

1995-96 SESSION  
COMMITTEE HEARING  
RECORDS

Committee Name:

Joint Committee on  
Finance (JC-Fi)

Sample:

Record of Comm. Proceedings ... RCP

- 05hrAC-EdR\_RCP\_pt01a
- 05hrAC-EdR\_RCP\_pt01b
- 05hrAC-EdR\_RCP\_pt02

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XVIII. Department of Public Instruction -- Steven B. Dold, Assistant State Superintendent

Pursuant to s. 9145(7) of 1995 Wisconsin Act 27, the department requests approval of its plan to allocate savings from budgetary efficiency measures in the amount of \$3,524,000 in 1996-97 among the department's general purpose revenue appropriations.

Governor's Recommendation

Approve the report. It is modified from the original report that the Department of Administration recommended approving on September 12, 1995.

## CORRESPONDENCE MEMORANDUM

STATE OF WISCONSIN  
Department of Administration

*Date:* April 10, 1996

*To:* Members, Joint Committee on Finance

*From:* James R. Klauser, Secretary  
Department of Administration

*Subject:* S. 13.10 Request of the Department of Public Instruction (DPI) Relating to Budget Efficiency Measures as required by Wisconsin Act 27

**Request**

As required under section 9145 (7) of 1995 Wisconsin Act 27, the department requests the Joint Committee on Finance's approval of its allocation of the unspecified budget efficiency measures for 1996-97 of \$3,524,000.

**Background**

1995 Wisconsin Act 27 required the DPI to submit a report to the Joint Committee on Finance recommending how to allocate savings of \$904,800 in 1995-96 and \$3,524,000 in 1996-97 among the department's general purpose revenue appropriations, excluding local assistance appropriations and the appropriation under s. 20.255 (3) (ea) for library contracts. The department submitted the report to the Joint Committee on Finance on September 1, 1995. The committee approved the recommended allocation for 1995-96, reduced the department's GPR position authority for 1995-96 to reflect the report, and delayed action on the 1996-97 allocation.

The 1995-96 reduction that was approved allocated the entire 1995-96 amount of \$904,800 GPR to the appropriation for general program operations under s. 20.255 (1) (a).

**Summary of Report**

The request by the DPI for 1996-97 differs from the September 1, 1995 plan. Tables 1 through 3 summarize the proposal. It includes:

- Eliminating 31.905 GPR-funded FTE in 1996-97 (see Table 1). This represents an additional 23.54 FTE over the 1995-96 reduction, but is less than proposed by DPI in September 1995.
- Transferring 22.385 FTE in 1996-97 from GPR to other fund sources (see Table 2). This represents an additional 16.81 FTE over the 1995-96 transfers, and is more than proposed by DPI in September 1995. The Department of Administration would need to approve 16.81 federally-funded FTE in 1996-97 to accommodate proposed fund source transfers.

- Decreasing the 1996-97 supplies and services budget for educational assessment by \$250,000 GPR (from a base of \$622,000) (see Table 3).

### Analysis

The 1996-97 reduction of \$3,524,000 GPR would be allocated as follows: \$2,038,300 from general program operations (for a net reduction from 1995-96 of 12.3%); \$1,135,700 from residential schools general program operations (for a net reduction from 1995-96 of 11.3%); \$250,000 from educational assessment (for a net reduction from 1995-96 of 29.1%); and \$100,000 from minority pupil group scholarships (for a net reduction from 1995-96 of 10%).

The report identifies the number of positions to be eliminated by division in 1996-97 and the types of positions. The only positions not identified by type are the 5.5 FTE proposed for reduction at the State Reference and Loan Library and 5.58 FTE at the two residential schools.

The proposed transfer of 14.76 GPR-funded FTE at the residential schools to federal Individuals with Disabilities Education Act (IDEA) funding would save an estimated \$917,200 GPR. (The September 1995 DPI proposal contained a transfer of 11.24 FTE for savings of \$700,700. The increased transfer preserves maintenance positions at the residential schools.) The department would replace the GPR by allocating an equal amount of IDEA funding to the residential schools and reducing the amount of discretionary IDEA funding distributed to school districts. In FY96, the state will receive approximately \$50 million in IDEA funding. Of this, 20% may be used for discretionary purposes, 5% may be used for administration, and 75% must be distributed to school districts as a formula pass-through. The DPI intends to budget approximately \$10 million for FY96 discretionary awards, with \$8.5 million coming from FY96 federal funds and \$1.6 million from FY95 carryover. DPI indicates that federal funding for this program has been stable in past years and believes that this will continue in spite of reductions in other areas of federal funding for education.

In FY97, the \$917,200 in IDEA funding proposed for reallocation to the residential schools would come from the \$8.5 million in federal discretionary funds received by the department. DPI would reduce the amount of funding awarded to school districts through competitive grants by an average 10.8%. The reduction would not come from formula pass-through funds. Note that about 53 school districts, 12 CESAs, and 4 other agencies received discretionary funds in 1995-96. To complete the reallocation, the Department of Administration would need to approve the creation of 14.76 new FTE federal positions which would be offset by a comparable reduction in GPR-funded positions.

The \$250,000 reduction in educational assessment funding in 1996-97 would reduce the amount of technical assistance provided to school districts regarding pupil assessment practices and administering the state's 4th, 8th, and 10th grade knowledge and concepts exams. However, the reduction would not delay implementation of the 4th, 8th, and 10th grade exams. This reduction could be tentatively approved as part of the DPI's report, with

Members, Joint Committee on Finance  
April 10, 1996  
Page 3

the understanding that the State Superintendent would review other alternatives at the beginning of the 1996-97 fiscal year.

The \$100,000 reduction in the Minority Precollege Scholarship program would reduce the number of scholarships available to qualifying minority students for participation at post-secondary institutions in programs which are designed to improve academic skills.

The department's proposal includes eliminating 6.5 FTE and \$75,000 in expenditures for supplies and services and materials from the Division for Library Services and Community Learning. This reduction is 0.75 FTE larger than the September 1995 proposal, but \$63,200 less in terms of spending reductions. The level of the GPR reduction (13.8%) to library services is comparable to the overall reduction to DPI operations of 12.1%. The Assembly Education Subcommittee on Libraries requested in a January 30, 1996 letter to the co-chairs of the Joint Committee on Finance that the September 1995 reduction to this division not be approved. JCF has not taken any action on the letter.

#### **Recommendation**

Approve the report. It is modified from the original report that the Department of Administration recommended approving on September 12, 1995.

Prepared by: Robert G. Cramer (266-1923)

**TABLE 1: POSITION REDUCTIONS**

<b>POSITION (by DPI division)</b>	<b>Approved for 1995-96 (FTE)</b>	<b>Proposed for 1996-97 (FTE)</b>
Office of the Superintendent		
- School Admin. Consultant	1.00	1.00
Instructional Services		
- Community Serv. Specialist	0.295	0.295
- Env. Ed Consultant	0.60	0.60
- Research Technician	0.20	0.20
- Education Program Coordinator	0.00	0.35
- Education Consultant, G&T	0.00	0.50
- Program Assistant	0.00	0.55
Equity and Advocacy		
- Ed. Program Coordinator	0.25	0.25
- Program Assistant, Amer. Ind.	0.00	0.40
- School Nurse Consultant	0.00	0.66
- Alcohol, Other Drug Consultant	0.00	0.25
- 2nd Year, Residential Schools	0.00	5.58
Financial Resources/Management		
- Assistant State Supt.	1.00	1.00
- Program Assistant	1.00	2.00
- School Admin. Consultant	0.00	1.00
- WEOP Position	0.00	0.75
Ed. Accountability/Policy		
- Financial Supervisor	1.00	1.00
- Budget and Policy Officer	1.00	1.00
- Program Assistant	0.40	1.40
- Management Info. Technician	1.42	3.42
- Education Program Specialist	0.00	1.00
- Management Information Specialist	0.00	1.00
- Attorney	0.00	1.00
Library Services		
- Library Consultant	0.20	0.20
- Community Education Consultant	0.00	1.00
- 2nd Year, Unspecified	0.00	5.50
<b>Total Reductions</b>	<b>8.365</b>	<b>31.905</b>

**TABLE 2: POSITION TRANSFERS**

<b>POSITION (by DPI division)</b>	<b>Approved for 1995-96 (FTE)</b>	<b>Proposed for 1996-97 (FTE)</b>
Instructional Services		
- Admin. Officer to PR	0.20	0.20
- Program Assistant to PR	0.25	0.25
- Admin. Assistant to PRS	0.20	0.20
- Program Assistant to PRS	0.20	0.20
Equity and Advocacy		
- Ed. Consultant to FED	0.75	0.75
- Program Assistants to FED	1.825	1.825
- 2nd Year, Unspecified to FED	0.00	1.55
- 2nd Year, Residential Schools to FED	0.00	14.76
Financial Resources/Management		
- 2nd Year, Unspecified to FED	0.00	0.50
Ed. Accountability/Policy		
- Management Info. Tech to PR	0.50	0.50
Library Services		
- Admin. Officer to FED	1.00	1.00
- Library Serv. Asst. to FED	0.65	0.65
<b>Total Transfers</b>	<b>5.575</b>	<b>22.385</b>

**TABLE 3: SPECIFIC FUNDING REDUCTIONS**

<b>REDUCTION (by DPI division)</b>	<b>Approved for 1995-96</b>	<b>Proposed for 1996-97</b>
Instructional Services		
- Science World S&S	\$96,000	\$96,000
Equity and Advocacy		
- S&S (To FED)	\$0	\$1,100
Financial Resources/Management		
- LTEs/S&S	\$50,000	\$50,000
- WEOP S&S	\$0	\$32,600
- Minority Precollege Scholarships (10% of Appropriation)	\$0	\$100,000
Ed. Accountability/Policy		
- S&S	\$9,600	\$9,600
- LTEs	\$9,500	\$9,500
- Assessment S&S	\$0	\$250,000
Library Services		
- S&S	\$6,000	\$31,000
- Capital Equipment	\$6,000	\$6,000
- Books and Periodicals	\$0	\$50,000
Agency-Wide		
- S&S	\$0	\$250,000
- Rent	\$0	\$66,100
<b>Total Reductions</b>	<b>\$177,100</b>	<b>\$951,900</b>





State of Wisconsin  
Department of Public Instruction

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XVIII

John T. Benson  
State Superintendent

Robert H. Gomoll  
Deputy State Superintendent

Date: March 18, 1996  
To: Members, Joint Committee on Finance  
From: John T. Benson, State Superintendent  
Subj: 1996-97 Budget Reductions

This responds to the provision in 1995 Wisconsin Act 27 directing that

**SECTION 9145 (7) ... EFFICIENCY MEASURES.** By September 1, 1995, the department of public instruction shall submit a report to the joint committee on finance recommending how savings in fiscal year 1995-96 of \$904,800 and in fiscal year 1996-97 of \$3,524,000 resulting from budgetary efficiency measures should be allocated among the department's general purpose revenue appropriations, excluding local assistance appropriations and the appropriation under section 20.255(3)(ea) of the statutes. The recommendation may be implemented only upon approval of the committee.

On October 26, 1995, the Committee approved the department's recommendations for the distribution of the 1995-96 reductions within the agency's (non-residential schools) general program operations appropriation. However, the Committee delayed action on the department's recommendations for the distribution of the 1996-97 reductions until a subsequent s. 13.10 meeting. On November 13, 1995 the department resubmitted its recommendations for the distribution of the 1996-97 reductions. On November 30, the Committee wrote that it would consider the 1996-97 recommendations "at its March, 1996, meeting under s.13.10."

This is a request to distribute the 1996-97 required reduction of \$3,524,000 as follows:

20.255 (1) (a) general program operations	\$ 2,038,300
20.255 (1) (b) general program operations; residential schools	\$ 1,135,700*
20.255 (1) (dt) educational assessment program	\$ 250,000
20.255 (3) (fz) minority precollege scholarships	\$ 100,000
	-----
	\$ 3,524,000

\*Most of this GPR reduction would be offset by increased federal Individuals with Disabilities Education Act (IDEA) funding for the residential schools' operations. See explanation to follow.

Please note that the above proposal represents only a portion of the department's 1995-97 budget reductions. Should this recommendation for distribution of the \$3,524,000 "unallocated" reduction for 1996-97 be approved, the distribution of the entire \$6,044,700 biennial budget reduction will be as follows:

	<u>1995-96</u>	<u>1996-97</u>	<u>Biennial Cut</u>
20.255 (1)(a) general program operations	\$ 2,127,600	2,156,300	4,283,900
20.255(1)(b) program operations; resid. schools	275,100	1,135,700	1,410,800
20.255(1)(dt) educational assessment program	--	250,000	250,000
20.255(3)(fz) minority precollege scholarships	--	100,000	100,000
Total	<u>\$ 2,402,700</u>	<u>3,642,000</u>	<u>6,044,700</u>

Attached is a report detailing, for 1996-97, recommendations to allocate \$3,642,000 in budget reductions among GPR appropriations and within DPI divisions. Please note that some of the 1996-97 reductions were specified in Act 27; in some cases specific positions were eliminated and in others positions in a specific division were eliminated. However, most of the \$3,642,000 reduction was unspecified. More specific fiscal information has been provided to the Department of Administration and Legislative Fiscal Bureau staff. If you have any questions about the report or the request, please contact Faye Stark, Director of the Bureau for Policy and Budget, at 266-1966.

Thank you for your review and consideration of this report. Steven B. Dold, Assistant State Superintendent, will represent the department at the April 16, 1996 meeting of the Committee.

Attachments

1996-97

(all reductions listed are in addition to 1995-96 reductions)

NOTE: To assist and provide perspective for the Committee in its review of the recommendations, listed first, for each DPI division, are Act 27-required and specified reductions; listed second (in bold face) are the department's recommendations for allocation of the remaining Act 27-required, but unspecified, reductions.

Office of State Superintendent

Specified reduction-- (- 472,700)

Outreach team:\* 5.75 GPR and 1.25 FED positions

\*Note: 4.00 of 6.00 school administration consultant positions on the outreach team have already been reallocated or eliminated to meet other budget reduction requirements as of 1995-96. To meet legislative intent, the remaining 2.00 GPR-funded consultant positions and the program assistant position will be eliminated in 1996-97.

**Unspecified reduction--none**

*Impact on services: The elimination of the outreach team will reduce assistance and services to low-performing schools and school districts required under s. 115.38. It will also limit the department's ability to respond to school district requests for assistance in curriculum development, school staff professional development and school district administrative functions.*

1996-97 REDUCTION TOTAL: \$ 173,900  
( 2.50 FTE)

Division for Learning Support: Instructional Services

Specified reduction-- (- 127,500)

2.00 GPR positions  
(Recommendation: 1.00 physical education consultant; 1.00 children at risk/GED consultant)

**Unspecified reduction--**

**(Recommendation: .35 education program coordinator; .50 gifted and talented education consultant; .55 program assistant)**

*Impact on services: The elimination of these positions will reduce assistance and services to school districts and individuals in the areas of physical education, children at risk/GED programming, alternative education, and gifted and talented education.*

1996-97 REDUCTION TOTAL: \$ 218,600  
(3.40 FTE)

Division for Learning Support: Equity and Advocacy

Specified reduction--none

**Unspecified reduction--**

**(Recommendation: .40 program assistant, American Indian Education program; .66 school nurse consultant; .25 AOD consultant; transfer 1.55 GPR positions to FED revenues (IDEA; Drug-Free Schools))**

*Impact on services: The elimination of positions or their transfer to federal revenue sources will reduce assistance and services to school districts in certain state-funded programs such as alcohol and other drug abuse prevention programs; in the case of transfers, the positions' functions must change to reflect federal funding sources. The other GPR reductions will reduce agency support services to the American Indian Education program and will reduce the agency's school nurse consultant services.*

1996-97 REDUCTION TOTAL: \$ 155,800  
(2.86 FTE)

**Unspecified reduction (residential schools)--**

**(Recommendation: 5.58 GPR positions (- 218,500); transfer 14.76 GPR positions at the residential schools to federal IDEA funding (- 917,200))**

*Impact on services: Instructional and student services at the residential schools during the regular school year will be unaffected by these reductions. The actual reduction to the residential schools' budget (beyond the 2.6% specified reduction in 1995-96) is 2.0%. Most actual position cuts will relate to implementation of efficiency measures in the food services program. However, the adult summer school operated by WSVH will be shortened from 5 weeks to 3. During 1996, the student summer school at WSD will not be held due to renovation in the education building. Beginning in 1997, the department will seek federal IDEA funds to reestablish student summer school at WSD.*

1996-97 REDUCTION TOTAL: \$ 1,135,700  
(20.34 FTE)

Division for Financial Resources and Management Services

Specified reduction -- (-194,600)

4.00 GPR FTE positions

(Recommendation: 1.00 financial specialist; 1.00 management information specialist; 1.00 school administration consultant (transportation); 1.00 program assistant)

**Unspecified reduction--**

**(Recommendation: 1.00 school administration consultant (finance); 1.00 program assistant; .75 Wisconsin Educational Opportunities Program (WEOP) position; transfer .50 GPR position to FED/food and nutrition and Title VI ; reduce WEOP supplies and services (-32,600); reduce minority precollege scholarships ( - 100,000))**

*Impact on services: The elimination of these positions and resources will reduce school finance and school management assistance and services to school districts and reduce some WEOP services. The minority precollege scholarship reduction will translate into a 10% reduction in the number of scholarships available to qualifying minority students.*

1996-97 REDUCTION TOTAL: \$490,500  
(7.25FTE)

Division for Educational Accountability, Policy and Management Support

**Specified reduction-- (- 228,000)**

6.00 GPR FTE positions

(Recommendation: 2.00 budget and policy analysts; 1.00 personnel assistant; 1.00 motor vehicle operator; 1.00 clerical assistant; 1.00 program assistant)

**Unspecified reduction--**

**(Recommendation: 2.00 management information technicians; 1.00 program assistant; 1.00 management information specialist; 1.00 education program specialist; 1.00 attorney; reduce supplies and services for educational assessment program (-250,000))**

*Impact on services: The elimination of these positions will further reduce services to DPI programs, the legislature and the public in areas of policy and legislative analysis, budgeting, personnel, fiscal management, data processing and educational information management. The educational assessment program reduction will result in reduced technical assistance, including statewide and regional workshops for school professional staff in pupil assessment practices and in administration of the 4th, 8th and 10th grade concepts and knowledge tests. In addition, DPI legal services to school districts will be reduced.*

1996-97 REDUCTION TOTAL: \$ 790,700  
(12.00 FTE)

Division for Library Services and Community Learning

Specified reduction--none

**Unspecified reduction--**

**(Recommendation: 5.50GPR positions (State Reference and Loan Library);  
reduce supplies and services (- 25,000); books and periodicals (- 50,000)); 1.00  
community education consultant (Community Services and Publications Team))**

*Impact on services: The elimination of these positions and resources will reduce loan services of the state Reference and Loan Library. In addition, DPI services to school districts in the establishment and operation of community education programs will be reduced.*

1996-97 REDUCTION TOTAL: \$360,700  
(6.50 FTE)

DPI Main Office/GEF 3

**Unspecified reduction--**

**(Recommendation: reduce supplies and services (- 250,000); rent (- 66,100))\***

*Impact on services: The elimination of these resources will reduce assistance and services to school districts provided through state or regional workshops, on-site consultation, mailings and printed materials. Rent savings are anticipated due to the elimination, beginning in 1996-97, of many GPR-funded positions now housed in GEF 3 and the resulting reduced need for office space.*

1996-97 REDUCTION TOTAL: \$ 316,100

\* These cuts will not further affect the residential schools, WEOP offices or the State Reference and Loan Library.

**GRAND TOTAL-- DEPARTMENT OF PUBLIC INSTRUCTION 1996-97 REDUCTIONS**

GPR dollar reduction	- \$ 3,642,000
GPR FTE positions	- 54.85 FTE



## Legislative Fiscal Bureau

One East Main, Suite 301 • Madison, WI 53703 • (608) 266-3847 • Fax: (608) 267-6873

February 20, 1996

TO: Members  
Joint Committee on Finance

FROM: Bob Lang, Director

SUBJECT: Report from the Wisconsin Institute for School Executives

On February 6, 1996, a report was submitted to the Co-Chairs of the Joint Committee on Finance by the Wisconsin Institute for School Executives (WISE) Board of Trustees. The report is required under 1995 Act 27, section 9137(1j), as a condition of the release of funds (\$125,000 GPR annually) for the Institute.

On February 8, Committee members received a memorandum from the Co-Chairs which described the approval process and included a copy of the WISE report. Members were asked to notify the Co-Chairs by Friday, February 23, if they wish to meet in formal session to consider this report. If the Committee does not schedule a meeting for the purpose of reviewing the report by February 26, 1996, the report will be approved and the funds will be released.

### Legislative History

Funding for WISE was originally included in the Governor's 1995-97 budget bill (1995 AB 150). The bill would have created a new, annual appropriation within the Department of Public Instruction (DPI) and provided \$250,000 GPR in 1996-97 for payments to WISE. According to the Executive Budget Book, the funds were to be used for start-up costs for the Institute which would provide statewide continuing education programs for school administrators.

The Joint Committee on Finance modified the Governor's proposal by deleting the funds in the DPI appropriation and instead providing \$125,000 GPR annually in the Committee's supplemental appropriation and earmarking these funds for payments to WISE. The release of funds to the WISE appropriation would be contingent upon the Committee's approval, under a

14-day passive review process, of a report submitted by the Institute which included the following information:

- The Institute's objectives and proposed activities.
- A detailed budget for the staffing and operation of the Institute.
- An identification of all funding sources.

During deliberations on the budget bill, the Assembly deleted all funding for WISE. However, through Senate action, the Joint Finance provision related to WISE was restored and became part of the final state budget (1995 Act 27).

### **Objectives and Proposed Activities of WISE**

The Institute's Board of Trustees consists of the following twelve members:

- Two representatives of the Association of Wisconsin School Administrators
- Two representatives of the Wisconsin Association of School Business Officials
- Two representatives of the Wisconsin Association of School District Administrators
- Two representatives of the Wisconsin Council of Administrators of Special Services
- One representative of the Wisconsin Manufacturers and Commerce
- One representative of the Wisconsin Association of School Boards
- One representative of the UW System
- One representative of Cooperative Educational Service Agencies

The report states that the Institute's mission is "to improve student learning through high quality and comprehensive continuing education programs for practicing school administrators" and lists six primary activities which the Institute plans to undertake in order to fulfill this mission. According to the report, the Institute plans to do all of the following:

1. Determine the management structure of the Institute. The WISE Board of Trustees is currently considering either hiring staff directly or contracting with a professional association and/or other vendors for services to the Board. The Institute will also pursue alternative revenue sources to support its operations.
2. Establish partnerships with other groups concerned with school leadership (including private organizations, higher education institutions which provide school administrator preparation programs, professional associations and DPI) to create a sequential program for continuing professional development for school administrators.
3. Identify critical proficiencies for school administrators using currently existing national standards and a survey which the Institute will develop and distribute to Wisconsin school administrators to assist in identifying additional continuing education needs.



4. Create a catalog of existing continuing education programs for school administrators and use the information obtained in the survey to adapt and/or modify these programs and to develop new programs which address the professional needs of school administrators.

5. Develop three-year or four-year programs designed to meet the continuing education needs of school administrators. The programs and courses may be offered through teleconferencing, workshops or other means. The Institute plans to issue certificates of advanced proficiencies to administrators who successfully complete its programs.

6. Develop strategies to market the Institute's programs and certificates.

### **Budget Plan for WISE**

The budget information included in the report is based on a 15-month development and implementation schedule which would begin in April, 1996, and end on June 30, 1997. The Institute estimates that total operating costs for this period will be \$287,707, of which \$250,000 would be covered by the GPR funds earmarked for WISE.

The report indicates that the balance of \$37,707 would be obtained from other sources (such as program fees, grants, membership fees, foundation awards and in-kind contributions from school administrator professional associations), but provides no further detail regarding these alternative revenue sources. Although one of the goals of the Institute is to become self-sufficient, the Board of Trustees does not anticipate generating significant revenues to offset operating costs during the first 15 months of operation.

① While a section of the Institute's report indicates that the Board has not yet determined whether it will hire a staff or contract for services, the Institute's proposed budget includes the costs of employing an Institute director, a program director, clerical staff and limited-term staff. Of the total proposed budget, 67.5% would be allocated for staff costs, 21.5% would be used for program development and services, and the remaining 11% would be budgeted for operating expenses. The following table provides a breakdown of the estimated expenditures for the 15-month period.

**STAFF COSTS**

Detail?

Salaries*	\$141,750
Fringe Benefits*	39,895
Travel**	10,000
Training	<u>2,500</u>
Subtotal	\$194,145

**PROGRAM DEVELOPMENT AND SERVICES**

(2)

Direct Program Costs***	\$40,000
Research and Program Development	14,250
Printing	<u>7,500</u>
Subtotal	\$61,750

**OPERATING EXPENSES**

Supplies and Equipment	\$9,000
Rent and Utilities	8,250
Postage and Mailing	5,312
Telephone	3,000
Board Meetings	<u>6,250</u>
Subtotal	\$31,812

**GRAND TOTAL**

**\$287,707**

- \* According to WISE, the allocation between salaries and benefits was incorrect in its report. The amounts in the table are the correct amounts.
- \*\* Primarily staff travel, although some Board members may also travel.
- \*\*\* Costs directly related to continuing education programs (such as speakers' fees, workshops and conferences).

If the Committee approves the Institute's report, the amount of funding approved would be transferred from the Committee's supplemental appropriation (a biennial appropriation) to the WISE appropriation (an annual appropriation) within DPI. However, (the Institute has not specified the allocation of the funds between 1995-96 and 1996-97, nor does the report indicate what portion of the total expenses would be incurred in each year.) Although \$125,000 GPR annually was earmarked for payments to WISE, the Committee has discretion over the amount of funds allocated each year. Furthermore, Act 27 does not require that the Committee release the entire \$250,000. If the Committee does not believe that the entire \$250,000 should be provided, a lesser amount could be approved for release to the DPI appropriation.

(3)  
(4)

While funding for WISE would be provided through an appropriation in DPI, the appropriation language only states that payments would be made to WISE and does not specify the purposes for which the funds could be used by the Institute. Furthermore, Act 27 did not provide DPI with any responsibilities to monitor the program. Therefore, according to DPI staff, once the funds are transferred to the WISE appropriation, the Institute would simply request payment from DPI and the agency would make the payment. The Institute would not be required to report expenditure information to DPI which would document how the state funds were actually used. The Institute would be under no obligation to expend the monies according to the budget plan included in its report.

(5)

6 Finally, the report states that the Institute plans to seek additional GPR funds in the 1997-99 biennium and that "reliance on state funding will be phased out during the second biennium." It should be noted, however, that the appropriation within DPI for payments to WISE will sunset on June 30, 1997.

Rush

# Facsimile Cover Sheet

To: Senator Tim Weeden  
Company: Wisconsin Senate  
Phone: 266 2253  
Fax: ~~267 5474~~ 608 266 7038

From: DON MRDJENOVICH, EXECUTIVE DIRECTOR  
Company: WISCONSIN ASSOCIATION OF SCHOOL BUSINESS OFFICIALS  
Phone: (608 249 8588)  
Fax: 608 758 3368

Date: March 27, 1996

Pages including this cover page: 3

Comments:

Dear Senator Weeden:

I am sending you this briefing paper in the hope that it may save both of us some time. The approval of the release of funding for The Wisconsin Institute For School Executives will soon be before Joint Finance. The School Administrators Alliance has scheduled representatives to make personal contact with Joint Finance members to answer questions and speak in support of releasing the appropriated funds and getting WISE on the road. The process has already taken much longer than anticipated.

After you have reviewed the briefing paper, I would appreciate your letting me know if you have any questions or concerns, and if you plan to continue to support this initiative. It is an issue that is very important to school administrators. The WISE will serve a good and useful purpose.

I will be pleased to meet with you or visit by phone if you deem it necessary. Thank you for any consideration given this correspondence.

Kindest personal regards,



P.S. I'm enjoying my new "part time" job.

# Wisconsin Institute For School Executives

## *Information Guide For: Briefing Visits*

**Why this visit:** On April 16, 1996 the Joint Committee on Finance will consider releasing funds in the amount of \$250,000 to the WISE that were placed in the budget by the governor and approved by the legislature. They will be considering this matter (along with others) as part of the review process.

**Goal of the visit:** Determine whether members of the Joint Finance Committee will vote in favor of releasing the funds.

**WISE...The Idea:** To provide high quality, comprehensive, ongoing, sequential professional development opportunities for practicing K-12 school administrators in Wisconsin.

**WISE...The Goal:** To improve student learning through the development of advanced professional competencies.

**Governance:** WISE is a partnership of the four largest professional school administrator associations in Wisconsin, consisting of in excess of 3,000 school professionals. These associations represent elementary and secondary principals, associate principals, superintendents, business officials, pupil service personnel, and other supervisory school professionals (AWSA, WASBO, WASDA, WCASS).

Also a part of the governance structure are:

The Wisconsin Manufacturers and Commerce (WMC)  
The Wisconsin Association of School Boards (WASB)  
The University of Wisconsin System (UW)  
The Cooperative Educational Service Agencies (CESA)

**The Investment:** The partners in this project, with a governing body in the form of a Board of Trustees, have met since September to develop the concept and provide for a sound organizational structure.

A conservative estimate of \$16,380, in the form of contributed services, has been "spent" to date. This time has been "spent" researching, communicating, and developing this concept. Articles of incorporation and bylaws have been written and filed with the Secretary of State under Chapter 181 of the Wisconsin Statutes. The WISE has applied for non-profit status. A service mark (logo) has been developed and will be registered. A proposal has been written and a budget developed.

In addition to the time contributed by the partners in the project, over \$2,600 in expenses have been incurred. These have involved legal counsel, mileage, meals, and other services. This brings the estimated total investment to date of \$18,380.

**This investment of time and money is a signal of the ongoing commitment of the partners in this program to make it work.**

Funds released to the WISE in the amount of \$125,000 for each year of the biennium will be used in the hiring of a director, salary and fringe benefits for staff, development of printed materials, communications, office start up expenses, postage, meeting expenses, research, rent, and utilities.

**Accountability:**

The board of Trustees recognizes the need for strict financial accountability. The financial status of the WISE will be monitored monthly by the Board of Trustees. Given their investment of human capital to date, all expenditures will be carefully scrutinized. A quarterly summary financial report will be developed. This will be available for scrutiny by any agency deemed to be appropriate by the Joint Committee on Finance. All expenditures and revenues will be audited with the customary and usual procedures within the Department of Public Instruction, the agency through which the funds will be transmitted.

As with so many human endeavors, the Board underestimated the time necessary to move the WISE from the conceptual stage to the implementation stage. When the legislation was passed the WISE Board of Trustees did not exist. The time it took to create the Board, convene it, incorporate the members' ideas and priorities into the proposal was time that was well invested.

**Summary:**

The WISE will yield a good return on the initial investment. It will be partially state funded for the current biennium. The original request was for \$460,000. Continuing funding will be requested for the 1997-99 biennium. Reliance on state funding will be phased out in the second biennium, making the WISE an independent entity that is financially self-sufficient.

**Note:**

All members of the Joint Committee on Finance have received:

The initial proposal for the WISE dated January, 1996  
A Legislative Fiscal Bureau Memo dated February 20, 1996



## Legislative Fiscal Bureau

One East Main, Suite 301 • Madison, WI 53703 • (608) 266-3847 • Fax: (608) 267-6873

11-3-2

April 16, 1996

TO: Members  
Joint Committee on Finance

FROM: Bob Lang, Director

SUBJECT: Section 13.10 Request for Approval of Report on the Wisconsin Institute for School Executives--Agenda Item XIX

### BACKGROUND

In the 1995-97 biennial budget bill (1995 AB 150), the Governor recommended providing \$250,000 GPR in 1996-97 through a new, annual appropriation within the Department of Public Instruction (DPI) for payments to the Wisconsin Institute for School Executives (WISE). According to the Executive Budget Book, the funds were to be used for start-up costs for the Institute which would provide statewide continuing education programs for school administrators.

The Joint Committee on Finance modified the Governor's proposal by deleting the funds in the DPI appropriation and instead providing \$125,000 GPR annually in the Committee's supplemental appropriation and earmarking these funds for payments to WISE. The release of funds to the WISE appropriation was to be contingent upon the Committee's approval, under a 14-day passive review process, of a report submitted by the Institute including the following information:

- The Institute's objectives and proposed activities.
- A detailed budget for the staffing and operation of the Institute.
- An identification of all funding sources.

During deliberations on the budget bill, the Assembly deleted all funding for WISE. However, through Senate action, the Joint Finance provision related to WISE was restored and became part of the final state budget (1995 Act 27).

On February 6, 1996, the required report was submitted to the Co-chairs of the Joint Committee on Finance by the Wisconsin Institute for School Executives (WISE) Board of Trustees. The Board consists of the following twelve members:

- Two representatives of the Association of Wisconsin School Administrators
- Two representatives of the Wisconsin Association of School Business Officials
- Two representatives of the Wisconsin Association of School District Administrators
- Two representatives of the Wisconsin Council of Administrators of Special Services
- One representative of the Wisconsin Manufacturers and Commerce
- One representative of the Wisconsin Association of School Boards
- One representative of the UW System
- One representative of Cooperative Educational Service Agencies

On February 23, the Co-chairs notified the WISE Board of Trustees that the Committee wished to meet in formal session to consider the Institute's report.

## **REQUEST**

The Wisconsin Institute for School Executives requests the Committee's approval of a report on the Institute's objectives and proposed activities as required under 1995 Act 27, section 9137(1j) and the release of \$250,000 GPR for the Institute from the Committee's supplemental appropriation to the DPI appropriation for payment to the Institute (s. 20.255(3)(ed) of the statutes).

## **ANALYSIS**

There are approximately 3,000 school administrators in Wisconsin. Administrator licenses are issued by DPI and must be renewed every five years with renewal contingent upon completion of six semester credits, or the equivalent, of continuing education during the five years prior to renewal of the license (the same requirement applies to teachers). Credits can be obtained by completing courses at an accredited college or university and attending workshops, seminars or conferences approved by DPI.

Continuing education courses for administrators are currently provided by the UW System (Extension and campus programs), private colleges, professional associations, DPI, cooperative educational service agencies (CESAs) and private consultants. In addition, school administrators, or their school districts, pay an annual fee (ranging from \$75 to \$500) for membership in professional associations which offer, as their primary services, conferences, workshops, legal assistance and lobbying services.

Representatives of the professional associations contend that the existing continuing education courses are uncoordinated and nonsequential and that the individual associations have



insufficient staff and funding to provide more adequate programs. Therefore, it was argued during deliberations on the 1995-97 budget that the state should provide start-up funds for an institute which would coordinate such efforts.

Opponents of the Governor's proposal argued that it is the responsibility of professional associations to coordinate their programs with those offered by other providers. If it is determined that these programs are not meeting the needs of administrators, the associations could work with continuing education providers to determine how these needs could be met. In addition, it was noted that the state does not fund similar institutes for other professionals.

### **Objectives and Proposed Activities of WISE**

The Institute's report to the Committee states that its mission is "to improve student learning through high quality and comprehensive continuing education programs for practicing school administrators" and lists the following six primary activities which the Institute plans to undertake in order to fulfill this mission:

1. Determine the management structure of the Institute. The WISE Board of Trustees is currently considering either hiring staff directly or contracting with a professional association and/or other vendors for services to the Board. The Institute would also pursue alternative revenue sources to support its operations.
2. Establish partnerships with other groups concerned with school leadership (including private organizations, higher education institutions which provide school administrator preparation programs, professional associations and DPI) to create a sequential program for continuing professional development for school administrators.
3. Identify critical proficiencies for school administrators using currently existing national standards and a survey which the Institute would develop and distribute to Wisconsin school administrators to assist in identifying additional continuing education needs.
4. Create a catalog of existing continuing education programs for school administrators and use the information obtained in the survey to adapt and/or modify these programs and to develop new programs which address the professional needs of school administrators.
5. Develop three-year or four-year programs designed to meet the continuing education needs of school administrators. The programs and courses could be offered through teleconferencing, workshops or other means. The Institute plans to issue certificates of advanced proficiencies to administrators who successfully complete its programs.
6. Develop strategies to market the Institute's programs and certificates.

## Budget Plan for WISE

The proposed budget for WISE is based on a 15-month development and implementation schedule which would begin in April, 1996, and end on June 30, 1997. The Institute estimates that total operating costs for this period will be \$287,707, of which \$250,000 would be covered by the GPR funds earmarked for WISE. The following table provides a breakdown of the estimated expenditures for the 15-month period.

<b>STAFF COSTS</b>			
Salaries*	\$141,750		
Fringe Benefits*	39,895		
Travel**	10,000		
Training	2,500		
Subtotal	\$194,145		(400)
<b>PROGRAM DEVELOPMENT AND SERVICES</b>			
Direct Program Costs***	\$40,000		
Research and Program Development	14,250		
Printing	7,500		
Subtotal	\$61,750		fixed
<b>OPERATING EXPENSES</b>			
Supplies and Equipment	\$9,000		
Rent and Utilities	8,250		
Postage and Mailing	5,312		
Telephone	3,000		
Board Meetings	6,250		
Subtotal	\$31,812		fixed
<b>GRAND TOTAL</b>	<b>\$287,707</b>		

\* According to WISE, the allocation between salaries and benefits was incorrect in its report. The amounts in the table are the correct amounts.

\*\* Primarily staff travel, although some Board members may also travel.

\*\*\* Costs directly related to continuing education programs (such as speakers' fees, workshops and conferences).

While a section of the Institute's report indicates that the Board has not yet determined whether it will hire a staff or contract for services, the Institute's proposed budget includes the costs of employing an Institute director, a program director, clerical staff and limited-term staff. Of the total proposed budget, 67.5% would be allocated for staff costs, 21.5% would be used for program development and services, and the remaining 11% would be budgeted for operating expenses.

The report indicates that the \$37,707 which would not be covered by the \$250,000 in GPR funds would be obtained from other sources (such as program fees, grants, membership fees, foundation awards and in-kind contributions from school administrator professional associations).

However, the report provides no further detail regarding these alternative revenue sources. Although one of the goals of the Institute is to become self-sufficient, the Board of Trustees does not anticipate generating significant non-state revenues to offset operating costs during the first 15 months of operation.

The report indicates that the Institute plans to seek additional GPR funds in the 1997-99 biennium and that "reliance on state funding will be phased out during the second biennium." It should be noted, however, that the appropriation within DPI for payments to WISE will sunset on June 30, 1997.

While funding for WISE would be provided through an appropriation in DPI, the appropriation language only states that payments would be made to WISE and does not specify the purposes for which the funds could be used by the Institute. Furthermore, Act 27 did not provide DPI with any responsibilities to monitor the program. Therefore, according to DPI staff, once the funds are transferred to the WISE appropriation, the Institute would simply request payment from DPI and the agency would make the payment. The Institute would not be required to report expenditure information to DPI which would document how the state funds were actually used. Furthermore, the Institute would be under no obligation to expend the monies according to the budget plan included in its report. Therefore, the Committee may wish to direct the Institute to submit a report to the Committee and the Governor by August 1, 1997, which includes a description of how the funds were expended, continuing education programs developed or implemented and the progress made by the Institute in achieving its stated objectives.

Although \$125,000 GPR annually was earmarked for payments to WISE, the Committee has discretion over the amount of funds allocated each year. Furthermore, since Act 27 does not require that the Committee release the entire \$250,000, a lesser amount could be approved for release to the DPI appropriation. For example, it could be argued that because \$125,000 GPR annually was earmarked for WISE in the Committee's appropriation, the Legislature intended that this amount be provided to WISE each year. Since the 1995-96 fiscal year is almost over, the Committee could decide to release an amount equal to 14 months of funding (May, 1996 through June, 1997) which would be approximately \$150,000. The Institute would either have to reduce its budget to meet this lower funding level or increase its non-state revenues.

## ALTERNATIVES

1. Approve the report of the Wisconsin Institute for School Executives and transfer \$250,000 GPR in 1995-96 from the Committee's supplemental appropriation to the DPI appropriation for payments to WISE.

2. Approve the Institute's report and transfer \$150,000 GPR in 1995-96 from the Committee's supplemental appropriation to the DPI appropriation for payments to WISE. No additional GPR funds would be provided by the Committee for the Institute.

3. In addition to Alternatives 1 or 2, direct that the Institute submit a report to the Committee and to the Governor by August 1, 1997, on the activities of the Institute and the expenditure of the GPR funds. Require that the report include: (a) a detailed explanation of how the funds were spent by the Institute; (b) a description of the activities and accomplishments of the Institute (including any continuing education courses or programs developed or implemented by the Institute) beginning in May, 1996; and (c) the progress made by the Institute in achieving its objectives.

4. Deny the request for approval of the WISE report. Funding of \$250,000 GPR would remain in the Committee's supplemental appropriation.

Prepared By: Merry Bukolt

# Wisconsin Institute for School Executives

## STAFF COSTS

Salary & fringe benefits estimated \*

POSITION	PER ANNUAL	PER MONTH	14 MON. COST	FRINGES 31.1%
Director	60,000	5,000	70,000	21,770
(1) Prog. Dir.	30,000	2,500	35,000	10,885
(1) Clerical	20,004	1,667	23,338	7,258
Limit Term Staff	11,496	958	13,412	-
total	121,500		141,750**	39,913***

\* The above figures represent a projected staff cost scenario, subject to change based on decisions made by the WISE Board of Trustees

\*\* Fiscal Bureau est. = 141,750

\*\*\* Fiscal Bureau est. = 39,895

Travel \$10,000

In-State staff	5,000.00
Out-State	2,500.00
In-State Board	2,500.00
Total	10,000.00

Training = \$2,500

Leadership training  
Technology (w/state wide communications network) Computer  
Finance & Acctg.

Sub-total = \$194,163.00

## PROGRAM DEVELOPMENT & SERVICES

Direct program costs = \$40,000

Workshops & conferences = 8 x 5,000 = 40,000

To include: facility charges, speaker fees, meals, materials, etc.

Research & program development = \$14,250  
Development of training materials, surveys  
Instructional materials to be used in conference & workshop settings

Printing = \$7,500  
Resource materials, brochures, newsletters, etc.

Sub-total = \$61,750.00

## **OPERATING EXPENSES**

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Supplies & Equipment = \$9,000  
Work processing, duplicating, fax, furniture, paper, etc.

Rent & Utilities = \$8,250  
Dependent on shared space and availability

Postage & Mailing = \$5,312  
Bulk mailing permit, 1st class, 2nd class  
Promotion, program brochures, communications, etc.

Telephone = \$3,000  
Long distance & local service

Board Meeting = \$6,250  
12 board members  
14 meetings (446.43 per mtg.)  
(mostly mileage)

Sub-total = \$31,012.00

Grand Total = \$287,725.00 \*

\* Difference between this total and that in the Legislative Fiscal Analysis document is \$18.00.  
(\$18.00 difference due to slight difference in fringe benefit estimate)

**ISSUES/QUESTIONS RAISED BY LEGISLATIVE FISCAL BUREAU IN PAPER DATED  
APRIL 16, 1996**

1. Opponents . . . this is the responsibility of professional organizations?

WISE is more than getting the appropriate stakeholders in a room and "coordinating". WISE involves re-structuring decision-making, and operations so that the stakeholders jointly identify needs, the most effective existing means of meeting those needs, and creating new programs when necessary (access for all regions of the state). How is WISE going to do this? Not by creating a bureaucracy in State Government but by creating a partnership with the professional associations of school administrators throughout the state. WISE will leverage the training resources of the professional associations, UW System, CESAs, and the business community to offer the continuous training necessary to lead our schools into the next century. In short, the professional organizations are taking responsibility for restructuring to provide more effective services more efficiently. This is a clear choice between business as usual or "inter-governmental cooperation".

The State requires lawyers to be members of the state bar, etc.,.

2. a. Staff or contract for services?

This board is comprised of leaders in business and education who are fully qualified to make such decisions and it is in their best interests to make the right decision for WISE.

b. 67 % for staff, 21% for program development, 11% for operating expenses? These are the kinds of percentages you would expect to be associated with "start-up" costs.

3. Report provides no detail regarding alternative revenue sources. . .

WISE will be pursuing grants, such as, Goals 2000 and foundation support from sources, such as, the Parker Foundation, AAL, Allen Bradley, Johnson Wax, Kimberley Clark, etc.

It is important to keep in mind that the goal of WISE is to use this start-up period to complete the tasks that are necessary for it to be **self-sufficient and successful in the long-term not to make a quick buck**. WISE will use this time to: determine proper management structure, identify critical proficiencies for school administrators based upon existing national standards and a survey of WISE's future customers, create a catalog of existing continuing education programs, develop programs for administrators in each of the critical proficiencies, develop strategies to market the Institute's programs and certificates, develop third-party financial partnerships (grants, memberships, foundations), etc. It was the goal of the Governor and Legislature to provide start-up funding so that WISE could complete the steps necessary at the front-end so that in would be successful

and self-sufficient in future years.

Since Act 27 was passed the WISE board has been named, convened and submitted its proposal to the Committee in January. A conservative estimate of \$18,380 in the form of contributed services, has been spent to date. Articles of incorporation and bylaws have been written and filed with the Secretary of State under Chapter 181 of the Wisconsin Statutes. The WISE has applied for non-profit status. A service mark (logo) has been developed and will be registered.

4. Report indicates. . . however appropriation will sunset on June 30, 1997.

WISE will request funds in the next biennium. However, the WISE board knows that there are no guarantees.

5. Act 27 did not provide DPI with responsibilities to monitor. . .

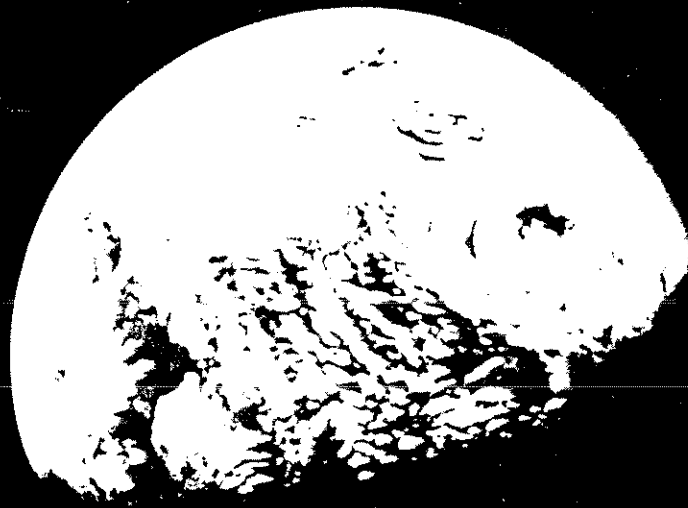
WISE board is made-up of educational and business leaders who understand and expect to be held accountable. WISE would absolutely support the committee asking the Institute to submit a report by August 1, 1997, including a description of how funds were expended, programs developed, and progress the Institute has made towards achieving its objectives.

6. Since the 95-96 fiscal year is almost over the Committee could provide for 14 months of funding \$150,000 . . .

The intent of the Governor and the Legislature was to provide start-up costs for WISE. The thought of reducing that commitment is absurd:

- Attracting a quality director would be greatly diminished (1 yr instead of a two year commitment) Question for us: How do we get around the problem of bridging two fiscal years?
- Start-up costs are fixed: WISE will survey administrators, mail-telephone foundations, etc.
- MI funded MIEM at 250,000 dollars per year for 8 years.
- NC 10,000,000 for professional development academy for school leaders.
- FL \$240,000 for principals, \$360,000 for superintendents, \$363 to start-up academy and \$380,000 for on-going costs





**A NEW DESIGN FOR  
EDUCATION IN WISCONSIN**  
SCHOOLS CAPABLE OF CONTINUOUS IMPROVEMENT

A Report to:

Honorable Tommy G. Thompson, Governor

Dr. Herbert J. Grover, Superintendent of Public Instruction

Commission on Schools for the 21st Century  
Ody J. Fish, Chair

State of Wisconsin, December, 1990

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## Technology, Science and Mathematics Committee

<b>Julie Stafford, Chair</b>	Director of Education Partnerships, Cray Research	Chippewa Falls
Dean Axtell	Chairman of the Board, Trak International	Port Washington
Scott Fromader	Operations Manager, Governor's Office, and Former Teacher	Madison
John Hays	Principal, South Division High School	Milwaukee
John Janty	Teacher (Mathematics), Waunakee High School	Madison
Esther Letven	Director, Regional Staff Dev Ctr, UW-Parkside	Racine
Terrence MacTaggart	Chancellor, University of Wisconsin-Superior	Superior
Deborah McGriff	Deputy Superintendent of Milwaukee Public Schools	Milwaukee
Paul Norton	Executive Director Wisconsin Educational Communications Board	Madison
Paul Ormson	Teacher (Science) and Mayor	Elkhorn

## Teacher/Administrator Supply and Quality Committee

<b>Robert Swanson, Chair</b>	Chancellor Emeritus, University of Wisconsin-Stout	Menomonie
Fermin Burgos	Principal, Wilbur Wright Middle School	Milwaukee
Richard Collins	President, WI Education Association Council and Teacher	Madison
Linda Cross	Teacher (English), Hortonville High School	Waupaca
Gina Degiovanni	Student, Edgewood High School, Madison	Prairie du Sac
Monte Hottmann	Assistant Superintendent, Department of Public Instruction	Madison
Sandra Mills	Commissioner, Education Commission of the States and Former Teacher	Appleton
James Stewart	Associate Registrar, University of Wisconsin-Whitewater School Board Member, Whitewater Schools	Whitewater
Sue Ann Thompson	Teacher (6th grade), Elroy-Kendall-Wilton Schools	Elroy

## Educational Assessment Committee

<b>Karl Hertz, Chair</b>	District Administrator Mequon-Thiensville School District	Thiensville
Michele LaRock	Director, Nicolet College Native American Center	Rhineland
William Paton	Former Superintendent	Oconomowoc
Rita Provoznik	School Board President	Chippewa Falls
Barbara Shade	Dean, Division of Education, UW-Parkside	Racine
Margaret Sherry	Former Teacher and Free Lance Writer	Madison
Gary Wehlage	Professor, Curriculum & Instruction, and Associate Director of the Center on Organization and Restructuring of Schools, UW-Madison	Madison
S. Michael Wilk	School Board President and Attorney	Kenosha
Agnes Williams	Teacher (Human Relations), Washington High School	Milwaukee

evaluations. The supervision and evaluation component would be used to determine whether the inductee should be recommended to the state for a regular five-year license.

b. The support and mentoring component should provide for the development of a general network of support for the inductee among administrators, an approved preparation program, professional education associations, and the Department of Public Instruction as well as provide for mentors to function as part of the support network and to provide advice and counsel to the inductee. The support and mentoring component would have no responsibility or role in determining whether an inductee should be recommended to the state for a regular five-year license.

Request that financial assistance be provided to school districts to implement a beginning administrator assistance program.

The funds requested for this program would cover two state-wide mentor training sessions each year, including compensation to the school district for release time for the mentor's training. In the second year of the biennium, the mentors would be assigned to new administrators, and 200 new mentors would be trained for the following year. Each mentor would be paid a stipend of \$500, and the school district would be compensated \$500 to pay for substitute staffing during the time in which the mentor is released for training or to work with the beginning administrator. In addition, seminar training would be held for the new administrators to assist them during their transition year.

Funding would be as follows:

	1991-92	1992-93
Mentor training workshops	\$ 18,000	\$ 18,000
Release time for mentors:		
\$250/mentor x 200 mentors	\$ 50,000	
\$500/mentor x 200 mentors		\$100,000
Stipend for mentors		
(\$500/mentor x 200 mentors)		\$100,000
	\$ 68,000	\$218,000

3. Amend s.118.24(1), stats., to replace the phrase "assistant to such persons" with the phrase "other persons who are required to hold administrative licenses." This amendment will give equal security by authorizing three-year contracts for all administrators.

The current law does not extend this contractual protection to other administrators. The Superintendent's Task Force on Administrative Leadership, Training and Licensure made the following finding:

The Task Force finds that the lack of job security in administrative positions, particularly entry-level positions, is one of three primary obstacles in attracting outstanding teachers with leadership potential into administration. It is particularly important if you consider this scenario:

We expect to hire entry-level administrators with the responsibility for instructional leadership, the evaluation of staff, and working with parents. They frequently must do their job where teachers have contractual security, the superintendent has a three-year contract and good relations with the school board, and the parents have political connections.

X 4. Renewal of the administrative license is recommended to remain the same with the six semester hours of credit or its equivalent of 180-clock hours for the five-year license. (Task Force recommendation) The Department of Public Instruction is recommending the continuation of additional funding of, as a strong recertification program, the Administrative Leadership Academy. Leadership in Administration and Development Program (LEAD), has as its major goal to enrich the experience of school administrators in mid-career so they may enhance their leadership skills, promote effective schools, and be equipped to face challenges and demands not present when they began their careers. Academies are held for both superintendents (25) and principals (50).

The Academy is funded by a combination of federal, state and local sources. Federal funding for the first three years was provided at a 2-1 ratio; that is, the federal share was twice the non-federal share. Costs of the program include fees and expenses for the Academy instructors, specialized materials and supplies for the Academy, meals, lodging and expenses for participants, and salaries, fringes and expenses of a project director and part-time program assistant. Local school districts pay tuition of \$300 per participant, plus the participants' lodging and other expenses.

It is anticipated that the grant will be extended for an additional three years; however, the grant will be about half the original amount and the funding ratio will be 3-1, with the state/local share (including in-kind contributions) being three times the federal share.

Under this request, the Academy would be funded as follows:

	1991-92	1992-93
GPR	\$ 80,000	\$ 80,000
Participant tuition	\$ 22,000	\$ 22,000
Federal Project LEAD contribution	\$ 69,000	\$ 69,000
	<u>\$171,000</u>	<u>\$171,000</u>

Project LEAD provided approximately \$145,000 in the last year of the original grant period. It is expected that the grant will be approximately \$69,000 per year for the extended three-year grant period. The department is, therefore, requesting \$80,000 to replace reduced federal funds, and share in increased supplies and services costs of operating the Academy.

The committee further recommends the following:

- a. Staff development opportunities are critical for recertification and for professional growth. The Task Force report recommended that the role and budget of cooperative educational service agencies be augmented to enhance the quality, accessibility, delivery, and coordination of professional development and training programs for administrators.
- b. When employing entry-level administrators, boards of education must address compensation to attract outstanding teachers with leadership potential to administer. The salary offered an entry-level administrator should equate to a teacher with a masters degree and seven years of experience on a per diem basis as a minimum in order to attract teachers with leadership potential into educational administration.
- c. Amend the statutes to address job security, particularly in entry-level positions, to attract outstanding teachers with leadership potential to administration: provide that, after a three-year probationary period, all administrators must be issued a three-year rolling contract.

#### 407 BEGINNING TEACHER ASSISTANCE PROGRAMS

1. Provide an item in the state budget to pay an allocation per beginning teacher to the local school district.
2. Add a provision to state law which requires that all Wisconsin school districts provide a program or access to a Beginning Teacher Assistance Program approved by the DPI.

#### 408 CONTRACTS WITH TEACHERS IN PRIVATE PRACTICE

Develop legislation to permit schools to contract with teachers who have incorporated to provide instructional services to schools. The legislation should be a "sunset law" with a period long enough to try out and evaluate the concept (4 to 6 years).

The law should include guarantees of teacher quality, e.g., that persons offering the instruction be Wisconsin certified teachers. The law should provide guarantees to employed teachers, e.g., that such contracts not result in layoffs of existing staff members.

#### 409 TEACHER/ADMINISTRATOR ALTERNATIVE LICENSURE

The DPI should challenge the public and independent colleges and universities in Wisconsin to examine the special needs of the schools and develop either standard or experimental programs which will provide qualified people to fill those needs.

The opportunities to fill such assignments, and the means of becoming qualified for them, should be made known to individuals with experience in other careers who have talent and desire to teach or work as administrators in the public schools.

Specifically, the Commission recommends the creation of a performance-based, pilot procedure which provides opportunities for persons who possess exceptional leadership, educational, and administrative skills and training, but not necessarily a full three (3) years of classroom teaching experience, to qualify for an administrative mentorship/residency in a school district which will lead to qualification and certification as a school administrator. Participants in the pilot program would be required to complete a prescribed training

Representative Schneiders



Wisconsin Institute for School Executives

Motion:

Move to provide that, as a condition for receiving any state funds, the Wisconsin Institute for School Executives (WISE) Board of Trustees shall amend its articles of incorporation to reflect the addition of the following board members who shall remain on the Board at least through June 30, 1997:

- One member appointed by the Governor;
- One member appointed by the Speaker of the Assembly; and
- One member appointed by the Majority Leader of the Senate.

Once the articles of incorporation have been amended, the Department of Administration shall transfer funds from the Committee's supplemental appropriation to the Department of Public Instruction appropriation for payments to WISE.