

PLEASE POST



SCHOOL DISTRICT OF SHOREWOOD  
Shorewood, Wisconsin  
April 28, 2026 AGENDA

SCHOOL BOARD MEETING  
6:00 PM  
**Shorewood High School Library Media Center (LMC)**  
**1701 East Capitol Drive**  
**Shorewood, WI 53211**

Parking is available in the Shorewood High School lot; please enter through the Administration Building doors and take the stairs up to the second floor. *An elevator is accessible near the east stairs.*

Participants may also access the Annual Meeting on Zoom:

Join Zoom:

<https://us02web.zoom.us/j/81599627722>

Meeting ID: 815 9962 7722

One tap mobile

+16468769923,,81599627722# US (New York)

+13017158592,,81599627722# US (Washington DC)

Dial by your location

+1 646 876 9923 US (New York)

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 408 638 0968 US (San Jose)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

Meeting ID: 815 9962 7722

Find your local number: <https://us02web.zoom.us/u/kdeePLnyIh>

Parameters for Public Comment

The Board welcomes public comments. Public comments are limited to three minutes per person. Per Wisconsin's open meeting law and guidance issued by Wisconsin's Attorney General, we cannot engage in substantive discussions or act on items not on the agenda; however, we will follow up with speakers after the

meeting or add items to a future Board agenda for purposes of addressing the matter. Further, we do not permit discussion of pupils, current or former staff, or job candidates. The Board is also reachable by email at schoolboard@shorewood.k12.wi.us.

*This meeting notice was posted on April 24, 2026.*

**I. 6 pm CALL TO ORDER**

A. Adopt the Agenda (GC2)

B. Overarching Result for Shorewood School District (R1)

*Our students are leaders who challenge themselves to grow and achieve academically, pursue their passions, navigate change, learn continuously and contribute to the common good.*

C. Awards and Recognitions

**II. 6:05 pm STUDENT ACHIEVEMENT AND RESULTS (R1)**

**Shorewood High School**

**III. 6:15 pm PUBLIC COMMENT #1 (GC3)**

*Initiate and maintain effective communication with the citizens and other important stakeholder groups as a means to engage them in the work of the Board and the District.*

**IV. 6:30 pm SUPERINTENDENT'S REPORT**

**3**

**Task Force Report**

**V. 6:50 pm SUPERINTENDENT'S CONSENT AGENDA**

A. Approval of Monthly Financials (March 2026)

**20**

**VI. 6:55 pm STUDENT BOARD REPRESENTATIVE REPORT**

**VII. 7:00 pm BOARD BUSINESS AND POSSIBLE BOARD ACTION**

A. Presentation of 2026-2027 Budget Balancing Strategies

**28**

B. Approval of Board Bylaws

**31**

**VIII. 7:30 pm BOARD CONSENT AGENDA (GC2)**

A. Approval of Board Meeting Minutes

**32**

April 14, 2026 Regular Board Meeting

April 14, 2026 Closed Session

April 21, 2026 Board Workshop/New Member Orientation

B. Approval of Aramark Contract Renewal

**36**

C. Approval of Kelly Education Contract Extension

**37**

D. Approval of Service Agreement for Crossing Guards

E. Approval of WIAA Co-op Girls Softball Application (2026-2028)

**38**

**IX. 7:35 pm PUBLIC COMMENT #2 (GC3)**

*Initiate and maintain effective communication with the citizens and other important stakeholder groups as a means to engage them in the work of the Board and the District.*

**X. 7:45 pm BOARD MEMBER REPORTS**

**XI. 7:55 pm REVIEW OF 'TO DO' AND FUTURE AGENDA ITEMS**

**XII. 8:00 pm RECESS AND DEBRIEF**



**EXECUTIVE SUMMARY  
FOR THE SHOREWOOD SCHOOL BOARD**

**Topic:** Superintendent's Report

**Date:** April 28, 2026

**Prepared by:** Laurie Burgos, Superintendent

**Recommended action:**

- Information only
- Presentation/discussion
- Discussion/action by School Board
- Presentation/action next meeting

**Purpose:**

To summarize school and District topics, discuss strategic priorities, and provide follow up on items from prior Board meetings.

**Report on the Task Force on Long-Term Financial Sustainability**

The majority of my Superintendent's Report will be devoted to the presentation of the Task Force Report. The Report does not outline a recommendation; it provides a summary of Task Force activities to-date, discusses the overall direction of the group's work, in terms of their evaluation of school configurations and related data, and identifies issues for further consideration.

The structure of Task Force sessions was designed by the District and Ryan Maxwell, our Task Force Facilitator, and Founder and Principal Consultant, Exceptionally Good. Ryan's experience as an educator, organizational leader, and Shorewood parent was immensely helpful in generating constructive and creative Task Force dialogue, and the resulting data and feedback needed, and we will review the Report at a May 18 Task Force Community Update and Information Session (6:00 pm in the Shorewood High School Library Media Center). We encourage District families and Shorewood residents to attend.

As Board and community discussions about long-term planning and financial sustainability move forward, I want to take this opportunity to thank the community for engaging in the

visioning and strategic planning process that led to the creation of the Task Force, and to its members. Task Force volunteers have steadfastly represented the values and priorities that have long distinguished our community while exploring the challenges and opportunities we presented. Their commitment and care is reflected in the Task Force report, and I am deeply grateful for the group's ongoing support and partnership.

### **District and School Updates**

While funding for special education reimbursements we have discussed at recent Board meetings continue to be included in state negotiations about use of the budget surplus, districts must plan to make up the shortfall between the promised reimbursement rate and the projected rate as they develop budgets for next year. As a reminder, the difference for our District this year is roughly \$115,000. In addition to factoring this into our budget balancing work, and without a meaningful increase in the special education reimbursement rate (currently 38%), the District expects to transfer approximately \$2 million from our general operating budget to cover unreimbursed, mandated special education expenses next year.

We have received many expressions of interest in participating on the District's Wellness Committee from students, staff, and families. Kate Harder, Director of Special Education and Student Service, will be following up with those who submitted responses to the interest survey to share the meeting schedule; Kate is also working with the District's Human Growth and Development Committee and will provide an update on this group's activities to the School Board later this year.

Members of the District Office team and I met with the Lake Bluff 4K and 5K faculty last week to discuss delayed enrollment requests, and we will hold similar meetings with the Atwater kindergarten faculty and with the Bright Beginnings staff. These meetings are aimed at clarifying procedures and developing additional protocols to support the delayed enrollment request and evaluation process, as well as parent/guardian discussions about kindergarten readiness or other concerns, and I will provide an update on this at a future Board meeting.

Finally, Shorewood High School seniors picked up their caps & gowns this week, and there are many recognition events, year-end performances, and celebrations coming for up students in all grade levels and their families. Thanks to our staff, parent and community volunteers, our School Board, and the many District supporters who make these activities possible.



# Task Force

On Long-Term Financial  
Sustainability



## Report to the Board of Education

April 28, 2026



Facilitated and Authored by:

Ryan Maxwell, Lead Facilitator, Founder and  
Principal Consultant, Exceptionally Good

Laurie Burgos, Ph.D.  
Superintendent

Heather Heaviland  
Director of Business Services



## Executive Summary

Similar to many school districts across the state of Wisconsin, the Shorewood School District is at a consequential crossroads. Structural budget pressures, driven by constrained state funding, rising operational costs, and declining enrollment present decisions that the Board of Education (Board) will need to approach with both decisiveness and care. With long-term financial sustainability as one of the goals of the 2025-2030 Strategic Plan, the District convened the Task Force on Long-Term Financial Sustainability (Task Force) to address these challenges. A diverse cross-section of approximately 40 parents/caregivers, educators, Shorewood community members, and District leaders, has been engaged since December 2025 in a rigorous, community-grounded process to consider cost savings, evaluate school configuration scenarios, and provide the Board with a comprehensive analysis of the options available.

This work is also grounded in the District's Promise Statement:

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

The Task Force process honors this mission by examining how facilities, grade configurations, enrollment strategy, and financial planning can best sustain strong opportunities for students now and in the future.

This report summarizes the work of that process to date. It is not a final recommendation. The Task Force recognizes that final decisions regarding District configuration, financial sustainability strategies, and implementation rest with the Board. This report is intended to support those deliberations through community-informed analysis, structured feedback, and thoughtful perspective.

The leading configurations (see Appendix A) emerging from evaluation are Scenario E (Big Middle / Small High) and Scenario F (Big Middle / Big High), both of which consolidate grade levels, leverage the SIS building for expanded community use and recreation programming, preserve a standalone middle school experience, and achieve annual savings. Scenario B (Two Feed Into One) remains under active consideration and has a larger financial impact, but carries community concerns about middle and high school students sharing a school that the Board will need to weigh carefully.

The key variable separating Scenarios E and F is Open Enrollment (OE): Scenario E retains minimal OE and produces a smaller high school; Scenario F expands OE, filling the high school and maintaining a breadth of course offerings. Task Force members hold mixed views on the variable of OE, and the Board's judgment on this point will be significant.

The Status Quo (Scenario Zero) does not offer a viable long-term path towards long-term financial sustainability. The current operational model cannot be supported without an operating referendum higher than the current \$5.5M/year level, which expires in 2028. Importantly, the community may not sustain the same level of financial support.

The initial assessment of the various scenarios for financial and non-financial criteria can be found in Appendix B. All Task Force materials are available on the [District website](#).

# Overview of the Task Force Process

## Purpose and Charge

The Task Force charge was to evaluate school configuration scenarios, balancing financial responsibility, educational excellence, and community impact. The Task Force was not empowered to make a binding decision, but rather produce an honest, community-grounded assessment of the scenarios for the Board's deliberation through a process that emphasized structured protocols, mixed constituent groups, anonymous data collection and feedback loops, and transparent communication of results.

## Composition and Structure

The Task Force was composed of a broad cross-section of approximately 40 Shorewood participants, including parents, educators, support staff, administrators, and community members without children currently enrolled in the District. Participation was consistent and committed across the full meeting series. The process also included an ad hoc subcommittee of Task Force members who took on additional responsibility for communication drafting, community survey development, and synthesis work between sessions.

## Meeting Series and Community Engagement

- December 8*      Community Information Session: Introduced the Task Force's charge; gathered community input on process values and priorities.
  
- January 12*      Task Force Meeting #1: Built shared knowledge on the district's financial situation and strategic context; established working agreements.
  
- January 26*      Task Force Meeting #2: Initial scenario analysis using a structured gallery walk format; Task Force requested additional scenario development.
  
- February 23*     Task Force Meeting #3: Reviewed results of student focus groups; expanded scenarios (E and F); facilitated Q&A across three domains - finance, student experience, and process; captured "What if...?" ideas; subcommittee volunteers identified.
  
- March 2*          Community Update and Input Session: Broader community briefing on Task progress; input gathered on emerging questions and scenario variables.
  
- March 14*        Scenario Evaluation Summit (4.5 hours): Full Task Force evaluated all scenarios against a seven-criterion rubric (1-4 scale); scores recorded and tallied; top scenarios identified for further refinement.
  
- March 23*        Task Force Meeting #4: Structured analysis of leading scenarios (B, E, F, and Zero) - plusses, minuses, implementation challenges, and solutions for each.
  
- April 13*         Task Force Meeting #5: Review of cost containment measures.
  
- April 27*         Task Force Meeting #6: Review of this report; Final discussion and assessments.

The District will host another Community Information<sup>7</sup> Session about this work on May 18, 2026.

## Evaluation Criteria

The School Board established seven core criteria to guide the evaluation of school configurations:

- **Strong Educational Quality:** *Sustain and strengthen academic programs; Maintain meaningful class sizes;*
- **Positive Student Experience:** *Minimize unnecessary transitions; Preserve access to enrichment and a strong sense of belonging;*
- **Equity and Access:** *Ensure all students have equitable access to facilities, programs, and services;*
- **Community Identity and Stability:** *Respect neighborhood identity and thoughtfully manage transition;*
- **Responsible Alignment with Enrollment Trends:** *Configure for projected enrollment shifts; Efficient use of space;*
- **Strategic Coherence:** *Decisions must advance the District's strategic plan, not serve as short-term fixes; and*
- **Long-Term Financial Sustainability:** *Scenarios must be financially responsible, transparent, and durable.*

## Focus on School Configurations

Prior to the work of the Task Force, the Board and District explored less disruptive cost-containment measures, the impact of which is insufficient to address the scale of the District's financial challenge. As a result, the Board directed the District to examine school consolidation as a more significant structural solution to create recurring savings while preserving academic excellence.

## Leading School Configuration Models

Following the March 14 Scenario Evaluation Summit, the Task Force identified three configurations as the leading models for further consideration. A fourth scenario, Scenario Zero (Status Quo) remains for comparative reference, as the Board must evaluate the implications of inaction alongside the implications of change.

## Scenario Evaluation Summary

The Task Force evaluated all seven scenarios presented against a seven-criterion rubric with a scale of one to four (4 = highest). Criteria included Educational Quality, Student Experience, Community/Stakeholder Impact, Equity and Access, Enrollment and Demographics, Strategic Alignment, and Financial Sustainability. The scores below represent the averaged assessment of all Task Force participants who completed the evaluation at the March 14 Summit.

Scenario	Configuration	Non-Financial Score	Financial Score	Combined Score	Financial Savings
<b>Scenario F</b>	Big Middle / Big High K4-4   5-8   9-12 + OE	19.5	3.07	<b>59.8 ★</b>	\$1.5M-\$2M/yr
<b>Scenario E</b>	Big Middle / Small High K4-4   5-8   9-12	16.83	3.13	<b>52.7</b>	\$1.5M-\$2M/yr
<b>Scenario B</b>	Two Feed Into One K4-6   K4-6   7-12	14.2	3.43	<b>48.8</b>	\$1.75M-\$2.5M/yr
<b>Scenario Zero</b>	Status Quo K4-6   K4-6   7-8   9-12	17.2	1.4	<b>24.1</b>	No Savings

*Note: ★ indicates the highest combined score. The combined score was derived by taking the financial score and multiplying it by the non-financial score in order to communicate a score that represents the Board's charge: finding financial sustainability while maintaining academic excellence. Scenario F led in overall combined score; Scenario B achieved the highest financial score; Scenario E achieved the lowest student-to-staff ratio among the top three scenarios.*

## Configuration Descriptions

### Scenario F — Big Middle / Big High

*Lake Bluff (Grades K4-4) | Atwater (Grades 5-8) | SHS (Grades 9-12)*

Scenario F represents the highest-scoring configuration overall. It establishes Lake Bluff as a dedicated lower elementary campus (K4-4), Atwater as a middle/intermediate school campus (grades 5-8), and SHS as a full 9-12 high school. Scenario F expands OE, opening seats starting in grade 5. This maintains total District enrollment at approximately 1,904 students by replacing expected resident student declines with additional OE seats. This expansion fills buildings and serves as the primary driver of higher high school enrollment (673 students vs. 509 in Scenario E). The Shorewood Fitness Center and Recreation Department would relocate to the first floor of SIS, creating a community asset with the potential to expand recreation programming and services. Financial savings are projected in the Medium Low range (\$1.5M-\$2M per year). The Lake Bluff, Atwater, and SHS buildings are fully utilized in this scenario.

### Scenario E — Big Middle / Small High

*Lake Bluff (Grades K4-4) | Atwater (Grades 5-8) | SHS (Grades 9-12)*

Scenario E carries the same grade-band structure as Scenario F but with a reduction of Open Enrollment compared to current levels. Total enrollment of approximately 1,636 students is based on projections from the [MD Roffers Report](#). The resulting high school is smaller than current SHS enrollment with approximately 509 students, which would likely impact the course offerings available for students. Atwater is not fully occupied under this scenario. Financial savings are projected in the Medium Low range (\$1.5M-\$2M per year). While this change would not require a move for the Fitness Center or Recreation Department, it may still be beneficial to do so.

## **Scenario B — Two Feed Into One**

*Lake Bluff (Grades K4-6, 3 sections/grade) | Atwater (Grades K4-6, 2 sections/grade) | SHS (Grades 7-12)*

Scenario B retains both elementary campuses, maintaining neighborhood walkability, and consolidates grades 7-12 into Shorewood High School. Current attendance areas would be replaced by a different procedure to determine elementary school assignment in order to better balance cohort sizes with two sections per grade level at one school and three at the other. This produces the highest financial savings of the three leading models and the highest financial score in the evaluation (3.43). Middle school students gain access to high school facilities, labs, and potentially broader course offerings. However, this scenario generates community concern about placing 7th graders in the same building as 12th graders. Open Enrollment is minimal with a limited number of seats ending in grade 9.

## **Scenario Zero — Status Quo**

*Lake Bluff (K4-6) | Atwater (K4-6) | SIS (7-8) | SHS (9-12)*

The current four-building configuration is retained as a reference point. It preserves all existing grade-level transitions, neighborhood school proximity, and the two-year standalone middle school experience. However, it generates no structural financial savings. An awkward elementary class-size split between Atwater and Lake Bluff exists and all SIS students transition in or out of the school each year. Sustaining this configuration long-term will require a substantially larger operating referendum, a risk a majority of the Task Force views as financially untenable and strategically unsound.

## **Central Design Tensions**

The Task Force's deliberations revealed four persistent tensions that cut across all configuration choices. These are not simple disagreements to be resolved by majority vote, but rather value-laden tradeoffs the Board must weigh thoughtfully. Following is a synthesis of Task Force deliberation on these tensions.

### **Design Tension 1: Expand or Limit Open Enrollment**

This is perhaps the design variable with the strongest variance of support in the process. Open Enrollment partially determines District revenue as well as expenses (each OE student brings both revenue and additional costs), building utilization levels, the diversity of the student body, and the size and breadth of high school programming.

Proponents of OE expansion (Scenario F) argue that OE helps fill underutilized buildings, preserve course offerings, stabilize staffing, and bring in revenue. They see that community benefits from a more diverse and sustainably-sized district. On the other side of the OE issue, the District cannot control the number of OE applications, demand may vary from year to year, and per-pupil revenue from OE is less than that of resident students. Some Task Force members also raised concerns about starting OE at grade 5, and meeting student academic and social emotional needs.

The Task Force did not resolve this tension. Data shows Scenario F scores highest overall, but community sentiment on OE is not unanimous, and the Board may wish to seek direct community input on its referendum appetite and input into the District's approach to OE before making a decision.

### **Design Tension 2: Middle School Experience**

The question of where 7th and 8th graders belong, and by extension, 5th and 6th graders, is an emotionally-charged design variable in the process. Students themselves weighed in during structured

focus groups at each school, expressing a clear preference for a distinct middle school experience with its own identity, culture, and developmental space.

Scenarios E and F both offer a Grades 5-8 middle school configuration housed at Atwater. The Task Force broadly affirmed the idea of a middle school experience, citing developmental appropriateness, vertical curriculum alignment, opportunities for increased staff collaboration, possible staffing efficiencies, and the importance of grade-level transitions that feel meaningful rather than arbitrary.

Scenario B collapses the middle school experience into the high school building, which evoked concerns from some Task Force members about middle school-aged students being housed in a school with older peers. Others on the Task Force saw value in the potential for increased and expanded advanced learning and peer mentorship opportunities for middle school students. The decrease in the overall number of school transitions is also generally seen as better for students.

The Task Force's deliberations leaned in support of a 5-8 middle school configuration, housed in a dedicated building and believed that configuration would serve students well. Scenario B (that includes a Grade 7-12 secondary school) remains on the table for its financial advantages. While national and regional models have demonstrated that a Grades 7-12 secondary school can be successful when well-implemented, the Board must weigh this configuration against articulated concerns.

### **Design Tension 3: Walkability and Neighborhood Schools**

Shorewood's history and identity is, in part, built on its walkable neighborhood elementary schools. Many families choose to live near Lake Bluff or Atwater and plan their children's elementary experience around that proximity. While all three scenarios impact the ability of families to choose a school based on their address, Scenarios E and F would bring all elementary students to Lake Bluff for Grades K4-4 and to Atwater for Grades 5-8. This reduces walkability for a particular set of students and families, specifically those who both walk their children to school and also live further from the centerpoint between Lake Bluff and Atwater. Walkability is maintained to a greater degree in Scenario B, but with elementary school assignment determined by the District.

At the same time, the current two-elementary structure creates awkward class-size splits, uneven resource allocation, and inefficient use of building capacity. Consolidating elementary grades at Lake Bluff and converting Atwater to a true intermediate/middle school campus addresses these inefficiencies simultaneously and allows for deeper grade-level teacher collaboration.

This tension may ultimately be addressed through creative solutions, such as walking pathways, adjusted start times, school pickup/drop-off logistics, and pedestrian infrastructure. Walkability concerns merit consideration; however, the Board may also wish to weigh these concerns alongside broader educational, operational, and financial factors.

### **Design Tension 4: Referendum Magnitude and Programmatic Implications**

None of the scenarios eliminate the need for continued operating referendum support; they only impact the size relative to the current 2023 referendum amount of \$5.5 million per year for five years. The Board will need to assess the community's appetite for a larger or sustained referendum amount, and whether that referendum should be paired with program reductions, staff adjustments, or other changes to the District's current operating model.

Scenario E streamlines the District's footprint but does not eliminate the need for an operating referendum. Without additional program changes, that referendum would likely need to be larger than

the current one. Scenario F offers more OE revenue, but brings additional staffing costs. Therefore, savings are potentially similar, but in the long-term, slightly less than the annual savings of Scenario E. Scenario B offers the most potential to maintain an operating referendum at or near the current amount, but may still require an increase. Scenario Zero (Status Quo) requires a significantly larger operating referendum.

Task Force members identified future operating referendum funding as the single-most important question to put before the broader community and helped the District craft a short set of survey questions for the April 2026 School Perceptions survey. While these survey results serve as a pulse check of how community members feel about this issue at this point in time, they do not replace future work to inform the community about the need for another operating referendum.

## **Considerations for the Board**

The Task Force respectfully offers the following considerations as the Board evaluates potential paths forward. No scenario is perfect, and each carries real tradeoffs. Throughout the work of the Task Force, community members demonstrated a strong capacity to engage with complexity, consider differing viewpoints, and remain committed to constructive civic dialogue even when the issues are deeply personal.

This spirit of engagement is a meaningful community strength and provides a strong foundation for the Board's work to determine the most responsible and sustainable path forward - one that the community can understand, support, and successfully implement over time.

### **In the Near Term**

As the Board considers available options, weighing both quantitative and qualitative data will be helpful. Financial sustainability is essential, but so too are student belonging, academic outcomes, staff morale, family confidence, and community cohesion. Each scenario presents meaningful advantages as well as tradeoffs, and no path is without change or adjustment.

Additionally, the scenario with the highest degree of potential savings may not be the strongest long-term solution, just as the highest scoring option may require careful attention to implementation and community impact. The central task is to determine which path best aligns with the community's values and District strategic priorities.

### **In the Longer Term**

Shorewood has built a reputation for educational excellence that is among its greatest community assets. This contributes to the vitality of the broader community and remains an important factor for current and prospective families.

The decisions made in the coming months will shape the District's academic programming, enrollment patterns, staffing structures, and financial position for years to come. The seven evaluation criteria established at the outset of this process reflect enduring commitments to students and the community. Continued deliberation and decisions grounded in those criteria will help ensure that any final direction remains connected to the values that guided the Task Force's work.

## **Closing Reflections**

Change can be an opportunity to strengthen programs, improve alignment of resources, and build an even stronger future for Shorewood. The Board's work is to determine the path that best allows the District to fulfill the Promise Statement that serves as the foundation for our Strategic Plan: To value, support, and challenge every student so they thrive now and in the future they choose.

Whatever direction is chosen, successful implementation will depend on effective change management, including clear communication, thoughtful planning, operational readiness, and meaningful engagement with students, staff, and families. The Shorewood community will need timely information, opportunities for dialogue, and confidence that the transition is being managed with care.

The Shorewood School District is very fortunate to be part of a community that cares deeply about its schools. That commitment was evident throughout the Task Force process, and we want to express genuine appreciation and admiration to all Task Force members, students, families, and community members who have dedicated time to addressing the needs of students *and* our long-term financial sustainability goals.

## Appendix A - Leading Scenarios for Consideration

### Scenario E: Big Middle/Small High

Total Enrollment: 1,636



Schools	Considerations	Potential Impacts
<p><b>Lake Bluff</b> Grades K4-4 Enrollment: 643</p> <p><b>Atwater</b> Grades 5-8 Enrollment: 484</p> <p><b>SHS</b> Grades 9-12 Enrollment: 509</p>	<ul style="list-style-type: none"> <li>Atwater not fully occupied;</li> <li>Requires review of elective offerings and sequence;</li> <li>Reduction in available courses and/or limits on student scheduling at SHS;</li> <li>No change to Fitness Center or Rec. Dept.</li> </ul>	<p><b>Open Enrollment</b> Seats/% Total Enrollment</p> <p><b>39/2%</b></p> <p><b>Student-to-Staff Ratio</b></p> <p><b>8.9</b></p> <p><b>Financial</b></p> <p>Medium (Low End) (\$1.5M-\$2M Per Year)</p>

### Scenario F: Big Middle/Big High

Total Enrollment: 1,904



Schools	Considerations	Potential Impacts
<p><b>Lake Bluff</b> Grades K4-4 Enrollment: 643</p> <p><b>Atwater</b> Grades 5-8 Enrollment: 588</p> <p><b>SHS</b> Grades 9-12 Enrollment: 673</p>	<ul style="list-style-type: none"> <li>All three buildings fully utilized;</li> <li>OE starts at grade 5;</li> <li>Requires review of elective offerings and sequence;</li> <li>Fitness Center and Rec. Dept. move to first floor of SIS.</li> </ul>	<p><b>Open Enrollment</b> Seats/% Total Enrollment</p> <p><b>306/16%</b></p> <p><b>Student-to-Staff Ratio</b></p> <p><b>9.2</b></p> <p><b>Financial</b></p> <p>Medium (Low End) (\$1.5M-\$2M Per Year)</p>

# Scenario B: Two Feed Into One

Total Enrollment: 1,636



Schools	Considerations	Potential Impacts
<p><b>Lake Bluff</b> Grades K4-6 3 sections per grade Enrollment: 524</p> <p><b>Atwater</b> Grades K4-6 2 sections per grade Enrollment: 359</p> <p><b>SHS</b> Grades 7-12 Enrollment: 753</p>	<ul style="list-style-type: none"> <li>Attendance boundaries no longer define school assignment;</li> <li>Excess physical capacity at Atwater; minimal OE capacity ends at 9<sup>th</sup> grade</li> <li>Possible use of second floor classrooms at SIS;</li> <li>Grades 7-12 are in some of the same classes; share hallways, etc., but could have separate cafeteria;</li> <li>Fitness Center and Rec. Dept. move to first floor of SIS.</li> </ul>	<p><b>Open Enrollment</b> Seats/% Total Enrollment</p> <p><b>39/2%</b></p> <p><b>Student-to-Staff Ratio</b></p> <p><b>9.1</b></p> <p><b>Financial</b> Medium (\$1.75M-\$2.5M Per Year)</p>

# Scenario Zero: Status Quo

Total Enrollment: 1,906



Schools	Considerations	Potential Impacts
<p><b>Lake Bluff</b> Grades K4-6 Enrollment: 546</p> <p><b>Atwater</b> Grades K4-6 Enrollment: 469</p> <p><b>SIS</b> Grades 7-8 Enrollment: 291</p> <p><b>SHS</b> Grades 9-12 Enrollment: 600</p>	<ul style="list-style-type: none"> <li>Awkward elementary class size split across campuses;</li> <li>Two-grade middle school.</li> </ul>	<p><b>Open Enrollment</b> Seats/% Total Enrollment</p> <p><b>220/12%</b></p> <p><b>Student-to-Staff Ratio</b></p> <p><b>9.4</b></p> <p><b>Financial</b> N/A</p>

## Appendix B - Task Force Assessment of Leading Scenarios

The following scenario assessments are drawn directly from the Task Force's structured work on March 23, 2026. Each table reflects the collective input of table groups across the full Task Force, including strengths, concerns, anticipated implementation challenges, and potential solutions. These are the perspectives the Task Force asks the Board to carefully consider.

<b>Scenario F — Big Middle / Big High</b> <i>K4-4 at Lake Bluff   Grades 5-8 at Atwater   Grades 9-12 at SHS   OE begins at Grade 5   Total Enrollment ~1,904   Savings: \$1.5M–\$2M/yr</i>	
STRENGTHS	CONCERNS
<ul style="list-style-type: none"> <li>● Highest combined evaluation score across all seven criteria (59.8)</li> <li>● Maintains a dedicated middle school experience (Grades 5-8)</li> <li>● All three buildings fully and efficiently utilized</li> <li>● Larger high school offers greater breadth of high school course offerings</li> <li>● Cohort continuity: grade levels remain together within each building transition</li> <li>● More uniform class sizes across elementary grades</li> <li>● Fitness Center and Recreation Department can relocate to SIS, creating a community asset</li> <li>● Higher enrollment provides staffing stability</li> <li>● More opportunities for staff collaboration</li> <li>● Less administrative overhead - Consolidation reduces leadership duplication</li> </ul>	<ul style="list-style-type: none"> <li>● Walkability is reduced for families who live further from the center of Shorewood</li> <li>● Some elective offerings in Grades 4-5 may change</li> <li>● Atwater building capacity may be stretched</li> <li>● Requires review of elective offerings and course sequencing at SHS</li> <li>● OE beginning at Grade 5 may be a challenging entry point for students and require additional marketing efforts to reach enrollment goal</li> </ul>
IMPLEMENTATION CHALLENGES	
<ul style="list-style-type: none"> <li>● Walkability and change to community identity</li> <li>● OE students starting at grade 5</li> <li>● Physical space: Gym/lab/music spaces may need to be retrofitted at Atwater</li> </ul>	
POTENTIAL SOLUTIONS THE BOARD MIGHT CONSIDER	
<ul style="list-style-type: none"> <li>● Create staggered start/end times and structured walk-route protocols for younger students</li> <li>● Invest in early PD and staff leadership development across all buildings</li> <li>● Establish clear OE enrollment criteria/expectations for families from the outset</li> <li>● Develop a strategy for student community-building between campuses</li> <li>● Use SIS building space for community use, childcare, and recreation programming</li> <li>● Engage Village government early on traffic, pedestrian infrastructure, and crossing guard coverage</li> </ul>	

## Scenario E — Big Middle / Small High

K4-4 at Lake Bluff | Grades 5-8 at Atwater | Grades 9-12 at SHS | Minimal OE | Total Enrollment ~1,636  
| Savings: \$1.5M–\$2M/yr

### STRENGTHS

- Second-highest combined evaluation score (52.7); lowest student-to-staff ratio (8.9)
- Maintains a dedicated middle school experience (Grades 5-8)
- Cohort/grade-level continuity: all students in the same grade share one building
- Equitable class sizes across elementary grades at Lake Bluff
- Increased teacher collaboration within grade bands
- More robust and developmentally coherent middle school experience
- Staff can specialize in grade-band curriculum; reduced cross-building travel
- SIS building freed for community use and expanded recreation programming
- Smaller referendum ask compared to Status Quo
- Students may feel a stronger sense of belonging at the grade-band level
- Less administrative overhead - Consolidation reduces leadership duplication

### CONCERNS

- Smaller high school (~509 students) limits course offerings and elective breadth
- Minimal OE means HS building remains underutilized
- Reduced OE changes school demographics; fewer new community connections
- Walkability is reduced for families further from the center of Shorewood
- Complex drop-off/pick-up logistics across three campuses
- Some building under-utilization at Atwater
- Elective offerings at SHS may need to be reduced or sequenced more tightly
- Staff reductions required, but may be addressed through attrition
- OE students who have been in the district long-term face uncertainty about their pathway

### IMPLEMENTATION CHALLENGES

- Reduction in course offerings - particularly at SHS - is the central challenge; requires deliberate scheduling solutions or fewer course options for students
- OE students currently enrolled need clear, respectful communication about their pathway

### POTENTIAL SOLUTIONS THE BOARD MIGHT CONSIDER

- Partner with UWM or other institutions for elective access (online or in-person) at SHS
- Use SIS spaces for recreation programming - makerspaces, after-school programming, and enrichment
- Consider offering early retirement incentives to manage FTE reductions
- Launch separate working groups to redesign K-4 at Lake Bluff and 5-8 at Atwater, then align
- Stagger start times across buildings; develop walking-school-bus routes and crossing guard coverage
- Develop a community plan for SIS building: Milestones, Rec Department, or other Village use
- Vary course offerings and scheduling at SHS to accommodate electives for all grade levels

## Scenario B — Two Feed Into One

*K4-6 at Lake Bluff (3 sections/grade) | K4-6 at Atwater (2 sections/grade) | Grades 7-12 at SHS | OE ends at Grade 9 | Total Enrollment ~1,636 | High Savings*

### STRENGTHS

- Highest financial sustainability score of all leading models (3.43 / 4.0)
- Maintains walkability as is for neighborhood elementary campuses
- Fewer building transitions for students overall (one transition vs. two currently)
- Middle school students have potential access to high school academic facilities, labs, and courses
- Peer mentorship opportunities across grade levels within one campus
- Financial: aligns with current facilities referendum obligations; cost savings are significant
- Rec Department and Fitness Center relocation to SIS creates community benefit
- Consistent elementary structure; Staff and families familiar with K-6 configurations
- Less administrative overhead - Consolidation reduces leadership duplication

### CONCERNS

- 7th graders sharing a building, hallways, and campus with older high school students
- Middle school identity not immediately distinct
- High school reaches near-capacity (95%), creating space and logistics pressures
- Attendance boundaries for elementary become less defined
- Unequal class sections between Lake Bluff (3) and Atwater (2) create staffing challenges
- Need for a lunch facility for 7th and 8th graders at SHS (open campus is 9–12 only)
- Teacher licensure implications: Middle school teachers may not be certified to teach high school courses
- Elementary split between Atwater and Lake Bluff continues to create planning and collaboration challenges

### IMPLEMENTATION CHALLENGES

- Middle school students interacting with high school students holds concerns for some
- Removing boundary distinctions between Atwater and Lake Bluff elementary zones may produce community conflict
- Likely disruption for current OE families who enrolled with the expectation of a K–12 pathway
- Retrofitting SHS to house a cafeteria
- Teacher licensure may require changing staffing assignments across buildings

### POTENTIAL SOLUTIONS THE BOARD MIGHT CONSIDER

- Configure a physically and operationally distinct 7–8 wing or zone at SHS - separate schedules, entrances, lunch, and social spaces (may require significant capital investment)
- Open campus privileges restricted to Grades 9-12 only; dedicated lunch periods for Grades 7-8
- Design peer mentorship programming to be intentional and age-appropriate, not incidental proximity
- Develop a clear, transparent plan for affected OE families with ample lead time
- Engage staff early in redesigning the 7-8 experience within the high school context

## Scenario Zero — Status Quo

*K4-6 at Lake Bluff | K4-6 at Atwater | Grades 7-8 at SIS | Grades 9-12 at SHS | OE ~220 students / 12%  
| No structural savings*

### STRENGTHS

- Preserves all current school configurations and identities
- Maintains walkability to neighborhood elementary schools
- Maintains the standalone middle school experience at SIS
- Teacher buy-in and continuity; least disruptive for staff and students
- Open Enrollment continues from K through Grade 12 within current parameters
- Strong academic track record in the current structure
- Least transition complexity for families

### CONCERNS

- Generates no structural financial savings - does not address the district's core fiscal challenge
- Requires a significantly larger and more frequent operating referendum
- Operating costs for four buildings are not sustainable
- Class-size split between Atwater and Lake Bluff continues; unequal sections create planning burdens
- SIS is in a state of perpetual transition for students
- High school course offerings will likely need to be reduced as enrollment declines
- If the referendum fails, the district faces deeper cuts with no structural safety net
- Retaining the current four-school model without taking action could be perceived as postponing difficult long-term decisions

### IMPLEMENTATION CHALLENGES

- The core implementation challenge is not logistical - it is financial and strategic
- A larger referendum will be required, and if it fails, the consequences are more severe than any reconfiguration
- Community trust may erode if the perception grows that the Task Force process produced no action
- Program cuts at SHS will likely be necessary even with a successful referendum
- Non-parent taxpayers bear disproportionate cost of a large referendum with no structural efficiency gains

### POTENTIAL SOLUTIONS THE BOARD MIGHT CONSIDER

- If the Board retains the Status Quo, it would be advisable to accompany that decision with a fully transparent financial roadmap
- A robust community education campaign on the true cost implications - per-household tax impact - is essential
- Clear communication regarding program reductions will need to occur regardless of configuration
- Consider a phased approach: commit to a timeline for future reconfiguration if referendum revenues fall short
- Engage Village and non-parent stakeholders directly in the referendum conversation



**EXECUTIVE SUMMARY  
FOR THE SHOREWOOD SCHOOL BOARD**

**Topic:** Monthly Financial Reports

**Date:** April 28, 2026

**Prepared by:** Heather Heaviland

**Recommended action:**

- Information only
- Presentation/discussion
- Discussion/action by board of education
- Presentation/action next meeting

**Purpose:** Financial reports are provided to the Board monthly to assist with monitoring of financial condition and compliance with the adopted budget.

**March 2026 Statements**

March 2026 financial statements reflect activities and financial changes for the first nine months of the 2025-2026 fiscal year (FY26):

- Revenue and Expenses
  - Revenues and expenses in the District’s general operating funds (10/27) are largely in line with historical trends and expectations. The financial dashboard attached provides additional narrative on revenue and expense trends.
  - Revenue from interest income and student fees is projected to exceed expectations, which for budgeting purposes are typically set conservatively given the uncertainty in this revenue stream. Student fee revenue increases are offset by increases in expenses.
  - Expenses are so far lower than expected for vehicle purchases and equipment. We do anticipate executing the vehicle and equipment purchases approved in this year’s budget later in the year. We will also allocate our vehicle depreciation to a designated fund balance account at the end of the year.
  - Expenses are also trending low for the District’s contribution to employee’s health insurance deductibles. These will also be allocated to a designated fund balance account for health care expenses at the end of the year.

- Balance Sheet
  - Changes to the balance sheet are in line with expectations.

Attachments:

- Financial Dashboard 2026-03
- Cash Receipts 2026-03
- Budget Status 2026-03
- Check Register 2026-03
- Balance Sheet 2026-03

**Additional Information**

**Understanding Account Numbers:** Account numbers are shown on several of the monthly reports. A complete description of account codes and how they are used can be obtained from the Business Office or Department of Public Instruction / School Financial Services website. The following is provided to assist with reading the provided monthly reports.

Fund - the 1st two digits are a designation of an accounting entity. The accounting entity is assigned by the DPI to ensure compliance with various statutory requirements related to the type of financial transactions reported. The common funds are:

- 10            General Fund is for recording any transaction not required to be recorded in another fund. This fund accounts for about 75% of total financial transactions.
  
- 21            Special Revenue Trust Fund is used to record transactions financed with non-governmental donations or other receipts designated for a specific educational purpose. Examples include support from PTO's, booster clubs, SEED and so forth.
  
- 27            The Special Education Fund is considered a sub-fund to the General Fund and is used to segregate financial transactions related to extraordinary costs for meeting the needs of students identified as requiring an Individualized Education Plan.
  
- 38 & 39      These funds are used to record property taxes levied for the purpose of repayment of long-term debt and the corresponding transactions for the principal and interest payments.
  
- 41 & 49      Capital Projects funds track revenue specifically raised to pay the costs of a capital project and the expenses thereof. Revenues are typically a segregated property tax levy or borrowed amounts.

- 50 The fund is used to segregate financial transactions related to operating the school food service program. A deficit, if any, in this fund is covered with a transfer from the General Fund.
- 80 Financial transactions related to operating the Fitness Center , Recreation Programs or other community oriented activities are recorded in the Community Services Fund.

Type - accounts codes have the following account types:

- A Asset
- L Liability
- Q Equity
- E Expense
- R Revenue



## **Shorewood School District**

# Monthly Financial Report

Fiscal Year 2026 Revenue and Expenditure Activity Through March

## FISCAL YEAR 2026 REVENUE AND EXPENDITURE SUMMARY THROUGH MARCH

### 1. CURRENT YEAR-TO-DATE ACTUALS COMPARED TO THE PREVIOUS YEAR

COMPARED TO THE SAME PERIOD, TOTAL REVENUES ARE

**\$718,147**

HIGHER THAN THE PREVIOUS YEAR

COMPARED TO THE SAME PERIOD, TOTAL EXPENDITURES ARE

**\$10,865**

HIGHER THAN THE PREVIOUS YEAR

COMPARED TO THE SAME PERIOD, THE FUND BALANCE IS

**\$4,464,635**

HIGHER THAN THE PREVIOUS YEAR

### 2. CURRENT YEAR-TO-DATE ACTUALS COMPARED TO THE BUDGET

CURRENT YEAR-TO-DATE REVENUE COLLECTIONS ARE TRENDING

**\$447,969**

HIGHER THAN THE BUDGET

CURRENT YEAR-TO-DATE EXPENDITURES ARE TRENDING

**\$875,601**

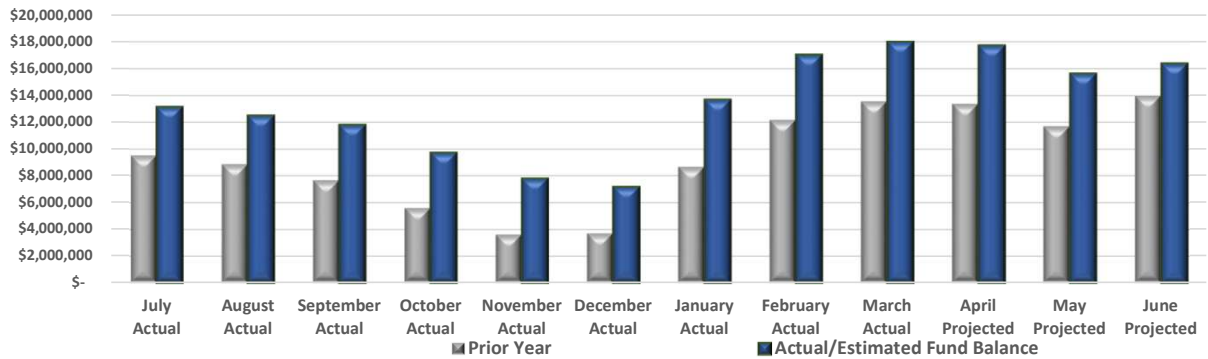
LOWER THAN THE BUDGET

POTENTIAL NET IMPACT WOULD RESULT IN A

**\$1,323,570**

HIGHER FUND BALANCE THAN ORIGINAL ESTIMATES

### 3. FUND BALANCE COMPARISON



JUNE 30 2025 ENDING FUND BALANCE

**\$13,978,530**

ESTIMATED 2026 YEAR END FUND BALANCE

**\$16,360,503**

# FISCAL YEAR 2026 MONTHLY REVENUE SUMMARY - MARCH

## 1. MARCH MONTH END REVENUE OVERVIEW (MTD)



	Current Year MTD Amount	Prior Year MTD Amount	Actual Compared to Last Year
Revenue From Local Sources	119,585	122,536	▶ (2,951)
Revenue From State Sources	2,914,462	3,229,708	▶ (315,246)
All Other Revenue	57,594	61,717	▶ (4,123)
<b>Total Revenue</b>	<b>3,091,641</b>	<b>3,413,961</b>	▶ <b>(322,321)</b>

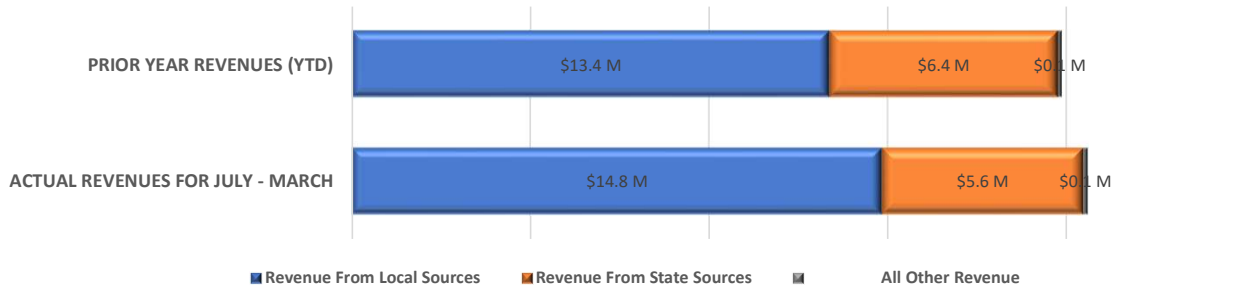
**ACTUAL REVENUE FOR THE MONTH WAS DOWN**

**\$322,321**

**COMPARED TO LAST YEAR.**

Overall total revenue for March is down -9.4% (-\$322,321). The largest change in this March's revenue collected compared to March of FY2025 is lower state aid - general (-\$308,015) and lower other revenue from state sources (-\$7,231).

## 2. YEAR TO DATE REVENUE OVERVIEW (YTD)



	Current Year YTD For July - March	Prior Year YTD For July - March	Actual Compared to Last Year
Revenue From Local Sources	14,842,544	13,373,096	▶ 1,469,448
Revenue From State Sources	5,643,952	6,404,076	▶ (760,124)
All Other Revenue	111,222	102,399	▶ 8,823
<b>Total Revenue</b>	<b>20,597,718</b>	<b>19,879,571</b>	▶ <b>718,147</b>

**COMPARED TO THE SAME PERIOD, TOTAL REVENUES ARE**

**\$718,147**

**HIGHER THAN THE PREVIOUS YEAR**

Fiscal year-to-date General Fund revenue collected totaled \$20,597,718 through March, which is \$718,147 or 3.6% higher than the amount collected last year. The largest difference in revenue when comparing current year-to-date revenue collected through March to the same period last year is taxes revenue coming in \$1,446,357 higher compared to the previous year, followed by state aid - general coming in -\$800,839 lower.

## FISCAL YEAR 2026 MONTHLY EXPENDITURE SUMMARY - MARCH

### 3. MARCH MONTH END EXPENDITURE OVERVIEW (MTD)

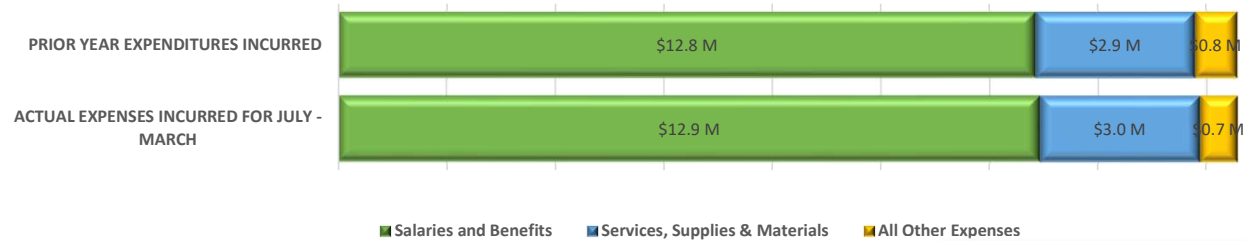


	Current Year MTD Amount	Prior Year MTD Amount	Actual Compared to Last Year
Salaries and Benefits	1,692,338	1,690,033	▲ 2,305
Services, Supplies & Materials	356,867	300,391	▲ 56,477
All Other Expenses	57,314	51,099	▲ 6,214
<b>Total Expenditures</b>	<b>2,106,519</b>	<b>2,041,523</b>	<b>▲ 64,997</b>

**ACTUAL EXPENSES FOR THE MONTH WAS UP**  
**\$64,997**  
**COMPARED TO LAST YEAR.**

Overall total expenses for March are up 3.2% (\$64,997). The largest change in this March's expenses compared to March of FY2025 is higher utilities (\$33,605), lower supplies (-\$21,100) and higher non-capital equipment (\$17,501).

### 4. YEAR TO DATE EXPENSE OVERVIEW (YTD)



	Actual Expenses For July - March	Prior Year Expenditures Incurred	Actual Compared to Last Year
Salaries and Benefits	12,929,389	12,849,333	▲ 80,056
Services, Supplies & Materials	2,953,947	2,937,377	▲ 16,570
All Other Expenses	691,276	777,037	▼ (85,761)
<b>Total Expenditures</b>	<b>16,574,611</b>	<b>16,563,746</b>	<b>▲ 10,865</b>

**COMPARED TO THE SAME PERIOD, TOTAL EXPENDITURES ARE**  
**\$10,865**  
**HIGHER THAN THE PREVIOUS YEAR**

Fiscal year-to-date General Fund expenses totaled \$16,574,611 through March, which is \$10,865 or .1% higher than the amount expended last year. The largest difference in expenditures when comparing current year-to-date expenditures through March to the same period last year is that equipment/vehicle - initial purchase costs are -\$206,939 lower compared to the previous year, followed by permanent full time coming in \$136,512 higher and property services coming in -\$91,064 lower.

# PROJECTED FISCAL YEAR 2026 REVENUE AND EXPENDITURE SUMMARY

## 5. PROJECTED YEAR END REVENUE RESULTS COMPARED TO THE BUDGET

**CURRENT YEAR-TO-DATE REVENUE COLLECTIONS ARE TRENDING**

**\$447,969**

**HIGHER THAN THE BUDGET**

	Budgeted Annual Revenues	Actual/Estimated Calculated Annual Amount	Variance Favorable/ (Unfavorable)
Revenue From Local Sources	20,448,108	20,866,357	418,250
Revenue From State Sources	8,248,362	8,239,431	(8,930)
All Other Revenue	2,456,237	2,494,887	38,650
<b>Total Revenue</b>	<b>31,152,706</b>	<b>31,600,676</b>	<b>447,969</b>

The top two categories (earnings on investments and other revenue from local sources), represents 83.2% of the variance between current revenue estimates and the budget.

**Top Budget vs. Actual/Estimated Amounts**

Variance Based on	Expected Over/(Under) Budget
EARNINGS ON INVESTMENTS	211,489
OTHER REVENUE FROM LOCAL SOURCES	161,156
OTHER REVENUE FROM STATE SOURCES	(73,647)
STATE SPECIAL PROJECT GRANTS	47,194
All Other Revenue Categories	101,777
<b>Total Revenue</b>	<b>447,970</b>

## 6. PROJECTED YEAR END EXPENDITURE RESULTS COMPARED TO THE BUDGET

**CURRENT YEAR-TO-DATE EXPENDITURES ARE TRENDING**

**\$875,601**

**LOWER THAN THE BUDGET**

	Budgeted Annual Expenses	Actual/Estimated Calculated Annual Amount	Budget compared to Actual/Estimated
Salaries and Benefits	20,813,854	20,402,461	(411,393)
Services, Supplies & Materials	4,914,422	4,829,354	(85,068)
All Other Expenses	4,366,027	3,986,887	(379,140)
<b>Total Expenditures</b>	<b>30,094,303</b>	<b>29,218,703</b>	<b>(875,601)</b>

The top two categories (health insurance and equipment/vehicle - initial purchase), represents 33.2% of the variance between current expense estimates and the budget.

**Top Budget vs. Actual/Estimated Amounts**

Variance Based on	Expected Over/(Under) Budget
HEALTH INSURANCE	(159,881)
EQUIPMENT/VEHICLE - INITIAL PURCHASE	(130,579)
EQUIPMENT/VEHICLE-REPLACEMENT	(122,255)
PAYMENT TO NON-GOVERNMENTAL AGENCIES AND INDI	(93,240)
All Other Expense Categories	(369,647)
<b>Total Expenses</b>	<b>(875,601)</b>



## EXECUTIVE SUMMARY FOR THE SHOREWOOD SCHOOL BOARD

**Topic:** Budget Balancing Strategies  
**Date:** April 28, 2026  
**Prepared by:** Heather Heaviland

- Information only  
 Presentation/discussion  
 Discussion/action by Board of Education  
 Presentation/action next meeting

### **Purpose:**

To share and obtain feedback on proposed strategies to maintain a balanced and sustainable budget for the Shorewood School District in both the 2026-2027 and future school years.

### **Background:**

On an annual basis, the District evaluates projected and planned spending for the next year to ensure that investments are aligned with needs. In addition, the District is continually looking ahead to ensure long-term sustainability of a high-quality education for all students. Last year, the District completed a new 5-year strategic plan that grounds our priorities. In addition, the District solicited input from both internal and external stakeholders and surfaced the following priorities:

- Salaries (highest priority for internal stakeholders)
- Core classroom sizes (a priority for both internal and external stakeholders)
- Benefits/health care (a priority for internal stakeholders)
- Staffing efficiency (a priority for external stakeholders)

Our internal Leadership Team also dedicated time to reviewing our strategic vision priorities, identifying core needs for 2026-27, and challenging ourselves to examine our current resource allocation and identify opportunities to better align resources to impact.

### **Investment Needs and Funding Strategies in 2026-27:**

The District focused on examining staffing assignments and opportunities to reallocate resources for better alignment with our vision and goals. Drawing from both our stakeholder input sessions and the strategic vision, we identified four key areas for a funding realignment.

1. Core Class Sizes: Maintaining manageable sizes in core classes (elementary primary classrooms, and secondary math, science, english/language arts, and social studies)
  - a. Goals:
    - i. Add classroom teacher at Atwater
    - ii. Add 0.2 to SHS ELA Department
    - iii. Add 0.2 FTE to SHS Science
  - b. Funding Strategy:
    - i. Reduce alternative education staffing (-0.8 through attrition)
    - ii. Reallocate 0.2 of Multilingual teacher to English
    - iii. Reduce under-enrolled elective courses (-1.0 through attrition)
  - c. Projected Net Financial Impact: \$0
  
2. Improve 3rd Grade Reading Achievement: Provide additional intervention staffing in order to better leverage reading specialists.
  - a. Goals
    - i. Add two reading intervention aides
  - b. Funding Strategy:
    - i. Reallocate instructional aides assigned to grade levels with class sizes that do not trigger a need for a full-day classroom aide
  - c. Projected Net Financial Impact: \$0
  
3. Operational/Staffing Efficiency
  - a. Goals:
    - i. Examine non-instructional roles for potential consolidation
  - b. Strategy:
    - i. Consolidate attendance/health aides at SIS and SHS (-1.75 FTE)
    - ii. Divide communications manager role across existing staff with partial outsourcing
  - c. Projected Net Financial Impact: \$-100K ongoing
  
4. Support Student Mental Health: State funding that we have relied on in order to integrate mental health professionals in each of our buildings has been significantly reduced.
  - a. Goal:
    - i. Maintain consulting services for our school support teams to ensure that student needs are comprehensively met
  - b. Funding Strategy:
    - i. Leverage state mental health grant (\$65,000 including prior year carryover)
    - ii. Evaluate alternative service model options for future years

- c. Projected Net Financial Impact: \$7,000 in FY27; Future TBD

Compensation and benefits also remain a priority. School Board operational expectations state that the District should be within the top 33% of salaries and fringe benefits compared to CESA 1 peer districts. The 2025 Operational Expectations Monitoring Report for Personnel Administration provided data showing that, within CESA 1 Shorewood is:

- In the 87th percentile for teacher compensation;
- In the 97th percentile for assistant principal compensation;
- In the 77th percentile for principal compensation
- In the 57th percentile for all other employee groups with available data.

The District's preliminary budget will include salary increases up to the state-allowed CPI increase of 2.63% and maintain a medical plan contribution of 87.4% of premium for the lowest cost plan. The additional cost of salary, fringe (retirement and social security), and health benefits is projected to be approximately \$930,000.

The District will offset a portion of this increase through:

- Leveraging revenue limit increase (projected at \$411K)
- Increasing anticipated interest income (\$130K)
- Decreasing the retirement set-aside (no benefit change; \$125K)

The anticipated budget impact of these increases is \$264,000 in FY27 and expected to grow in future years with the amount impacted by the magnitude of future increases.

### **Emerging and Ongoing Challenges**

Multiple expenses are increasing outside of the District's direct control and contributing to expense growth that is projected to significantly outpace revenue increases. These include:

- Ongoing cost of capital maintenance
- Rising health care costs
- Maintaining top compensation

While the District is working to mitigate the impacts of each of these, expense growth is anticipated to be a significant and ongoing challenge. High-impact, bold moves will be needed to change this trajectory. Under the Board's direction, we recently completed a neighborhood and enrollment study and engaged a Task Force to consider possible strategies for long-term financial sustainability.

### **Financial Impact:**

The net financial impact of new investments described above is estimated at approximately \$171,000. This does not include anticipated inflationary increases or adjustments to other spending which will be further presented in May.



**Topic:** Updated Board Bylaws

**Date:** April 10, 2025

**Prepared by:** Nathan Hammons, Board President and Policy Committee Member

**Recommended action:**

- Information only
- Presentation/discussion
- Discussion/action by board of education
- Discussion/action next meeting

**Purpose:** To present updated Bylaws for Board review and consideration.

**Background:** Most of the Board's Bylaws have not been reviewed or updated since 2016, despite substantial revisions to the NEOLA model templates on which they are based. The Administration provided the Policy Committee (comprised of Board Members Eckman and Hammons) with updated bylaws templates, which offer options from which boards of education may select to suit their district. The Policy Committee met twice to review the templates and select the bylaws and options within them best suited to the Shorewood School District.

**Recommendation:** Discuss the updated Board Bylaws, with a vote on adoption at the next Board meeting.



SCHOOL DISTRICT OF SHOREWOOD  
Board Meeting Minutes  
April 14, 2026

Board Member Participation: Nathan Hammons, President  
Ellen Eckman, Vice President & Governance Officer  
Mary Theisen, Treasurer  
Abby Fowler, Clerk

Aven Spahn, Student Board Representative

District Administrator Participation: Laurie Burgos, Superintendent  
Janice Carter, Principal, Atwater Elementary School  
Heather Heaviland, Director of Business Services  
Mike Joynt, Director of Teaching & Learning  
Shari Tucker, Director of Equity

I. 6:02 pm CALL TO ORDER

A. Motion to Adopt the Agenda

MOVED by Ellen Eckman and SECONDED by Mary Theisen AYE: 4 NAY: 0

B. Overarching Result for Shorewood School District

C. Awards & Recognition

II. 6:06 pm STUDENT ACHIEVEMENT PRESENTATION

Atwater Elementary School 5th Grade ELA Students and Jackie Butkovich, Teacher

III. 6:16 pm PUBLIC COMMENT #1

Charles McCanna 2100 East Kensington

Madeline Duffy 2100 East Kensington

Sharon Maier (Bright Beginnings Staff) 3719 North Farwell

Chris Donahoe 2520 East Beverly

Board Meeting Adjourned due to Tornado Warning

7:16 pm BOARD MEETING RECONVENED AND PUBLIC COMMENT RESUMED

Chris Donahoe 2520 East Beverly

IV. 7:21 pm SUPERINTENDENT'S REPORT

Presentation of the District Academic and Career Planning and Education for Employment Plan,  
Mike Joynt and Shari Tucker

V. 8:02 pm SUPERINTENDENT'S CONSENT AGENDA

A. Approval of District Staffing Changes: Appointments, Resignations, Retirements & Leave of Absence Requests: M. Gruber Retirement  
MOVED by Ellen Eckman and SECONDED by Abby Fowler AYE: 4 NAY: 0

VI. 8:03 pm STUDENT BOARD REPRESENTATIVE REPORT  
Participation in Advanced Placement and Dual-Credit Programs, Aven Spahn

VII. 8:04 pm BOARD BUSINESS AND POSSIBLE BOARD ACTION

A. Approval of OE 10 (Facilities) Operational Expectations Monitoring Document (In Compliance)  
MOVED by Abby Fowler and SECONDED by Mary Theisen AYE: 4 NAY: 0

B. Presentation of the Annual Capital and Vehicle Maintenance Plan

C. Approval of the Long-Term Capital Improvement Plan  
MOVED by Ellen Eckman and SECONDED by Mary Theisen AYE: 4 NAY: 0

D. Board Governance  
Review of Board Bylaws

VIII. 8:39 pm BOARD CONSENT AGENDA

A. Approval of Board Meeting Minutes  
March 10, 2026 Regular Board Meeting

B. Approval of Administrator Contract Renewals

C. Approval of Spectrum Contract for Lake Bluff Elementary School

D. Approval of 2025-2026 Budget Adjustment

E. Approval of Vendor Contract  
1. SIS Tennis Court Resurfacing  
2. SHS Track Restriping

MOVED by Abby Fowler and SECONDED by Ellen Eckman AYE: 4 NAY: 0

IX. 8:40 pm PUBLIC COMMENT #2 - no comments

IX. 8:41 pm BOARD MEMBER REPORTS

X. 8:42 pm REVIEW OF TO DO AND FUTURE AGENDA ITEMS

Budget Balancing Strategies; New Board Member Orientation; and Approval of Board Bylaws

XI. 8:43 pm RECESS AND DEBRIEF



SCHOOL DISTRICT OF SHOREWOOD  
Board Meeting Minutes - Closed Session  
April 14, 2026

Board Member Participation: Nathan Hammons, President  
Ellen Eckman, Vice President and Governance Officer  
Mary Theisen, Treasurer  
Abby Fowler, Clerk

Brian Feiges, Board Member-Elect

District Administrator Participation: Laurie Burgos, Superintendent  
Heather Heaviland, Director of Business Services

On Tuesday, April 14, 2026 at 5:03 pm, the School Board met in Closed Session.

Call to Order in Open Session.

The School Board voted to convene in Closed Session, pursuant to Wisconsin Statutes Section 19.85(1)(e) for purposes of "deliberating or negotiating the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session."

The meeting was adjourned without objection at 5:53 pm.



SCHOOL DISTRICT OF SHOREWOOD  
Board Workshop Minutes  
April 21, 2026

Board Member Participation: Ellen Eckman, Vice President and Governance Officer  
Mary Theisen, Treasurer  
Aaron Lippman, Member and Governance Officer  
Brian Feiges, Board Member-Elect

District Administrator Participation: Laurie Burgos, Superintendent

On Tuesday, April 21, School Board members met from 5:30 to 7:00 pm to conduct an orientation session for new Board member, Brian Feiges.



## EXECUTIVE SUMMARY FOR THE SHOREWOOD SCHOOL BOARD

**Topic:** Aramark Contract Renewal  
**Date:** April 28, 2026  
**Prepared by:** Heather Heaviland

- Information only
- Presentation/discussion
- Discussion/action by board of education
- Presentation/action next meeting

**Purpose:** To approve the renewal of the Food Service Management Company Agreement with Aramark for an additional year.

**Background:** The District is required by the Department of Public Instruction (DPI) to conduct an RFP to select a food service management company every five years. Following the initial selection through a regulated selection process, the District may renew the initial contract for four additional one-year terms. This will be the 3rd one-year contract renewal.

**Fiscal impact:** The fixed contract amount will increase by \$732.30, which is manageable within the Fund 50 food service budget.

Attachment: Shorewood-Aramark 26-27 Contract



## EXECUTIVE SUMMARY FOR THE SHOREWOOD SCHOOL BOARD

**Topic:** Kelly Education Agreement Extension  
**Date:** April 28, 2026  
**Prepared by:** Heather Heaviland

- Information only
- Presentation/discussion
- Discussion/action by board of education
- Presentation/action next meeting

**Purpose:** To approve the extension of our agreement with Kelly Education for an additional two years.

**Background:** The District contracts with Kelly Education to provide for substitute teachers and aides. So far this year, Kelly Education has filled 90% of our requests for substitute teachers. The fill rate for paraprofession is lower at 57%. Many substitutes engaged through Kelly Education come back to the District regularly. Continuing our relationship with Kelly Education for an additional two years is expected to provide ongoing continuity in substitute teacher staffing.

**Fiscal impact:** Kelly Education's fee will remain at the prior level of 28.5% of costs.

Attachment: Shorewood-Kelly Education Extension of Agreement



**EXECUTIVE SUMMARY  
FOR THE SHOREWOOD SCHOOL BOARD**

**Topic:** WIAA Cooperative Team Renewal Agreement

**Date:** April 28, 2026

**Prepared by:** Carrie Wettstein

**Recommended action:**

- Information only
- Presentation/discussion
- Discussion/action by committee
- Discussion/action by Board of Education
- Presentation/action next meeting

**Recommendation(s):** Approval of Renewal

**Background:**

The District's ongoing participation in a WIAA Cooperative Team Agreement has enabled Shorewood High School students to play varsity Girl's Softball in recent years, in partnership with the Brown Deer School District and the University School of Milwaukee.

Nicolet High School will join the Co-op next year, which will provide more opportunities for athletes to play and improve their skills, and distribute expenses, and Nicolet will serve as the "host" school for the Co-op.

The number of Shorewood students participating on the team over the past four years has been consistent. In addition to athletics fees paid by student families, the District contributes to overall Co-op expenses based on the number of Shorewood students participating in the sport.

Player Participation 2023-Present

- 22-23 - 6 players
- 23-24 - 7 players
- 24-25 - 7 players
- 25-26 - 6 players



# Wisconsin Interscholastic Athletic Association

## Cooperative Team Sponsorship Signatures

2026-27 & 2027-28 Co-op Application (except Football)

\*Gymnastics co-ops are due annually

*By our signatures we agree we have, as a school administration and school board, reviewed and discussed the items indicated on this form. We further confirm that our school district will provide the same level of institutional oversight to this program as to other sports sponsored by our district. In addition, we acknowledge that any monetary funds provided to us by outside sources will be handled according to district policies. Parent support groups, etc., shall not be involved in paying program expenses directly.*

**Applications submitted without all required signatures will be considered incomplete and not accepted.**

Co-op Application ID: 47337

(found on Cooperative Team Sponsorship form)

SCHOOL NAME: Shorewood High School

SPORT: Softball

GIRLS/BOYS: Girls

**Board of Education or Governing Body President:**

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

**District Administrator:**

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Name of Conference: Woodland Conference

*Signature from a person authorized to represent the conference affiliation of this co-op program; typically, a conference commissioner or the equivalent.*

*If, at the time of the signature, conference affiliation has yet to be determined for this cooperative agreement, signatures should be ascertained from the current affiliation of the involved schools. If a school(s) is currently unaffiliated/independent, no signature is required.*

*(Through the conference realignment application process, approval and opinion of all affected conferences and schools will be required.)*

Commissioner Approval Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_