



WISCONSIN INSTITUTE FOR LAW & LIBERTY, INC.
330 E. Kilbourn Ave., Suite 725, Milwaukee, WI 53202-3141
414-727-WILL
Fax 414-727-6385
www.will-law.org

December 13, 2024

VIA ELECTRONIC MAIL ONLY: OCR.Chicago@ed.gov

Chicago Office
Office for Civil Rights
U.S. Department of Education
John C. Kluczynski Federal Building
230 S. Dearborn Street, 37th Floor
Chicago, IL 60604

Re: Title VI Complaint Against Wauwatosa School District

Dear Sirs or Madams:

The Wisconsin Institute for Law & Liberty (“WILL”) is a non-profit, public interest law and policy organization dedicated to, among other things, advancing the rule of law, individual liberty, and a robust civil society. Through litigation, education, and public discourse, WILL’s nationwide Equality Under the Law project opposes discriminatory programs and policies that make decisions based on race.

Today, we write to inform you of an unlawful and unconstitutional decision by the Wauwatosa School Board (located in Wauwatosa, Wisconsin) to close Wauwatosa STEM School (“Wauwatosa STEM”) and eliminate other, STEM-specific District programming, in part because the racial makeup of the STEM-focused student body does not match the overall racial makeup of students attending the Wauwatosa School District (“WSD”).

As you are aware, racially motivated decision-making is unconstitutional and illegal under Title VI of the Civil Rights Act of 1964. Consequently, please consider this letter a formal complaint under Title VI of the Civil Rights Act of 1964.

I. WSD’s decision to close Wauwatosa STEM and eliminate other STEM-specific programming was racially motivated.

There is myriad evidence that WSD’s decision to eliminate its STEM programming was motivated, at least in part, by an interest in achieving racial balancing at all schools throughout the District.

According to publicly available documents and statements on the WSD website, WSD launched a task force called the “Tosa 2075 Task Force” in June of 2023¹ and instructed it to address various items labeled as “challenges” within the District.² One such “challenge” related to STEM and Montessori programming which, the District noted, has a “student population [] not as diverse as the District’s overall population.”³ In another document, the Task Force rephrased this lack of racial diversity, calling it a “concern” that “the racial demographic makeup of the student population is not as diverse as the overall District.”⁴ The Task Force also developed and applied a “STEM Evaluation Rubric,” which credited, as positive, certain programs with a higher racial minority population and, therefore, a lower white population.⁵

Furthermore, internal documents obtained pursuant to a public records request WILL submitted on this issue⁶ similarly show that WSD explicitly considered racial balancing when assessing WSD’s STEM programming.⁷ For example, on January 30, 2024, WSD’s “Chief of Pupil and Family Supports” sent an email to the principals of two WSD schools, stating:

“I wanted to provide you both with an update regarding conversations that have occurred regarding our ability to increase diversity and representation in our STEM programs. Specifically, racial diversity to better match our districtwide demographics. I have consulted with our attorney regarding the idea of reserving a % of seats for STEM based on our enrollment demographics. Unfortunately, this is a problematic and ill-advised tactic. Not only is it difficult to control given our 5th grade STEM students pathways into these programs but also due to our

¹ See Wauwatosa School District, *Tosa 2075 Task Force*, available [here](#) (Last visited Dec. 9, 2024); See also Appendix at App. 0001, included with this Complaint.

² See Wauwatosa School District, *Tosa 2075 Creating Our Future Together, “Our Challenges,”* available [here](#) (Last visited Dec. 9, 2024). See also Appendix at App. 0002.

³ *Id.*, see “*Our Challenges*,” “*Breadth of Academic Portfolio*,” available [here](#) (Last visited Dec. 9, 2024); See also Appendix at App. 0002.

⁴ See Wauwatosa School District, *Academics + Resident Student Enrollment Brief* at 3, available [here](#) (last visited Dec. 9, 2024); See also Appendix at App. 0003–0006.

⁵ See Wauwatosa School District, *STEM Evaluation Rubric*, available [here](#) (Last visited Dec. 9, 2024). See also Appendix at App. 0007–0010.

⁶ See WILL Letter Re: Racial Balancing Practices in the Wauwatosa School District, available [here](#) (last visited Dec. 9, 2024).

⁷ See Appendix at App. 0011–0034.

current sibling preference. This tactic also has no legal precedence or authority and other programs have allegedly been challenged on this front.”⁸

Other documentation the District has currently provided⁹ in response to WILL’s public records request likewise indicates that “racial diversity in the WSD” was a “core value” of WSD’s “Strategic Plan,” as well as the Task Force’s recommendations.¹⁰

Therefore, based on these documents, and notwithstanding any additional information that may come to light pursuant to WILL's public records request,¹¹ both WSD and its Task Force clearly viewed the populations of white students in any given program or school as a negative factor that must be corrected.

On October 22, 2024, WILL sent a letter¹² to WSD Superintendent Demond Means, as well as all members of the Wauwatosa School Board, informing them that closing Wauwatosa STEM and eliminating other STEM-focused educational programs within the District *because of* an apparent imbalance in the racial makeup of students receiving STEM-specific instruction and the racial makeup of students in the District’s overall student body, is patently unconstitutional and in violation of Title VI of the Civil Rights Act of 1964.

Nevertheless, in a meeting held on October 28, 2024, the Wauwatosa School Board voted to phase-out Wauwatosa STEM, as well as two other, STEM-specific programs, over the next five years.¹³

The Wauwatosa School Board has—and will—argue that its decision to close these STEM programs was not racially-motivated and had nothing to do with achieving a racial balance.¹⁴ Instead, the Board is likely to cite “instructional issues”¹⁵ and “resource[]” “dilut[ion],”¹⁶ among many other “problems” as reasons for the closures. But these claimed motivations are simply not supported by the facts for three simple reasons.

⁸ A copy of this email is provided in Appendix at App. 0013; *See also* App. 0014–0022.

⁹ *See* Appendix at App. 0011–0012.

¹⁰ *Id.* at App. 0033–0034.

¹¹ *See supra*, n. 6, 9.

¹² *See* WILL Letter Re: Racial Balancing Practices in the Wauwatosa School District, available [here](#) (last visited Dec. 9, 2024).

¹³ Wauwatosa School Board Meeting, October 28, 2024 at 2:54:34–38 (Wauwatosa “W”- STEM); 2:58:30–50 (M-STEM – Middle School STEM); 3:03:00–18 (U-STEM – Underwood Elementary STEM); available [here](#) (Last visited Nov. 25, 2024).

¹⁴ *Id.* at 2:29:03–25 available [here](#) (Last visited Nov. 21, 2024).

¹⁵ *See e.g., Id.* at 2:20:24–52 available [here](#) (Last visited Nov. 21, 2024).

¹⁶ *See e.g., Id.* at 2:22:45–2:23:30 available [here](#) (Last visited Nov. 21, 2024).

First, according to the U.S. News & World Report, Wauwatosa STEM is the *highest-performing* elementary school in WSD¹⁷ and the *fifth-best* elementary school in the State of Wisconsin.¹⁸ This strongly suggests that the school’s closure is *not* due to “instructional issues.”

Second, and as described above, documents developed by the WSD Task Force, as well as an internal email explicitly expressing WSD’s interest in balancing the racial makeup of students enrolled in WSD’s STEM programming, make clear that an interest in achieving racial balancing influenced—at least to some extent—the Board’s decision to close Wauwatosa STEM and end other STEM-specific programming within the District. If race were *not* a motivating factor, then what could have possibly been the Task Force’s reason for measuring the STEM programs’ student bodies by race and noting, in multiple places, that the racial makeup of students in the District’s STEM programming does not match the racial makeup of the District’s student body as whole? And, relatedly, why else would WSD’s “Chief of Pupil and Family Supports” email other District staff about possible strategies—including a racial quota system—to ensure that the racial makeup of STEM-enrolled students would reflect the racial makeup of students District-wide?

Moreover, the District’s discussion of race did not end with the Task Force or the above-referenced internal documents: during an exchange regarding WILL’s letter at the School Board’s October 28, 2024, meeting, Dr. Means candidly acknowledged that “The demographic makeup of W-STEM [Wauwatosa STEM] is not commensurate with what the overall demographic makeup of our school district is... It’s just not as diverse... from a racial standpoint.”¹⁹ And while Dr. Means quickly disclaimed any allegation that the “racial balance” of students participating in the District’s STEM programming is the *reason* for the closures,²⁰ there has *still* been no explanation for why the racial composition of the STEM-specific student body was *ever* a component of the Task Force’s evaluation and report or a topic of concern among District staff. In fact, rather than answering a Student Representative’s question regarding “why” the District “[chose] to mention that [the racial makeup of Wauwatosa STEM is not as diverse as the overall student population],”²¹ Dr. Means stated, “WILL, in their threatening letter... [has] taken components of statements and [has] put it together for an argument, but it is not salient to the recommendation that is being presented this evening...”²² That response is unconvincing.

¹⁷ U.S. News & World Report. *Education: Best Elementary Schools in Wauwatosa School District*, available [here](#) (Last visited Dec. 5, 2024).

¹⁸ U.S. News & World Report. *Education: Wauwatosa STEM*, available [here](#) (Dec. 9, 2024).

¹⁹ Wauwatosa School Board Meeting, October 28, 2024 at 2:28:32–52, available [here](#) (Last visited Nov. 21, 2024).

²⁰ *Id.* at 2:29:03–25 available [here](#) (Last visited Nov. 26, 2024).

²¹ *Id.* at 2:29:42–2:29:57 available [here](#) (Last visited Nov. 26, 2024).

²² *Id.* at 2:29:58–2:30:25 available [here](#) (Last visited Nov. 26, 2024).

Third, and finally, Michael Meier, a Wauwatosa School Board Member, is able to provide testimony in support of WILL’s claim that race was a motivating factor in the Board’s decision to end these programs. As a member of the Board, Mr. Meier has first-hand knowledge of the Board’s racial motivations.

In view of this evidence, it is difficult to imagine how the Wauwatosa School Board can, or will, show that its decision to end these programs had *nothing to do* with race. Moreover, the *extent* to which the School Board’s decision was racially motivated (whether in whole or in part) is of no consequence to this complaint: *any* racial balancing motivations are unlawful. *See, e.g., Students for Fair Admissions, Inc. (SFFA) v. President & Fellows of Harvard Coll.*, 600 U.S. 181, 223–24, 229–31 (2023). Therefore, upon information and belief, WSD’s decision to phase-out Wauwatosa STEM and other, STEM-specific District programming, violates Title VI of the Civil Rights Act of 1964 as described below.

II. The Title VI Violation.

As a recipient of federal funding from the U.S. Department of Education²³, WSD is subject to Title VI of the Civil Rights Act of 1964, which prohibits discrimination “on the grounds of race, color, or national origin.”²⁴ This means that, among other things, WSD cannot, “on ground of race, color, or national origin:”²⁵

- (i) “Deny an individual any service, financial aid, or other benefit provided under the program;
- (ii) Provide any service, financial aid, or other benefit to an individual which is different, or is provided in a different manner, from that provided to others under the program;
- (iii) Subject an individual to segregation or separate treatment in any matter related to his receipt of any service, financial aid, or other benefit under the program;
- (iv) Restrict an individual in any way in the enjoyment of any advantage or privilege enjoyed by others receiving any service, financial aid, or other benefit under the program;

²³ *See* Wauwatosa School District. *Wauwatosa School District Final Budget Book 2024–2025* at pp. 3, 10 & 15, available [here](#) (Last visited Dec. 9, 2024) (listing federal funding, including that which WSD receives from the U.S. Department of Education); *See also* Wisconsin Department of Public Instruction, *Title I, Part A, List of Title I Schools for 2023-24*, available [here](#) (Last visited Dec. 5, 2024).

²⁴ 42 U.S.C. § 2000d; *see also* 34 C.F.R. §§ 100.1; 100.2; 100.3, 100.13 (implementing regulations)

²⁵ 34 C.F.R. § 100.3(b)(1)

- (v) Treat an individual differently from others in determining whether he satisfies any admission, enrollment, quote, eligibility, membership or other requirement or condition which individuals must meet in order to be provided any service, financial aid, or other benefit provided under the program;
- (vi) Deny an individual an opportunity to participate in the program through the provision of services or otherwise or afford him an opportunity to do so which is different from that afforded others under the program (including the opportunity to participate in the program as an employee but only to the extent set forth in paragraph (c) of this section).
- (vii) Deny a person the opportunity to participate as a member of a planning or advisory body which is an integral part of the program.”²⁶

“One of the principal reasons [that] race is treated as a forbidden classification is that it *demeans* the dignity and worth of a person to be judged by ancestry instead of by his or her own merit and essential qualities.” *SFFA*, 600 U.S. at 220, quoting *Rice v. Cayetano*, 528 U.S. 495, 517 (2000) (emphasis added). Accordingly, WSD has “no ... authority... to use race as a factor in affording educational opportunities among its [students].” *Id.* at 204.

Unfortunately, the Task Force’s report, the above-referenced internal documents, and WSD’s decision to eliminate its STEM programming during the October 28, 2024, School Board meeting indicate that WSD believes there is an inherent *benefit* in considering “race for race’s sake.” *Id.* at 220. They’re wrong. Instead, “outright racial balancing” efforts and measurement practices are “patently unconstitutional” and violate Title VI. *Id.* at 223 (citation omitted). Furthermore, “[r]acial balancing is not transformed from ‘patently unconstitutional’ to a compelling state interest by simply relabeling it ‘racial diversity.’” *Fischer v. University of Texas at Austin*, 570 U.S. 297, 311 (2013), quoting *Parents Involved in Community Schools v. Seattle School Dist. No. 1*, 551 U.S. 701, 732 (2007) (which directly addressed the unconstitutionality of racial balancing in the K-12 setting).

Because race says nothing about a person’s inherent worth as an individual, racial balancing efforts—which reduce, categorize, and assign importance to persons *according to their race*—“can only ‘cause continued hurt and injury.’” *SFFA*, 600 U.S. at 221, quoting *Edmonson v. Leesville Concrete Co.*, 500 U.S. 614, 631 (1991). That continued hurt and injury will happen here is readily apparent, given that WSD plans to phase-out a high-performing school and other beneficial STEM programs due—at least in part—to an unlawful interest in racial balancing.

²⁶ *Id.*

Consequently, we ask that you open a formal investigation based on this timely-filed Complaint²⁷ and find that the WSD Board of Education's decision to close Wauwatosa STEM, as well as two other STEM-specific District programs, violates Title VI.

Sincerely,

WISCONSIN INSTITUTE FOR LAW & LIBERTY, INC.



Daniel P. Lennington
Deputy Counsel



Nathalie E. Burmeister
Associate Counsel

²⁷ 34 C.F.R. § 100.7(b)

APPENDIX

Tosa 2075 Task Force

The Future of Education in Wauwatosa

In accordance with the [Strategic Plan](#), specifically strategic objectives 6.1 & 6.2, the Superintendent will develop a task force of community members, staff members and other stakeholders to bring forth recommendations for the School Board to consider in the following areas:

- Long-term facility needs in the School District
 - Finalize the five-year long-range facility plan for existing District facilities
- Comprehensive analysis of the impact of policies [5113 \(Public School Open Enrollment - Inter-District\)](#) and [5120 \(Assignment in District\)](#)
 - Classroom space needs in schools as a result of the policies
 - Student enrollment patterns as a result of the policies
 - Lottery School admission considerations
 - Strategies to best increase resident enrollment figures - including the analysis of magnet school programming (Example: Wauwatosa Montessori School)
 - Analyze current and potential innovative academic programming
- Viability of transportation services in the District
- Develop a comprehensive long term financial strategy benchmarking key financial indicators with comparable Southeast WI school districts.

[VIEW THE TASK FORCE'S FINAL REPORT](#)

[VIEW THE PRESENTATION TO THE BOARD](#)

Foundational Materials: Phase One

- [2018 Facility Assessment Study \(PRA\)](#)
- [Task Force Purpose + Charge](#)
- [Community Task Force Slide Deck \(PRA\)](#)
- [Teacher Staffing Report](#)
- [Ed/Operational Staffing Report](#)
- [Class Sections as of 8/25/23](#)
- [Budget Planning Community Update](#)
- [2023-24 Preliminary Budget for Action](#)
- [Community Change + Projections Report](#)
- [2018 Facilities Referendum Newsletter](#)

Foundational Materials: Phase Two

- [Spring Phase Overview](#)
- [Academics + Resident Student Enrollment Brief](#)
- [Transportation Brief](#)
- [Budget + Taxation Brief](#)
- [Facilities Brief](#)
- [Policies Brief](#)
- [Finance + Facilities Board Presentation](#)

Community Questions + Answers

All questions received from members of the Wauwatosa community, the Board of Education, and Tosa 2075 Task Force members have been compiled into one resource. Please click the button below to view the questions and the responses provided by District leaders.

[Community Questions + Answers](#)

Please note that data requests from Task Force members were collected and compiled, along with responses from District leaders, in [this spreadsheet](#). Due to the volume of requests, the data requests from Task Force members will not be incorporated into the Community Questions + Answers document separately.

Meeting Information

Agendas, Materials + Summaries: Phase One

June 27, 2023	+
August 8, 2023	+
August 22, 2023	+
September 12, 2023	+
September 27, 2023	+
October 10, 2023	+
October 24, 2023	+
November 14, 2023	+
November 28, 2023	+
December 13, 2023	+
January 9, 2024	+
January 23, 2024	+

Agendas, Materials + Summaries: Phase Two

February 13, 2024	+
February 27, 2024	+
March 12, 2024	+
April 9, 2024	+
April 23, 2024	+
May 7, 2024	+

Community Communication

[Message to Jefferson and Washington staff and families - October 24, 2023](#)

[Message to Wauwatosa community regarding Task Force scenario options - October 25, 2023](#)

[Message to Wauwatosa community regarding Task Force update - November 7, 2023](#)

[Message to Jefferson and Washington communities regarding Frequently Asked Questions - November 16, 2023](#)

[Message to Community regarding Tosa 2075 Task Force Update - April 22, 2024](#)

Questions for the Task Force? Ask Here!

Tosa 2075 Task Force Public Comment

[Sign in to Google](#) to save your progress. [Learn more](#)

* Indicates required question

Your Name (optional)

Your Email Address (optional)

Inquiry Category *

Choose ▾

Please provide your comment or question below.

[Submit](#)

[Clear form](#)

Never submit passwords through Google Forms.

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 Wauwatosa, WI 53226
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Stay Connected



Tosa 2075

Creating Our Future Together

There are so many exciting things happening in the Wauwatosa School District!

Students continue to perform extremely well in the visual and performing arts, academically, and athletically. More than 80% of our brick and mortar schools realized academic growth in at least one content area (English Language Arts, Math, Science, and Social Studies), according to the Department of Public Instruction's release of 2022-23 school year Forward data. Students in the Wauwatosa West Theatre program have been invited to perform *Frozen: The Broadway Musical* at the International Thespian Festival in June, and Orchestra students from Wauwatosa East recently traveled to Italy to participate in once-in-a-lifetime performances and experience the culture of the country.

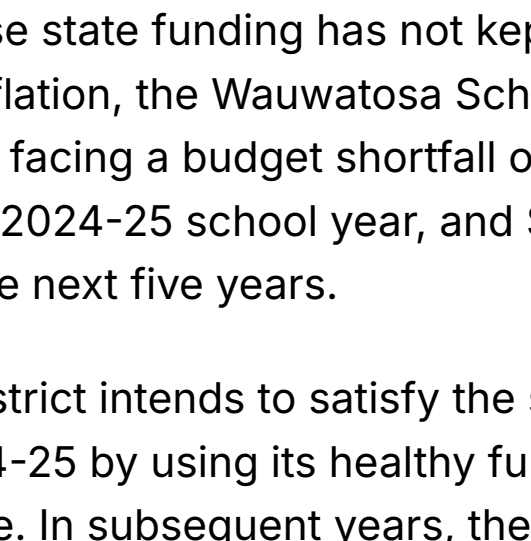
If you would like to retain and preserve the great work taking place in Wauwatosa, it will require our whole community to work together to make informed, forward-thinking decisions for the betterment of the children of Wauwatosa.

[Get the Latest Info: Join Our Email List](#)

[View Community Presentation](#)

Our Challenges

A video overview regarding the District's current financial and facility challenges can be found [here](#).

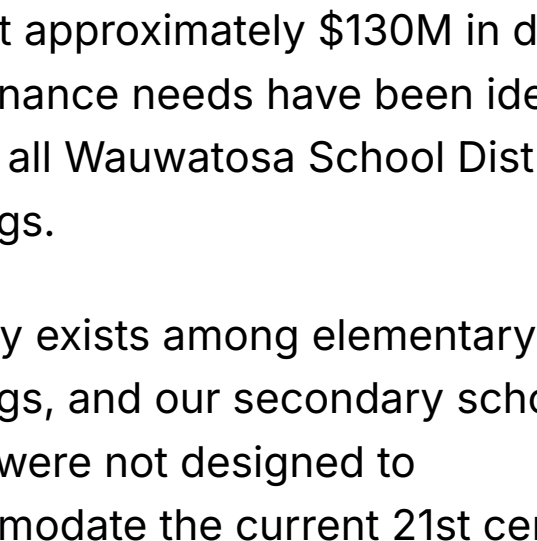


Inadequate Funding

Because state funding has not kept pace with inflation, the Wauwatosa School District facing a budget shortfall of \$9.3M for the 2024-25 school year, and \$61M over the next five years.

The District intends to satisfy the shortfall in 2024-25 by using its healthy fund balance. In subsequent years, the District must either reduce its expenditures or seek additional revenue streams.

[Learn More](#)

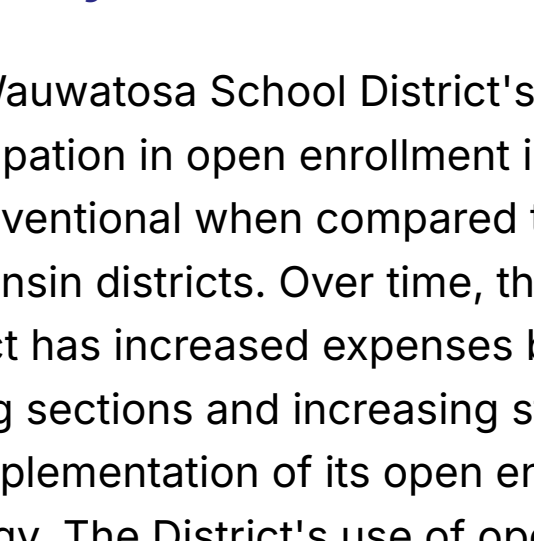


Aging Facilities

At least approximately \$130M in deferred maintenance needs have been identified across all Wauwatosa School District buildings.

Inequity exists among elementary school buildings, and our secondary schools - which were not designed to accommodate the current 21st century learning needs of our students - contain foundational systems and structures that are well past their end-of-life expectancy.

[Learn More](#)



Policies: Open Enrollment + Boundary Lines

The Wauwatosa School District's current participation in open enrollment is unconventional when compared to other Wisconsin districts. Over time, the District has increased expenses by adding sections and increasing staffing in the implementation of its open enrollment strategy. The District's use of open enrollment also allows the District to maintain its current brick and mortar footprint.

A contemporary review of school attendance boundary lines is a healthy process that a school district should engage in every ten years. The Wauwatosa School District has not engaged in reviewing its school attendance zones since the late 1990s. It is important that the District's boundary lines still fit our community and balance student populations across all of the schools in Wauwatosa.

[Learn More](#)



Breadth of Academic Portfolio

The District's academic portfolio presents management challenges, and the investment in specialty schools and programs (STEM and Montessori) is significant.

Using the current lottery system, these schools and programs have less than a 14% acceptance rate, and the student population is not as diverse as the District's overall population.

[Learn More](#)

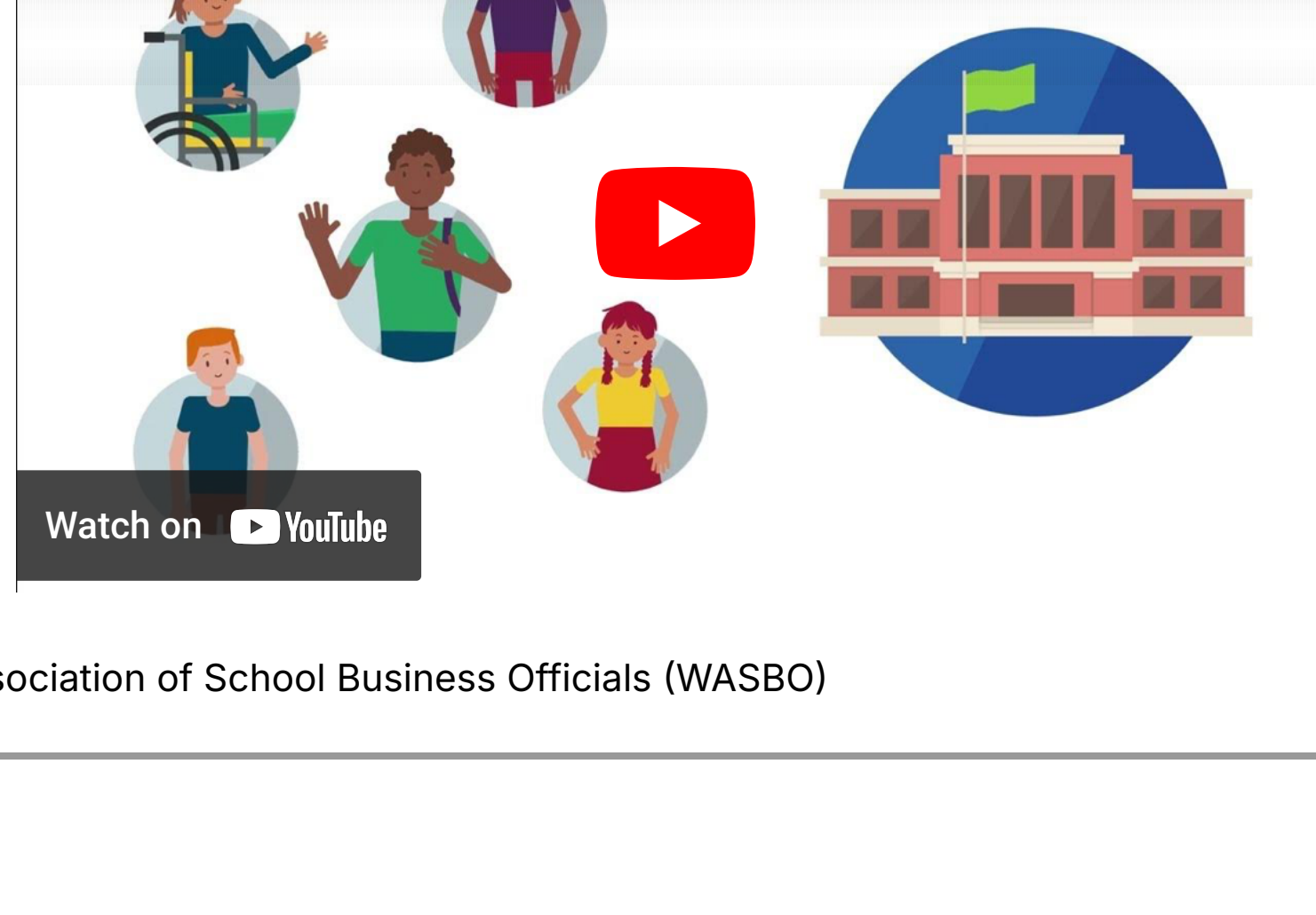


Transportation Inequities

The Wauwatosa School District currently uses the City Option in regards to transportation. This means that the District relies on the Milwaukee County Transit System to provide students with transportation to and from school.

The District's current approach to transportation exacerbates inequity and opportunity in the community. The ability to transport students to their schools currently rests on the social capital that their families possess.

[Learn More](#)

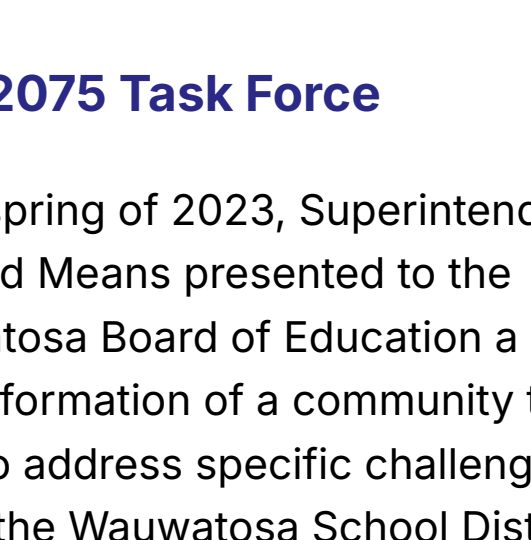


Video Credit: Wisconsin Association of School Business Officials (WASBO)

Our Approach

In Wauwatosa, all stakeholder input and engagement is valuable.

The Board of Education will be the final decision-maker regarding the five charge areas, and it is important that members of the community provide their input, perspectives and feedback to help inform the Board's decision. To gather community voice, the Board will leverage input from the Tosa 2075 Task Force, data from a community-wide survey, and feedback gathered via three community engagement sessions. The Board will also review recommendations developed by District administrators.

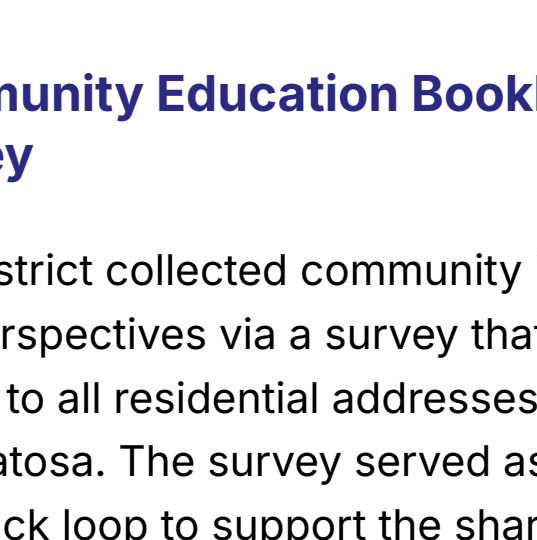


Tosa 2075 Task Force

In the spring of 2023, Superintendent Dr. Demond Means presented to the Wauwatosa Board of Education a vision for the formation of a community task force to address specific challenges facing the Wauwatosa School District.

The Tosa 2075 Task Force provided the Board of Education with input and perspectives related to how best to address large-scope issues such as: reviewing existing boundary lines in the District (policy 5120), five-year budget and facility planning, exploring the legal obligations and potential implications of expanded transportation options, enrollment strategy (policy 5113 and promoting greater resident enrollment), and advancing the academic objectives of the District's Strategic Plan.

[Visit Tosa 2075 Task Force Web Page](#)



Community Education Booklet + Survey

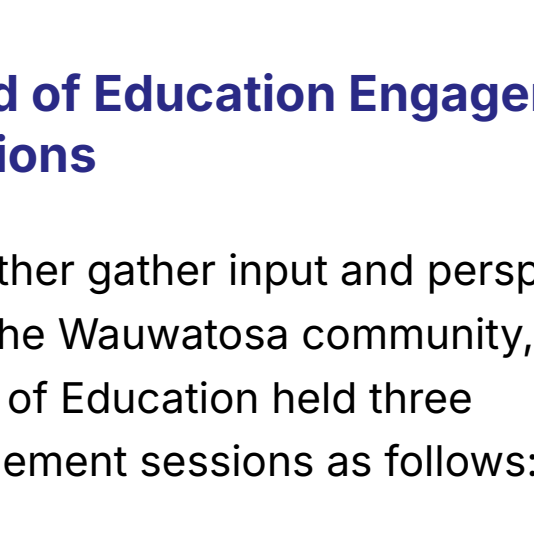
The District collected community input and perspectives via a survey that was mailed to all residential addresses in Wauwatosa. The survey served as a feedback loop to support the sharing of perspectives with the Board of Education.

The District engaged [School Perceptions](#), an independent education research firm, to conduct the survey. School Perceptions is the same company that managed the community survey conducted ahead of the 2018 facilities referendum.

To provide community members with foundational information that will be helpful as the survey is completed, a booklet was mailed to all residential addresses in Wauwatosa. A digital copy of the booklet can be found below.

[View Educational Booklet](#)

[View Survey Results](#)



Board of Education Engagement Sessions

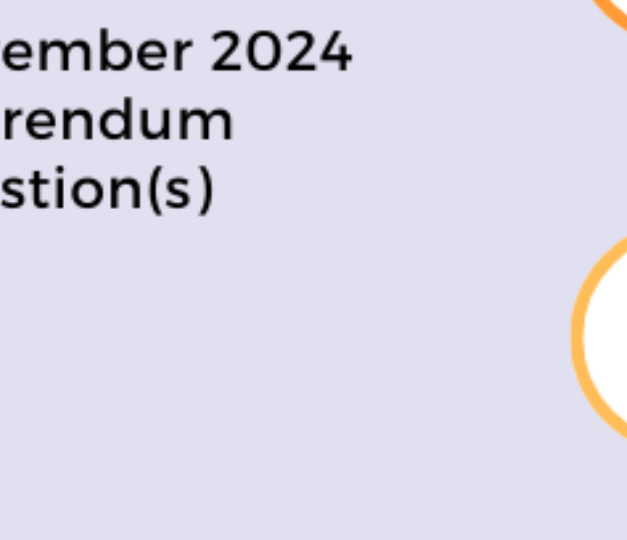
To further gather input and perspectives from the Wauwatosa community, the Board of Education held three engagement sessions as follows:

- Monday, May 20 at 6 p.m. at Longfellow Middle School (Cafeteria)
- Tuesday, May 28 at 6 p.m. at Underwood Elementary School (Cafeteria)
- Wednesday, June 5 at 6 p.m. at Lincoln Elementary School (Cafeteria)

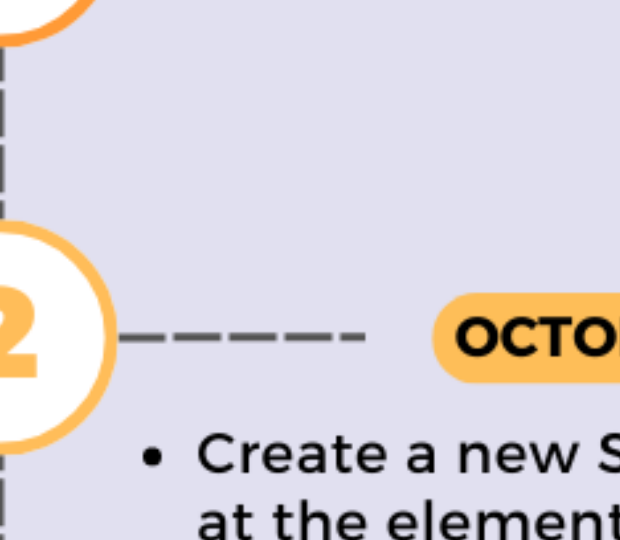
The sessions provided an opportunity for community members to learn more about the challenges facing the District and voice their opinion(s) related to solutions for addressing those challenges.

[Sign Up for Childcare](#)

NEW: District Administrator Recommendations



[WATCH: Administrator Recommendations](#)



[READ: Administrator Recommendations](#)

Our Timeline

IMPORTANT DECISION DATES

- JUNE 2024**

 - November 2024 referendum question(s)

1
- 2

OCTOBER 2024

 - Create a new STEM course at the elementary level
 - Sunset elementary Spanish after 24-25
 - Phase out MSTEM in 25-26 and adopt new STEM electives at middle school level
- NOVEMBER 2024**

 - Finalize elementary school grade configuration
 - Policy 5120 - Boundary Lines and High School Intra-District Transfer
 - Finalize RFP for transportation carrier

3
- 4

JANUARY 2025

 - Policy 5113 - Open Enrollment
 - Execute long-range open enrollment strategy
- APRIL 2025**

Secure contract with transportation carrier

5
- 6

JUNE 2025

 - Fund policy 6235 - Fund Balance
 - Adopt Fund 46 resolution
 - Work with MCTS to provide the option to purchase bus passes for students who live 2+ more miles from school
- NOVEMBER 2025**

 - Cover costs associated with securing CDL licenses
 - Receive analysis of STEM programming

7
- DECEMBER 2026**

 - Adopt JK-6, 7-12 model to begin 2029-30 school year
 - Policy 5120 - shift attendance zones to accommodate JK-6, 7-12

9
- 10

TO BE DETERMINED

 - Develop PT Transportation Supervisor employee classification
 - Purchase vehicle(s) for non-home-to-school activities

NOTE: The Wauwatosa community will vote on the operational and facility referendums on November 5, 2024.

Get Involved

Presentations will be held throughout the community in an effort to continue to inform and engage the residents of Wauwatosa. If you are interested in scheduling a presentation for your neighborhood association, apartment/condo community, faith-based organization, or social club, please contact communications intern Daisy Lehmann at lehmann-ds@wauwatosa.k12.wi.us.

The Cost

	Monthly	Yearly
Estimated Fair Market Property Value Find your property value	Example 1 \$100,000	Example 2 \$300,000
FACILITIES \$60M funded over twenty years; an increase of \$0.43 per \$1k per year.	\$43.00 per year	\$129.00 per year
OPERATIONAL \$64.4M funded over four years; an increase of \$1.67 per \$1k per year.	\$167.00 per year	\$501.00 per year
Total Increase	\$210.00 per year	\$630.00 per year

Frequently Asked Questions

Finances + Budgeting

- Why is the District facing a budget shortfall? Did District leaders fail to appropriately manage funds? +
- Wauwatosa taxpayers just approved a \$125M referendum in 2018. Why is the District seeking another referendum? +
- Why are so many Wisconsin school districts going to referendum? +
- What would a referendum cost me? +
- I don't have school-aged children. Why should I care about investing in the District? +

Facilities

- Wauwatosa residents appreciate the character of our homes and buildings. Why do we need to renovate our school buildings? +
- The District built four new elementary schools and addressed maintenance with the 2018 referendum. Why is the District seeking another referendum? +
- What educational outcomes can be expected as a result of addressing District facilities? +

Policies: Open Enrollment + Boundary Lines

- Why are boundary lines being discussed? +

Academic Portfolio

- What does the District's current academic portfolio currently include? +
- Does the District provide academic offerings that are above and beyond the requirements of the Department of Public Instruction? +

Transportation

- Why doesn't the District provide transportation to all students? +
- How much would it cost to provide transportation services? +

Looking Forward

- When will the Board make a decision about next steps? +
- If the District seeks a referendum, on what ballot will be question(s) be? +

Tosa 2075 Task Force

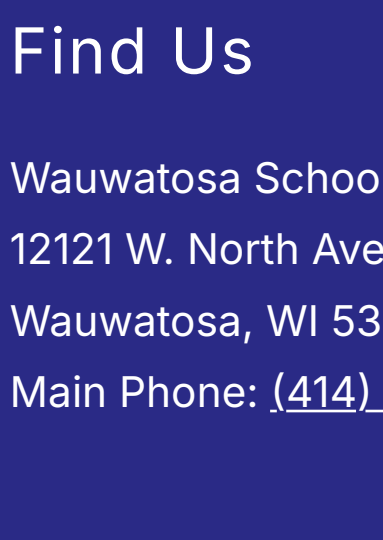
- What is the Tosa 2075 Task Force? +
- How were Task Force members selected? +
- What process did the Task Force use to arrive at its suggestion(s) to the Board of Education? +

Community Survey

- When will the survey be sent to Wauwatosa residents? +
- How will the District use the survey data? +
- Will the survey results be made available to the Wauwatosa community? +

Board of Education Engagement Sessions

- What is the goal of the engagement sessions? +
- Who can attend the sessions? +
- When and where will the engagement sessions be held? +



Find Us
Wauwatosa School District
12121 W. North Ave.
Wauwatosa, WI 53226
Main Phone: (414) 773-1000

Stay Connected





Tosa 2075

Academics + Resident Student Enrollment Brief

Introduction

One of the visionary elements of the Wauwatosa School District is to ensure an exceptional educational experience for every student. The metrics used to determine whether the District is fulfilling its mission and vision are typically associated with performance on standardized assessments, teacher-produced grades, and student and family satisfaction of the educational experience. Linked are the most recent District [standardized assessment results](#) and [Strategic Plan Milestones](#). The District's most recent [Annual Report](#) highlights the positive momentum in academic performance.

The Wauwatosa School District is a uniquely-structured learning institution. The District operates nine (9) traditional Junior Kindergarten through fifth grade schools, two (2) middle schools, and two (2) comprehensive high schools. Additionally, the District operates a School Board-chartered science, technology, engineering, and math (STEM) school within one of its traditional elementary schools, a STEM-themed program-within-a-school (USTEM), a STEM programming strand at both middle schools, and a District-wide Junior Kindergarten through eighth grade Montessori school. The District also operates a charter virtual academy, and provides educational services at Children's Wisconsin and the Vel R. Phillips Juvenile Justice Center.

The District's academic portfolio is complex and presents management challenges. Previously, WSD schools operated with minimal District-level oversight which led to a loose collection of schools, not a unified school system connected through a viable and guaranteed curriculum and instruction structure. In short, each building principal served as its own director of curriculum and instruction as well as its own director of student services, which created significant inequities across the organization. This was highlighted in the [2022 curriculum, instruction, and assessment audit](#).

The investment in the District's specialty schools and programs is significant. It is important to note that the District's commitment to specialty schools and programming requires additional administrative oversight and resources that are pulled away from attending to the District's overall strategic goal of ensuring that every student has an exceptional academic experience.

Further, it cannot be emphasized enough how decimated the District's Division of Academic Performance was from a staffing perspective in 2021. Appropriate maintenance to curriculum revision, teacher and principal support, talent development programming and proper academic guidance for our students with special needs was absent. The reinvestment in these vital aspects of a high-functioning school district is in service of Strategic Goal #1 and can be found in this [District Office Comparison Spreadsheet](#).

Student Enrollment Patterns as a Result of the System

The District developed an academic program aimed at drawing the interest of resident families to stay in the public school system. Charter schools (WSTEM and WVA), STEM programs (USTEM and MSTEM), and a Montessori School all aim to encourage resident families to enroll their children in the Wauwatosa School District.

Program/School	Resident	Non-Resident	Hispanic /Latino	American Indian/Alaska Native	Asian	Black/African American	Native Hawaiian/ Other Pacific Islander	White	Two or More
WSTEM	124	9	6	0	5	2	0	113	7
USTEM	109	17	14	1	1	10	0	87	13
MSTEM (Longfellow)	138	19	7	0	6	11	0	126	10
MSTEM (Whitman)	72	15	9	0	3	11	0	62	8
Montessori	166	14	16	0	8	8	0	124	24
WVA	60	69	18	0	5	46	0	52	8
*As of Third Friday 23-24									

Unfortunately, the District does not have a school-age census system to determine what percentage of all school-age children living in Wauwatosa attend the public school system.

Lottery School Admission Considerations

The issue of lottery school admission for: (1) Wauwatosa STEM School, (2) USTEM, (3) Montessori, and (4) middle school STEM strand programming is consistently a concern for many families in the District. There is significant interest in gaining admission into the schools and programs listed previously. Currently, there is a 13.9% acceptance rate for WSTEM and Montessori applications combined. Of the 418 applications received for the 2023-24 school year, 53 or 12.6% were received from students identified as non-resident.

Strategies to Best Increase Resident Enrollment

The District has had academic success with the specialty schools and programming options offered to students. There is a hypothesis that these offerings assist in retaining resident students in the Wauwatosa public schools. Unfortunately, there is

no official survey data to confirm this theory. The District also does not have a system to measure whether or not the charter schools, STEM programs and/or Montessori School have succeeded in encouraging resident families to enroll their children in the Wauwatosa School District.

A concern with the speciality school and programming options is that the racial demographic makeup of the student population is not as diverse as the overall District.

A theory exists that if every classroom provides exceptional instruction and students are provided with a wide variety of course offerings and academic support, the public school system in Wauwatosa will be a strong enough standalone brand to draw and retain resident students. In short, strengthening a depleted and weakened academic foundation should be the first objective of the District, not expanding specialty schools and programming.

The Nexus of Academic Programming and Finances

The District acknowledges that the current academic model results in a more expensive educational system. The District's investment in a comprehensive JK-12 model ensures that there are various course offerings that appeal to the interests of all students. The variance in course options is more expensive because of the connection to staffing requirements.

Since 80% of the District's expenses are tied to staffing costs, the most efficient pathway to cost reduction in this area is to provide fewer offerings at all levels. This would result in the District only offering basic courses associated with statutory graduation requirements.

Instead, students in Wauwatosa have ample opportunity to explore their interests and talents. For example, at the elementary level, program offerings such as Spanish, band, and orchestra are not statutorily required. [This spreadsheet outlines what is and is not a statutory requirement in the state of Wisconsin.](#)

In order to provide all students with a comprehensive, robust, regionally-competitive and rigorous academic program that includes advanced placement programming, elective courses, and academic support services, a significant investment in staffing is required.

Facility + Instructional Programming

The existing facility footprint in the District does not match with the extensive and comprehensive instructional programming offered. For example, at five of our elementary schools, the space for band and orchestra instruction is not optimal. At many of our elementary schools, Spanish teachers travel between classrooms and store their instructional materials on a cart. The middle school STEM programming is not occurring in learning environments conducive to STEM instruction. And the high school buildings are aged and not commensurate with a 21st century learning experience.

Additionally, there are concerns with the basic set of the instructional learning areas (sensory spaces, storage, acoustics, general overall space, lighting, vertical spaces such as blank walls and white boards, and flexible furniture) that allows for collaborative learning opportunities. Finally, the current learning environments do not lend themselves to serving as welcoming school cultures. For example, cafeteria areas in the secondary schools are obsolete, the high school theater areas need significant upgrades, libraries in our secondary schools and at many of our elementary schools are in need of improvement, and the student lounge areas in our high schools are aged and need renovation.

As such, it is imperative that investments in the facilities are aligned to best maximize the instructional program that has been demanded by the community and subsequently developed within the District.

Essential Questions

- 1. TASK FORCE QUESTION: Is the current [depth and breath of academic programming and services](#) commensurate with the expectations and goals of the Strategic Plan?**
 - a. If not, what additions or reductions do you recommend?**

- 2. TASK FORCE QUESTION: Is the District's investment in speciality schools and elective programming beneficial to the overall academic and economic goals of the District?**

Domain 1: Culture					
Element	Investigating	Developing	Evolving	Innovating	Evidenced By
1.1 Measurement of Student Attitude/Interest	Does not meet minimum indicators for developing	Informal methods are used to measure students' attitudes toward STEM and/or interest in STEM classes/career pathways, and the school's STEM program is revised, as needed, based upon analysis of this data.	Formal measurement of students' attitudes toward STEM and/or interest in STEM classes/career pathways are measured on an annual basis and the school's STEM program is revised, as needed, based upon analysis of this data.	Formal measurement of students' attitudes toward STEM and/or interest in STEM classes/career pathways are measured at least two times per school year and the school's STEM program is revised, as needed, based upon analysis of this data.	
1.2 STEM Program Engagement	Does not meet minimum indicators for developing	Schools actively engage stakeholders, including parents, educational leaders, and community partners in activities to reflect, grow, and promote the school's STEM program using two of the following activities: 1. Surveys 2. STEM-focused community forums 3. STEM community partner celebrations 4. STEM volunteer opportunities and recognition events 5. STEM career, community, or business presentations 6. STEM-focused press releases/newsletters 7. STEM-focused community/family nights	Schools actively engage stakeholders, including parents, educational leaders, and community partners in activities to reflect, grow, and promote the school's STEM program using three of the following activities: 1. Surveys 2. STEM-focused community forums 3. STEM community partner celebrations 4. STEM volunteer opportunities and recognition events 5. STEM career, community, or business presentations 6. STEM-focused press releases/newsletters 7. STEM-focused community/family nights	Schools actively engage stakeholders, including parents, educational leaders, and community partners in activities to reflect, grow, and promote the school's STEM program using five of the following activities: 1. Surveys 2. STEM-focused community forums 3. STEM community partner celebrations 4. STEM volunteer opportunities and recognition events 5. STEM career, community, or business presentations 6. STEM-focused press releases/newsletters 7. STEM-focused community/family nights	
1.3 Ongoing Support	Does not meet minimum indicators for developing	All teachers in the STEM program experience at least one of these forms of instructional supports related to STEM instruction biannually: 1. Peer observation 2. Lesson study 3. Critical feedback 4. Coaching 5. Modeling 6. Action research 7. Mentoring	All teachers in the STEM program experience at least one of these forms of instructional supports related to STEM instruction quarterly: 1. Peer observation 2. Lesson study 3. Critical feedback 4. Coaching 5. Modeling 6. Action research 7. Mentoring	All teachers in the STEM program experience at least one of these forms of instructional supports related to STEM instruction monthly: 1. Peer observation 2. Lesson study 3. Critical feedback 4. Coaching 5. Modeling 6. Action research 7. Mentoring	
1.4 College and Career STEM Awareness	Does not meet minimum indicators for developing	Ensures that 50% of students engage in learning around STEM careers including the pathways in which to enter those careers (ie: college, apprenticeships, etc.)	Ensures that 75% of students engage in learning around STEM careers including the pathways in which to enter those careers (ie: college, apprenticeships, etc.)	Ensures that ALL students engage in learning around STEM careers including the pathways in which to enter those careers (ie: college, apprenticeships, etc.)	

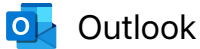
1.5 Student Diversity (Not applicable in non-lottery STEM programming)	Does not meet minimum indicators for developing	Student applicants mirrors the diversity of the District for student groups that have been historically marginalized.	Student applicants exceeds service to historically marginalized student groups in comparison to the District as a whole.	Student applicants significantly exceeds service to historically marginalized student groups in comparison to the District as a whole (majority minority).	
Domain 2: Curriculum					
Element	Investigating	Developing	Evolving	Innovating	Evidenced By
2.1 Curriculum Integration	Does not meet minimum indicators for developing	At least 50% of planned, integrated STEM curriculum is evidence-based and aligned to WI Academic Standards	At least 75% of planned, integrated STEM curriculum is evidence-based and aligned to WI Academic Standards	100% of planned, integrated STEM curriculum is evidence-based and aligned to WI Academic Standards	
2.2 Employability Skills	Does not meet minimum indicators for developing	Ensures that at least 50% of students experience appropriate college and career preparation activities (e.g. goal-setting, perseverance, time management, organization, feedback, reflection, conflict resolution, self-advocacy)	Ensures that at least 75% of students experience appropriate college and career preparation activities (e.g. goal-setting, perseverance, time management, organization, feedback, reflection, conflict resolution, self-advocacy)	Ensures that ALL students experience appropriate college and career preparation activities (e.g. goal-setting, perseverance, time management, organization, feedback, reflection, conflict resolution, self-advocacy)	
2.3 Value Beyond School	Does not meet minimum indicators for developing	Learning tasks in each unit of study ask students to apply concepts, theories, observations, procedures, or problems to clarify, understand, or resolve situations in the world beyond school, but the kind of application requested is not likely to help students understand the utility of the subject in the real world.	Learning tasks in each unit of study require students to apply themes, theories, observations, concepts, procedures, or problems to clarify, understand, or resolve situations in the world beyond school. The kind of application requested helps students understand the utility of the subject in the real world. However, there is no effort to influence an audience beyond school.	Learning tasks in each unit of study requires students to apply themes, theories, observations, concepts, procedures, or problems to clarify, understand, or resolve situations in the world beyond school. The kind of application requested helps students understand the utility of the subjects in the real world. Students must display, exhibit, or demonstrate their work in ways that will influence an audience beyond school.	
2.4 Standards-based and Transdisciplinary Assessments	Does not meet minimum indicators for developing	Assessments measure grade-level standards in the relevant content areas.	Assessments measure grade-level standards in all 4 STEM (NGSS and WI Math Standards) subject areas also while engaging students in problem solving tasks and providing connections to computational thinking and digital literacy.	Assessments measure grade-level standards in all 4 STEM (NGSS and WI Math Standards) subject areas also while engaging students in problem solving tasks and providing connections to computational thinking and digital literacy used in a transdisciplinary manner. Students are guided in the assessment to understand their learning related to particular targets.	

2.5 Statutory Compliance	Does not meet minimum indicators for developing	Some of the statutory requirements related to Act 20 (early literacy) are being explicitly taught/followed.	All of the statutory requirements related to Act 20 (early literacy) are being explicitly taught/followed.	All of the aforementioned statutory requirements are being explicitly taught/followed in an authentic and innovating manner	
Domain 3: Instruction					
Element	Investigating	Developing	Evolving	Innovating	Evidenced By
3.1 Student Instructional Work Groups	Does not meet minimum indicators for developing	At least two times per month, students work in groups as follows: 1. Students collaborate with peers based upon STEM project/intended outcomes. 2. Students actively question, brainstorm, utilize the design process to make decisions. 3. Each group member has at least one well-defined assigned role that is critical to successful project/goal completion. 4. Accountability is measured and recorded for each individual as well as the entire group.	At least one time per week, students work in groups as follows: 1. Students collaborate with peers based upon STEM project/intended outcomes. 2. Students actively question, brainstorm, utilize the design process to make decisions. 3. Each group member has at least one well-defined assigned role that is critical to successful project/goal completion. 4. Accountability is measured and recorded for each individual as well as the entire group.	Three or more times per week, students work in groups as follows: 1. Students collaborate with peers based upon STEM project/intended outcomes. 2. Students actively question, brainstorm, utilize the design process to make decisions. 3. Each group member has at least one well-defined assigned role that is critical to successful project/goal completion. 4. Accountability is measured and recorded for each individual as well as the entire group.	
3.2 Technology in Instruction	Does not meet minimum indicators for developing	In 50% of learning tasks, students use appropriate instructional technology equipment, materials, processes, and tools to engage in and enhance their STEM learning (e.g., data collection/analysis, design, creation, virtual simulations, research and communication).	In 75% of learning tasks, students use appropriate instructional technology equipment, materials, processes, and tools to engage in and enhance their STEM learning (e.g., data collection/analysis, design, creation, virtual simulations, research and communication).	In 100% of learning tasks, students use appropriate instructional technology equipment, materials, processes, and tools to engage in and enhance their STEM learning (e.g., data collection/analysis, design, creation, virtual simulations, research and communication).	
3.3 Student-Centered Learning Experiences	Does not meet minimum indicators for developing	50% of teachers offer student-centered learning experiences which are designed for total participation, and which require complex thinking, promote dissonance, and utilize: multiple modalities and pathways, peer collaboration, purposeful movement, interaction with text, and student choice and voice.	75% of teachers offer student-centered learning experiences which are designed for total participation, and which require complex thinking, promote dissonance, and utilize: multiple modalities and pathways, peer collaboration, purposeful movement, interaction with text, and student choice and voice.	100% of teachers offer student-centered learning experiences which are designed for total participation, and which require complex thinking, promote dissonance, and utilize: multiple modalities and pathways, peer collaboration, purposeful movement, interaction with text, and student choice and voice.	

3.4 STEM Instructional Approach Training	Does not meet minimum indicators for developing	At least 25% of teachers have an advanced educational background and/or advanced real-world experience in one of the elements of STEM and have been involved in ongoing training in implementing an integrated STEM instructional approach in the context of solving a real-world problem or challenge with a focus on problembased and inquiry-based learning training.	At least 60% of teachers have an educational background and/or real-world experience in one of the elements of STEM and have been involved in ongoing training in implementing an integrated STEM instructional approach in the context of solving a real-world problem or challenge with a focus on problembased and inquiry-based learning training.	100% of teachers have an educational background and/or real-world experience in one of the elements of STEM and have been involved in ongoing training in implementing an integrated STEM instructional approach in the context of solving a real-world problem or challenge with a focus on problembased and inquiry-based learning training.	
3.5 Standardized Academic Outcomes for Historically Marginalized Student Groups (females, students of color, students with disabilities, students that receive free/reduced lunch, students whose first language is not English)	Does not meet minimum indicators for developing	Standardized testing outcomes proportionatly mirror that of the larger District for historically margnialized student groups.	Standardized testing outcomes surpass district outcomes for historically margnialized student groups.	Standardized testing outcomes significantly surpass district outcomes for historically marginalized student groups.	

Domain 4: Partnerships

Element	Investigating	Developing	Evolving	Innovating	Evidenced By
4.1 Community Partner Feedback	Does not meet minimum indicators for developing	A STEM Advisory Board is established consisting of at least one local STEM community partner that provides regular feedback on the school's STEM program.	A STEM Advisory Board is established consisting of at least two local STEM community partner that provides regular feedback on the school's STEM program.	A STEM Advisory Board is established consisting of at least three local STEM community partner that provides regular feedback on the school's STEM program.	
4.2 Community Engagement	Does not meet minimum indicators for developing	One to two local community partners are actively engaged in the STEM program.	Three to four local community partners are actively engaged in the STEM program.	Five or more local community partners are actively engaged in the STEM program.	
4.3 Diverse Community Outreach	Does not meet minimum indicators for developing	The mission of at least one of the community partners is to uplift historically marginalized communities in the STEM field.	The mission of at least two of the community partners is to uplift historically marginalized communities in the STEM field.	The mission of at least four or more of the community partners is to uplift historically marginalized communities in the STEM field.	



Open Records Request - Initial Response

From Price, Jamie <priceja@wauwatosa.k12.wi.us>

Date Thu 10/31/2024 3:00 PM

To Stephanie Cerniglia <stephanie@will-law.org>; Daniel Lennington <Dan@will-law.org>

Cc Means, Demond <meansde@wauwatosa.k12.wi.us>; Summers, Julia <summerju@wauwatosa.k12.wi.us>

Hello,

The Wauwatosa School District received a public information request from you on October 22, 2024. Your request mentioned:

All communications from January 1, 2024, to present (including text messages, e-mails, memoranda, and any other form of communication) between Superintendent Demond Means and LaShawnda Holland related to the racial makeup of schools or programs within WSD.

Emails sent by or to any member of the WSD Board of Education discussing the "diversity" or racial balance of any STEM programs or particular schools within WSD.

The Wauwatosa School District has reviewed its files and has located responsive records to your request. Instructions on how to retrieve those records are below.

- Visit https://wauwatosasdwi.govqa.us/WEBAPP/_rs/supporthome.aspx
- Click "Search by Reference Number" on the left-hand menu.
- Enter the reference number #R000201-102224 and click "Search".

If you expect to be submitting further requests we invite you to create an account within our system by clicking "Login" on the left-hand side menu, then "Create an Account". Creating an account will allow you to submit FOIA requests online, collate any potential future requests and responses in one location, view your request status, and receive automated status communications related to your requests.

Creating an account in our system is not required. It is purely a convenient option offered by Wauwatosa School District that you may wish to utilize.

Sincerely,

--

Jamie Price

Director of Technology

Wauwatosa School District

office (414) 773-1054 mobile (414) 375-9727
address 7500 Milwaukee Ave Wauwatosa, WI 53213
web www.wauwatosaschools.org social @tosaschools

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If you receive this message in error, or are not the intended recipients(s), please immediately notify the sender by email and destroy all copies of the original message, including attachments.

From: Pinion, Luke
Sent: Tue, 30 Jan 2024 15:02:23 -0600
To: Larson, Seth; Sarah Dianich
Cc: Hoppe, Debra; Means, Demond; LaShawnda Holland; Sarah Ellis
Subject: Longellow and Whitman STEM Enrollment

Good afternoon, Dr. Larson and Mrs. Dianich. I wanted to provide you both with an update regarding conversations that have occurred regarding our ability to increase diversity and representation in our STEM programs. Specifically, racial diversity to better match our districtwide demographics. I have consulted with our attorney regarding the idea of reserving a % of seats for STEM based on our enrollment demographics. Unfortunately, this is a problematic and ill-advised tactic. Not only is it difficult to control given our 5th grade STEM students pathways into these programs but also due to our current sibling preference. This tactic also has no legal precedence or authority and other programs have allegedly been challenged on this front.

The recommendation is to increase our efforts on the front end. Specifically, promotion, awareness, and accessibility. I am cc'ing Shawnda to serve as a thought partner with you both to this end. Some essential questions to get the conversation going:

How do we specifically target groups of students/parents who are not adequately represented or connected to the 'happenings' of the school?

How can we increase accessibility and visibility of these program options to students and families who are underrepresented? What avenues can we increase our efforts to elevate visibility and accessibility for our target audience?

How can we continue to help remove barriers to applying for families?

What historical data are examining in order to properly target efforts?

Please let me know if there is anything myself or Debbie can do to further support this work. Thank you.

--

Luke Pinion

Chief of Pupil and Family Supports

Wauwatosa School District

phone (414) 773-1080 address 12121 W North Avenue Wauwatosa, WI 53226

web www.wauwatosaschools.org social @tosaschools

From: Dianich, Sarah
Sent: Thu, 1 Feb 2024 07:58:54 -0600
To: Holland, LaShawnda
Cc: Hoppe, Debra; Larson, Seth; Means, Demond; Pinion, Luke; Sarah Ellis
Subject: Re: Longellow and Whitman STEM Enrollment

Thank you for initiating this conversation; I look forward to it.

Kind regards,

Sarah K. Dianich (she/her/hers)
Principal
Whitman Middle School - Watch us Grow!

phone (414) 773-2610 address 11100 W. Center St, Wauwatosa, WI 53222
web <https://whitman.wauwatosa.k12.wi.us/o/whitman> social [Facebook](#) [Twitter](#) [Instagram](#)

On Thu, Feb 1, 2024 at 7:06 AM Holland, LaShawnda <hollanla@wauwatosa.k12.wi.us> wrote:
Thank you Debbie! The 7th works for me.

Best,
LaShawnda Holland (she/her/hers)
Director of Diversity and Inclusion
Wauwatosa School District
phone (414) 773-1034 address 12121 W North Avenue Wauwatosa, WI 53226
web www.wauwatosaschools.org social @tosaschools
To schedule an appointment click [HERE](#).

On Thu, Feb 1, 2024 at 7:04 AM Hoppe, Debra <hoppede@wauwatosa.k12.wi.us> wrote:
The only times that seem to synch are either the 7th or 12th at 4PM.

Let me know how you would like to proceed.

Thanks,
Debbie

On Thu, Feb 1, 2024 at 7:00 AM Holland, LaShawnda <hollanla@wauwatosa.k12.wi.us>
wrote:
Good morning All,

Debbie upon your return, can you find a mutual time for Dr. Larson, Mrs. Dianich, and myself to meet to discuss avenues that will assist in increasing the diversity of our STEM programs at Whitman and Longfellow?

Thank you in advance!

Best,

LaShawnda Holland (she/her/hers)

Director of Diversity and Inclusion

Wauwatosa School District

phone (414) 773-1034 address [12121 W North Avenue Wauwatosa, WI 53226](#)

web www.wauwatosaschools.org social @tosaschools

To schedule an appointment click [HERE](#).

On Tue, Jan 30, 2024 at 3:02 PM Pinion, Luke <pinionlu@wauwatosak12.wi.us> wrote:

Good afternoon, Dr. Larson and Mrs. Dianich. I wanted to provide you both with an update regarding conversations that have occurred regarding our ability to increase diversity and representation in our STEM programs. Specifically, racial diversity to better match our districtwide demographics. I have consulted with our attorney regarding the idea of reserving a % of seats for STEM based on our enrollment demographics. Unfortunately, this is a problematic and ill-advised tactic. Not only is it difficult to control given our 5th grade STEM students pathways into these programs but also due to our current sibling preference. This tactic also has no legal precedence or authority and other programs have allegedly been challenged on this front.

The recommendation is to increase our efforts on the front end. Specifically, promotion, awareness, and accessibility. I am cc'ing Shawnda to serve as a thought partner with you both to this end. Some essential questions to get the conversation going:

How do we specifically target groups of students/parents who are not adequately represented or connected to the 'happenings' of the school?

How can we increase accessibility and visibility of these program options to students and families who are underrepresented? What avenues can we increase our efforts to elevate visibility and accessibility for our target audience?

How can we continue to help remove barriers to applying for families?

What historical data are examining in order to properly target efforts?

Please let me know if there is anything myself or Debbie can do to further support this work. Thank you.

--

Luke Pinion

Chief of Pupil and Family Supports

Wauwatosa School District

phone (414) 773-1080 address [12121 W North Avenue Wauwatosa, WI 53226](#)
web www.wauwatosaschools.org social @tosaschools

--

Debbie Hoppe (she/her/hers)

Administrative Assistant, Pupil + Family Supports

Fisher Administration Building

(414) 773-1085

From: Holland, LaShawnda
Sent: Thu, 1 Feb 2024 07:00:00 -0600
To: Pinion, Luke
Cc: Larson, Seth; Sarah Dianich; Hoppe, Debra; Means, Demond; Sarah Ellis
Subject: Re: Longellow and Whitman STEM Enrollment

Good morning All,

Debbie upon your return, can you find a mutual time for Dr. Larson, Mrs. Dianich, and myself to meet to discuss avenues that will assist in increasing the diversity of our STEM programs at Whitman and Longellow?

Thank you in advance!

Best,
LaShawnda Holland (she/her/hers)

Director of Diversity and Inclusion
Wauwatosa School District

phone (414) 773-1034 address 12121 W North Avenue Wauwatosa, WI 53226

web www.wauwatosaschools.org social @tosaschools

To schedule an appointment click [HERE](#).

On Tue, Jan 30, 2024 at 3:02 PM Pinion, Luke <pinionlu@wauwatosa.k12.wi.us> wrote:

Good afternoon, Dr. Larson and Mrs. Dianich. I wanted to provide you both with an update regarding conversations that have occurred regarding our ability to increase diversity and representation in our STEM programs. Specifically, racial diversity to better match our districtwide demographics. I have consulted with our attorney regarding the idea of reserving a % of seats for STEM based on our enrollment demographics. Unfortunately, this is a problematic and ill-advised tactic. Not only is it difficult to control given our 5th grade STEM students pathways into these programs but also due to our current sibling preference. This tactic also has no legal precedence or authority and other programs have allegedly been challenged on this front.

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Please let me know if there is anything myself or Debbie can do to further support this work.
Thank you.

--

Luke Pinion

Chief of Pupil and Family Supports

Wauwatosa School District

phone (414) 773-1080 address 12121 W North Avenue Wauwatosa, WI 53226

web www.wauwatosaschools.org social @tosaschools

From: Hoppe, Debra
Sent: Thu, 1 Feb 2024 07:04:13 -0600
To: Holland, LaShawnda
Cc: Pinion, Luke; Larson, Seth; Sarah Dianich; Means, Demond; Sarah Ellis
Subject: Re: Longellow and Whitman STEM Enrollment

The only times that seem to synch are either the 7th or 12th at 4PM.

Let me know how you would like to proceed.

Thanks,
Debbie

On Thu, Feb 1, 2024 at 7:00 AM Holland, LaShawnda <hollanla@wauwatosa.k12.wi.us> wrote:
Good morning All,
Debbie upon your return, can you find a mutual time for Dr. Larson, Mrs. Dianich, and myself to meet to discuss avenues that will assist in increasing the diversity of our STEM programs at Whitman and Longfellow?

Thank you in advance!

Best,
LaShawnda Holland (she/her/hers)

Director of Diversity and Inclusion
Wauwatosa School District

phone (414) 773-1034 address 12121 W North Avenue Wauwatosa, WI 53226

web www.wauwatosaschools.org social @tosaschools

To schedule an appointment click [HERE](#).

On Tue, Jan 30, 2024 at 3:02 PM Pinion, Luke <pinionlu@wauwatosa.k12.wi.us> wrote:
Good afternoon, Dr. Larson and Mrs. Dianich. I wanted to provide you both with an update regarding conversations that have occurred regarding our ability to increase diversity and representation in our STEM programs. Specifically, racial diversity to better match our districtwide demographics. I have consulted with our attorney regarding the idea of reserving a % of seats for STEM based on our enrollment demographics. Unfortunately, this is a problematic and ill-advised tactic. Not only is it difficult to control given our 5th grade STEM students pathways into these programs but also due to our current sibling preference. This tactic also has no legal precedence or authority and other programs have allegedly been challenged on this front.

The recommendation is to increase our efforts on the front end. Specifically, promotion, awareness, and accessibility. I am cc'ing Shawnda to serve as a thought partner with you both to this end. Some essential questions to get the conversation going:

How do we specifically target groups of students/parents who are not adequately represented or connected to the 'happenings' of the school?
How can we increase accessibility and visibility of these program options to students and families who are underrepresented? What avenues can we increase our efforts to elevate visibility and accessibility for our target audience?
How can we continue to help remove barriers to applying for families?
What historical data are examining in order to properly target efforts?

Please let me know if there is anything myself or Debbie can do to further support this work. Thank you.

--

Luke Pinion

Chief of Pupil and Family Supports
Wauwatosa School District

phone (414) 773-1080 address 12121 W North Avenue Wauwatosa, WI 53226
web www.wauwatosaschools.org social @tosaschools

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Debbie Hoppe (she/her/hers)
Administrative Assistant, Pupil + Family Supports
Fisher Administration Building

(414) 773-1085

From: Holland, LaShawnda
Sent: Thu, 1 Feb 2024 07:06:29 -0600
To: Hoppe, Debra
Cc: Larson, Seth; Means, Demond; Pinion, Luke; Sarah Dianich; Sarah Ellis
Subject: Re: Longellow and Whitman STEM Enrollment

Thank you Debbie! The 7th works for me.

Best,
LaShawnda Holland (she/her/hers)

Director of Diversity and Inclusion
Wauwatosa School District

phone (414) 773-1034 address 12121 W North Avenue Wauwatosa, WI 53226

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Luke Pinion

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Debbie Hoppe (she/her/hers)

Administrative Assistant, Pupil + Family Supports

Fisher Administration Building

(414) 773-1085

DATE: January 19, 2024
TO: Wauwatosa Board of Education
CC: Dr. Demond Means, Superintendent, Wauwatosa School District
FROM: Matt Bubness, Director, Baker Tilly Municipal Advisors
SUBJECT: Tosa 2075 Task Force – Open Enrollment Recommendations for Board of Education Consideration

The following serves as formal submittal of recommendations for consideration by the Wauwatosa Board of Education (the “Board”) for potential changes to the Wauwatosa School District’s (“WSD”) policy related to Open Enrollment. I submit these recommendations on behalf of the Tosa 2075 Task Force - The Future of Education in Wauwatosa (the “Task Force”). I have attended all meetings of the Task Force and have served as the facilitator for the group since the second meeting in mid 2023. To date, the Task Force has convened 10 times, with one cancellation earlier this month due to weather.

The Task Force is comprised of approximately 60 members from a broad range of the WSD community. Fifty of the Task Force members are parents of current WSD students, with nine being parents of past WSD students. Geographically, the Task Force membership is split near evenly between East and West sides of Wauwatosa and also includes two members from Milwaukee. In addition, the Task Force includes five members of the WSD staff. Since September, attendance at each Task Force meeting has been fairly consistent at approximately 30 members.

In accordance with the WSD’s Strategic Plan, the WSD’s Superintendent will develop a Task Force of community members, staff members and other stakeholders to bring forth recommendations for the Board to consider in the following areas:

- Long-term facility needs in WSD
 - Finalize the five-year long-range facility plan for existing WSD facilities
- Comprehensive analysis of the impact of policies 5113 (Public School Open Enrollment - Inter-District) and 5120 (Assignment in District)
 - Classroom space needs in schools as a result of the policies
 - Student enrollment patterns as a result of the policies
 - Lottery School admission considerations
 - Strategies to best increase resident enrollment figures - including the analysis of magnet school programming (Example: Wauwatosa Montessori School)
 - Analyze current and potential innovative academic programming
- Viability of transportation services in the WSD
- Develop a comprehensive long term financial strategy benchmarking key financial indicators with comparable Southeast WI school districts.

Recommendations for Board consideration regarding budget and facilities will be provided by May 2024. The Open Enrollment recommendations were provided in advance of May 2024, as the Task Force was made aware in late 2023 of the need to update the WSD’s Open Enrollment policies as early as possible in 2024.

Open Enrollment has dominated the topic of presentations and discussions for a number of the Task Force’s meetings (as evident by the meeting agendas posted [here](#)). Information has been presented and provided to the Task Force by

WSD administration regarding financial and academic impacts of Open Enrollment. Significant time has been devoted at Task Force meetings to allow members to discuss and analyze Open Enrollment information to help best inform their opinions and recommendations on the topic. Finally, dedicated time was provided at the end of year 2023 Task Force meetings to allow for development of recommendations and gaining some consensus on differing viewpoints on how WSD should manage Open Enrollment going forward.

The Task Force engaged in considerable back and forth in arriving at its recommendations. The option to provide multiple recommendations was posed to the group to help offset the need for the entire group to achieve consensus on one recommendation. Various avenues to help guide the Task Force were employed, including on-line polls, group discussion strategies, templates to guide recommendation development, theories of action presentation, etc. Given the extended back and forth, the size of the group, and with strong opinions all around, the ability for the Task Force to develop cohesive recommendations, while challenging, is a “win” and will hopefully leave the group well positioned moving forward.

From their extensive discussions, the Task Force has arrived at two sets of recommendations for the Board to consider regarding changes to policies around Open Enrollment. Variance of opinions on how to proceed in developing recommendations initially divided the room near evenly, in terms of favoring policy changes significantly reducing Open Enrollment versus leaving it more status quo. The group looking for larger reductions in the number of Open Enrollment students quickly coalesced around changes to Open Enrollment policies favoring a district-wide, minimum class size (as presented in Attachment A). The other members were initially leaning towards deferring any changes to Open Enrollment until all other Task Force recommendations (i.e. those on WSD finances and facilities) were developed. After further discussion over two meetings, the group recommended changes to Open Enrollment policies also favoring a district-wide basis for determining seats, but not at the minimum level. This group also proposed changes to WSD Open Enrollment, but more in the spirit of improving the use of Open Enrollment and not severely restricting the number of WSD Open Enrollment students (see Attachment B).

As stated above, the full recommendations are included and attached to this memo as follows:

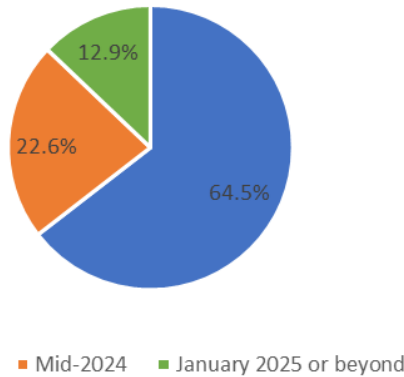
- Attachment A – recommending District-wide/minimum class size
- Attachment B – recommending District-wide/mid-level class size

I strongly encourage reading each Attachment in its entirety to learn more about the Task Force members’ rationales and thought processes behind their recommendations. Task Force members have devoted considerable time and effort to make these necessary, yet extremely difficult and interrelated recommendations.

With recommendations being developed by smaller working groups comprised of segments of the Task Force, a survey was developed and distributed to Task Force members on January 4th to gauge their support for various topics related to Open Enrollment. Approximately half of the Task Force members (31) responded. The questions and responses are summarized as follows:

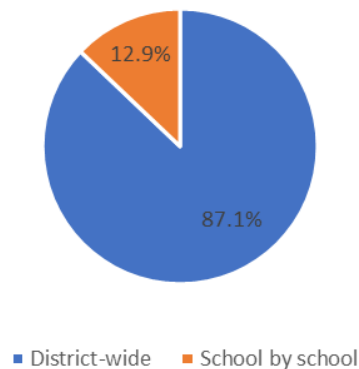
1. Please provide your name and email address (*Question was asked to confirm if respondent was a Task Force member. Thirty-seven total responses were received, but six were removed for either being duplicates or not providing contact info.*)
2. In your opinion, what should be the timing for making changes to policies regarding Open Enrollment:
 - a. January 2024 – 20 responses (64.5%)
 - b. Mid-2024 - 7 responses (22.6%)
 - c. January 2025 or beyond – 4 responses (12.9%)

2. In your opinion, what should be the timing for making changes to policies regarding Open Enrollment:



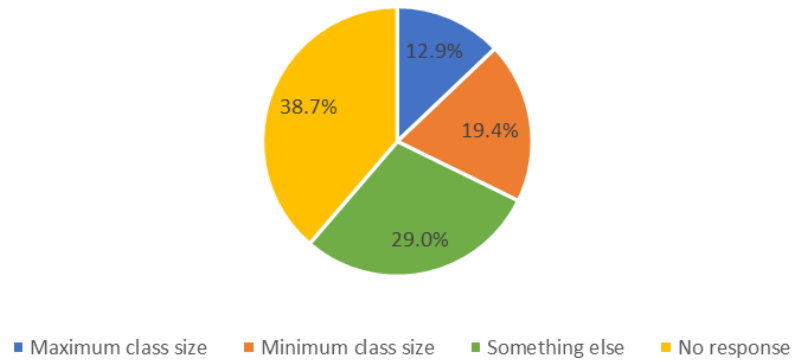
3. Regarding the Open Enrollment policy - which of the following should be the basis for how available seats are determined?
- District-wide – 27 responses (87%)
 - School by school – 4 responses (13%)

3. Regarding the Open Enrollment policy - which of the following should be the basis for how available seats are determined?



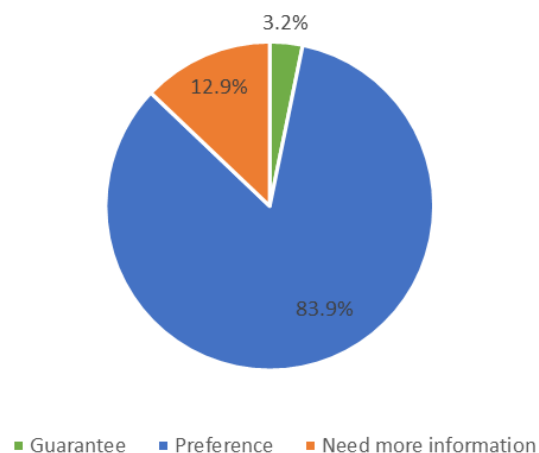
4. Further regarding the Open Enrollment policy - which of the following should be the basis for how available seats are determined? - (NOTE: a number of respondents skipped this question – possible technical issue with survey tool as the question was presented in a different format than other questions in survey)
- Maximum class size – 4 responses (13%)
 - Minimum class size – 6 responses (19%)
 - Something else – 9 responses (29%)
 - Blank – 12 ‘responses’ (39%)

4. Further regarding the Open Enrollment policy - which of the following should be the basis for how available seats are determined?



5. Should students who attend via Tuition Waiver be given preference or a guarantee that they can attend school in the Wauwatosa School District in future years?
- Guarantee – 1 response (3%)
 - Preference – 26 responses (84%)
 - Need more information – 4 responses (13%)

5. Should students who attend via Tuition Waiver be given preference or a guarantee that they can attend school in the Wauwatosa School District in future years?



In summary, the survey results show a large majority in favor of using District-wide for seat availability and also using preference for tuition waivers. While not as overwhelming, a majority of members responding to the survey are also comfortable with moving forward with changes to Open Enrollment related policies now. Less clarity is evident from the members responding to the question of how available seats are determined in terms of maximum or minimum class sizes, which is unsurprising given the competing Task Force recommendations provided on this area.

Thank you for the chance to serve the WSD in facilitating this important work. I look forward to continuing to work with the Task Force to develop recommendations for Board consideration on the remaining topics of budget and facilities.

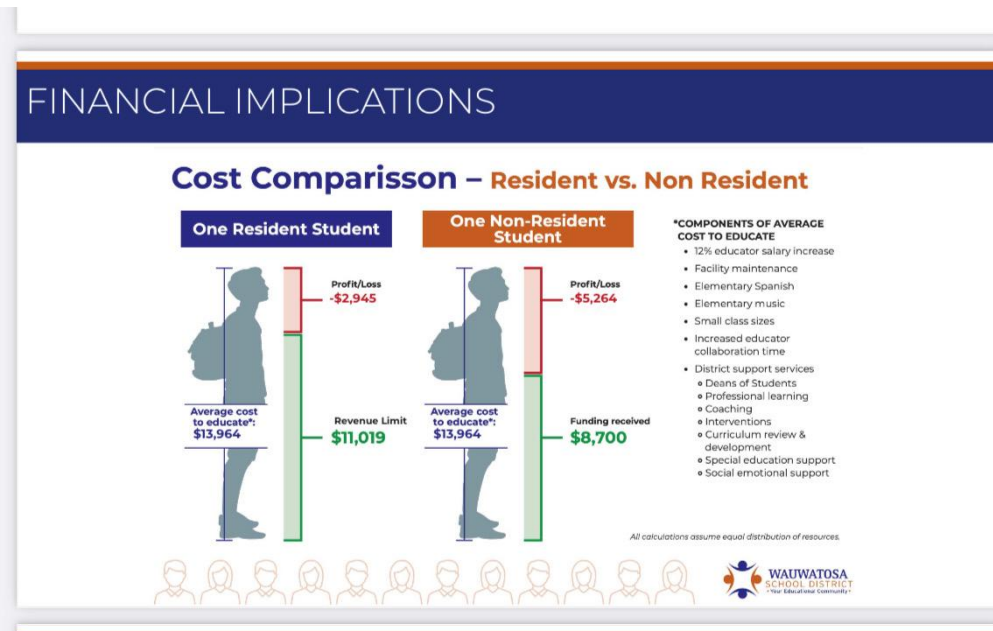
ATTACHMENT A

We members of the 2075 Task Force have been presented with information about the District's policy and practices regarding open enrollment. We have completed a comprehensive analysis of the impact of policy 5113 Public School Open Enrollment- Inter-district. After careful consideration of the information provided to the Task Force by Dr. Means, Luke Pinion, Sarah Zelazoski and Keith Brightman, the experts in this area, we make the following recommendation to the Wauwatosa School Board.

Recommendations for changes to policy 5113	Rationale for recommendations
<p>Utilize a formula based on 85% of minimum class size (not grade capacity) to be implemented at a district level (not building/school/grade level)</p>	<p>Using a formula based on minimum class size:</p> <ul style="list-style-type: none"> ● Gives the district more flexibility if/when resident students move in. Allows room for the reality that every year there are families moving into the district over the course of the school year ● Decreases the need to split sections at the last minute ● Eases staffing challenges when classes are not needed to be split, reduces need to hire more teachers ● Allows the district to maintain smaller class sizes ● Frees up staff to provide academic support for resident students ● Gives preference to resident students for transfers when needed <p>Using a formula based on district level vs school/building level:</p> <ul style="list-style-type: none"> ● Allows for consistency with class sizes across the district ● Allows the best use of space and staff
<p>Require tuition waiver students to re-apply for OE after waiver expires</p>	<p>The policy states that tuition waiver students 'may' have preference but the district's practice has been to guarantee tuition waiver students OE status after the tuition waiver expires. This has led to over 70 new open enrollment students above what was approved by the board.</p>
<p>Give resident students priority over OE students for intradistrict transfers</p>	<p>Accommodate needs of resident families first</p>

<p>Utilize a waitlist process to right size sections at specific schools for OE</p>	<p>The board has to make a decision in January on the number of open enrollment seats available. It may appear that few OE seats are available, but seats may become available later in the spring. Utilizing a waitlist would allow the district to approve OE seats later in the year.</p>
<p>Exercise the right to accept or deny open enrollment applications based on state statute: Criteria for accepting and rejecting applications may include only the following: -availability of space -paid tuition waiver -sibling preference -previous expulsion during current or 2 preceding school years involving a threat/false information related to explosives; endangering the health, safety or property of others on or off school grounds; possession of dangerous weapon while at school -habitual truancy -ability to provide special education services -pending special education evaluation</p>	<p>Promotes a safe school environment and a positive school culture</p>
<p>Confirm residency with home checks, data should be recorded in infinite campus</p>	<p>To reduce residency falsification</p>

Open enrollment was designed to be a financial model where a district or school would fill existing surplus resident capacity with non-resident students. The idea being that there would be incremental funding as an incentive to admit non-resident students. However, WSD has far surpassed this financial model where there is a diminishing return on the current level of OE students.



The Tosa 2075 recommends that the school board adopt a **resident focused enrollment strategy**. The district is currently using a non-resident strategy to fill classrooms using a school wide formula based on maximum class sizes. If/when a resident student moves into the district that has already been filled to the maximum with resident and non-resident students, this puts a class over the maximum, forcing the district to split/add sections and hire additional staff, often at the last minute. With the challenges in securing high quality staff, this puts the district in a difficult position.

The current policy as written uses a formula that is based on maximum class sizes. The policy states “The total number of open enrollment seats available in that grade will be determined by establishing open enrollment grade capacity at **85% of grade capacity** and subtracting projected enrollment from open enrollment grade capacity.” Changes to the open enrollment policy should include an open enrollment calculation based on **minimum** class sizes or simply ‘class size’. This would allow the district to use resident students as the foundation for class sizes and staffing. By making decisions on open enrollment seats at the **district** level versus the building/class/grade level, the district would have discretion as to which school open enrollment students would attend based on class sizes. This would ease staffing issues and building challenges by minimizing the likelihood of having to split sections and hire teachers at the last minute.

Open Enrollment - Minimum Formula Application

Applied Across District Enrollment

Grade	Enrollment Projection	Class Size	Sections Required	Grade Capacity	OE Capacity	OE Seats
JK	344	16.00	20	320.00	272	0
SK	374	16.00	24.00	384.00	326	0
1	439	18.00	23.67	426.01	362	0
2	536	18.00	28.67	516.01	439	0
3	502	19.00	24.67	468.67	398	0
4	509	21.00	22.67	476.01	405	0
5	564	21.00	24.67	518.01	440	0
6	592	22.00	22.67	498.70	424	0
7	548	22.00	20	440.00	374	0
8	564	22.00	20	440.00	374	0
9	622	23.00	20	460.00	391	0
10	612	23.00	19	437.00	371	0
11	721	23.00	21	483.00	411	0
12	715	23.00	21	483.00	411	0
						0



*By using the minimum class formula, it may appear that there are zero OE seats available in January when the board is required to provide the number of OE seats. However, utilizing a waitlist would allow for time to plan sections and staffing before opening OE seats. The district can then fill sections with OE seats later in the spring

We respectfully ask the school board to make the following changes to the open enrollment policy that will put Wauwatosa resident students first.

ATTACHMENT B

Task Force recommendations to the school board-

1. Adopt a formula application that uses 85% of mid level class sizes for open enrollment for the 2024-2025 school year.
2. Apply a district wide formula to allow the district flexibility to assign OE spots strategically to the schools best equipped to accept and educate those students without creating new sections or otherwise increasing support/variable costs
3. Utilize a wait list to optimize use of OE to fill last minute open seats at specific schools.
4. Make the minimal necessary adjustments to policy 5113 to ensure legal compliance.
5. Follow the [state's tuition waiver matrix](#) that articulates how each tuition waiver should be processed based on the date of the move.

Per the WSD's "Ellis Working Doc - Budget, OE, Facilities": The Wauwatosa School District's school fulfillment open enrollment strategy not only fills the current school buildings, but it also provides access to a quality school system for non-resident students, increases the diversity of the student body, and generates net revenue of \$1.25M.

It is clear that any major change to the rate of OE in the WSD will change the shape of the district and have a number of ripple effects. This group of task force members does not believe it is prudent to make a significant change without understanding those impacts from a comprehensive perspective.

Some of the potential impacts of a significant decrease to the rate of OE in the WSD include but are not limited to-

- Loss of at least \$1.25 million in annual net revenue brought by OE which is currently being used to cover a portion of the existing operations deficit.
- Loss of academic programming due to lower enrollment and a greater operations deficit.
- Elimination of staff due to lower district enrollment and a greater operations deficit.
- Elimination of support staff being utilized by both resident and non resident students.
- Decreased enrollment creating underutilized school buildings, leaving neighborhood schools vulnerable to closure.
- Disruption to current OE families who are planning to have younger siblings attend the WSD.
- Loss of a student and family population that adds value to the WSD through participation in theatre, sports, student leadership, PTAs/PTOs, and other extracurriculars.
- Loss of racial and socioeconomic diversity that comes with our OE population.

As stated in the WSD's "Tosa 2075 - Compilation of Community Questions", the WSD and school board do not have the data to provide any measurements of the impacts of OE reductions

“How can we measure the impacts of the OE students and their families (participation in PTA's, student leadership, etc)? The diversity our district gains?”

The District is committed to collecting this data as an extension of [Milestone 10](#). At this time, the District does not have a complete or consistent data set related to non-resident students that would allow District administrators to provide a response to this inquiry.”

Further, maintaining the current rate of open enrollment at this time is aligned with the WSD Strategic Plan in the following ways-

We respect and promote diversity, equity, inclusion, and accessibility.

Our open enrollment student population is 75.7% non-white students. The resident student population is 33.4% non-white students. Open enrollment provides increased racial diversity in the WSD, which is one of the core values of the Strategic Plan and is highly valued by many WSD families. A significant decrease to open enrollment would remove hundreds of students of color from our classrooms and families of color from our school communities.

We pursue continuous growth and improvement.

A long range reduction of open enrollment students will eliminate over 1000 students (16.43% of the district's student population) from our district. This reduction does not reflect continuous growth and will likely result in additional cuts and reductions as a result of the loss of over \$1 million in net revenue that open enrollment students bring to the WSD annually.

Thriving students are encouraged to pursue their interests and talents by engaging in co-curricular and elective course offerings.

This group of Task Force members has concerns about how the district will be able to maintain robust course offerings and extracurriculars with a proposed decrease of over 1000 students and \$1.25 million in net operations revenue. Without the full picture of how those programs can be maintained, divesting from open enrollment puts co-curricular and elective course offerings at imminent risk.

All community stakeholder input and engagement is valuable.

We recognize that the Task Force is a small sample of the community. The Task Force does not have representation from any open enrollment families, and also lacks representation from at least one school in our district. The School Board should have ample time and opportunity to engage with all stakeholders around the effects of a decrease to the open enrollment program before making major changes.

STRATEGIC OBJECTIVE 2.1

Immediately begin to implement strategies and programs to increase representation of students and staff members and the sense of belonging of individuals with disabilities; individuals of

color, LGBTQIA2S+ individuals; individuals with varied religious, atheist, and agnostic identities; individuals of varied immigration, citizenship, and DREAMER statuses; and individuals of limited socio-economic statuses.

As stated above, the open enrollment program adds diversity to the WSD. A significant decrease to OE removes hundreds of students of color from our schools.

Strategic goal 6.8

Explore methods to expand the use of District schools as the hub of the community.

The current open enrollment strategy is “extremely effective from an enrollment and social perspective” according to the presentation administrators provided to the School Board at the January 2nd meeting. The WSD’s investment in OE has kept our schools full and thriving. Divesting from open enrollment will leave many of our school buildings with low enrollment and under capacity. This not only leaves our neighborhood schools vulnerable to closure, but leaves fewer students and families who are connected to our schools, decreasing their prominence as community hubs.

STRATEGIC OBJECTIVE 6.3

In conjunction with the Board of Education, develop a Board Policy that requires the District to maintain an operational fund balance of a minimum of 35%.

The Task Force has been presented with a wide range of figures that reflect the overall financial impact of the current open enrollment strategy. The inconsistency in these numbers is concerning, however, there is clarity that the overall net financial impact of open enrollment is positive. To the tune of at least \$1.25 million dollars per year. That net revenue is being used to cover a portion of the district’s annual operations deficit. In fact, any decrease in open enrollment seats immediately adds to the annual operations deficit. It would not be prudent, or fiscally responsible to divest in open enrollment and create a greater deficit at this time without having a clear picture of what sacrifices will be necessary to make up for that financial loss.

The Task Force has been asked to consider many dynamic elements including open enrollment, facilities footprint & maintenance needs, budget shortfall, transportation, school boundary lines, and more. Without having a better understanding of how open enrollment changes would impact the other pieces, **we urge the board to refrain from making changes to the rate of open enrollment seats at this time**, until the Task Force can present a more comprehensive analysis for the board’s consideration.

We, 20 members of the Tosa 2075 Task Force respectfully submit this recommendation on January 12, 2024.