMENT STRATEGIES

Advertising

- ✓ Multiple platforms (WECAN & Frontline), k12jobspots.com, social media (Facebook, LinkedIn), website, school newsletters, press releases, exterior signs
- ✓ Events – AASD Recruitment event, university job fairs, and walk-in interviews
- ✓ Referral Incentive Program

Focus on candidate experience and follow-up

- ✓ How we treat candidates is a reflection of how we treat employees
- ✓ Hiring process efficiencies – hiring sooner than ever before
- ✓ Improved interview to hiring timing
- ✓ Excellent HR service



RECRUITMENT STRATEGIES

Collaboration/Partnerships

- ✓ Universities – Special Ed. Clinical hours (employed), on-the-job student teaching, **APPRENTICESHIPS**
- ✓ FVTC – 2 year ESSA program
- ✓ Organizations: US Venture, Leven, Lamers, Jacks, Chartwell, BGC, YMCA

Re-Recruitment / Boomerang

- ✓ Maintain contacts with former employees
- ✓ Outreach to employees on former leaves who resigned
- ✓ Rehired employees within 5 years (Benefit)

Marketing/Branding

- ✓ Competitive wages, excellent benefits, family-friendly work schedules, rewarding careers, caring work environment



RECRUITMENT STRATEGIES

Developing Talent

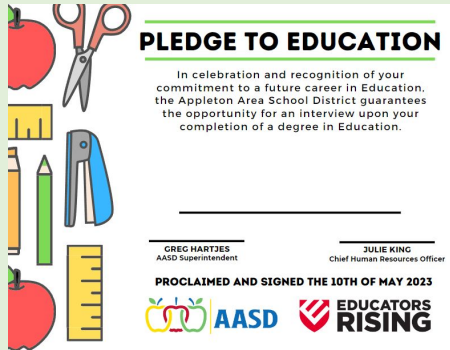
- ✓ Special Education Pathways
- ✓ Aspiring Administrators / Leadership Development
- ✓ Administrative Professional Conversations and shared opportunities
- ✓ Apprenticeship ([Article](#))

Recruitment of Non-Traditional Candidates

- ✓ Education on pathways to careers in education



EFFORTS: Promoting Careers, Providing Experiences & Recognizing Commitment in the Field of Education



STUDENT EXPERIENCES:

- CTE Internship
- Dual Credit Courses in Education
- Launch events
- Pledge to Education

Launch Events: Since 2018



STUDENT SIGNING EVENT: May 2024 TBD

Graduating seniors involved in education pathways will be recognized for their commitment to a future career in education by announcing their post-secondary plans for attending and completing a degree in education.

At the ceremony, students pledge to complete a degree in education, and in turn, the AASD will officially commit to offering them an interview for a position upon degree completion.

NEW: STUDENT APPRENTICESHIP TO EMPLOYEE APPRENTICESHIP PATHWAY

Future Focus:

Control Controlables & Capitalize on What Works



This will continue to be our work to control the controllables:

- Support emergency license teachers (continuing trend)
- Promoting Education as a Career - How we speak about the career matters
- Provide opportunities for students to explore careers in education and follow-up with those students (GYO: CAPP, Educators Rising, Launch Event, etc.)
- Improve branding and web/social media presence



Continue with what works and improve as a District:

- Continue to hire early – refine efficiencies of hiring while maintaining personal connection
- Enhance employee/candidate understanding of benefits and alignment to staff values (PTO / Post-Retirement benefits / Health insurance structure)
- Focus on re-recruiting to retain high quality staff
- Continue work to make AASD a great place to work (Staff Engagement Survey / Coordinated Wellness Efforts)