

2020-2021 First Year Superintendents Academy Sessions

❖ **Tuesday July 21, 2020 8:30 - 11:30 a.m.**

8:30 a.m. Introduction by Jon Bales, WASDA Executive Director

8:45 a.m. Political Lessons: Overview of Legislative Issues Related to the COVID 19 Health Crisis and Resulting State Financial Shortfall – John Forester, SAA

John Forrester will share his insights regarding the conversations and ‘leanings’ of the state legislature. What are the lessons learned, and what are the implications of what is occurring in the state legislature that are likely to play out with local school boards and community in the coming months?

9:15 a.m. School Budget Essentials in the New Environment – Baird School Finance Team

Does your 2020-21 district budget reflect the most recent actions of Congress and the state legislature? Have you prepared for multiple possible budget scenarios? Given the current state of affairs, what are the most financially responsible actions to take to position your district for the short term as well as long-term financial health? The School Finance Team from Robert W. Baird Co. will provide an update regarding key school finance variables superintendents must monitor and address, and provide recommendations to promote strong financial stewardship.

10:15 a.m. Effective ‘Back to School’ Communications in the COVID Environment – Joe Donovan, The Donovan Group

Back to School communications for the 2020-21 school year will be different than ever before. New health and safety procedures, social distancing, personnel issues, potential staggered start and end times or alternate days, bussing logistics, procedures if more active cases are identified....the list seems endless. Joe Donovan, from the Donovan Group, will offer recommendations for communication planning and messaging for school reopening.

11:15 a.m. General Q&A: Superintendent Interactions

11:30 a.m. Adjourn

❖ **Wednesday July 22, 2020 8:30 - 11:30 a.m.**

8:30 a.m. Introduction by Jon Bales, WASDA Executive Director

8:45 a.m. Navigating Legal Challenges Associated with Returning to School – Attorney Mike Julka, Boardman Clark

Districts are facing significant legal issues associated with reopening school including personnel contractual matters, bus contracts, liability concerns, etc. Attorney Julka will review statutory parameters and provide guidance regarding areas superintendents need to be prepared to address.

10:15 a.m. Back-to-School Preparation: Q&A with Leaders “In the Know” – Jon Bales, Mike Clark, Joe Donovan, Mike Julka

What dilemmas are you facing as you prepare for the start of school? Bring your questions for discussion, analysis and planning by the team of leaders who are most ‘in the know.’

11:30 a.m. Adjourn

❖ **Wednesday August 5, 2020 8:30 - 11:30 a.m.**

8:30 a.m. Welcome – Jon Bales, Executive Director WASDA

8:45 a.m. Introduction of New Superintendents – Kathleen Cooke (WASDA Academy Facilitator/KCMG Consulting)

9:00 a.m. Introduction/Overview of the Academy – Kathleen Cooke

9:15 a.m. ‘Reading’ and Understanding the ‘Tea Leaves’ and Getting in Front of the Politics Associated with Opening Schools This Year – Joe Donovan, The Donovan Group

Understanding community opinions and expectations is fundamental to shaping decisions and messaging communications for staff and community. This pandemic year makes getting communications right more important than ever. Joe Donovan will share strategies to identify key opinion leaders and proactively seek opinions and expectations to navigate the politics in your school community.

10:15 a.m. School Finance Fundamentals and Customized Finance Ed Camp – Baird School Finance Team

The School Finance Team from Robert W. Baird Co. will review key school finance variables and provide for each district, customized “need to know” school finance information for analysis, insight and increased understanding. This will assist in being prepared for three potential budget scenarios in response to the state financial crisis. Bring your finance questions and dilemmas to tap the expertise of Baird representatives during this interactive networking and problem solving opportunity

11:15 a.m. General Q&A: Back to School Preparations and First Year Superintendent Needs

11:30 a.m. Adjourn

❖ **Thursday August 6, 2020 8:30 - 11:30 a.m.**

8:30 a.m. Preventing a Crisis: Strategies to Promote Communications and Alignment Between the Board and Superintendent – Jon Bales/Kathleen Cooke

We can predict what is likely to happen if the superintendent makes a decision, as example, to require all staff and students to wear masks when they return to school in the fall, but the school board doesn’t know anything about it, and doesn’t support the idea. It is essential that the superintendent and school board are aligned about fundamental principles and core values, as well as the parameters that guide decision-making. This is especially important to navigate the challenges associated with reopening school, or closing for a resurgence of the COVID19 virus. Learn key strategies for communication, promoting focus, and gaining alignment between the board and superintendent.

9:00 a.m. What are the Legal Implications of ‘Safe and Healthful’ Facilities in the COVID Environment?
– Attorney Kirk Strang, Strang, Patteson, Renning, Lewis & Lacy, s.c.

The term “Safe and healthful facilities” means many things to people in the COVID environment. What do superintendents need to be prepared to address? What can you do and say if, as example.....staff don’t want to return to work because they think the environment isn’t safe? Can you require people to have their temperature taken? What are your legal responsibilities, and your liabilities? Attorney Strang will provide guidance for frequently asked staff and parent’s questions/attitudes/issues related to ‘safe and healthful facilities.’ Your questions can be posted during the session to be addressed by the presenter.

10:00 a.m. Implementing New Title IX Regulations – Attorney Kirk Strang, Strang, Patteson, Renning, Lewis & Lacy, s.c.

Title IX of the Education Amendments of 1972 prohibits discrimination on the basis of sex, in education programs or activities receiving federal financial assistance. The new regulations, which become effective August 14, 2020, have significant implications for K-12 school district policies and procedures governing sexual harassment investigations. This session will review the provisions superintendents need to ensure compliance with the new federal guidelines.

11:15 a.m. General Q&A: Back to School Preparations and First Year Superintendent Needs

11:30 a.m. Adjourn

❖ Wednesday August 12, 2020 10:00 - 11:30 a.m.

10:00 a.m. Enhancing Virtual Education: Preparing for the Inevitable or Finding the Opportunities? – Roger Rindo, Oconomowoc Area School District and Greg Kabara, Nicolet High School District

Virtual learning experiences during the COVID school closing last spring, varied greatly. Research indicates that the average student could be 7 months behind, while disadvantaged students could have a 10 month gap as result of their COVID-based virtual learning experience. Many schools will use virtual or blended learning models to reopen school in September. Health experts predict that a second wave of COVID may return in the fall which could necessitate further reliance on technology to serve students. How can virtual education be upgraded, or enhanced as a companion piece to face-to-face instruction, so that its strengths can be maximized for the greater benefit of students, and acceptance by staff? Learn strategies from two districts that have successfully harnessed virtual opportunities by prioritizing professional development of staff, to promote student results while building a positive reputation in the school community.

10:40 a.m. Creating and Posting Board Agendas – Attorney Kirk Strang, Strang, Patteson, Renning, Lewis & Lacy, s.c.

This session will provide an introduction to the basics of creating and posting school board agendas including how to hold virtual board meetings, in compliance with open meetings requirements and related state statutes. Topics will assist in assessing your current practices and ensuring legal compliance for regular school board meetings (in-person as well as virtual) as well as expulsion hearing and other special meetings.

11:15 a.m. General Q&A: Back to School Preparations and First Year Superintendent Needs

11:30 a.m. Adjourn

❖ Wednesday August 19, 2020 10:00 - 11:30 a.m.

10:00 a.m. Financial Management Brief: Understanding Your Fund Balance – Baird Financial Team

What is a fund balance? How is it calculated? What is a recommended level? Why is understanding your fund balance especially important in the COVID year where financial shortfalls could be expected? How can you best communicate to your board about it? The Baird School Finance Team will address everything you always wanted and need to know about managing and communicating about the district's fund balance.

10:45 a.m. Finalize Your Back to School Preparations: Q&A addressing Legal, Finance, Political and Communications Questions - Kirk Strang, Mike Clark, Jon Bales and Joe Donovan

This is your opportunity to seek wisdom and guidance for the legal, finance, political and communication issues that are standing between you and opening school. Bring your questions and concerns for discussion and problem solving.

11:30 a.m. Adjourn

❖Wednesday August 26, 2020 10:00 - 11:30 a.m.

10:00 a.m. Board and Superintendent Roles and Responsibilities – Attorney Bob Butler, WASB

In times of crisis, why do some organizations thrive, while others digress into conflict? Bob Butler will share from the WASB point of view, strategies that superintendents and school board presidents can implement to promote clarity of roles for peak performance. Discussion will include importance of the board and superintendent operating collaboratively, from their respective ‘lanes’ during times of crisis, and strategies that can be used to achieve this. This session will also provide an overview to the basics of school and governmental law related to school board responsibilities including the school board and board member power and duties, respective roles of the board and the district administrator, conflicts of interest and board member liabilities.

10:45 a.m. Defining Superintendent Evaluation – Jon Bales, WASDA

A successful superintendent evaluation process depends on clearly written expectations, mutually understood criteria and monitoring, and effective communications. In this pandemic year, the potential exists for the political factors to undermine what is written. It is doubly important to stay in tune with your board president regarding the changing landscape, and if necessary to revisit expectations. Use the ideas presented by Jon Bales to ensure your evaluation process is defined now, not after the fact, to best position you for success

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖September 2, 2020 No Session- Second Day of School

❖Wednesday September 9, 2020 10:00 - 11:30 a.m.

10:00 a.m. Five Levers to Improve Learning – Dr. Jim Rickabaugh, Consultant

Dr. Rickabaugh will provide a powerful framework to ensure schools are engaged in the work most likely to develop capacity of the organization and result in improved student learning. The discussion will include applications of the framework in this pandemic year and other contextual forces in play now and in the coming months.

11:00 a.m. Feedback on Your Opening Week – Jon Bales and Kathleen Cooke

We are one week into the new school year. What went well? What surprises arose? What areas need support? Be prepared to share what worked and ‘why’.....as well as your dilemmas to be addressed in this interactive discussion and planning session.

11:30 a.m. Adjourn

❖ Tuesday September 15, 2020 10:00 - 11:30 a.m.

10:00 a.m. Financial Management Brief: What to Monitor and What to Communicate to the School Board – Baird Financial Team

What questions do astute superintendents ask the business manager and bookkeeper? What data should be monitored on a regular basis especially with expected state's financial shortfalls? How does board policy play into decision-making? What information do boards of education typically want and need to know? Presenters from the Baird School Business Solutions Team will give insights for effective financial management.

10:30 a.m. Open Meetings Laws and Other Legal Tips New Superintendents Need to Know – Attorney Kirk Strang, Strang, Patteson, Renning, Lewis & Lacy, s.c.

Avoid legal entanglements for yourself and the board with fundamental legal tips offered by Attorney Kirk Strang.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖ Tuesday September 22, 2020 10:00 - 11:30 a.m.

10:00 a.m. Public Records Law and Other Legal Tips New Superintendents Need to Know: Part II – Attorney Kirk Strang, Strang, Patteson, Renning, Lewis & Lacy, s.c.

Engage in proactive review of your school district's practices to avoid legal entanglements. Attorney Kirk Strang will share insights and tips for the 'can't miss opportunity' Part II discussion.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖ Thursday October 1, 2020 10:00 - 11:30 a.m.

10:00 a.m. Financial Management Brief: Setting the Levy and Adopting the Final Budget – What to Know and Do, 30 Days Out - Baird Financial Team

Soon you will be presenting financial information to the board so that the final budget is adopted, the tax levy is set, and the levy is certified with the municipalities. What do you need to know and do to be ready for this important work? The Baird Financial Team will guide you.

10:30 a.m. Is Your Team Prepared to Communicate and Defuse a Crisis? – Joe Donovan, Donovan Group

Effective crisis communications and management are essential to your leadership. Learn principles of communication and crisis management that will promote clarity while preventing or minimizing the damage a crisis can inflict on the organization, its stakeholders and its reputation.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖Wednesday October 7, 2020 10:00-11:30 a.m.

10:00 a.m. The Superintendent's Role in Ensuring Equity and Achievement for All – Presenters TBD

The research is clear. Specific superintendent actions can positively influence student achievement. How can research be translated into everyday leadership behaviors to increase student achievement and ensure equitable achievement opportunities for every learner in your district? Learn from the successes of experienced superintendents who have worked collaboratively with their school community to make significant changes resulting in dramatic gains in achievement for all learners.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖Tuesday October 20, 2020 10:00 - 11:30 a.m.

10:00 a.m. Financial Management Brief: Setting the Levy and Adopting the Final Budget – Communicating Taxpayer Impact – Baird Financial Team

During the next several weeks, you and the board will receive the data you have been waiting for to adopt the final budget and set the mill rate. The Baird Financial Team will review strategies to position the district for long-term financial stewardship and to communicate taxpayer impact.

10:30 a.m. Meaningful Community Engagement – Drew Howick, Howick Associates

We know the importance of a meaningful relationship between the school district and the community it serves – the vision and values of how students are educated need to be clear and aligned. This session will overview a spectrum of methods for public participation and provide specifics of a highly collaborative approach called “Future Search.”

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖Wednesday November 4, 2020 10:00 - 11:30 a.m.

10:00 a.m. Financial Management Brief: Direct and Indirect Financial Impacts of Employee Handbooks – Baird Financial Team

How often have you heard the phrase, ‘this doesn’t cost the district anything’ as people reference staff handbook items? The Baird Financial Services Team will provide an eye-opening view of the direct and indirect costs of common employee handbook items.

10:30 a.m. Executive Presence – Kathleen Cooke, Michael Gallagher and Joe Donovan

What is Executive Presence? How does it contribute to your leadership influence? How can you develop great executive presence? Learn how to harness specific attributes and actions to increase your leadership image and results.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖ **Wednesday November 18, 2020 10:00 - 11:30 a.m.**

10:00 a.m. Financial Management Brief: Communicating Taxpayer Impact of Property Tax Bills – Baird Financial Team

Property tax bills will be sent in December. This session with the Baird Financial Team will help you anticipate stakeholder questions and concerns and develop meaningful and understandable communications regarding the impact of the property tax bill for your school community as well as individual taxpayers.

10:30 a.m. Achievement, Excellence and Equity: A Call to Action – Kathleen Cooke and Michael Gallagher, KCMG Consulting.

The status of children in our schools and the challenges facing public education require inspirational, passionate school leaders who possess an inner resolve to achieve despite obstacles and political distractions. Whether we apply best practices to ensure success for EVERY learner depends, in part, on how we feel about the fact, that we haven't achieved high levers of success with EVERY child thus far. What is your resolve? What are you prepared to do, to drive EXCELLENCE? This session will examine core principles and leadership actions that set some school leaders, their school systems and their RESULTS, apart from others

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖ **Wednesday December 2, 2020 10:00-11:30 a.m.**

10:00 a.m. Using Long-range Planning to Support Short Term Budget Planning – Baird Financial Team

It's time to begin planning your district budget for 2021-22. What is the best strategy for your team's work including aspects of student achievement and equity? Members of the Baird Financial team will help you to initiate a thoughtful, transparent budget planning and development process. (Bring your customized financial analytics to reference during the activity.)

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

❖ **Wednesday December 16, 2020 10:00-11:30 a.m.**

10:00 a.m. Financial Management Brief: Determining Staffing Needs and Salary Adjustments – Baird Financial Team

What factors need to be considered for staffing and salary adjustments as you develop the draft 2021-22 budget? How should your planning lead into board direction and upcoming negotiations? The Baird Financial Team will provide steps for projecting adequate staffing levels and salary adjustments.

10:30 a.m. Change Theory and Creating a Culture of an Engaged Workforce – Drew Howick, Howick Associates

The more that employees are engaged, the more likely they are to display discretionary effort, stay with the organization and effectively adapt to changing conditions. This session will focus on change theory concepts and engagement strategies to assist you in creating a positive workplace culture focused on learning and achievement.

11:15 a.m. General Q&A: First Year Superintendent Needs

11:30 a.m. Adjourn

Sample Second Semester Sessions

How to Communicate your Accomplishments and Results to the Board during Your Evaluation

Are you prepared with the proper documents or artifacts to illustrate your accomplishments? Do your documents align with the goals and expectations of the board? Evaluation sessions are typically nerve-racking for the board president as well as the superintendent. Learn tips to effectively prepare for your evaluation and communicate your work and results to the school board.

Financial Brief: How Student Count Impacts School Funding

Open Enrollment or resident student. Tuition placement for special education services. Tuition waiver. How are categories of enrollment counted and funded? What impact do they have on the budgeting process? The Baird Financial team will clarify what you need to know to develop a realistic budget for 2020-21.

Budget Planning and Development: Phase II

The district is nearing the end of the school year. Decisions made this year can have an impact on your budget in 2019-20 including levy and mill rate. In this session, you'll review end of the year processes and discuss potential impacts and considerations for future budget planning.

Financial Brief: How Will State Budget Proposals 'Impact' your District? Baird Financial Team

It is a biennial budget year. How will the legislative proposals under consideration affect your district? Members of the Baird Financial Team will help you analyze the impact of state budget proposals so you can effectively communicate with your school board, develop your draft 2021-22 budget, and advocate with your legislators.

Superintendent/Board Relations – Building an Effective Team

This activity will model facilitation and engagement strategies superintendents can implement to promote effective board operations, collaborative board superintendent relationships and thoughtful decision-making.

Navigating Teacher Contracts and Other Difficult Personnel Challenges to Ensure a Positive Workplace Culture

Ensuring a culture of success for each learner requires proactive, strategic leadership regarding contracts and resolution of difficult personnel issues. Our legal experts will provide Case Studies for contract development and a complex personnel issue to promote how to think like a superintendent including addressing the legal context, local school board policies parameters, handbook considerations, precedence setting, and political implications.

Strategies for Gaining Support and Advancing Initiatives with the Board of Education

Understanding board member perceptions and expectations and leveraging this information to achieve forward movement on district initiatives is fundamental to superintendent success. Explore strategies and techniques to find common ground, gain consensus and garner school board support of vision, goals, and initiatives on behalf of learners and the school community.

Financial Literacy – Debt 101

There are many procedures and statutory provisions relating to bonding and indebtedness. Learn from the experts what superintendents need to know including understanding the debt issuance process, Funds 38 and 39, ENNA filing requirements, the bond rating process role of bond counsel and other related topics.

Legal Update

The rapidly changing legal landscape continues to offer topics to be mastered to avoid legal entanglements. Gain insights from the “Legal Eagle” in a discussion of current issues with implications for your actions.

Providing Leadership When Expectations Conflict

Successful leaders understand that expectations of the staff, community or board may conflict. Rather than feeling caught in the middle, they employ strategies to identify and build common ground and ownership for direction while serving as a child advocate. Learn tips utilized by experienced leaders who have successfully prevented or navigated conflicting expectations to create a culture of high expectations, transparency and results.

Strategic Communications to Achieve Results

Effective communications don't happen by chance. They result from deliberate, intentional planning. This session will assist us to understand and apply a communications planning approach to identify communication goals, develop messages, select communication tools, involve stakeholders and assess results. Participants will work with the presenter to apply communications planning concepts for crisis communications. Come prepared to examine your greatest communication challenge in light of the concepts presented.

Leading for Equity: Predictive Modeling to Ensure Success for All

Do you have a sense of urgency and an unwavering focus to ensure equity and close achievement gaps? Learn how achievement gains can be realized by focusing on individual students ‘by name, by face’ through targeted instruction, setting and monitoring key performance objectives and applying predictive modeling to ensure the success of every learner.

Leading with New Eyes: Shifting Mindsets, Disrupting Assumptions, and Creating New Metaphors

Description: The process of transforming a system requires deep reflection, questioning old assumptions on which we have relied, developing new metaphors for the work, and shifting mindsets about what is possible. This session will feature ideas and activities to assist system leaders and stakeholders in transforming their organization by "seeing through new eyes." This interactive session will provide participants with opportunities to engage in activities and reflect on their assumptions, metaphors and mindsets about learning, leading, teaching, and schools.

How Do High Performing Superintendents Approach Legal Issues? – Part I

Description: Complex school legal issues are best resolved by using disciplined, systematic processes of critical thinking and decision making which include appropriately framing the issue, analysis, questioning and evaluating options from various points of view. This session will identify questions high performing superintendents ask as well as the steps and decision points they address when tackling a complex legal issue. Strategies will be presented, then applied, to a real-world problem during a round table case study activity.

Overcoming Challenges and Leveraging Opportunities to Achieve Meaningful Change in Your District Initiatives

Description: A wise superintendent once said, 'People's appetite for change is usually greater than their ability to digest it.' This is why there can be 'push-back' even when a school board or community has demanded that things must change! Some districts have mastered implementing change and embracing new ideas, with seemingly little opposition. Why the difference? What do they know? How do they do it? High performing leaders think and act differently during change processes using mental paths to discern and forecast possible issues, identify and analyze assumptions, apply leadership theory, and engage community in meaningful ways to develop ownership for decisions and capacity for implementation. This session will review strategies utilized to successfully manage organizational change and provide opportunities for participants to act on and apply them to their own district's change initiatives.

How Do High Performing Superintendents Approach Legal Issues? – Part II

Description: Hone your critical thinking and decision-making skills as you apply strategies utilized by high performing superintendents to real-world complex school legal issues during this interactive session. Practice anticipating unfolding scenarios and analyzing issues from multiple points of view, learn to identify salient points, material facts and evidence, and select the best possible course of action for complex legal issues.

Finishing the Year Strong and Planning Proactively for the Next Year

The school year is coming to a close. Many accomplishments have been achieved in your first year. But, one good year doesn't make a good run. Expectations will actually increase if you've had a good year. Attention to several tips can help ensure you have a strong finish to your first year and a productive start to your second.