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☞ Details: Proposed Audit: Personnel Policies and Practices, Wisconsin Technical College System

(FORM UPDATED: 08/11/2010)

## WISCONSIN STATE LEGISLATURE ... PUBLIC HEARING - COMMITTEE RECORDS

### 2005-06

(session year)

### Joint

(Assembly, Senate or Joint)

### Committee on Audit...

## COMMITTEE NOTICES ...

- Committee Reports ... **CR**
- Executive Sessions ... **ES**
- Public Hearings ... **PH**

## INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL

- Appointments ... **Appt** (w/Record of Comm. Proceedings)
- Clearinghouse Rules ... **CRule** (w/Record of Comm. Proceedings)
- Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)  
(**ab** = Assembly Bill)                      (**ar** = Assembly Resolution)                      (**ajr** = Assembly Joint Resolution)  
(**sb** = Senate Bill)                              (**sr** = Senate Resolution)                              (**sjr** = Senate Joint Resolution)
- Miscellaneous ... **Misc**

\* Contents organized for archiving by: Stefanie Rose (LRB) (October 2012)

# Part III

## National Health Care Skill Standards

- NHCSSP Core and Cluster Standards
- Proposed Standards
  - Health Care Core Standards
  - Therapeutic/Diagnostic Core Standards
  - Therapeutic Cluster Standards
  - Diagnostic Cluster Standards
  - Information Services Cluster Standards
  - Environmental Services Cluster Standards

This section presents the NHCSSP Standards. The Standards are intended as a template or model for users to apply as is or tailor to meet their specific needs. As previously described, these Standards are targeted broadly for health care workers primarily at the entry and technical levels. As such, they "fill the gap" between generic employability standards, such as SCANS and occupation-specific standards in the health care industry.

### NHCSSP Core and Cluster Standards

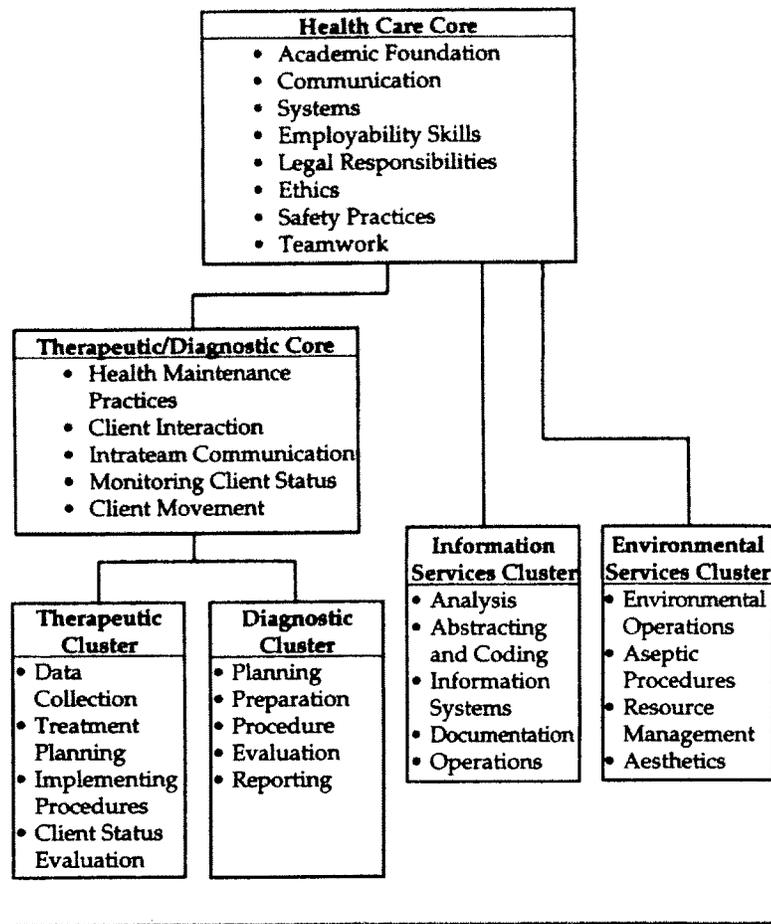
In their current form, the NHCSSP Standards represent *content standards*, indicating the knowledge and skills that are expected of health care workers. They are not *performance standards*, which would specify a level of achievement. However, in the implementation stage of the project, several pilot sites did experiment with assessment tools (e.g., projects, process recordings, role playing, and scenarios) to begin addressing the issue of performance level. The results or lessons learned from the pilot studies can be used as a starting point for establishing performance standards.

Each NHCSSP Standard follows a specific format. The standard statement consists of three parts: (1) a brief title describing the skill area or topic covered by the standard, (2) a description of the knowledge and the skill embodied in the standard, and (3) specific applications, i.e., points, to clarify what is meant by the standards statement. The points are only examples; they are not intended to be an exhaustive listing, but rather to illustrate the standard in a tangible way.

*Figure 6* illustrates the organization of the NHCSSP Standards, showing the connections among the various sets. This illustration is followed by a complete listing of the actual standards, beginning with the Health Care Core.

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**Figure 6**  
**NHCSSP Standards**



## Proposed Standards

### Health Care Core Standards

The industry core is a set of broad standards that serve as a foundation for occupations and functions across the health services. These standards specify the knowledge and skills that the vast majority of health care workers should have.

### Academic Foundation

Health care workers will know the academic subject matter required for proficiency within their area. They will use this knowledge as needed in their role.

*The following may be included:*

- Read and write, including charts, reports, and manuals
- Perform mathematical operations, including computations, weights, and measures
- Use health care terminology
- Apply knowledge of life sciences, such as biology, chemistry, physics, and human growth and development
- Be aware of the history of health care

## Communication

**Health care workers will know the various methods of giving and obtaining information. They will communicate effectively, both orally and in writing.**

*The following may be included:*

- Assess others' ability to understand
- Adapt communication to individual needs, including paraphrasing or translating
- Ask for clarification when needed
- Be sensitive to multicultural and multilingual needs
- Use facility-specific guidelines and methods of sending and receiving information
- Access and use electronically-produced information

## Systems

**Health care workers will understand how their role fits into their department, their organization, and the overall health care environment. They will identify how key systems affect services they perform and quality of care.**

*The following may be included:*

- Be aware of the range of services offered to clients
- Be aware of how reimbursement affects care delivery
- Prevent unnecessary waste and duplication
- Participate in quality improvement activities
- Use facility resources, such as other staff, manuals, and training opportunities

## Employability Skills

**Health care workers will understand how employability skills enhance their employment opportunities and job satisfaction. They will demonstrate key employability skills and will maintain and upgrade skills, as needed.**

*The following may be included:*

- Exhibit personal skills, such as attendance, time management, and individual responsibility
- Maintain professional conduct and appearance
- Use analytical skills to solve problems and make decisions
- Adapt to changing situations
- Upgrade technology skills
- Understand various career options and the preparation required for them

## Legal Responsibilities

**Health care workers will understand their legal responsibilities, limitations, and the implications of their actions within the health care delivery setting. They will perform their duties according to regulations, policies, laws, and legislated rights of clients.**

*The following may be included:*

- Be aware of malpractice and liability issues
- Maintain client confidentiality
- Operate within scope of practice
- Comply with legal requirements for documentation

## Ethics

**Health care workers will understand accepted ethical practices with respect to cultural, social, and ethnic differences within the health care environment. They will perform their duties within established ethical guidelines, supporting sensitive and quality health care delivery.**

*The following may be included:*

- Respect client rights and self-determination
- Promote justice and equal treatment of all persons
- Recognize the importance of client need over other considerations
- Exhibit loyalty to fellow workers and the organization
- Report any activity that adversely affects the health, safety, or welfare of clients or fellow workers
- Comply with pertinent regulatory guidelines, including OSHA standards
- Respect interdisciplinary differences among team members

## Safety Practices

**Health care workers will understand the existing and potential hazards to clients, coworkers, and self. They will prevent injury or illness through safe work practices and follow health and safety policies and procedures.**

*The following may be included:*

- Use Universal Precautions to control the spread of infection
- Apply principles of body mechanics, such as proper lifting techniques
- Prevent fire and electrical hazards
- Use instruments and equipment as directed
- Manage hazardous materials
- Follow emergency procedures and protocols
- Comply with pertinent regulatory guidelines, including OSHA

standards

## Teamwork

**Health care workers will understand the role and responsibilities of individual members as part of the health care team, including their ability to promote the delivery of quality health care. They will interact effectively and sensitively with all members of the health care team.**

*The following may be included:*

- Practice team membership skills, such as cooperation, leadership, and anticipation of the needs of coworkers
- Respect cultural and religious differences of team members
- Interact with others consistent with the health care team structure and lines of authority
- Manage conflict within the workplace through consideration of others' points of view
- Respect interdisciplinary differences among team members

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*Therapeutic/  
Diagnostic  
Core  
Standards*

The Therapeutic/Diagnostic Core Standards are a set of standards that apply to both therapeutic and diagnostic occupations and functions. The standards focus, for the most part, on direct client care.

## Health Maintenance Practices

**Therapeutic and diagnostic workers will understand the fundamentals of wellness and the prevention of disease processes. They will encourage the practice of preventive health behaviors among their clients.**

*The following may be included:*

- Be knowledgeable of available preventive health screenings and examinations
- Be aware of alternative health practices, such as massage therapy and herbal remedies
- Explain preventive health practices, such as good nutrition and stress management
- Encourage clients to manage and reduce health risk factors
- Show knowledge of illness prevention

## Client Interaction

**Therapeutic and diagnostic workers will understand how to explain planned procedures and goals to clients. They will use various strategies to respond to clients' questions and concerns.**

*The following may be included:*

- Determine clients' ability to understand
- Respond to clients' feelings
- Use language appropriate to the situation
- Use facility guidelines for giving health care information
- Respect clients' cultural differences

## Intrateam Communication

**Therapeutic and diagnostic workers will understand how to communicate client information within a team. They will convey this information to appropriate team members in a timely manner.**

*The following may be included:*

- Provide complete client information to team, including formal and informal observations
- Observe and report unsafe environmental conditions
- Recognize unusual occurrences in treatment progress
- Document and report information about changes in conditions that might introduce risk to clients or staff

## Monitoring Client Status

**Therapeutic and diagnostic workers will understand the process for monitoring client health status. They will assess health status according to respective professional standards and report results to the treatment team.**

*The following may be included:*

- Observe client during administered care and procedures
- Measure and report client vital signs or other indicators of health status
- Record client health status according to facility protocol
- Assist in determining the need for follow-up or alternative care

## Client Movement

**Therapeutic and diagnostic workers will understand the principles of body mechanics for positioning, transferring, and transporting clients. They will perform these activities efficiently and without injury to clients or self.**

*The following may be included:*

- Position client to ensure comfort
- Recognize center of gravity and base of support in order to use proper lifting techniques
- Use appropriate transport or transfer equipment
- Reassure clients and inform them of what to expect during activity

*Therapeutic  
Cluster  
Standards*

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These standards apply to occupations or functions primarily involved in changing the health status of the client over time. The standards specify the knowledge and skills that the worker in the therapeutic cluster should have.

## Data Collection

**Therapeutic workers will understand the facility protocol and guidelines for collecting data. They will participate in identifying client health care needs, strengths and problems, and report results.**

*The following may be included:*

- Observe client, instrumentation, and environment
- Follow facility policies and procedures
- Record and report information

## Treatment Planning

**Therapeutic workers will understand the general purpose and components of the treatment plan. They will assist in planning procedures according to facility protocol.**

*The following may be included:*

- Help involve client in planning
- Participate in problem identification and recognize possible interventions
- Identify resources needed to implement the plan, such as supplies and equipment

## Implementing Procedures

**Therapeutic workers will understand the procedures within their scope of practice and how these procedures relate to the goals and objectives of the treatment plan. They will complete procedures accurately and in a timely fashion, supporting the treatment team.**

*The following may be included:*

- Organize own work and assignments
- Document actions
- Use equipment and instruments according to manufacturer guidelines
- Monitor and evaluate own work to ensure continuous improvement

## Client Status Evaluation

**Therapeutic workers will know the clients' needs, strengths, and problems. They will assist in the evaluation of client status in**

**order to determine if treatment goals are being reached.**

*The following may be included:*

- Provide feedback to treatment team
- Use appropriate evaluation tools and instruments
- Make suggestions to modify or change treatment plan

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*Diagnostic  
Cluster  
Standards*

These standards apply to occupations or functions primarily involved in creating a picture of the health status of the client at a single point in time. The standards specify the knowledge and skills that the worker in the diagnostic cluster should have.

## Planning

**Diagnostic workers will understand the components and implications of requests for procedures. They will read the request for services and plan when and how to implement the services.**

*The following may be included:*

- Identify purpose and intent of request
- Report any inconsistency or error in the request to appropriate personnel
- Involve appropriate persons in planning
- Match resources to needs

## Preparation

**Diagnostic workers will know the steps of procedural set-ups. They will prepare the supplies, equipment, and client for procedures, according to facility protocol.**

*The following may be included:*

- Identify and gather supplies and equipment necessary for procedure
- Routinely maintain and calibrate equipment
- Explain procedures and give related information to client

## Procedure

**Diagnostic workers will understand the logic and sequence of the procedure, including alternative methods. They will perform procedures to create precise and accurate products.**

*The following may be included:*

- Use appropriate supplies and equipment
- Monitor quality of sample or specimen
- Interpret results of procedure to assure a quality product
- Produce proper documentation

## Evaluation

**Diagnostic workers will understand the principles of quality assurance. They will continuously evaluate the procedure and its product.**

*The following may be included:*

- Analyze product for diagnostic quality and take appropriate action
- Recognize abnormal results and take action consistent with level of training
- Customize, adjust, or modify procedures, as needed and within established guidelines

## Reporting

**Diagnostic workers will understand the need for precise, accurate, and timely reporting. They will produce and report results using appropriate communication channels.**

*The following may be included:*

- Use written, oral, keyboarding, and electronic communication skills to produce reports
- Deliver reports to all appropriate parties
- Confirm that all necessary information is received by the parties involved

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*Information  
Services  
Cluster  
Standards*

These standards apply to occupations or functions that document client care. The standards specify the knowledge and skills that workers in the information services cluster should have.

## Analysis

**Information service workers will know the quantitative and qualitative requirements for client information. They will analyze that information for various purposes.**

*The following may be included:*

- Verify client information
- Use computer programs to process information
- Prepare various reports
- Know requirements of external agencies, such as insurance companies, courts, and regulatory bodies

## Abstracting and Coding

**Information service workers will know how to read and interpret a medical record, using knowledge of medical terminology. They**

**will extract required information from the medical record.**

*The following may be included:*

- Locate information in the record for various purposes, such as filing, coding, or information processing
- Recognize standardized coding systems and uniform data definitions
- Convert narrative information into a statistical database
- Use automated systems
- Maintain specialty registries

## Information Systems

**Information service workers will understand the sources, routes, and flow of information within the health care environment. They will contribute to the design and implementation of new or revised systems or processes within their scope of work.**

*The following may be included:*

- Verify that system information is accurate and complete
- Analyze systems functions to improve efficiency
- Educate and orient staff to use of systems
- Ensure data security and confidentiality by controlling access and release of information

## Documentation

**Information service workers will understand the content and multiple uses of health information. They will document appropriate information.**

*The following may be included:*

- Obtain and record client information using appropriate terminology
- Transcribe health information
- Use available technology to document information
- Categorize and prioritize health information requests
- Follow legal guidelines for documentation in responding to requests for information
- Create, route, and mail correspondence regarding the medical record
- Perform admission, discharge, and transfer functions

## Operations

**Information service workers will understand the operations used to enter, retrieve, and maintain information. They will use health information equipment and materials safely and efficiently in daily operations.**

*The following may be included:*

- Select and use automated systems
- Maintain equipment and supplies
- Perform general troubleshooting
- Use and maintain filing, storage, and retrieval systems

*Environmental  
Services  
Cluster  
Standards*

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These standards apply to occupations or functions involving direct or indirect client care that create a therapeutic environment for providing that care. The standards specify the knowledge and skills that workers in the environmental services cluster should have.

## Environmental Operations

**Environmental service workers will understand the responsibilities of their assigned role. They will perform their tasks safely, following established internal and external guidelines.**

*The following may be included:*

- Assist in the selection of materials, supplies, and equipment necessary to provide services
- Follow manufacturer warnings and instructions, asking for clarification if needed
- Use materials, supplies, and equipment safely
- Monitor, observe, and report unsafe practices
- Continuously evaluate results and procedures

## Aseptic Procedures

**Environmental service workers will know the work practices that maintain a clean and healthy environment. They will follow recommended practices to reduce or eliminate pathogenic organisms.**

*The following may be included:*

- Practice Universal Precautions
- Practice prescribed techniques to prevent nosocomial infections
- Prevent the spread of pathogens by cleaning, disinfecting, or sterilizing surfaces, instruments, and equipment
- Maintain a sanitary food service environment and practice proper food handling procedures
- Conform to OSHA standards/guidelines

## Resource Management

**Environmental service workers will understand the principles and techniques of resource management. They will ensure the careful use of available resources to make timely decisions.**

*The following may be included:*

- Contain costs and reduce waste
- Provide quality service
- Practice time management
- Identify and solve potential problems and anticipate client needs
- Know and use inventory appropriately
- Practice recycling and waste management

## Aesthetics

**Environmental service workers will understand the importance of maintaining an environment that is aesthetically appealing. They will uphold facility standards for service, maintenance, and upkeep.**

*The following may be included:*

- Maintain facility in good repair
- Recognize therapeutic and functional aspects of color, decor, and furnishings
- Ensure the quality of food for staff and clients, including presentation, taste, and service
- Maintain an organized work environment, free from clutter
- Promote facility accessibility through a variety of methods, such as proper signage and offering directions

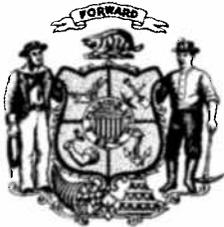
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# WISCONSIN STATE LEGISLATURE



# Public Support for the Wisconsin Technical Colleges in Perspective

*Data and information supporting a broader context for WTCS funding ...*

- **Perspective on Property Taxes**

The owner of a median value Wisconsin home paid an average of \$213 in property taxes to support his/her local technical college in 2004-05 ... *page 2*

Technical colleges have comprised a steady portion of property taxes (7.4%). The only major change occurred as a result of the shift to 2/3<sup>rd</sup>'s funding of K-12 ... *page 3 and 4*

As K-12's proportion of total property taxes decreased, all other taxing entities increased. Since 1980, technical colleges increased less than Municipalities and Counties ... *page 3 and 4*

The share of property tax burden carried by residential taxpayers has steadily and significantly increased ... *page 5*

- **Eroding State Investment in the WTCS**

General state revenues that used to comprise more than 35% of technical college funding now account for approximately 17% ... *page 6*

Even modest inflation takes a toll on stagnant/falling state support for technical colleges ... *page 7*

## Perspective on Wisconsin Technical College Property Taxes

Median home values have increased steadily while WTCS tax rates have decreased. This reflects that technical college taxes have not increased as fast as property values. This results in falling technical college taxes per \$100,000 in value, and slowly increasing taxes on the median value home.

	<u>WTCS statewide total mill rate</u>	<u>Statewide average annual WTCS property tax levy</u>
2001-02	1.67	\$ 167 on a \$100,000 home \$ 334 on a \$200,000 home <b>\$199 on a median value home of \$119,370</b>
2002-03	1.66	\$ 166 on a \$100,000 home \$ 332 on a \$200,000 home
2003-04	1.61	\$ 161 on a \$100,000 home \$ 322 on a \$200,000 home
2004-05	1.55	\$ 155 on a \$100,000 home \$ 310 on a \$200,000 home <b>\$213 on a median value home of \$137,727</b>

## Technical College Portion of Total Wisconsin Property Taxes

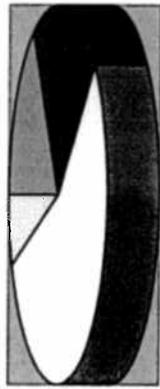
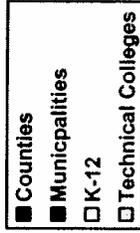
The percentage of total Wisconsin property taxes levied by technical colleges has remained essentially constant except for an increase attributable to the State's assumption of 2/3<sup>rd</sup>'s funding of K-12. The technical college share has increased less than counties or municipalities after 2/3<sup>rd</sup>'s funding of K-12 was implemented:

Percentage share of total property taxes:

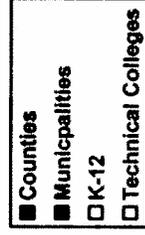
Year Levied	Municipal and Special District	County	K-12	Technical Colleges
1980-81	21.7	16.1	55.2	6.0
1985-86	23.9	15.3	54.3	5.8
1990-91	24.4	15.9	53.7	5.4
1995-96	24.0	16.8	52.7	5.8
2000-01	27.8	19.9	44.3	7.1
2003-04	27.8	20.1	43.8	7.4
<i>Change in proportion 1980-2004</i>	<i>+28.1</i>	<i>+24.8</i>	<i>-16.9</i>	<i>+23.3</i>

# Share of Wisconsin Property Taxes by Levying Authority ...

1980-81



2003-04



The technical college share has increased less than counties or municipalities after 2/3<sup>rd</sup>'s funding of K-12 was implemented:

*The change in proportion of tax levies by entity from 1980-81 to 2003-04 is:*

<b>K-12</b>	-16.9
<b>Municipal</b>	+28.1
<b>Counties</b>	+24.8
<b>Technical Colleges</b>	+23.3

## Shifting Residential Property Taxes

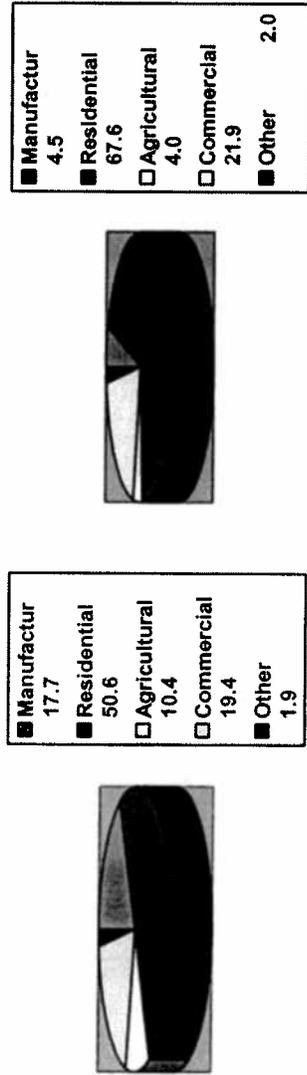
Residential property taxpayers feel “increases” due to a shifting of the total property tax burden from all property to residential property. The share of total property taxes on residential property has increased significantly as other property is exempted or assessed differently, and as values increase at different rates.

Over the past thirty years, the share of total property taxes paid by residential taxpayers increased by more than 1/3, while the share paid by manufacturing and agriculture together dropped by 70%.

### Share of Wisconsin property taxes by type of taxpayer...

1970-71

2001-02



The shift continues ... Since the 2001-02 data, the state cut in half the tax valuation of forest, swamp and waste land, continuing the steady shifting process reflected in the graphs.

*Shifting taxes is neither good nor bad “in a vacuum.” However, the steady shift of property taxes to residential taxpayers creates a burden that is largely hidden from taxpayers. Residential taxpayers feel the shift but may assume local governments “are just raising taxes again.”*

## State Investment in the WTCS Continues to Erode, Increasing Pressure on Property Taxes and Student Costs

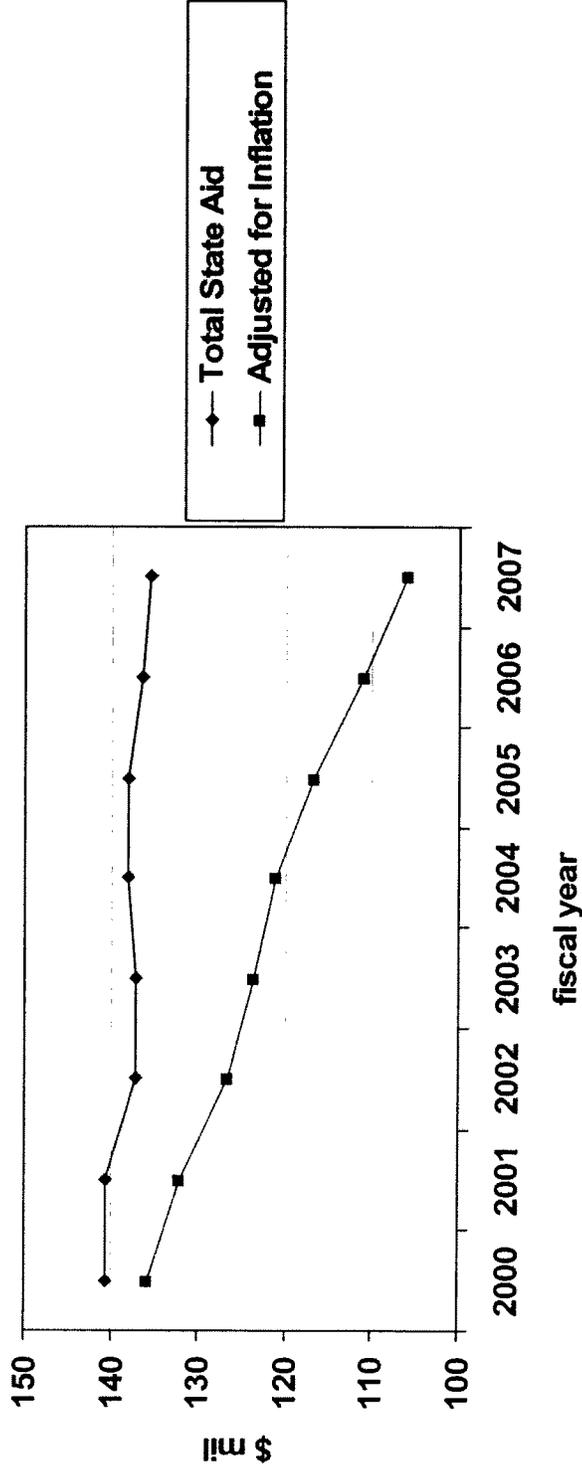
State support has fallen steadily and significantly as a share of total WTCS costs ...

### State General Funding as a % of WTCS Costs

1979-80	35.7%
1989-90	29.8%
1999-00	22.0%
2005	(estimated) less than 17.0 %

**Bottom Line: The state has not made technical colleges an adequate priority for general funding, in part because local taxing authority is available to sustain colleges during times of tight state budgets. The state's investment in technical colleges must be part of any discussion about local property tax burdens.**

## Eroding State Support for Wisconsin Technical Colleges 2000 - 2007



**Technical Colleges have not been “held harmless” in the state budget process. Diminishing state support of technical colleges fuels a shift of technical college costs to local property taxpayers.**

**Notes:**

- “Fiscal year” is July through June.
- “State Aid” through 2005 is WTCS general aid plus categorical aid according to Wisconsin Legislative Fiscal Bureau reports. Aid figures for 2006-07 assume a \$2 million cut required by 2005 Act 25 will be made as a \$1 million cut in each year. Total aid for 2006-07 does not include job training grant funds which pass through districts to business/industry.
- “Inflation” is U.S. CPI, all urban consumers, Department of Labor, to July, 2005. CPI for 7/2005 through to 6/2007 is estimated at 3.5% annually (The Department of Labor reports the annual U.S. all urban consumers rate is 3.6% as of August, 2006).

This report is prepared by:

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The District Boards Association is responsible for this report's content and is pleased to provide additional information or detail.

Data sources:

Wisconsin Technical College System, Wisconsin Department of Revenue,  
Wisconsin Legislative Fiscal Bureau, Wisconsin Taxpayers Alliance,  
U.S. Census Bureau, Wisconsin Department of Administration



***Recommendations of the Speaker's Task Force  
on the Wisconsin Technical College System***

***October 29, 2003***

**CREDIT TRANSFER**

1. Require by statute that up to 25 credits of general education courses shall automatically transfer between WTCS and UWS institutions.
2. Require the UWS and the WTCS to accelerate development of their own systemwide uniform curricula.
3. Require that the UWS and WTCS continue and accelerate the negotiation of articulation agreements. Require establishment of an articulation agreement for each program that exists in both systems. Utilize the Joint Administrative Committee on Academic Programs (JACAP) to identify which programs exist in both systems. Agreements should be developed at the department level.
4. Prioritize the programs for which articulation agreements will be developed based on "student flow" and economic development needs.
5. Establish a timeline for the development of articulation agreements.
6. In articulation agreements, include the option for students to "test out" of courses.
7. Direct the UWS and WTCS to promulgate rules establishing a procedure to appeal a decision of the receiving institution denying credit for a course taken at the other institution. The rules shall provide that decisions made pursuant to the process are final, notwithstanding s. 36.09 (4), Stats., the UWS faculty governance statute.

**DUPLICATION**

Request a performance audit by the Legislative Audit Bureau, examining whether there is duplication between the UWS and the WTCS in physical facilities or programs, in accordance with the attached scope statement.

**DISTRICT BOARDS**

1. Maintain the current method of appointing members of technical college district boards.
2. Amend s. 38.08 (1) (a) 1. and 2., Stats., relating to the composition of technical college district boards, as follows:

38.08 (1) (a) 1. A district board shall administer the district, shall reflect the diverse makeup of the district, and shall be composed of 9 members who are residents of the district, including 2 employers, 2 employees, 3

additional members, a school district administrator, as defined under s. 115.001 (8), and one elected official who holds a state or local office, as defined in s. 5.02. The board shall by rule define "employer" and "employee" for the purpose of this subdivision.

2. The employer and employee members of the district board shall be representative of the various businesses and industries in the district. The school district administrator shall be employed by the school board of a school district located in the district. ~~Of the 3 additional members, no more than 2 may be employers, no more than 2 may be employees, no more than 3 may be school district administrators and no more than 3 may be elected officials.~~ No 2 members of the district board may be officials of the same governmental unit nor may any district board member be a member of the school board that employs the school district administrator member.

3. Require the president of each technical college to make an annual presentation on the technical college district budget to each county board in the technical college district.

### **FUNDING**

1. The Legislature and WTCS should work towards establishing a funding formula for the WTCS under which an equal share of funding is derived from each of the three funding sources: student tuition; property taxes levied by the local technical college districts; and state aid. The Legislature should ensure that as tuition levels increase, financial aid is made available to ensure access to the WTCS by needy students. The Legislature should also consider whether the exemption from program fees for vocational adult courses for persons aged 62 years and older is appropriate. [s. 38.24 (1m) (b), Stats.]

2. The Legislature and the WTCS should strive to maintain: (a) the current high level of flexibility and local control within the WTCS which enables local technical college districts to respond quickly to local needs; and (b) general parity of programs offered by technical college districts throughout the state.

3. The WTCS should make greater efforts to ensure that technical colleges recover 100% of costs for contract courses they provide and should consider whether all technical colleges should be required to recover 100% or more of instructional costs for community service courses.

### **STATE BOARD AUTHORITY**

The WTCS Board, with the assistance of the WTCS Office staff, should undertake a self-assessment of its role and operations. The Board should identify changes that could be made to increase its responsibility and to increase accountability of the Board and the technical college system to the taxpayers. The analysis should also address the specific topics and questions set forth below. The Board should submit a report of its self-assessment and a plan of action addressing the Task Force's concerns to the Legislature within six months.

**Role of the State Board**

- Should the Board play a stronger role in developing statewide policies applicable to all technical colleges in the state?
- Should the Board exercise more control over activities and operations at technical colleges?
- Is the Board using its current authority, including authority over state aid and program approval, to an appropriate extent?
- Should faculty employment contracts, including the provision of health care coverage and other benefits, be negotiated on a statewide basis rather than individually by each technical college district? Are salary comparisons between technical college districts being used to artificially elevate WTCS faculty salaries statewide?

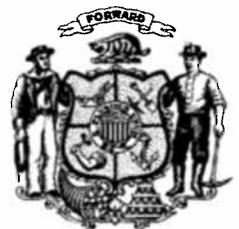
**Operations of the State Board**

- Does the Board meet often enough to enable Board members to develop sufficient expertise for informed decision making?
- Does the Board adequately review staff recommendations?
- Should the Board establish standing committees to focus on specific topics to enable Board members to develop expertise and familiarity with important topics?
- Is the Board Office staff configured in the best way possible? What is the proper role of the Office staff?
- Should the state consider eliminating the State Board, and operate the WTCS with only a President and Office staff?

MM:rv:tlu;ksm



# WISCONSIN STATE LEGISLATURE



31 - School board presidents SW  
School district Fox Valley

### Technical College District Board Appointment Process Summary

State Law  
Reviews  
process

1. District board secretary sends notice of local board vacancies to appointment committee (AC) members confirming positions to be filled. The AC is comprised of all of the district's constituent county board chairpersons (13 districts) or school board presidents (3 districts). AC's range from 2 to 31 members.
2. AC publishes districtwide legal notice of intent to appoint district board members meeting specific criteria and solicits submission of names of candidates. The AC must also send notice to district business, labor and other groups.
3. Candidates must submit name and qualifications including a resume, affidavit, and two written references within 14 days of the notice.
4. AC publishes districtwide legal notices containing names of persons being considered for appointment. Notice must be given at least 14 days before the meeting or hearing.
5. AC notices and holds *at least two public meetings*. The AC first holds a public meeting to discuss/review the district's "plan of representation" and to discuss the names and qualifications of individuals being considered for appointment. Second, the AC holds a public hearing at which: 1) The plan of representation is confirmed/adopted with any changes, and 2) Candidates are interviewed (candidates must be present to be considered), public hearing testimony is taken, and appointments are made. Hearing must be held within 60 days of receiving notice of vacancies.
6. All candidates including incumbent board members must go through the complete public process to be appointed/re-appointed. Appointments must be made following statutes (employers, employees, a local elected official, a school administrator and other factors) and the plan of representation (diversity, gender, geographic representation).
7. Appointment is by majority vote. A quorum consists of AC members from counties/school districts having a combined population greater than 50% of the population of the college district.
8. Within 5 days of making the appointments, the AC chairperson must send written notice of the appointments to the WTCS State Board, which reviews them to make sure they conform to statutory requirements and the district's plan of representation. The State Board approves the appointments in a public meeting.
9. Members take an oath of office at the District Board's organizational meeting on the second Monday in July. Members must register as public officials, file with and follow rules of the Ethics Board, and conduct business fully in compliance with open meeting and open records law.
10. District board members may be removed by the AC in a dully noticed public meeting without cause.



HATC Milwaukee - 21 school boards -  
→ 4 votes - 25 votes

## **Taxation, Representation, and Appointed Public Boards**

February, 2006

In 1971, the Wisconsin Supreme Court unanimously upheld the constitutionality local property tax levies by appointed public boards. In *Village of West Milwaukee v. Area Board of VTAE District 9*, 51 Wis.2d. 356 (1971), the Supreme Court held that the Legislature's establishment of area-based vocational education, governed by appointed district boards that operate the schools and levy taxes for their operation, did not infringe on voting rights or violate constitutional provisions concerning taxation and representation.

The Court's rationale, citing well-settled law, stated:

"It is obvious that under our present form of government taxation does not depend upon representation. There is no exemption in the income tax for those who are disqualified from voting by reason of age or other causes, or for corporations which cannot vote at all. The property tax is a classic example of a tax where the tax burden may have no relationship whatsoever to representation. In many communities a great portion of the property tax is paid by corporations, nonresidents and others who have no voting rights and no representation in the (legislative) body which levies the taxes."

The Court also stated:

"The legislature in its wisdom has determined that the interests of vocational education would be better served by financing the vocational schools on an area basis. There is nothing in (the state constitution) which prohibits this. The constitution neither requires nor prohibits the creation of vocational schools, nor, therefore, does it provide for the method of financing the schools."

Finally, the Court noted that the appointed board model in place to this day represents the district's interests and population:

"Every effort is made to provide for district boards which will represent the various interests and the population within the districts generally, and to do so by providing that representatives of the governmental units involved (all of them elected by the citizenry of the districts) might make the appointments."



**Speaker's Task Force on the Wisconsin Technical College System**  
Follow-Up meeting

Tuesday, February 14, 2006  
10am-2pm  
Legislative Council Conference Room  
Madison WI

**AGENDA**

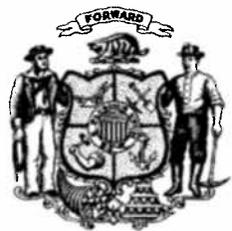
*21-30 credits -  
transfer -*

1. Welcome
2. Discussion of District Boards
  - a. Governance and accountability
  - b. Proposals to elect boards
  - c. Status and suggestions
3. Discussion of cost recovery of community service courses
4. Discussion of status of standardized curriculum *Kathy*
5. Discussion of student financial aid
  - a. Tuition trends
  - b. Student accountability
  - c. Funding mechanisms

*Open curriculum  
transfer -*
6. UW/WTCS initiatives/COBE progress update *Kathy*
7. Adjournment
  - 1) Subcommittee - look at electronic appointments
  - 2) Statute Change 6241A - No tuition



# WISCONSIN STATE LEGISLATURE



*Dubb/Jenson*

*Average -  
UW Madison  
Milw -*

*2yr College  
#160 / credit*

**WTCS FINANCIAL AID  
Speakers Taskforce on the WTCS  
2/14/06**

- 40% of WTCS program students get some form of need-based aid.
- 32% of WTCS applicants have an EFC of zero, compared to 13% of UWS applicants and 14% of applicants to Private Colleges and Universities.
- 24,545 WTCS students received Pell grants in 2003-04, as compared to 26,163 UWS students and 8,422 Private College or University students.
- The majority of WTCS student aid (84% in 2003-04) comes from federal programs and the majority of federal aid comes from loan programs (55% in 2004-05).
- WTCS Student Debt is increasing: in 2003-04, the average debt incurred by WTCS students (for attending a technical college) was \$4,898. In 2004-05, the average indebtedness of WTCS students increased 7.9% to \$5,286.
- Limited financial resources and insufficient financial aid dollars means WTCS students have a high Unmet Financial Need.

**Average Cost of Education  
Compared to Total Need-based Financial Assistance  
(2003-04)**

	<u>Independent Colleges and Universities</u>	<u>Tribal Colleges</u>	<u>UW System</u>	<u>WTC System</u>
Average Total Cost	\$22,360	\$11,745	\$11,594	\$ 9,954
Average Family Contribution	\$ 7,653	\$ 828	\$ 3,809	\$ 2,513
% of Total Cost	34.2%	7.0%	32.8%	25.2%
Average Need-Based Assistance	\$ 9,291	\$ 5,214	\$ 5,610	\$ 3,514
% of Total Cost	41.6%	44.4%	48.4%	35.3%
<b>Average Unmet Need</b>	<b>\$ 5,416</b>	<b>\$ 5,703</b>	<b>\$ 2,175</b>	<b>\$ 3,927</b>
<b>% of Total Cost</b>	<b>24.2%</b>	<b>48.6%</b>	<b>18.8%</b>	<b>39.5%</b>

Source: Wisconsin Higher Educational Aids Board Report #05-18, Exhibit C, 2/18/05.

**2003-04**  
**WISCONSIN TECHNICAL COLLEGE SYSTEM**  
**Breakdown of Non-Need-Based Financial Assistance Spent**

<b>Federal Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Parent Loan for Undergraduate Students (PLUS)	240	\$946,832	\$3,945	3.32%
Stafford Loans (unsubsidized)	10,489	\$23,166,083	\$2,209	81.33%
<b>Total Federal Assistance</b>	<b>10,729</b>	<b>\$24,112,915</b>	<b>\$2,247</b>	<b>84.66%</b>
<b>Institutional Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
AES Institutional Matching Funds	22	\$21,504	\$977	0.08%
Employment	337	\$419,832	\$1,246	1.47%
Grants / Scholarships	1,032	\$587,818	\$570	2.06%
Loans	21	\$3,800	\$181	0.01%
<b>Total Institutional Assistance</b>	<b>1,412</b>	<b>\$1,032,954</b>	<b>\$716</b>	<b>3.63%</b>
<b>Other Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Employment	0	\$0	\$0	0.00%
Grants / Scholarships	1,135	\$1,176,267	\$1,036	4.13%
Loans	95	\$16,373	\$172	0.06%
Other (1)	674	\$1,920,150	\$2,849	6.74%
<b>Total Other Assistance</b>	<b>1,904</b>	<b>\$3,112,790</b>	<b>\$1,635</b>	<b>10.93%</b>
<b>Private Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Alternative Loans	43	\$203,036	\$4,722	0.71%
<b>Total Private Assistance</b>	<b>43</b>	<b>\$203,036</b>	<b>\$4,722</b>	<b>0.71%</b>
<b>State Assistance Administered by HEAB</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Academic Excellence Scholarship	22	\$21,504	\$977	0.08%
<b>Total State Assistance</b>	<b>22</b>	<b>\$21,504</b>	<b>\$977</b>	<b>0.08%</b>
<b>TOTAL NON-NEED-BASED ASSISTANCE</b>	<b>14,110</b>	<b>\$28,483,199</b>	<b>\$2,019</b>	<b>100.00%</b>

(1) Includes Americorps, DVR, Employer Paid Tuition, PIC, third party payments, Veterans Benefits, and Workforce.

**2003-04**  
**WISCONSIN TECHNICAL COLLEGE SYSTEM**  
**Breakdown of Need-Based Financial Assistance Spent**

<b>Federal Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
<b>Employment</b>	<b>2,376</b>	<b>\$2,508,741</b>	<b>\$1,056</b>	<b>2.09%</b>
Federal Work Study	2,376	\$2,508,741	\$1,056	2.09%
<b>Grants</b>	<b>29,196</b>	<b>\$55,261,521</b>	<b>\$1,893</b>	<b>46.00%</b>
Bureau of Indian Affairs Grants	371	\$1,134,922	\$3,059	0.94%
Pell Grants	24,545	\$52,096,755	\$2,122	43.37%
Supplemental Educational Opportunity Grants	4,280	\$2,029,844	\$474	1.69%
<b>Loans</b>	<b>21,702</b>	<b>\$43,869,584</b>	<b>\$2,021</b>	<b>36.52%</b>
Perkins Loans	32	\$73,165	\$2,286	0.06%
Stafford Loans	21,670	\$43,796,419	\$2,021	36.46%
<b>Total Federal Assistance</b>	<b>53,274</b>	<b>\$101,639,846</b>	<b>\$1,908</b>	<b>84.61%</b>
<b>Institutional Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Employment	130	\$196,027	\$1,508	0.16%
Grants	258	\$146,350	\$567	0.12%
Loans	0	\$0	\$0	0.00%
<b>Total Institutional Assistance</b>	<b>388</b>	<b>\$342,377</b>	<b>\$882</b>	<b>0.28%</b>
<b>Other Assistance <sup>(1)</sup></b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
<b>Total Other Assistance</b>	<b>284</b>	<b>\$645,679</b>	<b>\$2,274</b>	<b>0.54%</b>
<b>Private Assistance</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
Privately Funded Grants or Scholarships	587	\$330,212	\$582	0.27%
<b>Total Private Assistance</b>	<b>567</b>	<b>\$330,212</b>	<b>\$582</b>	<b>0.27%</b>
<b>State Assistance Administered by HEAB</b>	<b>Number of Awards</b>	<b>Total Dollars</b>	<b>Average Award</b>	<b>% of Total Aid Spent</b>
<b>Grants</b>	<b>22,098</b>	<b>\$16,980,220</b>	<b>\$768</b>	<b>14.13%</b>
Hearing & Visually Handicapped Student Grant	37	\$57,365	\$1,550	0.05%
Indian Student Assistance Grant	270	\$228,140	\$845	0.19%
Minority Undergraduate Retention Grant	368	\$376,981	\$1,024	0.31%
Talent Incentive Program Grant	1,180	\$1,497,729	\$1,269	1.25%
* Wisconsin Higher Education Grant	20,232	\$14,796,980	\$731	12.32%
Wisconsin Tuition Grant - Aviation	11	\$23,025	\$2,093	0.02%
<b>Loans</b>	<b>151</b>	<b>\$196,212</b>	<b>\$1,299</b>	<b>0.16%</b>
Nursing Student Loan	151	\$196,212	\$1,299	0.16%
<b>Total State Assistance</b>	<b>22,249</b>	<b>\$17,176,432</b>	<b>\$772</b>	<b>14.30%</b>
<b>TOTAL NEED-BASED ASSISTANCE</b>	<b>76,762</b>	<b>\$120,134,546</b>	<b>\$1,565</b>	<b>100.00%</b>

(1) Includes Carl Perkins Voc. Ed. Programs, DVR, Employer Paid Tuition, PIC, TAA, Veterans Benefits, and Workforce.

## WTCS Tuition

Fiscal Year	Postsecondary/Voc Adult			Collegiate Transfer			Tuition Revenue % of Major Revenue
	Per Credit	Annual	% Change	Per Credit	Annual	% Change	
2000-01	61.50	1,845	3.8	85.90	2,577	5.7	15.9
2001-02	64.00	1,920	4.1	90.00	2,700	4.8	16.5
2002-03	67.00	2,010	4.7	94.00	2,820	4.4	16.8
2003-04	70.00	2,100	4.5	97.00	2,910	3.2	17.5
2004-05	76.00	2,280	8.6	103.00	3,090	6.2	18.2
Est. 2005-06	80.50	2,415	5.9	109.10	3,273	5.9	16.9

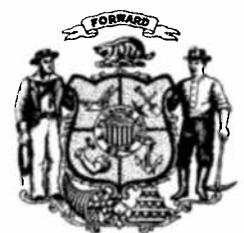
- Tuition is set for the entire System by the State Board
- State Board considers market factors, property tax revenues, state aids and access (both capacity and affect on Tuition)
- By statute, PS/VA tuition must cover 14% of operational costs and Collegiate Transfer tuition must cover 31% of operational cost of those programs.
- In 2004-05, the recovery rate for PS/VA was 16.9%, and 35.4% for Collegiate Transfer.
- Tuition revenues are a function of per credit tuition levels AND enrollments
- Tuition revenues would have to almost double to reach one-third tuition funding

MODERNIZATION OF THE TECHNICAL COLLEGE SYSTEM ACT  
3 SECTIONS

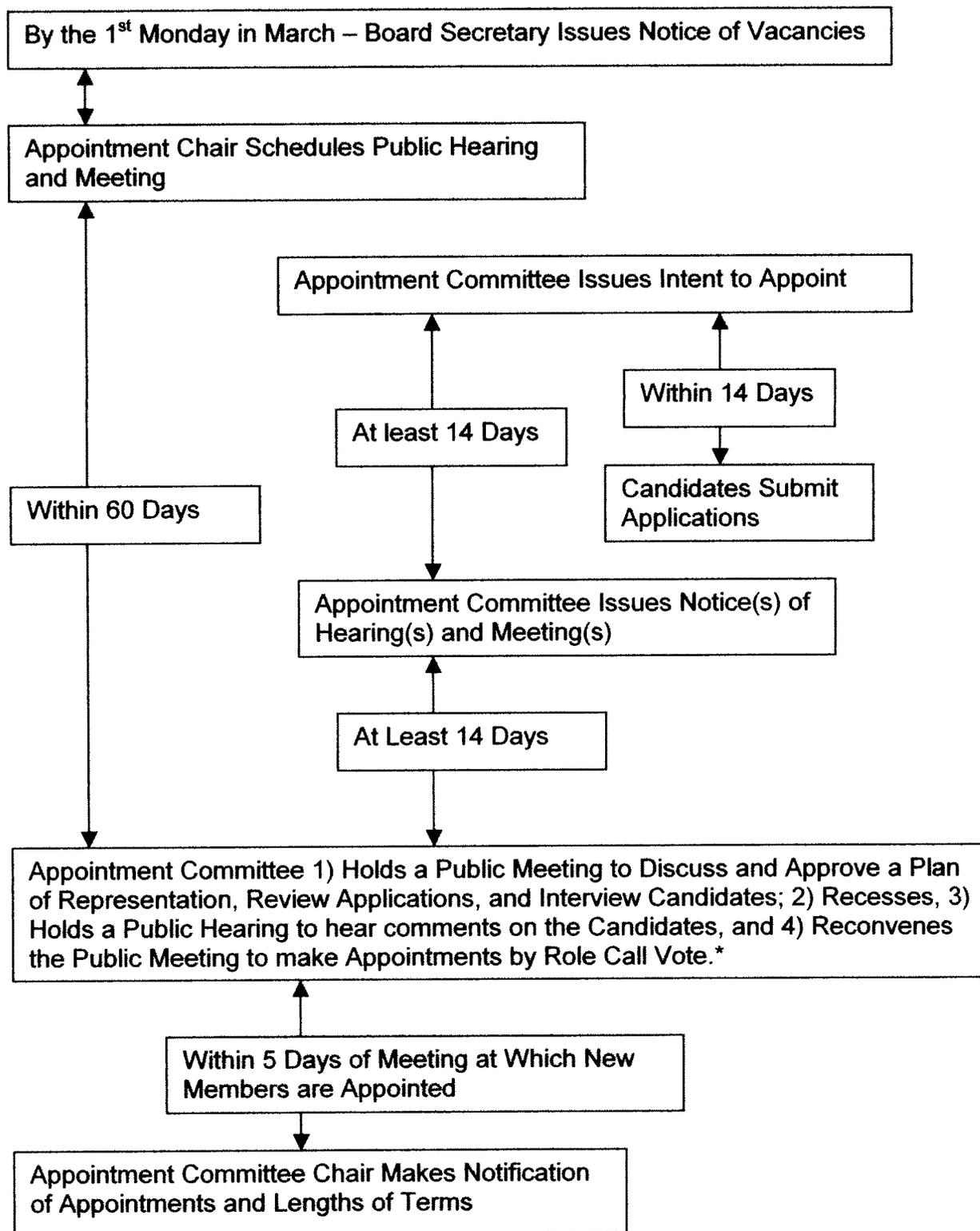
- 1) Positioning for the Global Economy
  - a) Establish national and international standards of achievement for all programs.
  - b) By statute require the system and each district to report their progress on meeting those standards.
  - c) Require that student learning of these standards be used as criteria for retention of faculty regardless of local bargaining agreements.
  - d) Provide incentive funding for districts that meet standards.
  - e) Allow districts to form public/private partnerships that either promote economic development or return revenue vs. expenditures to the college.
  - f) Allow the districts to add the term "community" to their names.
  
- 2) District Relationships for Global Economy of the Future
  - a) Public bargaining as advisory as with state employees.
  - b) Comparable use be those of community as a whole.
  - c) Dissolve the intermixing of board participation and replace with labor organization representation of 50 or more and minority representation reflecting the population of the district.
  - d) Require district faculty and staff to be accountable and available to a campus location for 35 hours per week.
  - e) Require all faculty regardless of union or committee assignments to teach a minimum of 23 hours per week and a maximum of 35 hours with 25 being the average as part of the regular full time contract.
  - f) Require faculty to participate in college-called meetings and committees as a part of their regular work day with no extra compensation.
  - g) Bar districts from paying faculty for union participation at the discretion of the union with refund to college related business.
  
- 3) System Reforms for the Global Economy
  - a) State Board appointed from three nominations from the districts.
  - b) Expand State Board to sixteen and one at-large member.
  - c) Line item state dollars to districts the budgets set on a formula under state system budget.
  - d) Restrict as much as possible the dollars available at the state level but not a part of the line item budgets to districts; i.e., state could take the biggest hunk of the total budget and only leave what they want to leave for the districts.
  - e) By statute, restrict State Board members to non-employees of the system or districts.



# WISCONSIN STATE LEGISLATURE



## District Board Appointment Process Timeline



**\*By State law, the Appointment Committee need hold only one Public Meeting and one Public Hearing, but may hold more than one Meeting and more than one**

Hearing as long as the order noted in the graphic is followed; e.g., an Appointment Committee may not review applications until after it has approved a plan of representation and an Appointment Committee may not hold a Public Hearing until after it has interviewed candidates etc.

### **Other Items**

If the appointment is to fill a vacancy due to a resignation, the 60 day clock begins with the notification of the Appointment Committee Chair.

If a vacancy due to a resignation occurs after the first of the year and there will be a spring election, the Appointment Committee has 60 days after the election to fill the vacancy. Filling such a vacancy may be folded into the process for filling vacancies due to term expiration, but does not have to be.