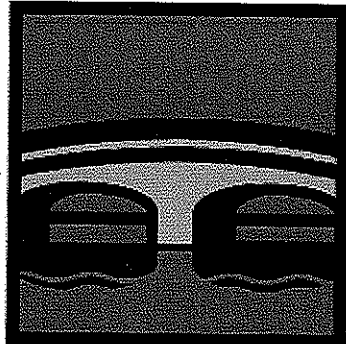
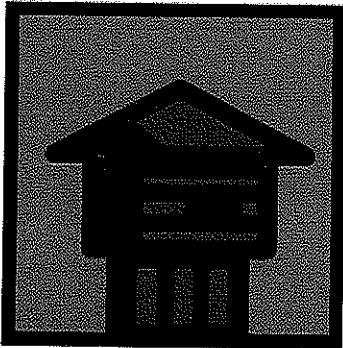


Proposed School Budget and Annual Report

SCHOOL DISTRICT OF



F O R T • A T K I N S O N

2009-2010

School District of Fort Atkinson

ANNUAL MEETING REPORT

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1 SCHOOL DISTRICT OF FORT ATKINSON

2
3 BOARD OF EDUCATION AND
4 ADMINISTRATION

5
6 JULY 27, 2009

7
8
9 Board of Education

10
11 Scott Johnson, President

12 Carrie Chisholm, Vice-President

13 Bob Chady, Treasurer

14 Kent Koebke, Clerk

15 Rodger Thomann, Member

16
17
18 Administration

19 Dr. James Fitzpatrick, Superintendent of Schools

20 Mr. Jason Demerath, Director of Business Services

21 Mr. Dennis Kuchenmeister, Director of Buildings and Grounds

22 Mr. Armando Martinez, Director of Student Nutrition

23 Mrs. Amy Oakley, Director of Instruction

24 Mr. John Peterson, Director of Special Education/Pupil Services

25 Mr. John Ottow, Director of Technology

26 Dr. Robert Abbott, Principal, Fort Atkinson Middle School

27 Mr. Anthony Bolz, Principal, Barrie Elementary School

28 Dr. Rick Brietzke, Principal, Purdy Elementary School

29 Mr. David Geiger, Principal, Luther Elementary School

30 Mrs. Vicki Wright, Principal, Rockwell Elementary School

31 Dr. Jeffrey Zaspel, Principal, Fort Atkinson High School

32 Mr. Paul Christensen, Associate Principal, Fort Atkinson Middle School

33 Mr. Mark Pollex, Athletic Director/Associate Principal, Fort Atkinson High School

34 Mr. Brent Torrenza, Associate Principal, Fort Atkinson High School

1 SCHOOL DISTRICT OF FORT ATKINSON

2
3
4 ORDER OF BUSINESS FOR
5 ANNUAL MEETING

6
7 July 27, 2009
8 8:00 PM

9
10 Board Meeting Room
11 Luther Administration Center
12 201 Park Street
13 Fort Atkinson, Wisconsin 53538
14

15
16 I. CALL TO ORDER

- 17 A. President Scott Johnson Will Call the Meeting to Order
- 18 B. Introduction of Parliamentarians
- 19 C. Introduction of School Board and Administrators
- 20 D. Voter Eligibility will be Explained*

21
22
23
24
25
26
27 II. ELECTION OF CHAIRPERSON

28
29 A motion from the floor must be made to nominate and elect a chairperson for the Annual
30 Meeting.

31
32 Moved by _____ Seconded by _____

33
34 Action _____

35
36
37 III. ADOPTION OF SPECIAL PROCEDURES FOR VOTERS

38
39 The suggested procedures for participating in the Annual Meeting are found on page 6. A motion
40 to adopt these procedures is needed.

41
42 Moved by _____ Seconded by _____

43
44 Action _____

45
46
47 * Voter Eligibility: US Citizen;
48 Age 18 on Election Day, July 27, 2009
49 Resident of the School District of Fort Atkinson for Ten Days Prior to July 27, 2009
50

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5 **IV. APPROVAL OF MINUTES**

6
7 Minutes of the July 28, 2008, Annual Meeting

8
9 The minutes of the July 28, 2008, Annual Meeting are printed on pages 7-9. A motion to approve
10 these minutes is needed.

11
12 Moved by _____ Seconded by _____

13
14 Action _____

15
16
17 **V. PRESIDENT'S REPORT**

18
19 The **President's Report** is printed on page 10. President Scott Johnson will summarize the
20 printed report.

21
22
23 **VI. SUPERINTENDENT'S REPORT**

24
25 The **Superintendent's Report** is printed on page 11. Superintendent of Schools Dr. James
26 Fitzpatrick will summarize the printed report.

27
28
29 **VII. TREASURER'S REPORT**

30
31 The **Treasurer's Report** is printed on pages 12-14. Treasurer Bob Chady will summarize the
32 printed report.

33
34
35 **VIII. BUDGET HEARING**

36
37 Director of Business Services Jason Demerath will present the budget. A question and answer
38 period will follow.

39
40
41 **IX. TAX LEVY ADOPTION**

42
43 The following resolution is recommended for adoption by the electors at the Annual Meeting:

44
45 **BE IT RESOLVED** that a tax of \$14,399,721 be levied on the School
46 District of Fort Atkinson to fund the budget as proposed for the 2009-
47 2010 school year.

48
49 Moved by _____ Seconded by _____

50
51 Action _____

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3
4
5 **X. SALARY OF BOARD MEMBERS**

6
7 Wisconsin State Statute 120.10(3) authorizes the Annual Meeting to vote for annual salaries for
8 School Board members. The following resolution is recommended for adoption by the electors at the
9 Annual Meeting:

10
11 **BE IT RESOLVED that an annual salary of \$1,200 per member be**
12 **approved for the members of the Board of Education.**

13
14 Moved by _____ Seconded by _____

15
16 Action _____

17
18 **XI. REIMBURSEMENT OF SCHOOL BOARD MEMBERS**

19
20 Wisconsin State Statute 120.10(4) authorizes the Annual Meeting to vote for the payment of actual and
21 necessary expenses of a School Board member when traveling in the performance of duties. The
22 following resolution is recommended for adoption by the electors at the Annual Meeting:

23
24 **BE IT RESOLVED that members of the Board of Education of the School**
25 **District of Fort Atkinson be reimbursed for actual and necessary expenses**
26 **when traveling in the performance of duties as a School Board Member.**

27
28 Moved by _____ Seconded by _____

29
30 Action _____

31
32 **XII. AUTHORIZATION OF STATE TRUST FUND LOAN BORROWING**

33
34 **XIII. OTHER NEW BUSINESS**

35
36 **XIV. ADJOURNMENT**

37
38 A motion from the floor for adjournment of the 2009 Annual Meeting of the School District of
39 Fort Atkinson is needed.

40
41 Moved by _____ Seconded by _____

42
43 Action _____

44
45 Respectfully submitted,

46
47 Dr. James Fitzpatrick, Superintendent of Schools

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SPECIAL PROCEDURES FOR VOTERS
ATTENDING
THE ANNUAL MEETING

1. **Procedure for Addressing the Chair:** Speakers should proceed to a microphone, state their name and place of residence, and then address the chair.

2. **Procedure for All Motions Not Related to Specific Agenda Items:** These motions will be made under Other New Business.

3. **Procedure for Discussion:** Speakers on an issue should limit their presentation to three minutes. Speakers should speak to an issue on the floor only once. Equal time will be provided to hear both pro and con of any floor issue. Since this is a “grass roots” meeting much like the “old town hall” meeting, every person is invited to participate.

4. **Procedure for Voting:** All votes will be made by voice vote unless a division of the house is specifically requested.

5. **Discretion of the Chair:** The above procedures may be modified by the chair where clarification of issues and positions is necessary.

1 School District of Fort Atkinson

2
3 **ANNUAL MEETING MINUTES**

4
5 **July 28, 2008**
6 **8:00 PM**

7
8 Boardroom
9 Luther Administration Center
10 201 Park Street
11 Fort Atkinson, Wisconsin 53538
12

13 **CALL TO ORDER**

14 The 2008 Annual Meeting of the School District of Fort Atkinson convened in open session at 8:00 p.m. in the
15 Boardroom of the Luther Administration Center, 201 Park Street, Fort Atkinson, Wisconsin. President Kent
16 Koebke called the meeting to order. Other members of the Board of Education present were Vice-President Carrie
17 Chisholm, Treasurer Bob Chady, Clerk Rodger Thomann and Member Scott Johnson. Mr. Koebke announced
18 proper notice of the meeting had been given.
19

20 **Introduction of Parliamentarians**

21 Mr. Koebke introduced Ms. Julia Johnson, a representative of the Fort Atkinson FFA, and Attorney Chris Rogers of
22 Fort Atkinson.
23

24 **Introduction of School Board Members and Administrators**

25 Mr. Koebke announced the names of the Board of Education and Superintendent Dr. James Fitzpatrick introduced
26 administrative staff members.
27

28 **Voter Eligibility Explained**

29 Mr. Koebke explained a voter at the Annual Meeting must be a citizen of the United States, eighteen years of age on
30 Election Day and a resident of the School District of Fort Atkinson for ten days prior to July 28, 2008.
31

32 **ELECTION OF CHAIRPERSON**

33 Mrs. Carrie Chisholm, 1102 McCoy Park Road, Fort Atkinson, moved Mrs. Laurette Greenhalgh, 424 S. High
34 Street, Fort Atkinson, be nominated as chairperson for the Annual Meeting and Mr. Bob Chady, W5780 Edgewater
35 Road, Fort Atkinson, seconded the motion. Mrs. Greenhalgh was elected chairperson by voice vote.
36

37 **ADOPTION OF SPECIAL PROCEDURES FOR VOTERS**

38 Mrs. Greenhalgh reviewed the special procedures for voters attending the Annual Meeting. Mr. Scott
39 Johnson, N3043 Haas Road, Jefferson, moved the special procedures for voters be adopted and Mrs. Chisholm
40 seconded the motion. The motion passed by voice vote.
41

42 **APPROVAL OF MINUTES**

43 Mr. Rick Brietzke, N3123 Buena Vista Road, Fort Atkinson, moved the minutes of the July 23, 2007, Annual
44 Meeting be approved and Mrs. Chisholm seconded the motion. The motion passed by voice vote. Mr. Ardell
45 Wiederhoeft, 116 W. Cramer Street, Fort Atkinson, moved the minutes of the December 6, 2007, Special Meeting
46 be approved and Mr. Chady seconded the motion. The motion passed by voice vote.
47

48 **PRESIDENT'S REPORT**

49 President Koebke presented the President's Report, which included the following:

- 50 • It was an exceptional year for the District;
51 • Thanking Dr. Fitzpatrick for his efforts in promoting and supporting the School District;
52 • Thanking the administrators, staff and parents for the tremendous support for finer education;
53 • Pleased with the implementation of four-year old kindergarten with community partners;

- 1 • The District continues to move forward with pre K-12 balanced literacy, aligning the curriculum, building good
- 2 assessment tools and providing interventions driven by the "3 Questions," which are: 1) What is it we want our
- 3 students to know (curriculum), 2) How will we know that they learned it (assessment), and 3) What will we do
- 4 if they need more help or more challenge (interventions);
- 5 • The 2008-13 Strategic Plan was successfully developed;
- 6 • Continues to be accountable to the taxpayers and fiscally prudent;
- 7 • Thanking the taxpayers and citizens for the support.

8 9 **SUPERINTENDENT'S REPORT**

10 Dr. James Fitzpatrick presented the Superintendent's Report, which included the following:

- 11 • The District has great momentum to live up to the District's mission in providing programs and opportunities
- 12 for all students so they will reach their academic and personal potential;
- 13 • Technology seemingly changes by the minute and the Strategic Plan is built upon the premise the District will
- 14 gain more knowledge and information and will adjust to societal changes;
- 15 • The "people" who make up the educational team is what makes the District great;
- 16 • Thanking the Board of Education, Administration, faculty and staff for the "awesome performance" the past
- 17 year.

18 19 **TREASURER'S REPORT**

20 Mr. Bob Chady presented the Treasurer's Report, which included the following:

- 21 • The District remains committed to allowing the Academic Agenda drive District initiatives;
- 22 • Highlights of the past year included upgrading the heating and ventilating systems to geothermal technology,
- 23 continues maintenance of existing buildings, refunding of the General Obligation Bonds, the electors granted
- 24 authority to exceed revenue cap and the District honored the commitment of saving resources for future deficits,
- 25 4-year old kindergarten will increase state revenues and District electors approved a new lease agreement with
- 26 Charter Cable Partners, LLC, which will provide fiber optic to Barrie and Rockwell Elementary Schools;
- 27 • The Board accepted Business Manager Ardell Wiederhoeft's retirement request and hired Mr. Jason Demerath,
- 28 who will start in January of 2009;
- 29 • Contracts were reached with AFSCME, Double Three Transportation and Fort HealthCare;
- 30 • Future items include the negotiating of the contract with Fort Educational Association (FEA) which expires at
- 31 the end of the 2008-09 school year, Fund 50 Food Service account will be monitored and the referendum
- 32 monies will carry the District through 2010-11 school year;
- 33 • 2008-09 Budget information.

34 35 **BUDGET HEARING**

36 Mr. Chady presented information on the proposed budget.

37 38 **LEVY ADOPTION**

39 Mr. Chady moved the following resolution be adopted by the electors of the Annual Meeting:

40
41 **BE IT RESOLVED that a tax of \$14,136,974 be levied on the School District**
42 **of Fort Atkinson to fund the budget as proposed for the 2008-09 school year.**

43
44 Mr. Wiederhoeft seconded the motion. Motion passed by voice vote.

45 46 **SALARY OF BOARD MEMBERS**

47 Mr. Brietzke, Fort Atkinson, moved the following resolution be approved:

48
49 **BE IT RESOLVED that an annual salary of \$1,200 per member be**
50 **approved for the members of the Board of Education.**

51
52 Mr. Wiederhoeft seconded the motion. The motion passed by voice vote.

53 54 **REIMBURSEMENT OF SCHOOL BOARD MEMBERS**

1
2 Mr. Jeff Zaspel, 1112 Seminole Drive, Fort Atkinson, moved the following resolution be approved:

3
4 **BE IT RESOLVED** that members of the Board of Education of the School
5 **District of Fort Atkinson be reimbursed for actual and necessary expenses**
6 **when traveling in the performance of duties as a School Board member.**

7
8 Mr. Tony Bolz, W5958 Lee Drive, Fort Atkinson, seconded the motion. The motion passed by voice vote.

9
10 **OTHER NEW BUSINESS**

11 There was no new business.

12
13 **ADJOURNMENT**

14 Mr. Zaspel moved the Annual Meeting be adjourned and Mr. Bolz seconded the motion. The meeting was
15 adjourned at 8:50 p.m. by voice vote.

16
17 Respectfully submitted,

18
19 Debra Kopps
20 Annual Meeting Secretary

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PRESIDENT'S REPORT

Amidst the story of the year being the economic downturn our country is experiencing, the School District of Fort Atkinson accomplished much during the 2008-09 school year! The good news of our District for the future is somewhat tempered by the harsh reality of the recent state budget enacted into law July 1. I will yield to our Board Treasurer Bob Chady to share the District's financial standing while I remind all stakeholders of our District mission in that the *School District of Fort Atkinson is committed to delivering the quality opportunities and services each child needs to achieve his or her academic and personal potential!*

As President of the Board of Education, it would seem most appropriate to first thank the citizens of our learning community for their great support of our schools. While not wanting to dwell on the fiscal agenda, I think it is apparent to all that without the support of our citizens who voted to approve a revenue cap override in April of 2006, we would be cutting programs and services in order to present a balanced budget tonight. This is the unfortunate position many districts in this state now find themselves at their annual meetings, being held across the State of Wisconsin. Therefore, a big THANK YOU to our citizens for valuing and supporting education.

I would also like to thank my fellow Board Members, who I have had the chance to work closely with for the better part of two years. You will not find individuals who are more dedicated, or stronger advocates for finer education that meets the needs of ALL learners. I consider it a great honor to serve with my fellow Board Members, who I respect deeply as very talented and caring people who all bring a special perspective to their Boardmanship that brings out the best in all of us. I am humbled to serve as President of this Board in this the 2009-10 school year. As a governance body, duly elected by you the taxpayers, we are grateful for the confidence placed in us to be good stewards of the citizens in providing governance oversight and utilizing our resources wisely.

I also want to thank Dr. Fitzpatrick our superintendent, the administrators, educators, and staff for their dedicated efforts put forth each day. The educational team we have assembled in the learning community of Fort Atkinson has helped us grow our reputation as one of the finest school districts in Wisconsin. Their innovation, teamwork, and drive have established us as a school district of choice, and a beacon district that other districts aspire to emulate.

Before moving on, I would be remiss if I did not to take this opportunity to thank our community partners who helped make our first year of 4-Year-Old Kindergarten such a great success. Under the splendid leadership of our Barrie Elementary Principal Dr. Tony Bolz, this past year we enrolled 186 children in this program. For next year, we have a current enrollment of 199 children pre-registered. We believe the socio-emotional and educational development of four-year-olds is crucial to the readiness skills needed, and now provided, to all children, not just some, in now entering regular kindergarten programming.

Our Strategic Plan, in my opinion, has been our guiding light. Because our goals are spelled out in our academic, fiscal and communication agendas, we are able to monitor and provide oversight for the teaching and learning we hope to accomplish each year.

We have established five-year plans that we evaluate, review, and revise each year. A key component of our academic agenda has been to review our data points. These reports reveal much more about the academic and personal progress of our students than the narrow snapshot one gets from solely reviewing and relying on standardized test scores to tell the story of our learning journey in Fort Atkinson.

Our fiscal agenda is to support our academic and instructional programming. Our communication agenda is to interact and engage with our students, parents, and families in fostering meaningful relationships that will keep us focused on continual improvement. To this end, our Board of Education, the administration, and our educators and staff will strive to serve the needs of all children in the learning community of Fort Atkinson.

Respectfully submitted

Scott Johnson, President

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SUPERINTENDENT'S REPORT

We live in very interesting times. Change in our society is rampant and schools play a key role in the challenges and excitement these early years of the 21st century have brought to the forefront of the society we live in. Therefore, it is incumbent on us to plan for the future while maintaining the institutional values that are so much a part of our school district's rich history.

As we plan forward, I would be remiss if I were not to reflect upon the goals addressed this past year.

We implemented a new Social Studies program at our elementary level. We continued our work on balanced literacy throughout the entire school system. We have made strides in trying to differentiate our teaching strategies so to align better with the individual learning styles of our students. Our differentiation efforts compliment Response to Intervention (RtI) initiatives all schools in our nation are working toward in providing research-based interventions reliably and effectively, in helping each student learn and succeed. In addition, we continue to be guided by our three main questions:

1. What is it we want our students to learn (our curriculum).
2. How will we know if they learned it (our assessment).
3. What will we do if they need more help or more challenge (our interventions).

These questions have served us well in our quest to continually improve the teaching and learning in our district.

The conversation about change cannot be held without discussing the impact of technology as a part of everyday learning in Fort Atkinson. As we move forward with technology, we must view it not as separate from instruction but as a way to enhance what it is we want our students to learn. For we must recognize the children entering our schools today, are digital natives, linked to anywhere in the world they want to go at the click of a mouse! They have grown up in front of screens where graphics, sounds, and information pass quickly, and their multi-tasking natures now offer us great opportunities as well as some serious challenges. The social networks of FACEBOOK and MYSPACE that have been around quite awhile now, will evolve into something else just as texting, blogs, Wiki's and Twitter, unheard of five years ago, will eventually be replaced by something else. How do we, as schools, use such powerful tools to our advantage in helping students advance their learning? This is both a fascinating and frightening question. However, what we do know is there is no turning back, the only direction is FORWARD!

Another very important strategic plan goal is in the area of diversity. We want to continue our efforts in building our learning communities into places where respect and honor are readily recognized as a signature characteristic of our School District. For in the words of consultant, Cathy Hamilton, who did some great work with us both this year and last year, we want to build and maintain a culture in our schools where everyone feels safe, honored, and invited! This past year we held trainings for 250 students in grades six through twelve, while also in-servicing our staff. We will continue these efforts this upcoming school year; where respect and honor are in place, the learning is rich!

As we approach the 2009-2010 school year, we will continue our efforts with differentiated instruction, Response to Intervention (RtI), and balanced literacy. We look forward to developing a new K-5 Science program and providing staff development to our staff on improved grade reporting systems at the Middle and High Schools, and strengthening our school-to-career programming. It will be an exciting year!

As I close this report, we must always be mindful that amidst all the innovations, goals, and initiatives we set forth, our true success will be judged on the relationships we build among all in our learning community in assuring all children have every opportunity to develop their academic and personal potential.

Respectfully submitted,

Dr. James Fitzpatrick, Superintendent

TREASURER'S REPORT

Mission Statement

The School District of Fort Atkinson is committed to delivering the quality opportunities and services each student needs to achieve his or her academic and personal potential.

I lead with our mission statement intentionally as it provides not only our direction, but also our commitment to providing for the educational advancement of *ALL* students. Unlike those districts where the financial resources (budget) or constraints there to adversely affect the academic agenda and student learning opportunities, the School District of Fort Atkinson's academic agenda takes precedence in the budget process. Our Strategic Plan drives our annual budget, which can be credited to the taxpayer's approval of the current operating referendum. Without those additional resources, we would be facing the same decisions other districts are facing right now...where to cut rather than where to provide quality opportunities.

The 2008-09 school year was filled with changes within the District, and in particular, in the Business Office. This past year we completed our HVAC conversion to geothermal, turned around a food service program that was operating at an annual loss, welcomed a new Director of Business Services, and implemented a new financial software system. Above and beyond what happened here locally, there was a federal financial stimulus bill passed and a state budget approved that will both have a profound impact on our District for the coming year as well as into the foreseeable future. As for the 2008-09 school year, I am happy to report we finished the year in strong financial shape, allowing us to properly plan for the challenges that lie ahead.

Some Highlights of the Past Year:

HVAC/Geothermal Project Completion – In April 2006, District electors authorized the School Board to proceed with updating the HVAC systems at Barrie, Purdy and Rockwell Elementary Schools along with the Middle School to geothermal technology.

The conversion for all schools was completed this past spring providing an initial estimated savings of approximately \$65,000 per year. We hope to increase that savings by fine-tuning the systems at all the schools over the upcoming year as we work to determine optimal utilization throughout each heating and cooling season. We are all looking forward to a full analysis of the savings this technology will provides each year!

Buildings & Grounds – Through the years, the electors have provided the School District with the means to maintain our existing buildings. Accolades go out to the District's maintenance and custodial staff, past School Board members, and others who have contributed to the upkeep of our facilities. We need not look far to find other school districts that are experiencing troubles in these areas due to the financial situation many districts find themselves in. Unfortunately, maintenance is one of the first areas to be looked at for reductions as many view it as not directly affecting education. Fortunately, our Board and community view these facilities as community facilities and know that a safe and secure environment is crucial to the education of our children. Therefore, the Board is constantly updated on the status of the District's buildings and grounds through what is at least an annual update of the five- and ten-year maintenance plans. This ongoing update allows the Board to plan accordingly for future expenditures to maintain the quality buildings our community desires. This prior proper planning prevents more costly issues from arising in the future.

Food Service – I am extremely happy to report at the end of the 2008-09 school year our food service program is no longer operating at an annual deficit. In the past, our general budget had to subsidize the program as it lost money each year. Due to the diligence of our food service staff and our Student Nutrition Director, Armando Martinez, we are able to hold all 2009-10 food service prices at the same level as they were in 2008-09. We hope this helps those that are struggling in these difficult economic times and we remind those in our community who need assistance in paying for their children's meals to complete a Free and Reduced Meal Application for the upcoming year. A proper nutrition is imperative to being able to learn as much as possible while in the classroom. As is often said, if a student does not have their basic needs met such as food and shelter, learning is not going to be one of their top priorities.

1 Now that the program is on sound financial footing, we look to the future of the program and consider all the
2 possibilities it has to offer in terms of nutritional and even educational value. Your participation in this program is
3 greatly appreciated and we hope you will continue to support it as we look at improvements that can be made.
4

5 **Director of Business Services Change** – On January 1, 2009, we welcomed Jason Demerath as the new Director of
6 Business Services. Jason came to us from the Waukesha School District where he was the Controller and the
7 Interim Director of Business Services. We welcome him and his family to the Fort Atkinson community. I would
8 also like to take this opportunity to thank Ardell Wiederhoeft for his many years of service to the School District of
9 Fort Atkinson and wish him well in his endeavors in retirement.
10

11 Some Future Considerations:

12 **Financial Software Migration** – Along with the change in the Director of Business Services comes a change in the
13 financial software used by the District. The prior software was built by Mr. Wiederhoeft when he assumed the
14 position in the late 1970's. Beginning July 1st, the conversion was made to a system that is widely utilized by
15 schools across the state, *Skyward*. *Skyward* is headquartered in Stevens Point and is the software system utilized by
16 the majority of the districts in Wisconsin, Texas, and Washington. The next year will be one of transition for the
17 business office staff as they learn how to operate the new system and utilize it to its' full potential. We hope this
18 new system will be a valuable support mechanism to our employees as they focus on educating our students.
19

20 **Federal Financial Stimulus** – This past February the federal government passed a stimulus package that provided
21 funds directly to school districts. While it was widely reported these funds could be used to offset the effect of state
22 budget cuts, this statement is not entirely correct. The federal funds came through programs with specifically
23 designated uses for items and services that are provided to students with special needs and students of poverty.
24 These federal programs already had regulations in place on how funds associated with them could be used. This
25 limits what the District can use these stimulus funds for. Therefore, the administration will present a stimulus
26 spending plan at the August Board Meeting after careful consideration and exploration of all options available.
27

28 **Wisconsin State Budget** – On June 29, 2009, Governor Doyle signed the 2009-11 Biennial Budget into law. Given
29 the difficult economic times there was not one part of state government that was not effected. Unfortunately, that
30 included public education. As has been widely reported, there was a large cut in state aid along with other
31 provisions of the budget that have an impact on how school districts throughout the state operate. These provisions
32 included a reduction in the per pupil amount increase in the revenue limit and the elimination of the Qualified
33 Economic Offer (QEO) for teacher's union bargaining. In the early 1990's, when the revenue limits were put in
34 place there was what was called a "three-legged stool" of school finance in the state. The three legs were the
35 revenue limit, the QEO, and the state providing two-thirds funding to local districts. With the passing of this
36 biennial budget, the state has eliminated two of the three legs by reducing their state aid commitment and
37 eliminating the QEO. The only leg still in place is the revenue limit, which was ratcheted down in this budget.
38 These changes have had an impact on both the upcoming budget and our planning into the future.
39

40 **2009/10 Budget** – The District's budget being presented tonight varies from those presented in both May and June
41 as a result of the state budget that was passed at the end of June. Prior to adding the stimulus funds to the budget, in
42 2009/10 we are currently budgeting for a deficit of approximately \$107,000. This is a large change from the
43 original budget that was presented in May, which estimated a surplus of approximately \$145,000. This drastic
44 difference demonstrates the effects of the state budget changes at the local level. This may not be apparent from the
45 budget presented tonight as it may appear that a surplus exists. This surplus is a result of the use of stimulus funds
46 from the federal government, which will be detailed at the August Board Meeting. This surplus is being used to
47 offset the long-term impact of the state budget changes as outlined below.
48

49 **Long-Term Financial Planning** – As previously mentioned, the recently passed biennial budget has had an impact
50 on the District's financial planning. In looking at the long-term effects, it is estimated in 2011-12, the first year
51 following the sunset of the current operating referendum, the cumulative deficit will be in excess of \$800,000. Prior
52 to the changes at the state level, it was estimated that in 2011-12 there would be a cumulative surplus of over
53 \$400,000. This is a \$1.2 million difference just three years down the road. Obviously this presents some obstacles
54 as we look at long-term financial planning and the presentation of another referendum to our community as the

1 current referendum sunsets. Over the course of the next fiscal year, we will begin our planning to present this
2 referendum to the community. Part of this planning will be to demonstrate how we honored all of the promises we
3 made as we operated under the first referendum and to evaluate current operations and determine where efficiencies
4 exist to take advantage of them. I hope this will demonstrate to the community that what we ask for is sorely
5 needed to continue to deliver the quality opportunities and services each student needs to achieve his or her
6 academic and personal potential.

7
8 On behalf of the Board of Education for the School District of Fort Atkinson, we ask for your continued support and
9 we look forward to working with you to make the School District of Fort Atkinson the best it can be.

10
11 Respectfully submitted,
12
13 Bob Chady
14 Treasurer, Board of Education

SCHOOL DISTRICT OF FORT ATKINSON

2009-2010 BUDGET

INFORMATION

School District of Fort Atkinson

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BUDGET ADOPTION 2009-2010			
GENERAL FUND (FUND 10)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
Beginning Fund Balance (Account 930 000)	7,477,262.04	8,041,418.27	7,882,464.76
Ending Fund Balance, Reserved (Acct. 931 000)	1,325,349.00	1,269,951.00	901,024.00
Ending Fund Balance, Designated (Acct. 932 000)	6,716,069.27	6,612,513.76	6,981,440.76
Ending Fund Balance, Unappropriated (Acct. 933 000)	0.00	0.00	0.00
TOTAL ENDING FUND BALANCE (ACCT. 930 000)	8,041,418.27	7,882,464.76	8,044,351.76
REVENUES & OTHER FINANCING SOURCES			
100 Transfers-in	0.00	0.00	0.00
Local Sources			
210 Taxes	10,936,937.00	11,186,418.00	11,857,532.00
240 Payments for Services	4,282.37	6,225.00	0.00
260 Non-Capital Sales	14,445.00	13,477.88	0.00
270 School Activity Income	70,044.00	75,936.25	75,500.00
280 Interest on Investments	174,460.75	34,734.67	25,000.00
290 Other Revenue, Local Sources	164,976.41	363,975.64	158,850.00
Subtotal Local Sources	11,365,145.53	11,680,767.44	12,116,882.00
Other School Districts Within Wisconsin			
310 Transit of Aids	10,588.05	14,953.21	0.00
340 Payments for Services	563,454.50	650,788.00	916,500.00
380 Medical Service Reimbursements	0.00	0.00	0.00
390 Other Inter-district, Within Wisconsin	0.00	0.00	0.00
Subtotal Other School Districts within Wisconsin	574,042.55	665,741.21	916,500.00
Other School Districts Outside Wisconsin			
440 Payments for Services	0.00	0.00	0.00
490 Other Inter-district, Outside Wisconsin	0.00	0.00	0.00
Subtotal Other School Districts Outside Wisconsin	0.00	0.00	0.00
Intermediate Sources			
510 Transit of Aids	3,227.96	2,850.58	0.00
530 Payments for Services from CCDEB	0.00	0.00	0.00
540 Payments for Services from CESA	0.00	0.00	0.00
580 Medical Services Reimbursement	0.00	0.00	0.00
590 Other Intermediate Sources	0.00	0.00	0.00
Subtotal Intermediate Sources	3,227.96	2,850.58	0.00
State Sources			
610 State Aid -- Categorical	167,741.00	165,046.50	163,024.00
620 State Aid -- General	14,164,621.00	13,252,163.00	15,298,193.00
630 DPI Special Project Grants	9,839.94	136,347.40	63,291.00
640 Payments for Services	0.00	0.00	0.00
650 Student Achievement Guarantee in Education (SAGE Grant)	0.00	0.00	0.00
660 Other State Revenue Through Local Units	2,892.33	3,030.93	2,700.00
690 Other Revenue	51,065.00	64,909.24	65,699.00
Subtotal State Sources	14,396,159.27	13,621,497.07	15,592,907.00

	GENERAL FUND (FUND 10)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
1	GENERAL FUND (FUND 10)			
2	<i>Federal Sources</i>			
3	710 Transit of Aids	0.00	1,703,857.00	0.00
4	720 Impact Aid	0.00	13,489.46	0.00
5	730 DPI Special Project Grants	109,575.10	175,843.64	351,249.00
6	750 IASA Grants	107,272.32	157,139.85	244,454.00
7	760 JTPA	0.00	0.00	0.00
8	770 Other Federal Revenue Through Local Units	0.00	0.00	0.00
9	780 Other Federal Revenue Through State	0.00	0.00	0.00
10	790 Other Federal Revenue - Direct	0.00	0.00	0.00
11	Subtotal Federal Sources	216,847.42	2,050,329.95	595,703.00
12	<i>Other Financing Sources</i>			
13	850 Reorganization Settlement	0.00	0.00	0.00
14	860 Compensation, Fixed Assets	40.00	5,356.93	5,000.00
15	870 Long-Term Obligations	0.00	0.00	0.00
16	Subtotal Other Financing Sources	40.00	5,356.93	5,000.00
17	<i>Other Revenues</i>			
18	960 Adjustments	0.00	0.00	0.00
19	970 Refund of Disbursement	20,400.88	9,383.07	15,000.00
20	980 Medical Service Reimbursement	52,323.47	86,028.27	55,000.00
21	990 Miscellaneous	14,957.64	10,880.00	12,000.00
22	Subtotal Other Revenues	87,681.99	106,291.34	82,000.00
23	TOTAL REVENUES & OTHER FINANCING SOURCES	26,643,144.72	28,132,834.52	29,308,992.00
24	EXPENDITURES & OTHER FINANCING USES			
25	<i>Instruction</i>			
26	110 000 Undifferentiated Curriculum	3,814,572.73	4,047,778.69	4,459,568.00
27	120 000 Regular Curriculum	7,088,381.26	7,597,949.29	7,922,434.00
28	130 000 Vocational Curriculum	1,152,093.23	1,157,859.43	1,125,958.00
29	140 000 Physical Curriculum	1,042,267.92	1,060,511.67	988,168.00
30	160 000 Co-Curricular Activities	280,141.45	298,729.29	319,110.00
31	170 000 Other Special Needs	325,396.45	396,794.94	435,996.00
32	Subtotal Instruction	13,702,853.04	14,559,623.31	15,251,234.00
33	<i>Support Sources</i>			
34	210 000 Pupil Services	702,027.58	751,367.06	715,768.00
35	220 000 Instructional Staff Services	1,392,247.78	1,488,710.15	1,593,064.00
36	230 000 General Administration	344,351.42	370,918.55	501,024.00
37	240 000 School Building Administration	1,383,461.53	1,417,608.54	1,503,453.00
38	250 000 Business Administration	4,730,486.79	5,447,614.19	5,299,743.00
39	260 000 Central Services	560,643.61	581,919.25	588,223.00
40	270 000 Insurance & Judgments	171,216.40	180,425.59	188,228.00
41	280 000 Debt Services	1,452.00	1,452.00	2,000.00
42	290 000 Other Support Services	320,207.90	64,498.00	60,396.00
43	Subtotal Support Sources	9,606,095.01	10,304,513.33	10,451,899.00
44	<i>Non-Program Transactions</i>			
45	410 000 Inter-fund Transfers	2,491,927.84	2,590,723.17	2,553,088.00
46	430 000 Instructional Service Payments	276,644.49	831,509.55	887,884.00
47	490 000 Other Non-Program Transactions	1,468.11	5,418.67	3,000.00
48	Subtotal Non-Program Transactions	2,770,040.44	3,427,651.39	3,443,972.00
49	TOTAL EXPENDITURES & OTHER FINANCING USES	26,078,988.49	28,291,788.03	29,147,105.00

SPECIAL PROJECT FUNDS (FUNDS 21, 23, 27, 29)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	7,038.81	5,369.94	2,444.81
900 000 Ending Fund Balance	5,369.94	2,444.81	1,207.81
TOTAL REVENUES & OTHER FINANCING SOURCES	4,084,511.46	4,298,863.28	4,871,284.00
100 000 Instruction	2,940,595.64	3,138,446.01	3,599,183.00
200 000 Support Services	973,137.78	953,952.70	1,027,552.00
400 000 Non-Program Transactions	172,446.91	209,389.70	245,786.00
TOTAL EXPENDITURES & OTHER FINANCING USES	4,086,180.33	4,301,788.41	4,872,521.00

DEBT SERVICE FUND (FUNDS 38, 39)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	936,275.34	922,920.10	899,337.01
900 000 ENDING FUND BALANCES	922,920.10	899,337.01	869,711.01
TOTAL REVENUES & OTHER FINANCING SOURCES	11,438,758.83	2,553,530.67	2,543,189.00
281 000 Long-Term Capital Debt	2,807,114.07	2,577,113.76	2,572,815.00
282 000 Refinancing	8,645,000.00	0.00	0.00
283 000 Operational Debt	0.00	0.00	0.00
285 000 Post Employment Benefit Debt	0.00	0.00	0.00
289 000 Other Long-Term General Obligation Debt	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
TOTAL EXPENDITURES & OTHER FINANCING USES	11,452,114.07	2,577,113.76	2,572,815.00
842 000 INDEBTEDNESS, END OF YEAR	24,260,000.00	22,635,000.00	20,955,000.00

CAPITAL PROJECTS FUND (FUNDS 41, 48, 49)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	8,315,660.44	1,969,868.06	0.00
900 000 Ending Fund Balance	1,969,868.06	0.00	0.00
TOTAL REVENUES & OTHER FINANCING SOURCES	325,884.12	72,234.89	0.00
100 000 Instructional Services	0.00	0.00	0.00
200 000 Support Services	6,671,676.50	2,042,102.95	0.00
300 000 Community Services	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
TOTAL EXPENDITURES & OTHER FINANCING USES	6,671,676.50	2,042,102.95	0.00

FOOD SERVICE FUND (FUND 50)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	0.83	0.38	88,210.72
900 000 ENDING FUND BALANCE	0.38	88,210.72	109,660.72
TOTAL REVENUES & OTHER FINANCING SOURCES	1,229,952.62	1,289,263.58	1,280,665.00
200 000 Support Services	1,229,953.07	1,201,053.24	1,259,215.00
400 000 Non-Program Transactions	0.00	0.00	0.00
TOTAL EXPENDITURES & OTHER FINANCING USES	1,229,953.07	1,201,053.24	1,259,215.00

EMPLOYEE BENEFIT TRUST FUND (FUND 73)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	20,633.08	51,746.26	77,397.95
900 000 ENDING FUND BALANCE	51,746.26	77,397.95	106,780.95
TOTAL REVENUES & OTHER FINANCING SOURCES	627,344.37	580,164.50	617,041.00
200 000 Support Services	596,231.19	0.00	0.00
400 000 Non-Program Transactions	0.00	554,512.81	587,658.00
TOTAL EXPENDITURES & OTHER FINANCING USES	596,231.19	554,512.81	587,658.00

COMMUNITY SERVICE FUND (FUND 80)	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
900 000 Beginning Fund Balance	14,231.52	12,767.00	15,914.15
900 000 ENDING FUND BALANCE	12,767.00	15,914.15	15,914.15
TOTAL REVENUES & OTHER FINANCING SOURCES	21,335.27	24,977.87	20,050.00
200 000 Support Services	0.00	0.00	0.00
300 000 Community Services	22,799.79	21,830.72	20,050.00
400 000 Non-Program Transactions	0.00	0.00	0.00
TOTAL EXPENDITURES & OTHER FINANCING USES	22,799.79	21,830.72	20,050.00

PROPOSED PROPERTY TAX LEVY

FUND	Audited Annual 2007-2008	Unaudited Annual 2008-2009	Budget 2009-2010
General Fund	10,935,813.00	11,184,950.00	11,852,239.00
General Fund (Prior Year)	1,124.00	1,468.00	5,293.00
Referendum Debt Service Fund	2,581,399.00	2,547,464.00	2,542,189.00
TOTAL SCHOOL LEVY	13,518,336.00	13,733,882.00	14,399,721.00
PERCENTAGE INCREASE --			
TOTAL LEVY FROM PRIOR YEAR		1.59%	4.85%

1 (160000) CO-CURRICULAR ACTIVITIES
2
3 (161000) Co-Curricular Academics
4 (162000) Athletics/Sports
5 (163000) Co-Curricular Music
6 (164000) School/Public Service
7 (166000) Grade/Class Activity
8
9
10 (170000) SPECIAL NEEDS PROGRAMS
11
12 (171000) Culturally/Socially Disadvantaged Education
13 (172000) Gifted and Talented Education
14 (173000) Homebound Instruction for Non-Special Education Students
15 (174000) School-Age Parent Education
16 (179000) Other Special Needs Programs
17
18
19
20 SUPPORT SERVICES
21 (210000) PUPIL SERVICES
22
23 (212000) Social Workers
24 (213000) Guidance Services (Counselors)
25 (214000) Health Services (School Nurse)
26 (215000) Psychologists
27 (217000) Attendance Services (School Attendance Offices)
28 (218000) Physical/Occupational Therapy Services
29 (219000) Other Pupil Services
30
31
32 (220000) INSTRUCTIONAL STAFF SERVICES
33
34 (221000) Improvement of Instruction (Director of Instruction)
35 (222000) Educational Media (Library & Audio-Visual)
36 (223000) Supervision/Coordination of Instruction (Reading Coord., etc.)
37 (229000) Other General Administration
38
39
40 (230000) GENERAL ADMINISTRATION
41
42 (231000) Board of Education
43 (232000) District Administrator
44
45
46 (240000) SCHOOL BUILDING ADMINISTRATION
47
48 (241000) Office of Building Principals
49
50
51

1 (250000) BUSINESS ADMINISTRATION
2
3 (251000) Business Office
4 (252000) Fiscal Operations
5 (253000) Operation of Plant
6 (254000) Maintenance of Plant
7 (255000) Facility Acquisition/Remodeling
8 (256000) Pupil Transportation
9
10 (260000) CENTRAL SERVICES
11
12 (263000) Information Services (Telephone, Postage, Publications)
13 (264000) Support Staff Services (Inservice, Employee Assistance Program)
14 (266000) Data Processing Services
15 (269000) Technology Office
16
17
18 (270000) INSURANCE & JUDGMENTS (Property, Liability, Workers Comp.)
19
20
21 (280000) DEBT SERVICE (Paying Agent Fees, Temporary Borrowing Expenses)
22
23
24 (290000) OTHER SUPPORT SERVICES
25
26 (291000) Early Retirement (Post-Employment) Benefits
27 (292000) CESA General Administration
28
29
30
31 NON-PROGRAM TRANSACTIONS
32 (410000) INTERFUND OPERATING TRANSFERS
33
34
35 (430000) PURCHASED INSTRUCTIONAL SERVICES
36
37 (431000) General Tuition - Non-Open Enrollment
38 (435000) General Tuition - Open Enrollment
39 (436000) Special Education Tuition - Non-Open Enrollment
40 (437000) Special Education Tuition - Open Enrollment
41
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43 (490000) OTHER NON-PROGRAM TRANSACTIONS
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APPENDIX #2

The following is a repetition of the General Fund (Fund 10) Expenditures presented in this booklet. The presentation below is sorted by object rather than by function.

	AUDITED 2007 - 2008	UNAUDITED 2008-2009	BUDGET 2009-2010
Board of Education Salaries	\$5,000	\$6,000	\$6,000
Administration Salaries	1,127,849	1,180,753	1,202,536
Teacher Salaries	8,877,325	9,604,755	9,996,897
Custodial/Maintenance/Laundry Wages	926,624	958,118	979,484
Secretarial/Clerical/Teacher Aide/Para Wages	1,275,036	1,329,142	1,374,199
Other Wages/Salaries	581,884	590,731	630,189
TOTAL WAGES/SALARIES	\$12,793,718	\$13,669,499	\$14,189,305
State Retirement Benefits	\$1,644,497	\$1,480,003	\$1,595,297
Social Security Benefits	946,379	1,014,342	1,074,883
Life Insurance Benefits	18,720	20,135	21,286
Medical Insurance Benefits	2,802,247	2,760,743	2,929,252
Dental Insurance Benefits	227,459	238,277	240,104
Long-Term Disability Insurance Benefits	42,912	46,161	47,995
Other Employee Benefits/Credit Reimbursement	576,723	531,961	556,873
TOTAL EMPLOYEE BENEFITS	\$6,258,937	\$6,091,622	\$6,465,690
Personal Services	\$223,966	\$337,167	\$370,170
Property Services	735,509	1,278,690	855,404
Utilities	854,283	801,881	1,004,665
Pupil/Employee Travel	801,801	842,969	919,626
Postage/Printing/Telephone	91,161	98,114	104,685
Educational Services	0	426,360	462,384
Interdistrict/Intergovernmental Payments	293,865	420,554	452,750
Interfund Payment for Services	0	0	0
TOTAL PURCHASED SERVICES	\$3,000,585	\$4,205,734	\$4,169,684
Supplies and Materials	\$597,606	\$622,711	\$819,800
Apparel	0	3,359	0
Instructional Media	141,508	149,332	140,275
Non-Capital Equipment	39,306	66,836	30,516
Materials for Resale	13,657	11,468	1,614
Textbooks	119,314	130,908	75,270
Non-Instructional Computer Software	21,958	85,113	48,780
Other Non-Capital Objects	800	1,980	1,700
TOTAL NON-CAPITAL OBJECTS	\$934,149	\$1,071,707	\$1,117,955
Replacement Bldg Components/Remodel	\$0	\$15,733	\$0
Additional Equipment	104,132	124,897	105,516
Replacement Equipment	248,085	252,172	261,575
Equipment/Vehicle Rental	4,281	3,852	5,300
TOTAL CAPITAL OBJECTS	\$356,499	\$396,654	\$372,391

	AUDITED 2007 - 2008	UNAUDITED 2008-2009	BUDGET 2009-2010	
1				
2				
3				
4	Paying Agent Fees	\$1,452	\$1,452	\$2,000
5	TOTAL DEBT RETIREMENT	\$1,452	\$1,452	\$2,000
6				
7	Property/Liability/Workers Comp. Insurance	\$170,093	\$171,472	\$178,228
8	Judgments/Settlements	0	0	0
9	Unemployment Compensation	1,123	8,954	10,000
10	TOTAL INSURANCE/JUDGMENTS	\$171,216	\$180,426	\$188,228
11				
12	Transfer to Fund 27	\$2,449,329	\$2,590,723	\$2,553,088
13	Transfer to Fund 50	42,599	0	0
14	TOTAL INTERFUND TRANSFERS	\$2,491,928	\$2,590,723	\$2,553,088
15				
16	Dues and Fees	\$44,747	\$48,553	\$53,349
17	Revenue Refund (aidable)	0	1,326	0
18	Refund of Property Taxes	1,468	5,293	3,000
19	Miscellaneous	24,291	28,798	32,415
20	TOTAL DUES/FEES/MISCELLANEOUS	\$70,506	\$83,970	\$88,764
21				
22	TOTAL GENERAL FUND EXPENDITURES	\$26,078,988	\$28,291,788	\$29,147,105

GLOSSARY OF TERMS

1
2
3
4 **CASH RESERVE** - Money belonging to a particular fund, which has not been spent. In the Debt
5 Service Fund, a substantial amount of money must be held in reserve at June 30 to make
6 scheduled payments coming due before the next year's property tax money is received. In
7 other funds, money held in reserve is not planned to be spent--it is used to avoid at least
8 some of the borrowing, which would otherwise have to be done to pay bills before the
9 revenue is received with which to pay them.

10
11 **CATEGORICAL AID** - Money paid to the school district to help pay for expenses in a particular
12 category. "Pupil Transportation" and "Special Education" are examples of categorical aid.

13
14 **DEBT SERVICE**- Expenses of the school district resulting from borrowing money. It can be
15 principal or interest on either short-term or long-term loans.

16
17 **EQUALIZATION AID** - Money paid to school districts having less property value per student
18 than the state determines it should have. The intent is to equalize the financial support for
19 all public school districts in the state. The "Equalized Value" (described below) is used for
20 this calculation.

21
22 **EQUALIZED VALUE** - The value placed on property in the state by the Wisconsin Department
23 of Revenue. The purpose is to have a consistent basis used for placing values on property
24 throughout the state, eliminating assessment differences, which may exist from one
25 municipality to another. These values are used by the school district to equitably distribute
26 its tax levy to various municipalities. (Also, see "Equalization Aid.")

27
28 **IRREPEALABLE TAX LEVY** - A tax levy obligating the school district for more than one year,
29 which future Boards of Education cannot discontinue. For example, when the bonds were
30 sold for the high school, the tax necessary to make principal and interest payments was
31 levied, and at no time during the life of the bonds can the tax levy to meet those obligations
32 be discontinued.

33
34 **REGULAR CURRICULUM** - Instructional classrooms in which a teacher is responsible for
35 teaching only one subject to a particular group of students. Our School District uses this
36 classification for most middle school and high school classrooms.

37
38 **UNDIFFERENTIATED CURRICULUM** - Instructional classrooms where one teacher is
39 responsible for teaching two or more subjects to the same group of students. In general,
40 our School District uses this classification for its elementary school classrooms.