DeForest Area School District
Operational Expectations Monitoring Report

OE-7 ASSET PROTECTION
SUMMARY OF COMPLIANCE STATUS

Interpretations & indicators accepted by DASD Board of Education on January 11, 2016 Revised: November 23, 2020, January 23, 2023, August 14, 2023, November 11, 2024

Date Presented:
Date Approved:

SUPERINTENDENT CERTIFICATION

With respect to Operational Expectations OE - 7, Asset Protection, taken as a whole, the Superintendent certifies that the proceeding information is accurate and complete, and the district is:

___x____ In Compliance
_____ In Compliance with Exception (as noted in the evidence)
_____ Not in Compliance

Superintendent Summary Statement:

The DeForest Area School District is recommended as **"In Compliance"** with Board of Education Operational Expectations Policy 7 (OE-7), Asset Protection, for the 2025–2026 school year. The report confirms that the district has effectively implemented protocols and oversight to safeguard its physical, digital, and financial assets, thereby maintaining fiscal stability and ensuring the efficient, safe operation of the district's resources.

Signed: _____ Date: _____
Superintendent

BOARD OF EDUCATION ACTION

With respect to Operational Expectations OE -7, Asset Protection, the Board finds the district to be:

_____ In Compliance
_____ In Compliance with Exception (as noted in the evidence)
_____ Not in Compliance

Board Summary Statement/Motion:

Signed: _____ Date: _____
Board President

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The superintendent will assure that all physical, digital, and electronic assets are adequately protected, properly maintained, appropriately used and not placed at undue risk.

Superintendent Interpretation:

The Board values the investment made in both the physical and non-physical resources of the district. The board expects these resources to be safeguarded, cared for and managed in a manner that guarantees their efficient, safe, and effective utilization.

Key words or phrases:

- **Assure** means that all reasonable means are utilized
- **District assets** means capital equipment, buildings, intellectual property, human capital, and public image.
- **Adequately protected** means insured and/or adequately prepared with reserves in order to cover 100% of replacement value and also locked when not attended by staff
- **Properly maintained** means taken care of in a manner to ensure the longest possible service
- **Appropriately used** means handled in a manner consistent with the intended use
- **Placed at undue risk** means put in a reasonably avoidable situation that could reasonably be foreseen to cause damage or loss

7.1	**The superintendent will:** Maintain property and casualty insurance coverage on district property with limits equal to 100% of replacement value.	**Compliant**

Interpretation: The board values that assets are protected and we maintain adequate insurance on district property that will cover the costs of replacing such property in case of loss.

- **Property:** Facilities, vehicles, equipment, and materials with an insurable risk.
- **100% of replacement value:** The ability to replace and make whole property losses experienced by the District subject to any and all deductibles.

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Indicator 1: The District presents coverage declarations documenting property and casualty insurance combined with appropriate levels of reserve sufficient to cover 100% of replacement value.
Evidence: Property Coverage was maintained for the 2025-26 fiscal year through EMC Insurance. 2025-26 Insurance Declarations.

7.2	**The superintendent will:** Maintain both Errors and Omissions and Comprehensive General Liability Insurance coverage protecting board members, staff and the district itself, in an amount that is reasonable for school districts of comparable size and character.	**Compliant**

Interpretation: The Board values maintaining adequate insurance coverage that will protect the board members, staff and district against the risk of financial loss resulting from legal action or challenge.

- **Errors and Omission Insurance:** Protection for board members and staff who make a mistake or knowingly misstep in performing their duties in good faith and results in harm to the District, employees and the Board.
- **Comprehensive General Liability Insurance:** Protection for the district against all claims of bodily injury and property damage by third parties.
- **Amount that is reasonable:** The value of the insurance that is appropriate for industry standards and State Statutes.
- **Comparable size and character:** Other school districts with similar numbers of students and risk factors.

Indicator 1: The district purchases and receives the coverage declarations for Errors and Omissions insurance for board members and staff.
Evidence: The district purchased Errors and Omissions insurance through EMC Insurance for the 2025–26 fiscal year. 2025-26 Insurance Declarations, Linebacker Public Officials and Employment Practices Liability Declarations page 25
Indicator 2: The district purchases and receives Comprehensive General Liability Insurance for board members, staff and the district itself.
Evidence: The district purchased comprehensive general liability coverage and a commercial umbrella policy from EMC insurance that covered the July 1, 2025 to June 30, 2026 period. 2025-26 Insurance Declarations, General Liability Declarations page 39
Indicator 3: The district maintains Workers' compensation coverage as casualty insurance for workplace injuries, accidents, or illness.
Evidence: The district purchased Workers' Compensation insurance from EMC Insurance for the July 1, 2025 to June 30, 2026 period. 2025-26 Insurance Declarations, Workers' Compensation, page 19

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7.3	**The superintendent will:** Protect intellectual property, information, files, records and fixed assets from loss or significant damage.	**Compliant**

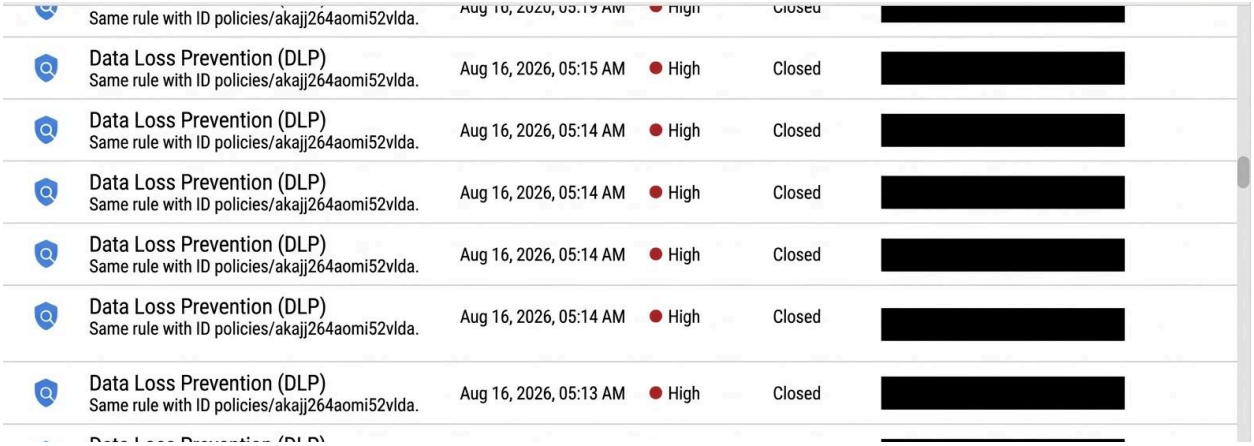
Interpretation: The Board values protecting any creative work that can be legally protected by a patent or trademark. I further interpret this policy to mean that all files will be backed up, secured, and stored as appropriate, and an appropriate maintenance plan and insurance coverage will be secured for fixed assets.

- **Intellectual property:** District created original curriculum, teaching materials, or other documents created by district employees as part of their job for use by the District or its employees.
- **Information, files and records:** Paper documents and electronic data on district servers deemed critical (Finance, Human Capital, Student Support and Research, Data & Accountability) to the operations of the District.
- **Significant Damage**: Damage that would result in interruptions to the daily operations of the district, would be irrevocable, or costly to repair.
- **Fixed Assets:** Capital items that are valued at $25,000 or more.

Indicator 1: The district has implemented and executes a process for regularly backing up the district's digital data.
Evidence: All servers are backed up either daily, weekly or monthly depending on operational criticalness. They are backed up to a storage device on school premises and a secondary back up to the cloud. Key user google workspace data gets backed up on a continual basis. This includes the user's Gmail, google drive, calendar and contacts plus most shared drives. For this last year, a testing environment was implemented to confirm backup validity. Daily log screenshot sample
Indicator 2: The district has in place a security access protocol that limits user access to sensitive and financial information Indicator
Evidence: For Skyward Financial, access is granted to only necessary users deemed by the business office and they give them access with Skyward. Only Human Resources has access to their (HR) systems. Skyward student access is granted by our Registrar. All windows computer access to files and folders are controlled by file and folder permissions by user or group deemed necessary by a user's role or assignment determined by their supervisor. Access is granted to that user or group by LISD (Learning Information Systems Department).
Indicator 3: The district has implemented Data Loss Prevention measures to monitor and prevent unauthorized sharing or transfer of district information and data.
Evidence: There are rules and alerts in place in google workspace that prevent certain PII (Personally Identifiable Information) (social security and credit card numbers) from being shared via gmail, google drive, chat or uploaded

files. The action is blocked, and an alert is generated. The alert is sent to the Director of LISD and the Network Administrator. The alerts are also listed in the dashboard of the Google administration panel.

Dashboard screenshot:



Indicator 4: The district equips buildings with and maintains surveillance cameras, alarms, and secure locks to protect physical assets and deter unauthorized access or potential damage.

Evidence: During the 25-26 school year there were 52 work orders for fixing cameras. These work orders followed our district process for fixing cameras. In 2025-26 11 cameras were replaced and 1 NVR (Recording server) due to non functionality. The door access control has group access levels to ensure a consistent level of access across the district. This was still operating in draft form in 25-26 to validate what access staff needs.

Evidence:

Keyscan groups Keyscan Groups Access Levels - Google Docs.pdf

Camera Workorder data Camera tickets 25-26 - Google Sheets.pdf

Camera Repair Process Camera Flow 25-26 - Google Docs.pdf

7.4 The superintendent may not: Allow facilities and equipment to be subject to improper use or insufficient maintenance.	**Compliant**

Interpretation: The Board values that the physical and digital property of the organization is used and cared for as well as properly maintained.

- **Facilities and equipment:** Fixed assets (buildings) and personal property (e.g. computers & vehicles) both instructional and non-instructional.

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- **Improper Use:** Inappropriate operation, treatment, or utilization in a manner that is contrary to intended purpose or violates District policies and procedures.
- **Insufficient maintenance:** Inadequate repair, cleaning, inspection, or upkeep as outlined by specifications or operational policies and procedures.

Indicator 1: The district tracks vandalism and misuse of facilities and equipment.
Evidence: A "Vandalism, Theft, Accidental damage, misuse of facilities" form was used by buildings during the 2025-26 school year. This was given to head custodians for them to keep track of incidents as they happened. The following data was collected: DASD- 23 reports of Vandalism, Theft, Accidental damage, misuse of facilities Evidence- 25-26 misuse data - Google Sheets.pdf
Indicator 2: The district performs annually scheduled facility inspections to monitor conditions of facilities, equipment, and ensure maintenance issues are addressed in a timely fashion.
Evidence: During the 25-26 school year the Custodial, Maintenance and Grounds Supervisors and the Director of Safety and Operations performed formal walk throughs of 2 of our buildings and recorded evidence collected on our walk through form. This data helped drive work completion with the B&G staff for DAMS, DO and EPES. These buildings were chosen as baseline for the work that needed to be done based on data received from the Reveal platform. Multiple walk-throughs with the Fire Department were held during the 2025-26 school year. They were held on August 27, December 22, 23, 29 and 30 2025 and June 12, 19 and 22 2026. These walk-throughs focused on compliance with local, state and national regulations. Head custodians, Maintenance and Grounds Supervisor and the Director of Safety and Operations were present during the walk throughs when available. These walk throughs are also used to grow the knowledge of staff in order to be a resource to the building. Notably, there are less violations as walk-throughs are conducted over time. Evidence-DASD School Custodial Maintenance Walkthrough Checklist and Data • Custodial walk through DAMS & DO.pdf • Custodial walk through EPE.pdf • Grounds walk through DAMS & DO.pdf • Grounds walk through EPE.pdf **PM Data-** • PM Data 25-26.pdf

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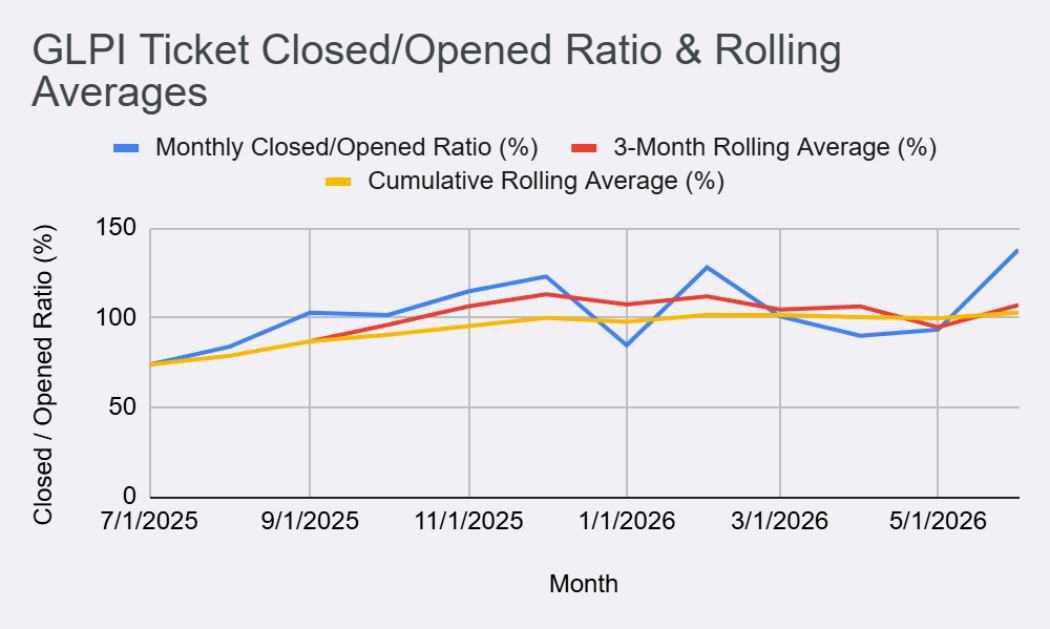
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Indicator 3: 96% of technology requests are completed within the school year requested and the average completion time is under 90 days.

Evidence:

1. **Overall Performance (12-Month Period)**
   - **Mean Monthly Closed/Opened Ratio: 102.74%**
   - **Aggregate Total Ratio: 101.73%** (5,496 total closed vs. 5,398 total opened).
   - Over the full 12-month period, the team closed more tickets than were opened, indicating a healthy backlog reduction trend overall.
2. **3-Month Rolling Trend Dynamics**
   - **Peak Closure Periods:** The 3-month rolling average peaked in **Dec 2025 (112.94%)** and **Feb 2026 (111.78%)**, driven by strong individual month closure ratios (122.84% and 127.97% respectively).
   - **Dips in Resolution Velocity:** Dips occurred in late summer (Jul–Aug 2025) and spring (May 2026 at 94.59%), where ticket opening rates outpaced resolutions.
3. **Cumulative Stabilization**
   - The cumulative rolling average started low in Jul 2025 at **73.64%**, steadily climbed past 100% by Feb 2026 (**101.42%**), and stabilized near **102.74%** by the end of June 2026.

Screenshot of ticketing tracking:



Indicator 3: Patches, updates, and addendums to the District network servers were regularly applied and documented by the Learning Information Systems Department.

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Evidence: Windows Server updates are automatically installed monthly. For the beginning of the 25/26 school year, a manual check on each server was conducted to confirm updates installed and then are documented. LISD then created a script that runs monthly that informs staff if the server was updated and when. In the future we look to automate this with some different tools. LISD installed the Skyward addendum within 2 weeks of its release along with other required updates. Screenshot of script

7.5	**The superintendent may not:** Recklessly expose the district, the board, or staff to legal liability.	**Compliant**

Interpretation: The Board values following the approved policies, regulations, and applicable laws in order to protect the board and staff from legal liability.

- **Recklessly expose:** Negligent actions that put the District in a legally untenable position.
- **Legal liability:** Situations the result in the District being legally and financially responsible.

Indicator 1: The District appropriately used legal counsel to protect the District against potentially litigious actions.

Evidence: Overall legal fees for 2025-26 were the lowest they have been since 2019-20. There were no litigation losses for the 2025-26 fiscal year.



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Indicator 2: There are no lawsuits where the district is determined by a court of law to have been legally responsible.
Evidence: There were no lawsuits for the 2025-26 fiscal year involving the district.

7.6 The superintendent may not: Invest funds in investments that are not secured or that are not authorized by law.	**Compliant**

Interpretation: The Board values the security of District funds. District funds will not be invested into unsecured instruments that do not meet the legal requirements of Wisconsin or Federal State law or puts the district's fiscal assets at risk of loss.

- **Funds:** Money or capital
- **Investments:** The commitment of District funds or other assets with the purpose of gaining profitable returns in the form of interest, income, dividend, and appreciation of value.
- **Secured:** Providing certainty or a guarantee in conformance with law to minimize the risk of loss.

Indicator 1: All investments are in compliance with State of Wisconsin statutes in regards to investments and have been maintained in accounts protected by FDIC insurance or collateral agreements.
Evidence: District funds were protected by either FDIC insurance or additional collateral insurance provided by the financial institutions. Copies of the collateral agreements/insurance

7.7 The superintendent may not: Purchase or sell real estate, including land and buildings.	**Compliant**

Interpretation: The Board values preventing the purchase or sale of real estate, land and buildings without a board motion specifically allowing the Superintendent to do so.

- **Real estate:** Property consisting of land and buildings.
- **Purchase:** To obtain ownership of real estate in exchange for money or value.
- **Sell:** shall mean to surrender ownership of an asset in exchange for money or value.

Indicator 1: No real estate was purchased, encumbered or disposed of without Board approval.

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Evidence: There were no purchases, encumbrances, or disposals of real estate property during the 2025-26 fiscal year. The Holum property was available for sale in 2025-26 which was approved by the Board in 2023-24. The property sold on September 15, 2026

7.8	**The superintendent may not:** Take any action that damages the district's public image or credibility.	**Compliant**

Interpretation: The Board values a positive reputation of the District.

- **Public image:** Overall perception of the District among the members of the community.
- **Credibility**: Trust

Indicator 1: The percent of respondents to a parent/community survey indicating positive public image and credibility of District services increases each year with a target of 80%.

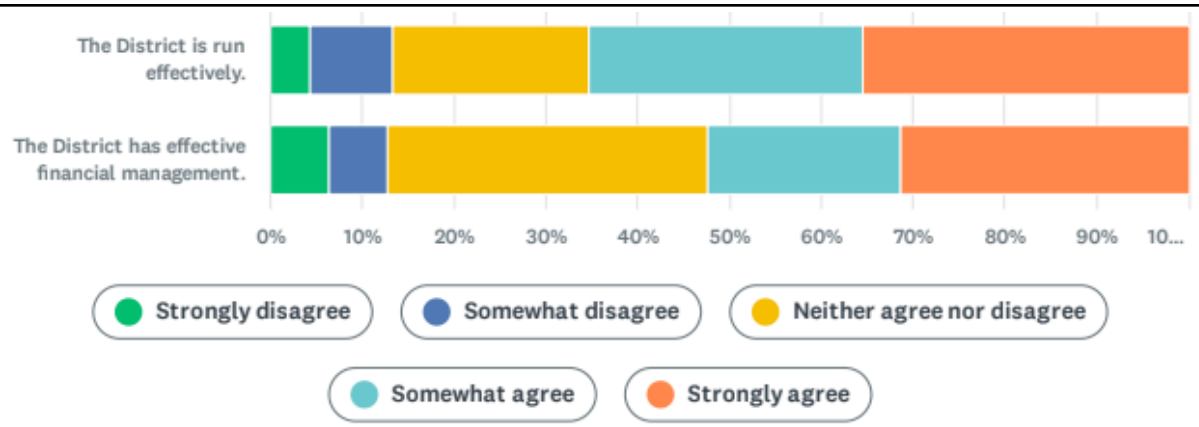
Evidence:

The survey of parents/guardians demonstrates that over 80% either are neutral in response or somewhat or strongly agree.



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	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree	Total
The District keeps me informed on important issues.	2.90% 19	3.96% 26	8.84% 58	36.13% 237	48.17% 316	656
The District collaborates with families and community to support children and families.	3.20% 21	5.49% 36	14.94% 98	35.67% 234	40.70% 267	656
The District is run effectively.	4.27% 28	8.99% 59	21.49% 141	29.88% 196	35.37% 232	656
The District has effective financial management.	6.40% 42	6.40% 42	34.91% 229	20.88% 137	31.40% 206	656
						2624

Capacity Building – Funding/Staffing:

Maintain current funding levels. The 2024 referendum allowed the district to make critical strides in catching up on deferred maintenance and vital infrastructure investments. Moving forward, the district will need to continue to

prioritize maintaining sustained funding for core safety and technology assets. This includes ongoing upgrades to cybersecurity, server infrastructure, network equipment (firewalls, switches, access points), camera replacements, walkie-talkie replacements, physical safety infrastructure work, and maintaining overall policy compliance.

Looking beyond the current fiscal year, budget allocations may need to be re-evaluated and increased to keep pace with rising costs related to maintaining these investments and ensuring that our infrastructure is up to date in the ever changing cybersecurity landscape.

2025-26 Action Plan Recap:
During the 2025–26 school year, collaboration with the Technology Department is underway to develop a consistent system for funding and charging when district materials are damaged.

Additionally, we created a long-range technology plan.

Update: We successfully established and deployed a standardized *Damaged Device Management and Fee Determination Process*. The new workflow defines clear steps for intake, investigation, and communication for accidental vs. negligent damages or lost devices. Additionally, it aligns clear financial accounting procedures between central technology and building-level budgets, including automated fee management via Infinite Campus.

Long-range plans will continue to be evaluated and implemented and vetted through the district technology committee.

Possible indicator revisions:

7.3 Indicator 2: "The district has in place a security access protocol that limits user access to sensitive and financial information Indicator" Remove "Indicator" and add a "." after information.

7.8 Indicator 1: "The percent of respondents to a parent/community survey indicating positive public image and credibility of District services increases each year with a target of 80%." Remove "community survey" because this survey is for parents/guardians.