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- Superintendent of the School District of Florence County 2015-2021

## Legislative Council Study Committee on Shared Services

### Request for Additional Information

1. Identify any barriers to the successful implementation of shared services by your school districts (*examples could include – statutory barriers, financial uncertainty, community relationships*)?

- Time (human limits and capacity) and geography:
  - Limited capacity in “specific roles.” Too often, too many individuals already have shared roles and responsibilities balanced against personal time.

If individuals are going to be asked to serve (play) another district(s) (team), they surely can't be in multiple roles (play both sides of the ball).

There needs to be a commitment to the same job description.

- Distance between districts compounds the capacity issue, as time during the day is spent in travel (takes away from both professional and personal time) – although there are matters that can be done virtually there are items where its paramount that individuals are onsite and regularly present.
- We need to remember - individuals have lives beyond their work.
- Previous legislative proposals to provide districts with funding incentives to share services (e.g., 2019 Assembly Bill 441) have been narrow in scope and have provided no incentive to districts that are already sharing personnel (even if the sharing is virtually brand new). The list of services could be expanded to include such positions as special education directors, gifted & talented coordinators, and perhaps other positions such as career counselors to help students match their academic and career plans (ACPs) to opportunities available in or near their community, or accessible via their technical colleges – each situation is unique, these are just a few examples. As one specific example, could CESAs could help with providing the gifted & talented coordinators or career counselors? This **is not** to suggest that districts should be mandated to create positions that don't exist without adequate financial support.

2. In your experience, have you tried to share services that proved not to be beneficial, if so please explain?

- I have personal experience as a shared Superintendent (Goodman/Armstrong Creek and Florence County 2013-2015) – A shared administrator must prepare for, attend, and

follow-up after at least two sets of school board meetings each month, which can involve travel and late nights, but there are always more meetings (committee, special meetings, expulsion hearings, etc., that require the superintendent's attention or presence); a shared superintendent needs to work with differing boards that may have differing governance or leadership styles and different policies, keep agenda items separate from each other, maintain focus, long evenings, travel – personal time is compromised. Additionally, in my situations, I still served as principal in one of the shared districts, which meant, even though I was supported by a dean of students, I was still the leader in curriculum implementation and advancement in addition to being responsible for staff observations and evaluation – fidelity was compromised. **Ended after two years**

- Finance manager – I have personal experience with districts sharing a business manager. Based on that experience, there are too many processes and responsibilities involved in being financial manager for two distinct school districts, especially without adequate supporting staff, regardless of qualifications (we had a CPA with public and private sector experience). The individual who shared the duties of finance manager for the two districts:
  - was exhausted in just over two years' time even though she was an expert from qualifications/education (CPA) and career experiences
  - found there was too much HR responsibility and oversight in addition to financial responsibilities

Again, the shared individual must attend and be present at two of everything (e.g., board meetings, budget committee, annual meetings, etc.) – personal time is compromised, and expertise is not maximized when other responsibilities and expectations are factored in. **Ended short of three years**

- Others (Director of Special Ed., S&L, school psych, OT, driver's ed) where travel and days are too long balanced against other responsibilities and personal lives.
  - Certain roles need for people to be on-site to perform certain duties—travel difficulties (including during inclement weather) disrupt schedules and systems due to time spent travelling.
    - **Director of Special Ed - ended after two years**, as this individual was also building principal in one of the districts, and special ed case load in both schools simultaneously increased
    - **Speech and Language - ended after four years** – increased case load in both districts, individual's family situation changed and individual desired to work in only one district for lesser compensation to have more personal/family time.
    - **School Psychologist – individual retired (served four years)**, yet the individual shared that serving four districts, with their increasing caseloads, combined with travel, was taxing, and shared that the shared position may be difficult to fill. When that individual retired, there were

no applicants for a four school, three-county posting. Districts subsequently relied on rehiring retired individuals and help from CESA to fill. With *WRS limitations on rehired annuitants, rehired personnel therefore could only fulfill the needs of one of the districts – without those restrictions would they have taken on another district maybe?*

- **Occupational Therapist** – reduced after five years – In this particular instance, the case load of the shared OT decreased in one district over time, so not as much of their services were needed in that district, yet their case load increased in another district. Consequently, in the first district—the one with reduced/minimal needs for services--the OT did not have the time available to continue serving the district; therefore, they had to find services elsewhere – assuming services may have been from CESA, but I’m not certain.
- **Driver’s Education** – reduced after seven years from serving three districts to two districts. Individual is full-time teacher in other content area in one district, in addition to advising numerous after school and other school community events
- Student needs and demands are ever-changing. More specifically, the demand for special education services continues to increase, not decrease – regardless, required services fluctuate regularly, too, which change schedules – one change alone can impact other participating districts at times. More required and specified services saw the “home district” (fiscal agent) have to use the current, shared staff to solely serve their district to meet IEP’s (Individualized Education Plans).
- Sharing district leadership may create some “direct” dollar savings but may cause a district to forego other opportunities - “indirect costs” are incurred and sharing may displace visionary leadership and continuous improvement. From my experience, the efforts to lead a district’s vision and mission is split between two, so only one-half in each (and arguably less – given time lost in travel and other accrued indirect costs...including human fatigue) of maintaining a commitment to each district.

As example, if an administrator has to complete grant application(s) for a single district, he/she will be further challenged in preparing a second, separate application(s) for a second district– the same with the various reports, including rigorous and extensive reporting such as federal civil rights (CRDC) among many others. Ability to accelerate curriculum, conduct staff evaluation and lead improvement efforts, and professional development, among many others, is limited when lead administrators need to do “**two of everything**” that regardless of topic or subject matter(s) simply takes and consumes time.

Administrative structures in rural schools are not as they are in suburban or larger. There are not assistant superintendents; there are not HR directors; there are not curriculum directors; finance responsibilities are handled by one, or two people at best, fulfilling part-time roles that other districts may employ one (or more) dedicated FTEs to fulfill. *In our small rural districts, we even have some superintendents who are driving buses (due to a variety of factors, including staffing and pay challenges, lack*

*of school bus driver candidates with a CDL license, etc.) Individuals committed to one specific role/job description are much more focused, and efficient, than an individual who must continually change and shift roles and the expectations of work. (Can a stock car driver pit stop their own vehicle? Sure, but he/she must unstrap, get out, grab the gas tank, fill it up, jack up the car, change the tires, suit back up, buckle in and then go and try to make up the time lost. Even then, not near as effective and efficient in the “pit stop” roles, yet if even the greatest driver - he/she can’t overcome the lost time on the track unless they drive for a longer time than the conclusion of the race. Sure, the team’s budget/cost of operations is less, and maybe the team continues to sustain as a stock car team, but they finish in the back of the pack not only because of the lost time, but they don’t have the team of experts fine tuning the car to pick up critical time – **enhanced performance** on the track [in the classroom])*

***When capacity is already limited, and then is spread thinner, the law of diminishing returns begins, or is accelerated, even when nominal supporting resources are added.***

***Yet, returns can be enhanced increased by investment of new resources in building additional capacity that is currently lacking. In my experience, such investment can provide a greater return in output in other areas that may lead to efficiencies. One of these areas may be the provision of HR capacity in small, rural districts, which lack access to such services.***

Adding dedicated HR capacity could relieve responsibilities on superintendents and/or business managers, and even principals and other office staff. Would adding a HR director potentially create new opportunities to explore in sharing, in addition to creating more time for administrative/office staff to focus on their role as intended in more direct support of students and their learning opportunities and experiences versus being mired in the minutiae of personnel issues and the operational end of a multi-million-dollar business? Again, this is **not** to suggest that districts should be mandated to create positions that don’t exist without adequate financial support but is merely an observation.

3. Can you identify any solutions that could address barriers to or incentivize greater use of shared services?
  - Any individual(s) in shared position need to have the **same role/job description** – they cannot have two distinct roles (e.g., superintendent/principal or finance manager/HR director)
    - I served as superintendent and principal simultaneously for one district, and as superintendent for the other. Of necessity, this meant handling, among all the other incidentals that would arise, even substitute teaching as needed in one of the districts. The duties of the principalship (leader of instruction, curriculum and evaluation, specifically) were often displaced due to the need to focus on the superintendency – the principal duties were prioritized to putting fires out (student behavior, schedules, staffing, etc.) versus the things (e.g., progressive planning, evaluation and data analysis for continuous growth and improvement in curriculum and staff development) that have been demonstrated to boost the

needle on student achievement. My work as both districts' shared superintendent was compromised versus if I did not have to take time in one district to serving as the sole staff evaluator and director of curriculum – there was immediate, noticeable regression in one of the districts particularly.

Ultimately, one district decided the financial savings were not worth the loss to students, and staff, and the shared service ended. There was exploration of adding another administrator, who could subsequently serve as Director of Special Education and Athletic Director, yet the costs were greater than returning to a one administrator model – if the shared incentive as proposed in the 2017-2019 budget existed, and did not limit sharing or incentives specific to the principal role (the language needed to provide more flexibility due to the uniqueness of each school district statewide), then maybe the shared role would have sustained.

Additionally, frankly, I was burned out in two years (my family will testify to this) – with an enhanced model, I maybe could have sustained the shared superintendency.

As this committee explores incentives for shared services, some thought needs to be given to what happens if sharing services doesn't work—if, for example, it (sharing) burns people out more quickly. We could inadvertently be placing districts in a situation where they might generate some short-term savings but wind up in an unsustainable situation with negative long-term consequences.

- Incentives, similar, but different, than those proposed in the 2017-2019 state budget bill, could possibly assist in alleviating the burden of “multiple hats” on individuals, potentially enticing staff to offer their services in areas of expertise to others, if adequately supported in ancillary/supporting roles – maybe some of these roles can be shared, as there are “common systems” and processes (e.g. HR, which doesn't exist in the majority of Wisconsin schools, provides relief and new capacity to hone in on areas of expertise in other administrative roles).

The shared service incentives were never given an opportunity due to the veto in the budget bill – yet I do think the language needs to be reviewed and amended in a few different ways:

- Why does the shared services incentive proposal not apply to those districts who already created shared services? The new dollars could be used to create further efficiencies (snowball effect of progression – “law of increasing returns”)
- Are there are “positions/job descriptions” that should be added? Are there those that should be removed, and dollars are reallocated for other roles? Each district is unique, and for those that are sharing, there can be even more “uniqueness” that the exceptions in the original proposal may hinder – “e.g., ...excluding principals and assistant principals...” (part of the original language in **2017 Assembly Bill 64/Senate Bill 30** of 2017-2019 biennial budget bill)
- Should dollars be more significant on the front-end, and for a longer duration, to provide ample time for training, transition and necessary support before the

shared service is completely, and satisfactorily, transitioned to as the new practice and model of administrative or operational delivery?

4. Provide examples of barriers that currently prevent school districts from moving forward with consolidation?

- **Community sentiment** - There is great community pride among school communities, especially in that our rural schools are seen as “the hub” of the community and serve as a magnet for community uses of the school beyond just education. Schools, particularly in our rural areas are a resource – they are a gathering place for varying events and social interactions throughout the school community. The list is extensive; as some examples, schools provide for utilization of their gymnasiums and weight rooms, some have public, shared libraries, or other events through their school libraries, some serve as polling places among other numerous extra and co-curricular activities where the community gathers.
- **Geography** - already creates challenges in the sharing of both administrative and educational services. Consolidation will lead to increased travel costs, but more concerning, increased time that students are on buses versus having that time for extra/co-curricular events (that we know help to keep students engaged with school), their studies or in time with their families, and we know many students are already challenged on the home front.
- **Commerce** - Citizens realize that without local schools, local commerce will become stagnated at best. As example, many rural communities are now nothing more than homesteads due to the closing of those schools – people know and recognize this in our rural areas – Wisconsin needs these outlying, rural communities for statewide commerce, particularly tourism.

Simply put from a statewide perspective, if there are fewer schools and fewer viable rural communities in many parts of our state, there will be fewer opportunities for tourism and growth of other businesses - if schools close, will there be enough volunteer emergency services, law enforcement, medical facilities in addition to other needed small businesses (gas stations, grocery, restaurant, lodging, etc.)? – ***I do not think this can be overlooked in these conversations.***

5. In what ways could the state incentivize school district consolidation:

- Not sure – I think “community sentiment” is the greatest challenge first and foremost, among others – not sure there is any incentive that overcomes the community sentiment and challenges of geography. I suspect community sentiment in favor of school district consolidation is likely much lower than many lawmakers imagine.
- Although additional funding can help, it’s not the sole catalyst for consolidation. The comment “Necessary, but not sufficient” was shared along during testimony along with “Money alone can’t do it.”

*Local control* prevails, and although some new ideas and incentives could help the process and hurdles from some (each situation is unique), in my experience, there is not a one-size fits all.

### **Closing Thoughts**

Conversations have moved more to “consolidation” discussions than “shared administrative or other services” in my observation. I do not see “consolidation” in the scope statement of this study committee other than in reference to the “consolidating services” in addition to the “county-wide school district models.” That scope statement reads:

**“The study committee is directed to review current barriers to shared administrative or other services between school districts, and explore statutory changes or creation of incentives to encourage efficiencies. The committee shall consider methods for sharing or consolidating services such as district-level administration and personnel, purchasing, technology and data processing, transportation, food service, and building maintenance and make recommendations for legislation. As part of its work, the committee shall study school district structures employed in other states, particularly county-wide school district models.”**

Florida’s countywide district model is much different in many ways and even the smallest Florida district has roughly five times the enrollment that the countywide district I served has. We do have two countywide school districts in Wisconsin, and I can speak to this having been the superintendent of one of those for eight years – maybe the other administrator of a countywide district (Menominee Indian School District) would desire to share also.

In my opinion there are not legislative/red-tape barriers preventing the sharing of services or consolidation. At the end of the day, incentives, particularly financial incentives, can be a catalyst, yet financial incentives do not:

- 1) Stop the hands of time – there are only 24 hours in a day...money can’t add time to the day, but it can create new capacity.
- 2) If individuals can remove some hats, with an initial boost in added capacity (e.g., HR), then in time maybe some more natural pathways will not only develop but be sustainable.

*There is a human element to all of this*...we can’t continue increasing expectations among employees. I think some discussions are on the right track in looking at systems and purchasing of services - let me elaborate on the HR component that I think could be a catalyst, at the administrative level, to possibly enhance and help with the sustainability of some administrative roles.

Public schools are a service business...they serve people, with people. By far, our biggest expenses are for personnel. Yet, many of our schools do not have HR departments. Superintendents, business officials, principals, etc. do not have HR degrees, training, knowledge, and expertise, yet it’s consuming more and more of their time... turning their positions of leadership into that of being more managerial. The indirect time costs are enormous in ways that I’ll refrain from elaborating on now. There are never-ending changes in various realms of employment, and one mistake can be catastrophic to a district financially. Districts are relying more and more on legal counsel to navigate these situations, and that comes at a cost – yet, with trained and qualified HR resources, could these costs, and the time spent by a superintendent, principal or financial manager be minimized? I think so.

As a people business, why do public schools not have more support in HR? As example:

Four of our NE Wisconsin schools (220+ full or part-time employees and over \$20 million in collective operating budget) were desiring to hire one full-time HR director. This would not even be for only addressing general employment inquiries and other situations that arise, but as one example, administering and overseeing onboarding and all other ongoing employment matters – please see **Vol. 45, No. 2 of WASB Policy Perspectives (see attached)** – *Onboarding Procedures for New Employees Draw From Many Policy Areas; Maintaining a Checklist Can Help Things Go Smoothly.*

In that document, which is attached, you will see 27 identified onboarding requirements or suggestions per federal and state law and/or local policies. In addition to onboarding, these records need to be maintained, updated, and monitored regularly, in addition to any other changes and implications due to employment requirements that are updated regularly and ever-changing. This does not include addressing unique situations of FMLA, ACA implications among others that occur regularly.

Having a committed, consistent HR individual/department can relieve administration of an ever-growing burden of attracting and retaining staff – this process (talent attraction/retention) is ongoing and tedious and was even prior to the pandemic...this will not change in the foreseeable future. Unfortunately, teacher and staff supply challenges are here to stay.

In closing, consider my aforementioned example: **a private industry with 220 full and part-time employees would not operate without a committed HR department. They would not expect their CEO, CFO or COO to do their onboarding, document processing and file upkeep – they have committed individuals for this. In addition, industry standards call for approximately one (1) HR staff to about 125-150 employees.**

Final Observations:

- 1) Continued discussions need to be student-focused/centered first and foremost. The primary question must be: Will doing so (sharing and/or consolidating) create new and expanding opportunities for students?
- 2) Local control is a priority and paramount. Community ownership of schools is deeply engrained. Each school district and school community is unique.
- 3) Many districts are, and have been, sharing services. The current consolidation framework does not provide incentives adequate to overcome items 1) and 2) above. Case in point – two of the districts shared in their testimony at our second meeting that their consolidation study by an outside entity found there were no financial incentives to progress the process of consolidating their districts

Part of this is surely that the “low-hanging fruit” have likely already been picked, in addition to other unique and creative efforts in sharing among districts, hence reducing expenses.

Not sure how much sharing of services will be seen in our larger school districts - i.e., 1,500 - 2,000 or larger student districts that, due to economies of scale, are running more efficiently.

Can some of these same economies of scale be created in smaller, rural school districts? In some areas possibly, in some I'm not certain. However, I am certain that school boards and administrators have already been sharing services and looking at any and all opportunities for a number of years utilizing Wisconsin Statute 66.0301.