Shorewood School District

May 18, 2026

Community Information Session

Task Force on Long-Term Financial Sustainability









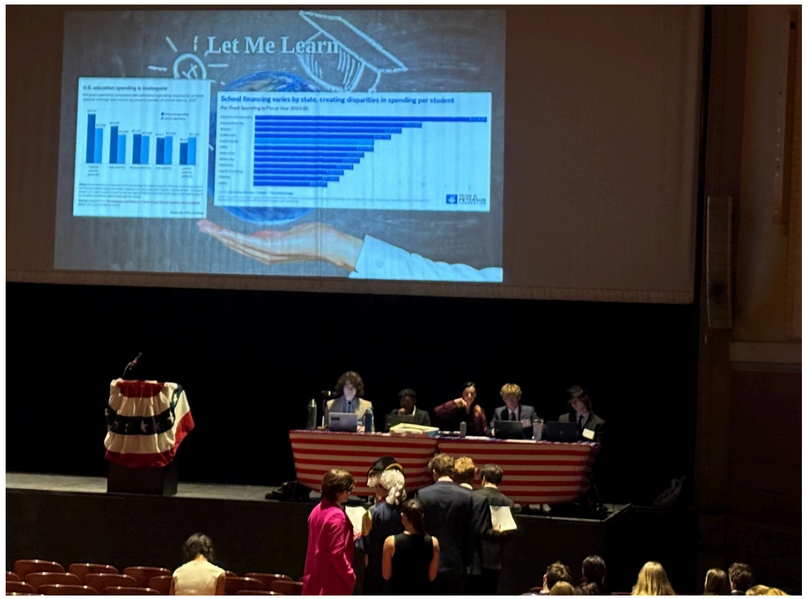
Welcome

Abby Fowler
President, Board of Education

Earlier today...











Tonight's Agenda

- Provide background information - Why are we here?
- Review key findings from Task Force (scenarios & tensions)
- Clarifying questions
- Community input
- Live poll & Exit ticket







Headlines from Around the State

STATE AFFAIRS
WISPOLITICS
Wisconsin's Premier Political News Service

Dan Rossmiller: What is going on with property taxes?

January 7, 2026

milwaukee journal sentinel

Lake Country School puts $3.2 million operational referendum on April ballot



Lawmakers must understand education funding before fixing it | Letters



The GOP has had majority cont
guess they can't fix school fund

LETTERS Letters to the Editor

Appleton Area School District discusses options to address funding gap ahead of board vote

You'll pay more in property taxes. Thank Wisconsin lawmakers | Opinion

Public school leaders don't want to rely on an endless cycle of referendums and local property tax increases.



OPINION Laurie Burgos, Matthew Joynt, Deborah Kerr, Jeffrey Weiss, Todd Alan Price and Cathy Olig

Headlines from Around the State

milwaukee journal sentinel

Democrats slam Evers' deal with GOP on school funding, tax relief

Three Democrats vying to replace Gov. Tony Evers along with the Democratic leader of the state Senate blasted a deal Evers cut with GOP leaders.

POLITICS May 12, 2026



Wisconsin schools would get $617M boost in $1.8B funding deal

Some education leaders view the $1.8 billion deal as a positive step but warn it does not solve long-term funding challenges.

EDUCATION May 12, 2026



Tax relief, school funding bill dies under pressure from Tiffany, Dems

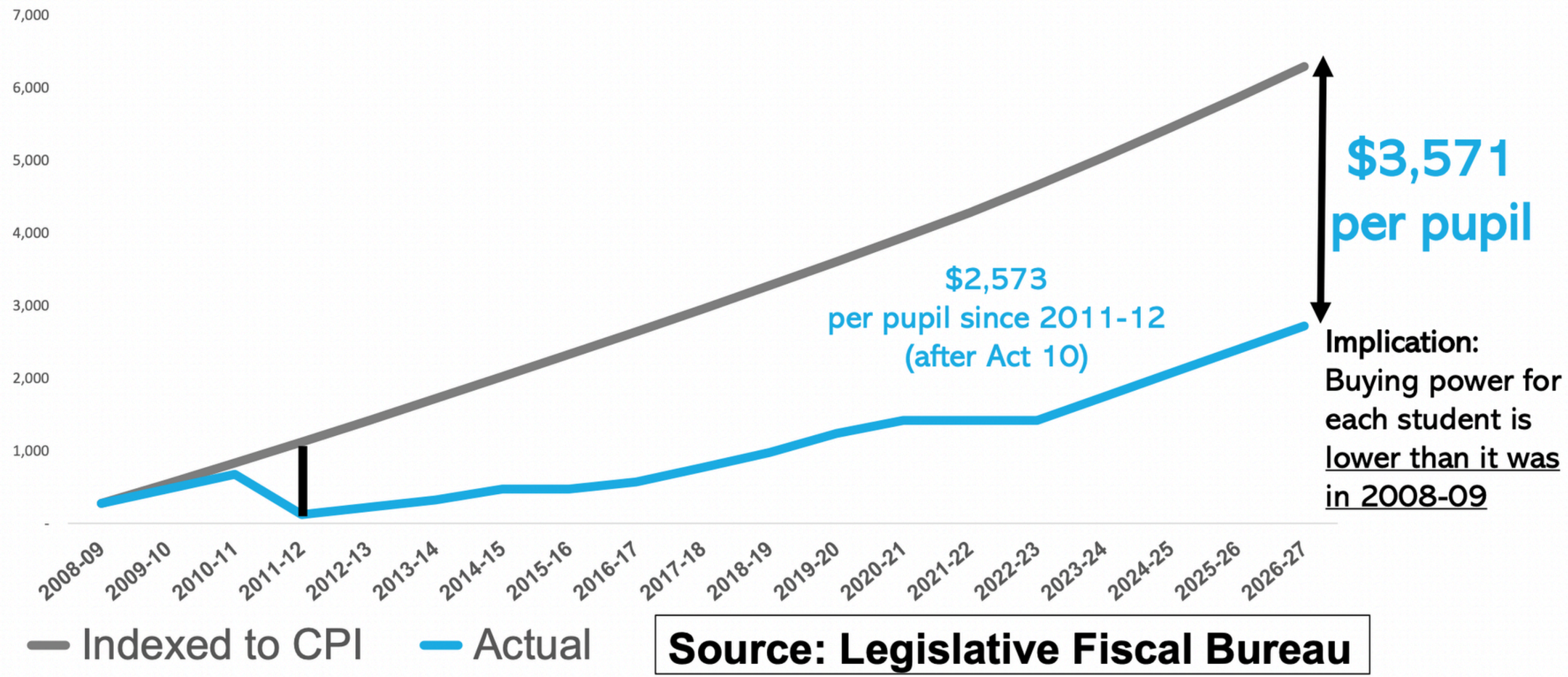
A measure to send millions of dollars to schools, reduce taxes and distribute rebate checks to taxpayers died late Wednesday.

POLITICS May 13, 2026



Wisconsin Per Pupil Funding

Cumulative annual adjustments in **general school district revenues per pupil** lag **inflation** by nearly $3,600 since 2009







OUR PROMISE

The Shorewood School District is an inclusive community that values, supports, and challenges every student so they thrive now and in the future they choose.





2025-2030 Strategic Plan

OUR PROMISE

The Shorewood School District is an inclusive community that values, supports, and challenges every student so they thrive now and in the future they choose.



1 CHALLENGING & ENGAGING LEARNING

A strong academic foundation equips students with the knowledge, collaboration, and critical thinking skills needed to succeed in college, careers, and lifelong learning while empowering them to contribute meaningfully to their communities.



2 A CULTURE OF BELONGING & GROWTH

Students thrive when they are supported as whole individuals and engaged as active contributors in a community in which belonging, growth, and continuous learning are modeled by staff and shaped by student voice.



3 STRONG PARTNERSHIPS

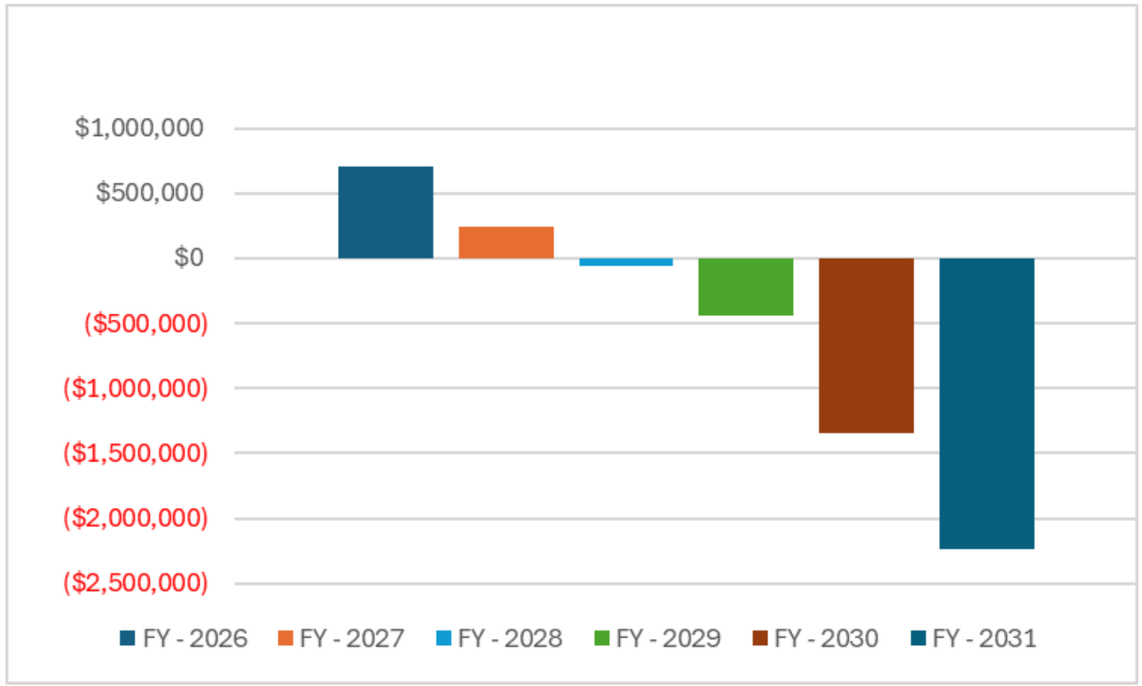
Strong partnerships with staff, families, community members, and organizations are essential. When schools and communities work together, students benefit from a wider network of support, resources, and opportunities that enrich learning and development.



4 OPERATIONAL EXCELLENCE

Safe and well-maintained school and community facilities create environments where students and staff can focus fully on learning and growth. At the same time, we recognize the importance of fiscal responsibility in supporting our Promise and sustaining conditions necessary for every student to thrive.

Operating Referendum Impact



Key Assumptions

- $5.5M/year operating referendum continues
- Stable K4-6 enrollment
- Stable open enrollment
- 7th-12th resident enrollment decrease per study
- Salary increase 3%/yr
- Medical insurance increase 10%/yr
- Other expense increases based on history and inflation
- Revenue increase of $325 per resident membership

Even with an ongoing $5.5M/year operating referendum, deficits are projected to grow by up to $2.2M per year

Current Amount =
$5.5M/year

Projected Need 2028+ =
$6.5-$7.5M+/year

Fiscal Stewardship: Steps Taken

The operating referendum was a shot in the arm that enabled us to “catch up” to the per pupil funding lag.

The District has also:

- Reduced staffing through enrollment alignment and attrition;
- Rebuilt fund balance (reserves);
- Established capital maintenance funding;
- Commissioned a report on long-term enrollment projections;
- Begun exercising strategic budgeting processes;
- Convened a 40-member community Task Force to focus on long-term financial sustainability.

Task Force on Long-Term Financial Sustainability

Task Force on Long-Term Finanicial Sustainability

- Six Task Force Sessions (January - April)
- Task Force Report
- Three Community Information Sessions (December, March, May)
- Student Focus Groups
- School Perceptions Survey Questions
- Board Workshops







Task Force materials are available on the District website under the Community tab.

Shorewood School District

Task Force Charge

Evaluate and recommend school and program configuration scenarios that align with financial parameters and balance financial responsibility, educational excellence, and community needs/impact.



Evaluation Criteria

- Educational Quality
- Student Experience
- Community & Stakeholder Impact
- Equity & Access
- Enrollment & Demographics
- Strategic Alignment
- ★ Financial Sustainability

School Configuration Scenarios

School Configuration Development Process

- Evaluate physical capacity of each school building
  - Review 2019 facilities report from Eppstein Uhen Architects
  - Walk the building to assess usage/configuration
- Test scenarios against building capacities
- Identify possible grade-level configurations with input from SSD leaders; Roffers study enrollment projections for 2030
- Project needed staffing for each model
- Evaluate potential cost savings for each model
- Curate research about educational impact of models

School Configuration Drivers of Financial Impact

- **Number of schools** - Leadership and office staffing
- **Grade configuration** - Staffing needs based on grade levels
- **Facility utilization** - Custodial and utility/maintenance costs
- **Number of students** - Staffing needs/student materials and supply costs
- **Open enrollment** - Increase or decrease in revenue
- **Number of staff** - Salaries and benefits, costs for substitutes, professional learning, etc.

Scenario F: Big Middle/Big High

Total Enrollment: 1,904



Schools

Lake Bluff
Grades K4-4
Enrollment: 643

Atwater
Grades 5-8
Enrollment: 588

SHS
Grades 9-12
Enrollment: 673

Considerations

- All three buildings fully utilized;
- OE starts at grade 5;
- Requires review of elective offerings and sequence;
- Fitness Center and Rec. Dept. move to first floor of SIS.

Potential Impacts

Open Enrollment
Seats/% Total Enrollment

306/16%

Student-to-Staff Ratio

9.2

Financial

Medium (Low End)
($1.5M-$2M Per Year)

Scenario B: Two Feed Into One

Total Enrollment: 1,636





Schools

Lake Bluff
Grades K4-6
3 sections per grade
Enrollment: 524

Atwater
Grades K4-6
2 sections per grade
Enrollment: 359

SHS
Grades 7-12
Enrollment: 753

Considerations

- Attendance boundaries no longer define school assignment;
- Excess physical capacity at Atwater; minimal OE capacity ends at 9th grade
- Possible use of second floor classrooms at SIS;
- Grades 7-12 are in some of the same classes; share hallways, etc., but could have separate cafeteria;
- Fitness Center and Rec. Dept. move to first floor of SIS.

Potential Impacts

Open Enrollment
Seats/% Total Enrollment

39/2%

Student-to-Staff Ratio

9.1

Financial

Medium
($1.75M-$2.5M Per Year)

Scenario Zero: Status Quo

Total Enrollment: 1,906



Schools

Lake Bluff
Grades K4-6
Enrollment: 546

Atwater
Grades K4-6
Enrollment: 469

SIS
Grades 7-8
Enrollment: 291

SHS
Grades 9-12
Enrollment: 600

Considerations

- Awkward elementary class size split across campuses;
- Two-grade middle school.

Potential Impacts

Open Enrollment
Seats/% Total Enrollment

220/12%

Student-to-Staff Ratio

9.4

Financial

N/A

Design Tensions: Every Path Includes Tradeoffs

The Task Force Report outlined four major design tensions:

- Expand or Limit Open Enrollment
- Middle School Experience
- Walkability & Neighborhood Schools
- Referendum Magnitude & Program Implications









Future Operating Referendum: Data & Sample Tax Impact

Survey Questions - “Pulse Check”

School Perceptions Survey - Spring 2026

Respondents with Children in SSD

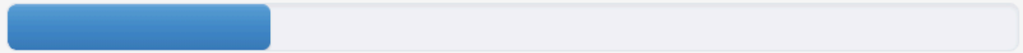
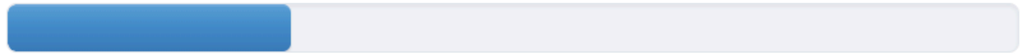
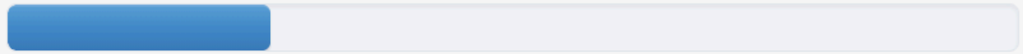
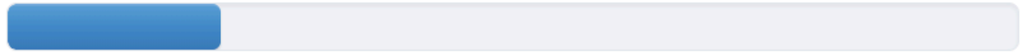
In 2023, the community passed an operating referendum for $5.5M each year for five years. Looking ahead, the District may need to consider a future operating referendum that is larger than the current one in order to sustain programs and services, which impacts the amount of the tax levy. Based on what you know today, which option would you be most likely to support? (n=232)		
An increase to the operating referendum large enough to maintain current programs and the existing four-school model (0)	74	31.9%
A moderate increase to the operating referendum, requiring a change in school configuration (e.g., moving from four schools to three) (0)	86	37.1%
No increase to the operating referendum, requiring significant changes to both school configuration and programs (0)	15	6.5%
Not sure / need more information (0)	57	24.6%

86% - Maintaining strong academic programs is **absolutely critical**

Survey Questions - “Pulse Check”

School Perceptions Survey - Spring 2026

Respondents without Children in SSD

In 2023, the community passed an operating referendum for $5.5M each year for five years. Looking ahead, the District may need to consider a future operating referendum that is larger than the current one in order to sustain programs and services, which impacts the amount of the tax levy. Based on what you know today, which option would you be most likely to support? (n=120)			
An increase to the operating referendum large enough to maintain current programs and the existing four-school model (0)	31	25.8%	
A moderate increase to the operating referendum, requiring a change in school configuration (e.g., moving from four schools to three) (0)	33	27.5%	
No increase to the operating referendum, requiring significant changes to both school configuration and programs (0)	31	25.8%	
Not sure / need more information (0)	25	20.8%	

78.7% - Maintaining strong academic programs is **absolutely critical**

Sample Impact of Operating Referendum Amounts*

Based on 2026 mill rate for illustrative purposes only. This is NOT a prediction of your tax bill.

Sample home value: $450,000

$5.5M/year

compared to other options

current amount

Total school tax (estimate)

~$4,883/yr

$6.5M/year

compared to other options

+~$189/yr

Total school tax (estimate)

~$5,072/yr

$7.5M/year

compared to other options

+~$378/yr

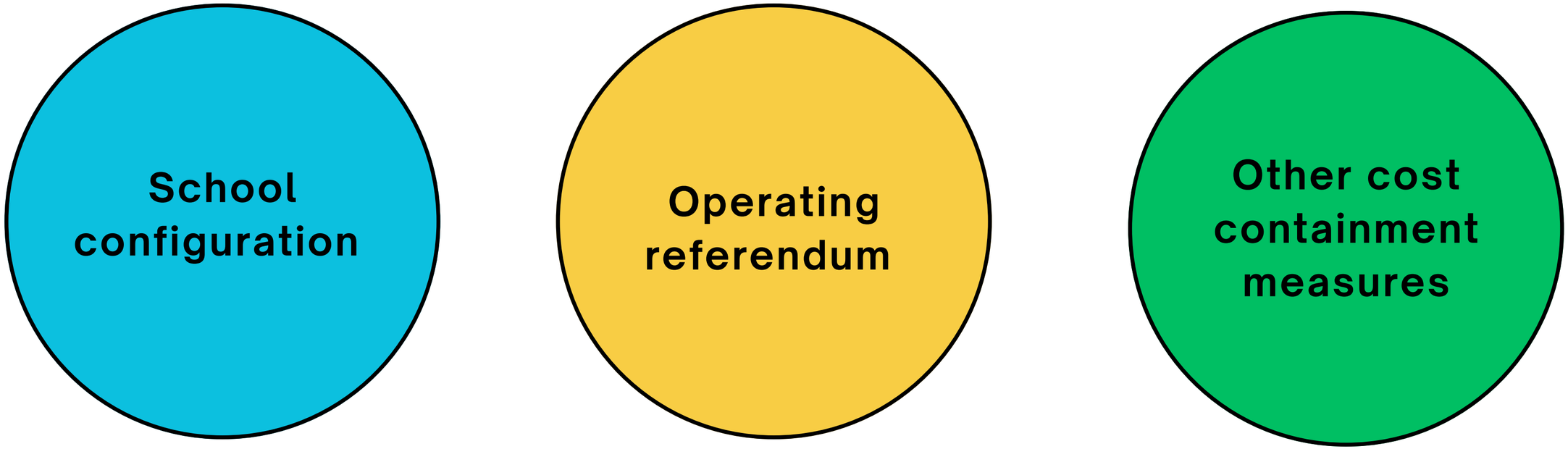
Total school tax (estimate)

~$5,261/yr

*
- Total school tax based on the 2026 mill rate and property values; Amounts will likely be different in future years;
- Does not include the school levy tax credit, which reduces the school tax burden;
- Property taxes may increase in future years even without a change to the operating referendum amount.

Components of Any Solution

Because expenses are projected to significantly outpace revenues, any plan for long-term financial stability will need to address:



Community Input

We need to hear from you.





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Community Input - Three Parts

Part One: 5 minutes

Turn & Talk

Use this time to:

- Name your initial reactions to what you've heard;
- Share your perspective on Scenario B or F or on the broader design tensions;
- Identify clarifying questions or talking points

Part Two: 10 minutes

Clarifying Questions

- This is a time for information, not persuasion.
- Ask brief clarifying questions to ensure everyone shares a common understanding of the facts;
- Questions should seek clarification - not make arguments or advocate for a position.

Part Three: 15 minutes

Community Input

Share your perspective and what matters to you. Help your elected officials understand where you stand:

- Scenario preference & why;
- Thoughts on key design tensions;
- What you believe is most important for students, families, and the long-term health of the district.

Community Agreements

We hold these agreements to make this a productive and respectful space for everyone.
Please state your name.

Share the Air

Wait for at least five others to speak before returning to the mic. Many perspectives deserve to be heard tonight.

Speak from Your Own Experience

Use "I" statements. Share your own perspective, not what "everyone" thinks or what you've heard others say.

Assume Positive Intent

Everyone in this room cares about Shorewood's students and community. Extend good faith to those whose views differ from yours.

Be Concise & Make Space

Keep comments focused so more voices can be heard. Tonight is not a debate, but rather a contribution to a broader process.

Civil & Honest Dialogue

You can disagree and you should share your truth. Do so with respect for the people in the room and for the difficulty of this work.

Focus on Helping the Board

The goal tonight is to give the Board a clear, honest picture of community priorities and values, not to convince your neighbors.

Questions/Comments are limited to one minute per person.

Live Poll

We need to hear from you.



Thank you!

- Board workshop - May 19
- Watch for more opportunities to engage with us!
- Please scan the QR code to provide us with additional input

https://bit.ly/4eQ6RJu





