DeForest Area School District
Operational Expectations Monitoring

OE-8 COMMUNICATING WITH THE BOARD
SUMMARY OF COMPLIANCE STATUS

Date Presented: June 9, 2025
Date Approved by the Board: June 9, 2025

Interpretations & indicators accepted by DASD Board of Education on May 22, 2017 Revised: September 23, 2024

SUPERINTENDENT CERTIFICATION

With respect to Operational Expectations 8, Communicating With the Board, 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 following Monitoring Report for the period of July 2024 - June 2025 reflects compliance with OE-8, "Communicating with the Board". The Superintendent is compliant with all items and indicators of Operational Expectations 8. The evidence presented indicates communications are appropriate and meet expectations for this monitoring period. The elimination of "Somewhat Agree" on the survey results was completed. The quarterly conversations as it relates to communication with the board has been helpful this year.

Signed: _____ Date: _____
Superintendent

BOARD OF EDUCATION ACTION

With respect to Operational Expectations 8, Communicating With the Board, the Board finds the district to be:

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

Board Summary Statement/Motion:

The board concurs that OE-8, Communicating with the Board, is compliant, and that the Superintendent works very hard to keep the board informed. Overall, the survey responses showed improvement. Removing the survey option of "somewhat agrees" helped clarify the data. The board was happy that parts of the action plan from the previous year have been implemented. It was noted that this OE should reflect the actual number of monitoring reports (8.1.2), and that rather than using a hard "end of July" date for 8.1.3, that using a rolling 12-month date made more sense since the board's calendar may change. Board members expressed a desire to use the quarterly conversations to address areas such as 8.5, 8.6, 8.7, and 8.9 where there was some

disagreement about the level of communication in those areas. It was felt that discussion sooner, at the quarterly conversations rather than waiting for the annual evaluation, would help clarify these areas for both the board and the superintendent. The desire to learn from each other and grow together was expressed.

Signed: _____ Date: _____
Board President

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The superintendent will assure that the Board is fully and adequately informed about matters relating to Board work and significant district concern.

Superintendent Interpretation:

The Board values being apprised of district events and issues that directly impact or inform board action or communications they may have with their constituents or the greater community they serve.

8.1 The Superintendent will: Submit required monitoring data (see policy **B/SR-5** -Monitoring Superintendent Performance) in a thorough, accurate and understandable fashion, according to the Board's annual work plan schedule, and including both Superintendent interpretations and relevant data to substantiate compliance or reasonable progress.	**Compliant**

Interpretation: The Board values that the coherent governance system, as outlined by the Board, is adhered to and schedules for work related to the governance system are followed by the superintendent.

Indicator 1: 100% of monitoring data is submitted per the annual work plan schedule.
Evidence: The Board Annual Work Plan reflects the efforts to adhere to expected preparation and presentation of monitoring reports.
Indicator 2: By the end of July of each year, the Board finds the district "in compliance" or "compliance with noted exceptions" with 10 of 12 OE policies.
Evidence: The Board approved 6 OE policies as compliant or compliant with noted exceptions, prior to the date of this monitoring report, June 9, 2025 . OE-8, OE-3, OE-9 are being presented on the same day as this report. All 3 are compliant, resulting in a total of 9 policies that the District is in compliance with or compliant with noted exceptions. Two OE policies have been presented as not in compliance. See Supt Annual Evaluation Cover Sheet.
Indicator 3: By the end of July of each year, the Board does not find the District to be "not in compliance" and without an acceptable action plan to remedy noncompliance for any OE policies presented.
Evidence: There were two monitoring reports (OE-10 & OE-12) identified as not in compliance for 2024-25. Despite that, areas for continued improvement were outlined in monitoring report action plans and capacity building.

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8.2 The Superintendent will: Inform the Board of significant transfers of money within funds or other changes substantially affecting the district's financial condition.	**Compliant**

Interpretation: The Board values financial awareness when dollars are moved between funds or something significant alters the anticipated course of the district's assumptions and projections.

Significant Transfers of Money means the movement of money in cost centers exceeding 10% of the total cost center transferred to another cost center. (This aligns with how the district develops an annual budget)

Substantially affecting the district's financial condition means those things contrary to the indicators and interpretations in OE-5 Financial Planning and OE-6 Financial Administration.

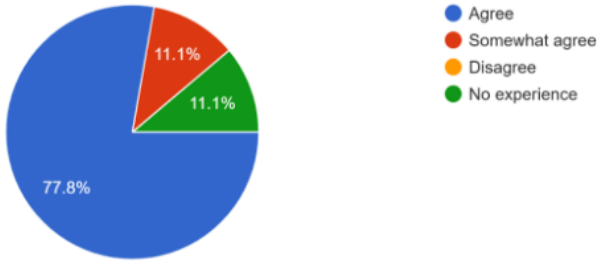
Indicator 1: Using the proposed Board Communication Survey question 2, the majority of the Board indicates they have been provided information regarding significant transfers of money or other changes substantially affecting the district's financial condition.

Q8.2 - The Superintendent informs the Board of significant transfers of money within funds or other changes substantially affecting the district's financial condition.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: The audit reports no instance where a significant amount of money was transferred from one line item to another without having informed the Board.

Evidence: Annual District Audit report (provided to the Board in the January 21, 2025 BOE Update) reflects no instances of significant money transfers without Board approval as per board policy.

DeForest Area School District
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SUMMARY OF COMPLIANCE STATUS

8.3 The Superintendent will: Assure that the Board has adequate information from a variety of internal and external viewpoints to assure informed Board decisions.	**Compliant**

Interpretation: The Board values diverse perspectives from both inside and outside the district to support informed, deliberate, and thoughtful board action.

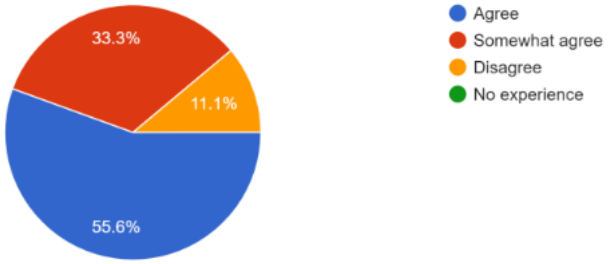
Indicator 1: Using the Board Communication Survey question 3, the majority of the Board indicates they have been provided information from appropriately diverse sources supporting their work.

Q8.3 - The Superintendent assures that the Board has adequate information from a variety of internal and external viewpoints to assure informed Board decisions.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: The superintendent utilizes committees and task forces composed of a variety of stakeholders to ensure diversity of perspectives is gained to better inform the board.

Evidence: The superintendent did not utilize any special task force during this monitoring period. However, standing committees utilized by the superintendent, such as support staff advisory, parent key communicators, insurance advisory, K-8 PTO's were held and will continue to be held, and were made up of representative stakeholders. The superintendent offered to provide a school district update to all district municipal boards in the fall, to gain perspective from external stakeholders. The Villages of DeForest and Windsor accepted the offer. In addition, the update was provided to Chamber of Commerce members to gain perspective from the business community. The superintendent met with members of the Clergy at meetings hosted by the school district. The Superintendent also utilized the expertise of professionals within specific fields, such as legal counsel, Erik Larson, Kent Smith & Milaney Leverson, Cesa 10 PBIS (Positive

Behavior Intervention Supports), Heather Lott, and area Superintendent meetings. Beginning in February 2024, the Superintendent engaged in over 70 opportunities, with diverse groups of community stakeholders, to provide information about public school financing and education on the need for a referendum. Communication Plan - Future Funding, BOE Invitation - Community Sessions, BOE Communication Plan - Referendum 2024,

8.4 The Superintendent will: Inform the Board of anticipated significant media coverage.	**Compliant**

Interpretation: The Board values advanced notice and being prepared for the potential significant news-making events.

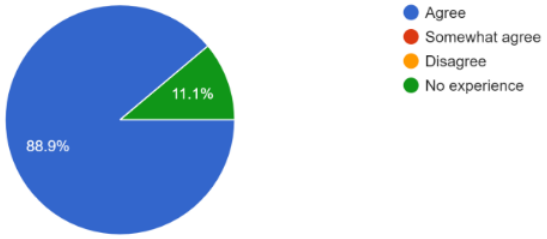
Indicator 1: Using the Board Communication Survey question 4, the majority of the Board indicates they have been informed of the possibilities and circumstances resulting in significant media coverage.

Q8.4 - The Superintendent informs the Board of anticipated significant media coverage.

2024-25 (9 responses)



2023-24 (9 responses)



8.5 The Superintendent will: Inform the Board, the Board President or individual members if, in the	**Compliant**

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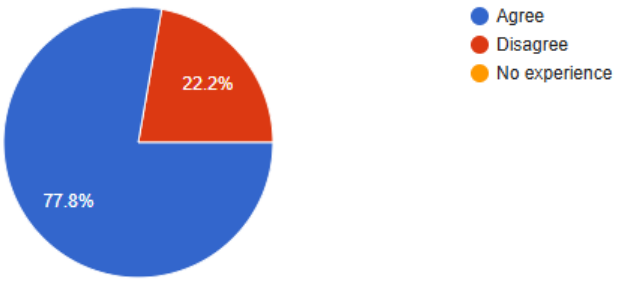
Superintendent's opinion, the Board or individual members have encroached into areas of responsibility assigned to the Superintendent or if the Board or its members are non-compliant with any ***Governance Culture*** or ***Board/Superintendent Relations*** policies.	

Interpretation: The Board values the foundation of its governance model and holds the superintendent responsible for keeping the Board informed of situations that potentially undermine their expectations related to coherent governance or board/superintendent roles and responsibilities.

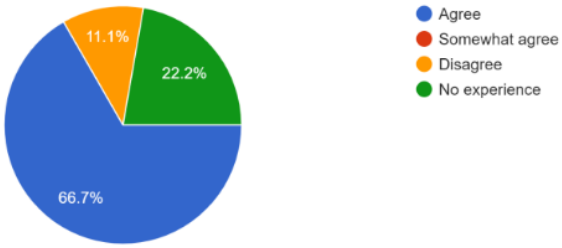
Indicator 1: Using the Board Communication Survey question 5, the majority of the Board indicates they have been informed if individual members have encroached into areas of responsibility assigned to the Superintendent or are non-compliant with the Governance Culture or Board/Superintendent Relations.

Q8.5 - The Superintendent informs the Board, the Board President or individual members if, in the Superintendent's opinion, the Board or individual Board members have encroached into areas of responsibility assigned to the Superintendent or if the Board or its members are non-compliant with any Governance Culture or Board/Superintendent Relations policies.

2024-25 (9 responses)



2023-24 (9 responses)



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OE-8 COMMUNICATING WITH THE BOARD
SUMMARY OF COMPLIANCE STATUS

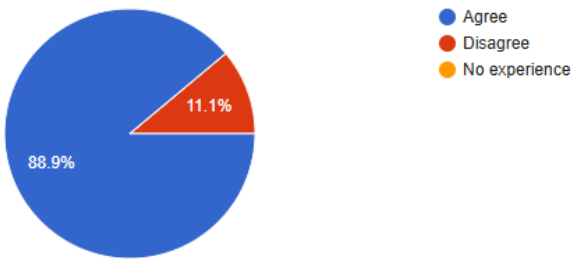
8.6 The Superintendent will: Present information in simple and concise form, indicating clearly whether the information is incidental, intended for decision preparation, or for formal monitoring.	**Compliant**

Interpretation: The Board values a format of reporting that directs their attention to those things that are background information, necessary for informed board action, or used as evidence supporting the board governance structure.

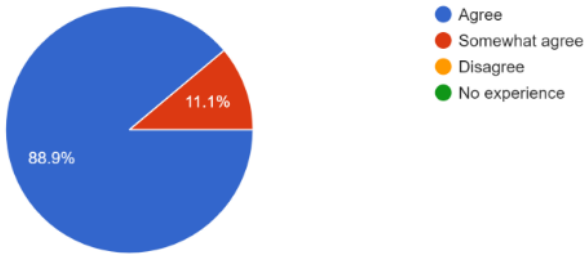
Indicator 1: Using the Board Communication Survey question 6, the majority of the Board indicates they have received information in a simple and concise form, indicating presented information is incidental, for decision preparation, or formal monitoring.

Q8.6 - The Superintendent presents information in simple and concise form, indicating clearly whether the information is incidental, intended for decision preparation, or for formal monitoring.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: During the Board and Superintendent "quarterly conversations", Board members indicate that the Superintendent provided information in a simple and concise form in support of the Board's work.

Evidence: No significant concerns about the way and manner information have been raised or noted.

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OE-8 COMMUNICATING WITH THE BOARD
SUMMARY OF COMPLIANCE STATUS

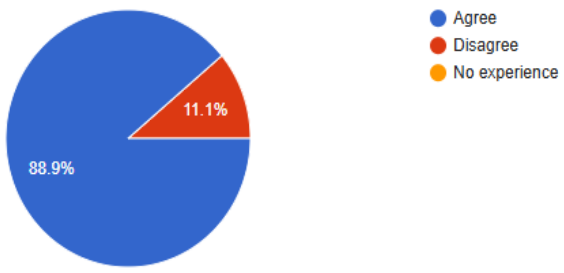
8.7 The Superintendent will: Treat all members impartially and assure that all members have equal access to information.	**Compliant**

Interpretation: The Board values the superintendent communicating with all Board members in a professional and equitable manner and that the Superintendent provides equitable access to information ensuring the Board can appropriately fulfill their responsibilities.

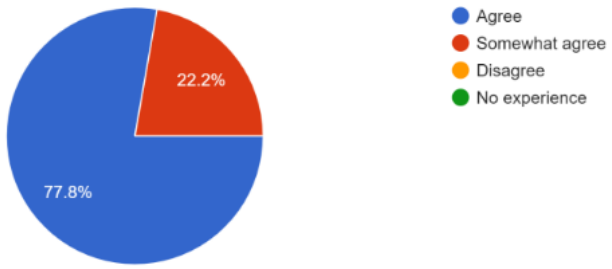
Indicator 1: Using the Board Communication Survey question 7, the majority of the Board indicates they have been treated equally and have equal access to information.

Q8.7 - The Superintendent treats all members impartially and assures that all members have equal access to information.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: During the Board and Superintendent "quarterly conversations", Board members indicate that the Superintendent provided information equitably to all board members on matters relating to Board business.

Evidence: The superintendent has not received feedback from any individual board member or from the Board President expressing any concerns about not receiving information.

8.8 The Superintendent will: Inform the Board in a timely manner of any actual or anticipated noncompliance	**Compliant**

with any Board ***Operational Expectations*** policy or any anticipated failure to achieve reasonable progress toward any ***Results*** policy.	

Interpretation: The Board values monitoring reports that present accurate information - including information that may not meet the expectations of the Board.

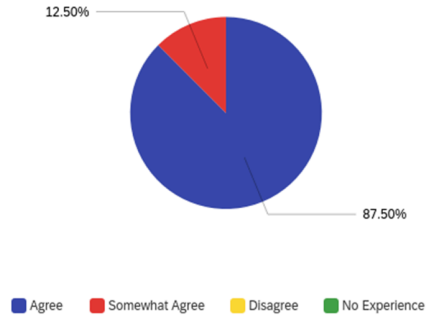
Indicator 1: Using the Board Communication Survey question 8, the majority of the Board indicates they have been informed in a timely manner of any actual or anticipated noncompliance with any Board Operational Expectation policy or any anticipated failure to achieve reasonable progress toward any Results policy.

Q8.8 - The Superintendent informs the Board in a timely manner of any actual or anticipated non-compliance with any Board Operational Expectations policy or any anticipated failure to achieve reasonable progress toward any Results policy.

2024-25 (9 responses)



2023-24 (9 responses)



8.9 The Superintendent will: Provide for the Board adequate information about all administrative actions and decisions that are delegated to the Superintendent, but required by law to be approved by the Board.	**Compliant**

Interpretation: The Board values awareness about those items the superintendent is making decisions about which are Board decisions in statute.

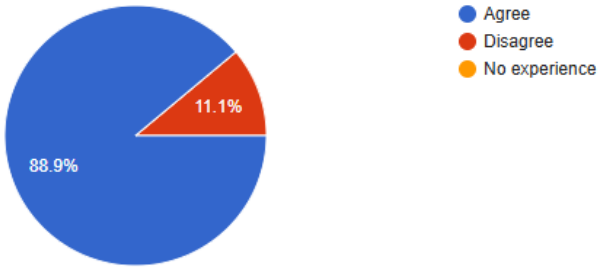
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OE-8 COMMUNICATING WITH THE BOARD
SUMMARY OF COMPLIANCE STATUS

Indicator 1: Using the Board Communication Survey question 9, the majority of the Board indicates they have been adequately informed about all administrative actions and decisions that are delegated to the Superintendent, but required by law to be approved by the Board.

Q8.9 - The Superintendent provides for the Board adequate information about all administrative actions and decisions that are delegated to the Superintendent, but required by law to be approved by the Board.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: The Board takes action at meetings on all items required by law to be approved by the Board.

Evidence: The Board agendas and the minutes from the 24-25 school year meetings demonstrate all items that require board approval. Minutes can be found in BoardDocs and on the District website.

8.10 The Superintendent will: Inform the Board in a timely manner of the resolution of complaints referred to the Superintendent by the Board.	**Compliant**

Interpretation: The Board values the Superintendent communicating back to the Board the results of any investigations of concerns that are brought forward by a consensus of the full Board, and that the Board has asked the superintendent to respond to.

DeForest Area School District
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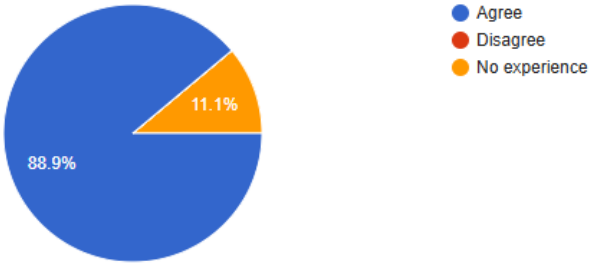
OE-8 COMMUNICATING WITH THE BOARD
SUMMARY OF COMPLIANCE STATUS

Complaints: Mean any concern or issue that is brought forward to the full Board for consensus on the need for follow up, and is presented to the Superintendent by the Board President in writing (such as email) or verbally shared (phone call).

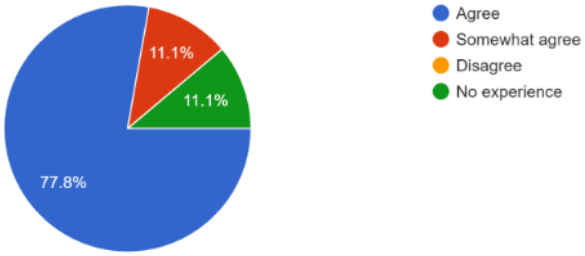
Indicator 1: Using the Board Communication Survey question 10, the majority of the Board indicates they have been informed in a timely manner of administrative disposition of complaints referred to the Superintendent by the Board.

Q8.10 - The Superintendent informs the Board in a timely manner of the resolution of complaints referred to the Superintendent by the Board.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: During the Board and Superintendent "quarterly conversations", Board members indicate that the Superintendent has adequately and in a timely manner informed them of administrative dispositions regarding complaints referred by Board members.

Evidence: The Board has not given feedback in quarterly conversations about significant concerns regarding timeliness of information.

8.11 The Superintendent will: Inform the Board in advance of any deletions of, additions to or significant modifications of any instructional programs.	**Compliant**

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SUMMARY OF COMPLIANCE STATUS

Interpretation: The Board values the learning experiences of all DASD students and expects to be apprised of major changes to instructional practices or curriculum before those changes are made.

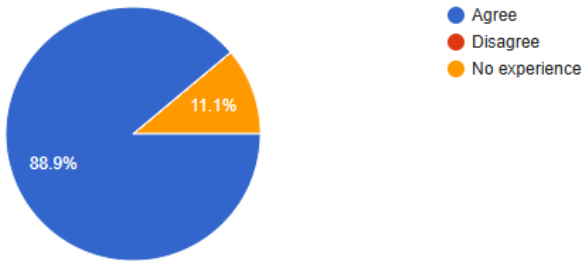
Significant modifications mean changes that require considerable professional development or resources to implement or remove.

Instructional programs mean the teaching practices, classroom instruction, and curriculum that take place daily in the District's schools.

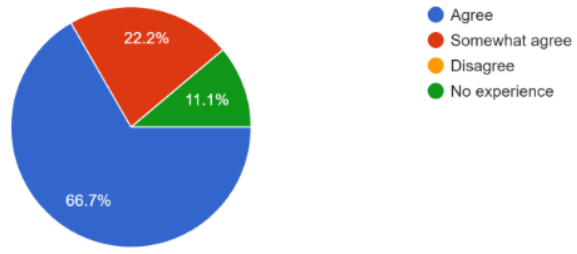
Indicator 1: Using the Board Communication Survey question 11, the majority of the Board indicates they have been informed in advance of any deletions of, additions to or significant modifications of any instructional programs.

Q8.11 - The Superintendent informs the Board in advance of any deletions, additions or significant modifications of any instructional programs.

2024-25 (9 responses)



2023-24 (9 responses)



Indicator 2: Board updates regularly include information regarding instructional programming and any impending significant changes to the instructional program or curriculum.

Evidence: Administration provides the Board with updates on instructional programming or curriculum, as needed.

July 2024 - Title IX (Nondiscrimination On The Basis of Sex in Education Programs or Activities)
August 2024 - Superintendent Student Advisory Group, Library Long Range Plan
September 2024 - AimswebPlus Universal Screener, Wisconsin Act 125 and Act 118 Requirements For The Use of Seclusion and Physical Restraint in Schools, Act 20
October 2024 - 7-12 Schedule Committee Work
November 2024 - Proficiency Rates in WI State Testing, State Report Cards, 9-12 Schedule Update &

Graduation Requirements
December 2024 - DAHS schedule change, Proficiency Rates in WI State Testing
March 2025 - ACT 95 Waiver (2x), Proficiency Rates in WI State Testing, Free Appropriate Public Education (FAPE)
June 2025 - Behavior Position Update, State Report Card Changes Coming

24-25 Board Meeting Agendas with information on instructional programming and changes to programs or curriculum:

September 9, 2024 - Board education on data and District action planning in regards to disproportionate and discrepant identifications by Department of Public Instruction (DPI)
November 11, 2024 - Board education on Act 20 requirements, new reading curriculum - Amplify, and Science of Reading methodology
November 11, 2024 - Presentation of annual Department of Public Instruction (DPI) State Report Card results with presentations by Eric Larsen
November 25, 2024 - Presentation and possible approval of Board Policy R-2 Literacy Monitoring Report
November 25, 2024 - Update on the need for a High School schedule change, the process, and potential changes in graduation requirements
December 09, 2024 - Presentation and possible approval of Board Policy R-2 Numeracy, Other Courses, and Technology Monitoring Report
February 10, 2025 - Introduction of College and Career Readiness Coordinator, and presentation on Academic Career Plans (ACP) and Career and Technical Education (CTE)
March 10, 2025 - Presentation and possible approval of monitoring report for Board of Education Policy R-3, Self-Directed Complex Thinker
March 17, 2025 - Public Hearing and action regarding Act 95 Waiver
April 14, 2025 - Presentation and possible approval of monitoring report for Board Policy R-4, Collaborative and Responsible Citizens
May 12, 2025 -Presentation and possible approval of Board Policy OE-10 - Learning Environment Monitoring Report
May 12, 2025 Presentation and possible approval of Board Policy OE-11 - Instructional Program Monitoring Report

8.12 The Superintendent will: In conjunction with legal counsel, provide the Board with information concerning the legal implications of actions under consideration by the Board.	**Compliant**

Interpretation: The Board values the opinion of the superintendent and legal counsel as it relates to any potential issues that are impacted by regulatory requirements or changes in state or federal law.

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Indicator 1: The Superintendent utilizes legal counsel to provide a legal update and training as part of the annual board orientation following the election of new or incumbent board members.
Evidence: Board Education orientation and legal update training was reflected in the Board Meeting agenda for April 28, 2025. The legal update was provided for the board by Tess O'Brien-Heinzen, Attorney - Renning, Lewis, & Lacy. We had no new elected board members in 2025.

Reference:
Addendum A - Board Communication Survey comments report

Additional information from OE-8 Board Survey (these two questions have not been reflected in the monitoring report)

Q8.1 - The Superintendent submits required monitoring data in a thorough, accurate and understandable fashion, according to the Board's annual work plan schedule, and including both Superintendent interpretations and relevant data to substantiate compliance or reasonable progress.



Q8.2 - The Superintendent provides for the Board, in a timely manner, information about trends, facts, and other information relevant to the Board's work.



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SUMMARY OF COMPLIANCE STATUS

Action Plan to Improve/Enhance OE-8:

Action Plan Recommendations:

Consider an indicator change for 8.1 Indicator 2 (see below)

8.1 Currently: Indicator 2: By the end of July of each year, the Board finds the district "in compliance" or "compliance with noted exceptions" with 10 of 12 OE policies.

Change to: By the end of July of each year, the Board finds the district "in compliance" or "compliance with noted exceptions" with 9 of 11 OE policies.

Rationale: There are only 11 OE's that have monitoring reports.

Capacity Building:

Continue to utilize the quarterly conversations to provide more feedback to the superintendent about items from OE-8 that are not clear.

Continue to utilize a portion of BOE professional development budget allocation to support continued growth and understanding of board roles vs. Superintendent roles.