

Honoring school board members • Focus on levies

April 2016 • Volume 60, Issue 2

JOURNAL

OHIO SCHOOL BOARDS ASSOCIATION



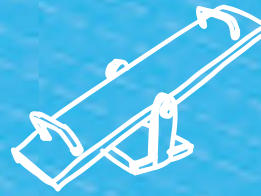
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OSBA leads the way to educational excellence by serving Ohio's public school board members and the diverse districts they represent through superior service, unwavering advocacy and creative solutions.

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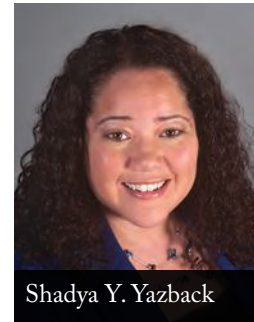
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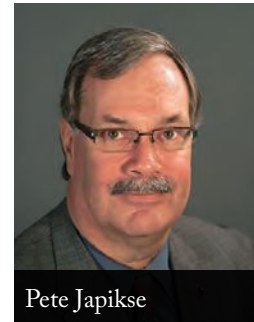
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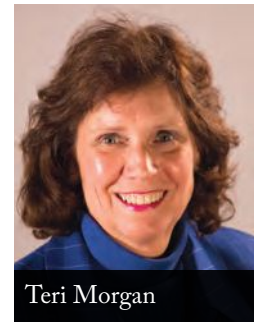
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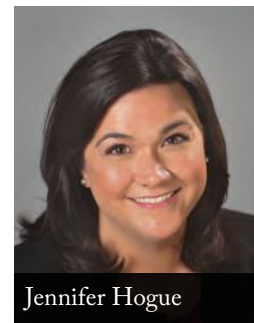
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A vote for education

Passing levies requires planning, communication

Richard Lewis, CAE, executive director

Imagine walking down the street and a stranger asks you for money. Maybe his need is apparent, maybe not. He may start the conversation with a reasonable promise or an unreasonable threat. Regardless, you have no idea why he is seeking your assistance.

Now transfer this metaphor to your school district. How do your residents react when you put a levy on the ballot? Do they know your schools? Do you communicate consistently with them or just at levy time? Do they know why you need a levy? Do you first tell them the good things the levy will bring or start by threatening cuts if it fails?

Under Ohio's school-funding system, levies are a burden school boards and districts must bear. Your job is not only that of governing body and policymaker, but fundraiser as well. The school-funding system is a complex relationship of shared responsibility between districts and the state. On average, roughly 46% of funding is a local responsibility, with some districts responsible for up to 95%.

Since 2003, 93% of Ohio's city, exempted village and local school districts have been on the ballot. Since a date at the polls is likely inevitable, it is important to do your homework far before you need a levy. This issue of the Journal can help you do just that.

Planning is essential. A levy that can't be passed or is inadequate to meet district needs is a waste of time and resources. It's crucial to determine how much funding is needed and for how long. It's also critical to take the pulse of the community on how it might vote.

Equally crucial is choosing the right type of levy, and school districts have myriad options to consider. Working closely with the district financial team, community stakeholders and outside experts in choosing what type of levy best suits your needs enhances the chances for success.

Research is a must when planning a levy or bond issue. The Ohio Education Policy Institute (OEPI) has tracked Ohio school levies over the past 15 years, examining the results for trends and insights. Among its findings are:

- operating levies are more likely to pass in primary and general elections (March/May and November) than in special elections (August);
- new operating levies are less than half as likely to pass as renewal and replacement levies are;
- continuing property and income tax levies are less likely to pass (40%) than are term-limited property and income tax levies (59%);
- income tax levies (both new and renewal) are less likely to pass than property tax levies by about 10 percentage points.

This OEPI research is posted at <http://links.ohioschoolboards.org/34956>. OSBA maintains a database of levy results dating back to 2003. A link to the database is available on OSBA's Levy Information and Resources Center page at <http://links.ohioschoolboards.org/57770>.

Communication also is key. There is an adage that the single, biggest illusion about communication is that it has taken place. Never make that assumption. Communicating with stakeholders

about district finances and the value schools provide to the community is indispensable and should be never-ending. The entire leadership team must make a year-round commitment to communication.

The late management consultant, author and educator **Peter Drucker** once said the most important thing about communication is hearing what isn't said. More than ever, districts are seeking public opinion before making decisions that can impact long-standing practices, community traditions or new directions. OSBA offers a survey service that can help you systematically, professionally and anonymously solicit public opinion. See <http://links.ohioschoolboards.org/47527> for details.

Levy outcomes impact much more than a district's bottom line, they also affect a school system's primary mission — student achievement. That was shown in a recent report by Ohio State University researchers Drs. **Zachary Peskowitz**, **Vladimir Kogan** and **Stéphane Lavertu**.

Their School District Tax Referenda, Spending Cuts and Student Achievement report showed levy failures ultimately lead to declines in student achievement, lower attendance rates and increased class sizes.

In the end, keep true to the mission of your schools. The revenue you derive from your levies is only a tool and will not solve all the challenges facing public education. Frequent levy requests will be a fact of life until Ohio public schools have all the resources they need to continue providing a high-quality education. ■



Diversity and the law in public schools

Shadya Y. Yazback, deputy director of legal services

Diversity permeates schools. The Merriam-Webster Dictionary defines diversity as “the quality or state of having many different forms, types, ideas, etc.” The mention of diversity and inclusion typically evokes thoughts of issues related to race and ethnicity, gender equality in the workplace and individuals with disabilities. However, in the public schools context, diversity and inclusion encompass a much wider variety of students who are protected by certain legal requirements.

Articles abound about the obligations of school districts under Title IX (prohibiting discrimination by sex in federally funded education programs); Title VI (prohibiting discrimination on the basis of race, color and national origin); and Section 504 and Title II (prohibiting discrimination on the basis of disability). To learn more about basic legal requirements for school districts in these areas, visit the U.S. Department of Education Office for Civil Rights Web page at <http://links.ohioschoolboards.org/74648>.

This article provides a high-level review of legal considerations for other groups of diverse students and is not intended to be legal advice. Be sure to work with your board counsel to determine how these requirements apply to your district.

Economically disadvantaged students

The Ohio Association of Foodbanks reported in 2014 that more than 570,000 Ohio children benefited from food bank services. According to 2015 Ohio Department of Education (ODE) data, more than 800,000 Ohio students

were economically disadvantaged. A student is economically disadvantaged if any child in the home qualifies for free or reduced lunch; if the household participates in public assistance programs, such as Medicaid, food stamps or public housing; or the child qualifies for Title I assistance.

School districts cannot charge economically disadvantaged students for costs associated with College Credit Plus. More generally, under Ohio Revised Code (RC) 3313.642, a school district cannot charge students eligible for free or reduced lunch fees “for any materials needed to enable the pupil to participate fully in a course of instruction.” The school board also has the ability to furnish free of charge any materials used in a course of instruction to pupils it determines are in “serious financial need” of such materials.

RC 3313.642 grants the school board discretion to determine if it will charge students eligible for free or reduced lunch fees to participate in extracurricular and pupil enrichment activities and for workforce readiness training equipment if the equipment is to be retained by the student after completing the class.

Foster children

The Legal Center for Foster Care and Education reports the national graduation rate for foster children is below 50% compared to approximately 72% for all students. Foster children also are twice as likely to be absent from school or have an out-of-school suspension. They are expelled at a rate three times higher than their peers. Foster children can encounter several

transitions in a short period of time: 34% of foster children have changed schools more than five times.

Recent changes in federal legislation have sought to address the needs of foster children in the education system. Changes in 2014 to the Family Educational Rights and Privacy Act (FERPA) provided child welfare agencies access to education records for youth in foster care. Beginning in the 2016-17 school year, the recently passed Every Student Succeeds Act (ESSA) will require school districts to identify a point of contact to oversee foster youth enrollment and progress and work with social service agencies to support students in foster care. ESSA also requires states to permit a foster child to remain in his or her school of origin; allow for immediate enrollment of a foster child, even if the records of the child are not immediately available; and provide transportation for foster children that remain in their school of origin. ODE rules to implement ESSA are forthcoming.

Homeless students

In 2013, the National Center on Family Homelessness reported 47,678 homeless children in Ohio. Under the McKinney-Vento Homeless Assistance Act (HAA), school districts must take certain steps to ensure homeless students have access to education and stability and support for education. School districts must designate a liaison to carry out their obligations under HAA.

A student is considered homeless under HAA if the child “lacks a fixed, regular and adequate nighttime residence.” This can include students who are

sharing housing with others due to the loss of housing or economic hardship; living in emergency or transitional housing; or living in motels, hotels and campgrounds, among other scenarios. Effective December 2016, ESSA removes children awaiting placement in foster care from the definition of homeless under HAA. Going forward, these children will be covered by ESSA's expanded foster care provisions.

Identifying homeless students is a case-by-case process, and the school district must consider the student's best interests in making decisions about placement.

If a student is identified as homeless, the school district of origin at the time the student became homeless must allow the student to continue attending in the district for the duration of homelessness and until the end of the academic year in which the student becomes permanently housed.

Alternatively, if the parent (or student, if unaccompanied) chooses, the student can immediately enroll in the district in which he or she is living. The district is not permitted to delay enrollment based on the need for documentation or enrollment deadlines that have lapsed. The district's liaison must work with the student and his or her family to obtain vaccinations and other required health screenings if the student does not have the necessary records.

For children designated as unaccompanied homeless youth, Ohio Administrative Code 3301-51-05 permits the district to appoint the appropriate staff of emergency shelters, transitional shelters, independent living programs and street outreach programs as temporary surrogates to serve in a parental role until a permanent surrogate parent can be appointed. It is the school district's responsibility to assign a surrogate unless a court order has already done so. Students older than

18 may request a surrogate who must complete ODE training before acting on behalf of the student.

Immigrant students

The U.S. Census Bureau estimates more than 41,000 Ohio children were foreign-born in 2014. Ohio's foreign-born population has increased steadily in the last two decades. The number of unauthorized youth in Ohio is not well documented. However, the Migration Policy Institute estimated in 2010 there were between 11,000 and 20,000 undocumented individuals under the age of 30 in the state.

A school district should not ask a student for proof of immigration status. In 1982, the U.S. Supreme Court held in *Plyler v. Doe* that undocumented students have a right to a free public K-12 education. The school district can ask for proof of residency pursuant to its policies and require the same documentation it would require of

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native-born students to register in the district. To the extent a student cannot provide such documentation, the district must consider if the student is homeless under HAA.

While 37.4% of foreign-born adults identified themselves as someone who speaks English “less than very well,” a 2014 report by the American Immigration Council indicated that 87.1% of children with immigrant parents in Ohio were considered English proficient. School districts must remain cognizant of documents and notices required by federal and state laws, such as the notice of rights under FERPA, when working with families that are not English proficient. The U.S. Department of Education Office for Civil Rights has a resource page with fact sheets in 20 different languages. You can access the page at <http://links.ohioschoolboards.org/13574>.

Students requiring religious accommodation

Under the First Amendment, schools are prohibited from establishing religion and restricting an individual’s religious practices. As Ohio becomes increasingly diverse, schools should remain mindful of these obligations. Unfortunately, the legal landscape regarding religious accommodations is still developing. Recent decisions from the U.S. Supreme Court, such as *Equal Employment Opportunity Commission v. Abercrombie & Fitch Stores* in 2015, suggest a broader view of the need for religious accommodation in certain settings, but it is unclear how these cases impact school districts.

School districts should be aware that religious accommodations could arise in several contexts, including, but not limited to:

- the interplay of religious head coverings, such as hijabs for Muslim girls, patkas and dastars for Sikh boys, kippahs and yarmulkes for Jewish boys and student dress codes;
- whether a district must

accommodate dietary restrictions (many religious groups, for example, do not eat pork or pig byproducts such as lard) and if such accommodation includes labeling foods or just allowing parents to supply meals;

- for older Muslim students who abstain from all food and drink from sunrise to sunset in observance the Islamic month of Ramadan; school districts need to consider if an accommodation is appropriate to avoid physical overexertion in physical education activities.

Districts should work with counsel in responding to requests for religious accommodations to ensure compliance with the changing legal landscape.

Transgender students

Transgender students internally identify as the gender opposite the gender they were assigned at birth. While case law is still developing in this area, the U.S. Department of Education Office for Civil Rights has taken the position that sex discrimination extends to claims of discrimination based on gender identity and that Title IX requires districts to accommodate transgender students.

School districts must be conscious of a variety of considerations for transgender students, including, but not limited to, names and pronouns used to address students in class, the privacy and accuracy of student records, athletic competition requirements and the gender neutrality (or lack thereof) of dress codes. Rather than establishing blanket policies, school districts should consider individualized plans for each transgender student requesting accommodation, as student needs will differ. You can read more about accommodating transgender students in the *According to Law* article in the December 2014 OSBA Journal at <http://links.ohioschoolboards.org/47520>.

A final note: bullying

It is important to note that many

students discussed in this article are at risk of being bullied. For example, the U.S. Department of Education recently observed that children from Muslim families, Arab-American children and boys from Sikh families who wear religious head coverings are at increased risk of bullying as a result of backlash from recent domestic and international terror attacks.

Under RC 3133.666, school boards are required to adopt anti-bullying policies. The board’s anti-bullying policy must be included in employee training and appear in student handbooks and any publications that set forth the comprehensive rules, procedures and standards of conduct for the district’s schools and students. The board also must explain the seriousness of cyberbullying to students in the district and their custodial parents or guardians.

ODE and the U.S. Department of Education have resource pages to help school districts educate students, parents and staff about bullying. One such resource is www.stopbullying.gov, which provides resources addressing bullying against certain groups of students such as LGBT youth, special-needs students and youth who are minorities by virtue of race, faith or national origin.

To learn more

OSBA has a resource page with more information on each of the groups discussed in this article. You can access the page at <http://links.ohioschoolboards.org/31452>.

You also can sign up for legal updates from the Legal Ledger, the legal division’s blog that highlights important legal issues facing schools. ■

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Boosting bus passenger safety with technology

Pete Japikse, deputy director of management services

When we think about the familiar yellow school bus, most of us don't think about advanced technology. After all, school buses have looked pretty much the same since many of us rode them more years ago than we'd like to admit.

We are accustomed to their yellow shape and black stripes, and we know they're likely powered by diesel fuel instead of gasoline. With a few exceptions, they look exactly like they did 20 years ago.

Up until the last few decades, perception matched reality. Relatively little changed under the hood and between the wheels. School buses continued to comply with hundreds of Federal Motor Vehicle Safety Standards and Regulations that served our children well. For many years, the standards and buses went unchanged. At the same time, innovation was common in our personal automobiles, leading to a fast-paced evolution.

Some of the changes to automobiles have been good, while others have been challenging. For example, air bags have saved lives, but the technology hasn't been without flaws. Airbags have caused injury and death. Thus sings the song of technological advancement — we gain from advances, but we also have to manage unintended consequences.

One case in which school bus technology initially failed was the advent of anti-lock braking systems (ABS). These systems have been very successful in cars; however, the concept for a school bus was a bit more difficult. In fact, the first generation of ABS for school buses was deemed a failure and

quickly removed. Twenty years later, in today's market, you cannot purchase a school bus without a better-engineered ABS that works successfully.

After a few false starts, we have now entered an era where technological advancements are coming faster than our rule-making agencies can manage them. The goal of those charged with overseeing school bus construction standards has been refocused. Instead of approving individual components for school buses, the challenge is to write rules that address allowable technologies and create broader parameters to ensure the impact of these technologies is positive, with minimal negative effect. Often, we find new concepts are rolled out before the next construction standards meeting is scheduled.

With this in mind, what's the best path for a school district to follow when ordering a new school bus? A few basic tenets will serve the buyer well:

- Stay informed about current product offerings. This requires staff to read trade journals, talk with bus dealers, interact with others in the industry, listen to others' experiences and consider what added value new products provide.
- Before you buy a particular new product, make certain it's approved for use on a school bus. The school bus is a highly-regulated vehicle — all installed equipment must meet federal standards and state regulations. Installing a new product that's not approved can render a new school bus unusable because it will not pass required inspections.

- Be very careful about “bleeding-edge” technology. Sometimes innovators will try to sell us new ideas that aren't yet perfected or reliable. Other products may be well-planned, but perhaps provide more benefit to the seller than the buyer. There also is a need to see if new products are dependable, have a clearly defined benefit and increase the net safety of your school bus. Past “good ideas” that did not pass muster include fuel line magnets to increase mpg, water injectors to stretch fuel usage, the propane engines of the 1980s and ABS of the 1990s. Some of these ideas have returned as very viable, such as propane engines and ABS. Others are memories of poorly spent funds.
- Evaluate your school bus needs as well as your bidding specifications. Too many specifications can lead to a case where the engineering manufacturers have invested in is defeated, such as when buyers specify transmissions and engines that are not compatible or fuel-efficient. Consider writing specifications for your buses that are performance driven and let the manufacturers focus on individual components. The factory engineers know what new technologies make their products better and which new products to avoid until proven. More importantly, find the right balance between what you have bought for the last 20 years and what is available in today's market that could make your bus more dependable, more cost effective and safer for the students who will ride it.

With those ground rules established, let's look at some of the various technologies becoming available. Some already are proven and worth investing in; others need a little more time before the benefit is clear.

- **Alternative fuels, including propane and compressed natural gas (CNG):** Propane has been on the market for several years and is working well. CNG has been available in larger buses and is just being added to conventional school buses. Diesel-electric hybrids, on the other hand, were purchased by very few and have demonstrated a lack of benefit to owners.
- **Engine braking:** This is a newer option in school buses but a well-proven one for large trucks and school buses in certain areas of the country. Benefits include better speed control on corners and hills and reduced wear on brakes.
- **Air disc brakes:** This is a newer option now available from all bus manufacturers. Enough schools have purchased this system to show positive results. Benefits include more positive braking and reduced maintenance requirements, including significantly longer brake pad life.
- **Engine computer systems:** To a certain extent, we have no control over what the manufacturer installs. While some individuals decry the "drive-by-wire" bus as harder to maintain, there also is truth in the fact that diagnostics can be easier, even if it requires a laptop computer to be plugged into the bus.
- **Wi-Fi-connected buses:** The newest buses are now being introduced as rolling "hot spots." Not only is this invaluable for passenger connectivity, the engine computer has evolved to the point where an "ill" bus is able to phone home and let the fleet mechanic know about an impending problem.
- **Vehicle telemetry monitoring:** Again, building on the engine computer system, data tracking equipment allows for the recording and oversight of braking,

acceleration, speed, activation of stop signs and red lights and driver inputs on the vehicle controls.

- **GPS monitoring:** The original equipment manufacturers and other providers are now offering integrated GPS units on individual school buses. This enables bus tracking and parent-centered applications that let parents know when the bus will arrive at their child's stop. Another advantage of GPS is the capability of setting up "geofences" — a boundary for the bus to operate within. When the bus goes outside the predefined boundary, a warning signal is sent to the dispatch office.
- **Tire pressure monitoring:** This system has been required in cars and is now showing up in school buses.
- **Student detection equipment:** This is a technology that was deemed a failure in 2001 because of mechanical unreliability and the number of false warnings. The technology has been refined and improved, and in at least one state, New Jersey, the law requires new school buses to be equipped with sensors to alert drivers when children walk in front of or behind the bus.
- **Driver tactile alerts:** A cutting-edge technology, this system warns the bus driver about lane drift, forward-collision potential, overspeed warnings and other alerts.
- **Backup cameras:** These have become commonplace in our cars but are just now beginning to be used in school buses.
- **Advanced video technology:** Consider driving a vehicle that has video cameras to provide 360-degree views outside the bus. The prototypes use cameras and technology to create a birds-eye view of the bus in the rear view mirror. This allows the driver to see vehicles and pedestrians anywhere around the bus.
- **Rolling route sheets on tablet computers:** While listed last, this may be the most significant

breakthrough in the pupil transportation industry. When linked with a GPS unit, we can put a tablet in the driver compartment that guides drivers along their bus route and keeps them on time without having to fumble through paper route sheets.

So we come full circle — the yellow school bus we buy tomorrow will look very much like the yellow school bus we bought last year. Although, it is very likely there will be some incredible new technologies included in that bus.

As districts continue to evaluate their transportation services, increase efficiency and maximize student safety, they are fortunate to have choices. The caution is to evaluate new options carefully, consider what has worked in the past, what can be improved and then follow a deliberate plan to purchase new buses wisely. ■



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Communication is key

Levy success requires a year-round commitment

Teri Morgan, deputy director of school board services

For nearly 10 years, I served as one of four board members on a county board of elections. I watched tax levies succeed, and I watched them fail.

School districts make difficult decisions about placing a tax levy on the ballot and spend many hours campaigning. But the real work should begin long before the vote.

Communication is key in every district, large or small, and lots of it. Know your variety of audiences and keep them continually apprised of your plans, successes and challenges.

So, how do you organize a successful levy campaign? First, be sure you know why you need this issue and its potential impact on taxpayers. Develop your key messages to simply and logically answer the “why” and “how much” questions. Make sure all board

members, administrators and district staff memorize them. It’s important for the same message to be repeated *many* times.

Although your focus should be on what your district can accomplish when the levy passes, be prepared to discuss what happens if it fails. Develop positive factual statements, not threats.

Voters don’t react well to statements such as, “All elementary busing will be discontinued.” Instead, provide a well-reasoned explanation: “Because we will need to cut operating expenses and the bus fleet used to serve our five elementary schools is one of our highest expense items, reductions will have to be made.”

One of the important next steps is to find your “cheerleader.” The chair chosen to lead your campaign committee

needs to be well-known and well-liked, with a positive outlook and a very good knowledge of the district. From there, work with your new chair to identify other possible committee members.

Keep your campaign committee separate from your board and staff. Board and staff may be active with the committee, but they should not lead it, and district funds can never be used for the campaign. You certainly want your treasurer to be involved, but use community leaders, parents and local government officials as core members.

Tap into the campaign committee’s creative juices to develop a theme — something short, catchy and easy to remember. Pick two colors for lawn signs, brochures, T-shirts or other items you will be displaying or distributing. Perhaps just using your school colors will make all items memorable, but

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be sure they won't blend in and be overlooked.

For brochures, use photos of real people in current situations, but be sure to have their permission and follow district policy in doing so. Select a variety of locations, not just athletic events or classrooms. Make sure the brochure showcases the depth and variety of public education in your district.

Keep yard sign design simple. Use fewer than five words and your two campaign colors but not photos. Often, reversing colors, like white letters on a blue background, make the sign more noticeable as drivers fly by. Don't forget the required disclaimer along the bottom.

After deciding on your committee, key messages and deliverables, it's time to pick the communication vehicles. Discuss how you will get the message out and to which audiences. The most effective communication is always person-to-person, but you will need to use mass and social media platforms as well.

Share your information with television, radio and newspaper outlets, but find creative and visual ways to present it. Having kids talk about how they love

their school tugs on the heartstrings of any voter. Find older adults who believe in the importance of quality schools, and use a written quote from them or put them on TV talking about schools at their kitchen table.

Plan a rally featuring the high school band to show communitywide support, and invite the media to talk with parents dressed in campaign T-shirts. When I first ran for the school board, my twins were elementary students, and I put them in sweatshirts that read "Vote for Mom" on the front and my name on the back.

When you set up any media interview, make it visual, even if it's for a newspaper. Have the reporter meet with your campaign chair in the school media center during a change of classes. The surrounding activity will hit home for the reporter and demonstrate how energized your district is and — hopefully — encourage a positive story.

If finances allow, organize a mail campaign and a door-to-door effort to put your brochure in the hands of every voter. Have signs available and ask if you can place them in residents' yards, especially in high-visibility areas. You

can even get very specific and target every voter requesting an absentee ballot with a specific mailing.

Finally, surround yourselves with experts on campaign finance laws and the legal filing deadlines. Designate your treasurer as the contact for the county board of elections to establish a good relationship for present and future needs.

OSBA offers an endorsed program through Public Finance Resources Inc. (PFR), a firm that provides financial forecasting services. PFR can help you develop a better understanding of the five-year forecast, what the numbers mean and how they translate to future planning. For more information on PFR, visit <http://links.ohioschoolboards.org/81506>.

This won't be the first or last time your district is on the ballot. So remember, keeping your district informed and doing your level best to educate them *every day* is key.

Following these easy tips will go a long way toward helping your district successfully pass a levy, but sharing news with your district all year long is the real key to truly educating voters. ■



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Seeking accountability

Charter school reform: Some things never change

Jennifer Hogue, lobbyist

Less than two weeks after a charter school reform bill — House Bill (HB) 2 — became law, lobbyists for the Electronic Classroom of Tomorrow (ECOT) were shopping amendments in the Ohio General Assembly to create new loopholes.

These amendments would delay new attendance tracking requirements for e-schools and fund them based on the number of enrolled students who are given a computer (as long as 900 hours of instruction are offered) rather than the number of students who participate in instruction.

In response to these amendments, Sen. **Peggy Lehner** (R-Kettering) told *The Columbus Dispatch*, “We were very clear in HB 2 that e-schools needed to do a better job tracking attendance. Anything that would water that down would be unacceptable to me and, I

suspect, to the legislature as a whole.”

The ECOT lobbyists didn’t stop there.

The most concerning amendment request being circulated is the Similar Student Measure (SSM), which is based on a measure used by California charter schools. The SSM amendment basically creates a way for poor-performing charter schools to ignore students with diverse needs, such as disabilities, limited English proficiency and economic disadvantages, by creating a lower standard and using student demographics as an excuse.

SSM essentially sets a lower performance bar for students with these demographics. Under SSM, schools would receive credit for getting students in these demographic groups to their expected level of performance rather than to proficiency. This measure

would produce better scores for poor-performing charters while allowing them to ignore the needs of students.

All students, regardless of their demographics, are entitled to a high-quality education that addresses their needs — not a system in which adults make excuses and are rewarded.

Dr. **Vladimir Kogan**, assistant professor of political science at Ohio State University, analyzed California’s measure using performance data from Ohio schools. In a November article on the website of the Thomas B. Fordham Institute, a charter school sponsor, he wrote, “Not only does it fail to accurately identify high- and low-achieving schools, but it also artificially inflates the measured performance of Ohio charter schools while disadvantaging schools in Ohio’s big eight urban districts for reasons that have nothing to do with the



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quality of the education they provide to their students.”

Another critic of SSM is **Chad Aldis**, vice president for Ohio policy and advocacy at the Thomas B. Fordham Institute.

“The only reason we are talking about instituting the California (model) is because some schools that have been low performing on virtually every other measure we’ve thrown out there have searched the country and found a model where they’re not,” he told *The Columbus Dispatch*. “They’re looking for a model that gives them the results they want.”

If these community schools were truly interested in a measure that accounts for where a student begins — and takes into account his or her unique needs — they need look no further than Ohio’s value-added student growth measure. Value added, by design, looks at year-to-year student growth. Ohio’s report card rewards schools for growth, even if they don’t meet the established performance bar for proficiency.

State Board of Education President **Tom Gunlock** told the *Dispatch* that SSM was “the worst idea I have ever heard in my entire life, ever. All we are expecting is one year of growth. We aren’t asking that they are at grade level, just one year of growth.” He added that this change would “make sure adults look better than they really are and do nothing (to ensure) students (in need of help, get it) ... making excuses for failure just doesn’t work.”

This is not the first time SSM has been before the Ohio General Assembly. In fact, it was discussed late last year. At that time, the Senate version of HB 2 included a study of the “validity and usefulness” of SSM as created by the California Charter Schools Association. The Senate version also specified that the Ohio Department of Education (ODE) would begin using SSM to produce a measure of student academic progress in the 2016-17 school year.

Ultimately, these provisions were removed during the conference committee process and replaced with a charge that ODE complete a study of SSM by Dec. 1. That study has just begun, but it appears ECOT would like it taken out of the hands of ODE and placed with the legislature.

“We passed a very responsible provision in HB 2 to study this before we consider adopting it, and I see no reason to change that,” Lehner told the *Dispatch*. “Certainly, there is no reason to move it from the department that is used to handling and examining data and putting it in the hands of the legislature, which is not.”

Why not allow the HB 2 study to continue? Why not include SSM in discussions about rewriting Ohio’s accountability plan as part of the transition to the Every Student Succeeds

Act (ESSA)? Because those two routes allow folks to see SSM for what it is — a measure that will harm kids and weaken the accountability system.

SSM is a step backward for Ohio’s accountability system. While districts may not like every measure on the report card, they continue to educate students by providing encouragement, not excuses. It’s disheartening that charter schools keep seeking ways to excuse their performance by ignoring student needs. Now they want to mask actual performance with a meaningless measure.

Unfortunately, this won’t be the last time charter schools try to create new laws designed solely to allow failing charters to continue business as usual at students’ expense.

Some things never change. ■



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Former OSBA executive director Martin dies at 92

Gary Motz, editor

OSBA and public education lost a good friend and strong supporter when **David B. Martin** died March 1 in Columbus.

Martin, who was 92, led OSBA as its executive director from 1972 until his retirement in 1984. He joined OSBA in 1970 as the association's first full-time lobbyist.

"Unfortunately, I didn't get to know Dave well until later in my career at OSBA," said OSBA Executive Director **Richard Lewis**. "But though our service as executive director was separated by over 30 years, he still served as a great mentor. He was always willing to talk, share his perspectives about the association and let you learn from his successes and mistakes.

"Dave was truly a friend to public education and OSBA. He will be greatly missed."

Martin served as the third OSBA chief executive and was the first to be promoted to that post from within. Hired as an associate director-legislative representative, he proved so skillful that he quickly became known as "OSBA's man at the Statehouse."

One of his early priorities as executive director was a staff reorganization to maximize the association's efficiency. Job titles changed, employees were promoted and responsibilities became more specialized.

There were dozens of new innovations and programs created and expanded under Martin's direction. They included the Ohio Council of School Board Attorneys, Legal Assistance Fund, a political action committee and policy, negotiations and executive search services. He also was instrumental in implementing a long-range plan, OSBA's move into a new building and a two-fold increase of staff.

"He really turned OSBA into a more professional place than it had ever been," said former OSBA General Counsel and Deputy Executive Director **Richard J. Dickinson**, who retired in 2007 after 30 years of service. "The earlier executive directors came from academia, and Dave had been a school superintendent and he brought that kind of thinking to the office. He was the one who made it possible for the move to the new Westerville headquarters. He found the site, raised the money and had the place built."

Martin's leadership and lobbying skills were second to none. In 1971, he helped orchestrate an extensive grassroots campaign seeking a major revision in Ohio's tax laws. That campaign led to the creation of Ohio's first income tax that helped increase state aid to public schools. He also was part of a team in 1971 that joined the National School Boards Association in Washington to convince Congress to override President **Richard M. Nixon's** veto of a \$4.4 billion education aid bill.

He also served as a mentor for many OSBA staff members over the years.

"I loved working with Dave," said **Timothy G. Kremer**, whom Martin hired in 1979. Kremer, who was deputy executive director when he left OSBA in 1998, is now executive director of the New York State School Boards Association. "OSBA was my first truly professional position, so I had a lot to learn. Dave was a great mentor. Like the head coach of a football team, he was very precise in 'calling the



David B. Martin speaks at the 1979 OSBA Capital Conference in Columbus. Martin, who served as OSBA executive director from 1972 to 1984, died March 1 at the age of 92.



Ohio Gov. John J. Gilligan signs into law Senate Bill 130, which increased the amount a school board may set aside in its service fund for expenses. OSBA initiated the 1973 piece of legislation. Looking on during the signing ceremony at the Statehouse are, from left, OSBA President Charles D. Tabor, Jackson City; OSBA Director of Legislative Services R. Dean Jollay Jr.; and OSBA Executive Director David B. Martin.

plays.’ He would send me out on many different assignments, clearly describe to me his expectations, recognize me when I was successful and reprimand me when I messed up. I always knew where I stood with Dave, and he gave me tremendous opportunities to succeed.”

Today, OSBA works closely with other statewide education associations. Martin played a key role in forging those relationships and cultivating them.

“One of the most noteworthy accomplishments started under his leadership was bringing the statewide education organizations together on a regular basis to discuss areas they could collaborate on,” said **Ann Landis**, who served as an administrative assistant to OSBA’s first four executive directors and retired in 1998. “Dave’s organizational skills were very strong, and I marveled at them. And, he was a super boss.”

Prior to joining OSBA, Martin served in a number of public education roles. He began his career in 1947 in Oak Harbor, his hometown. There he served as a teacher and football and

track coach at Oak Harbor High School in what is now the **Benton-Carroll-Salem Local** School District in Ottawa County. He later served the district as superintendent.

He also taught at several other northern Ohio school districts and was the first superintendent of **Eastland Career Center** near Columbus. The center is now known as **Eastland-Fairfield Career & Technical Schools**. After retiring from OSBA, he served as interim superintendent at **Ohio High-Point Career Center, Mechanicsburg EV** and **Swanton Local (Fulton)**.

Martin’s legacy will live on through the lives of the thousands of people he touched, whether as an educator, mentor or boss.

“Simply stated, Dave Martin is responsible for starting me on a career path that has led me to where I am today, nearly 37 years later,” Kremer said. “Meeting him back in 1979 was one of the best things that ever happened to me.” ■

Editor’s note: Martin’s obituary is posted at <http://links.ohio-schoolboards.org/73002>.

Closing the



Emmanuel Curtis, who coordinates Lima City's Closing the Achievement Gap (CTAG) middle school program, speaks to students at West Middle School. Since its inception in 2007, CTAG has been successful in raising the district's graduation rate.

Lima City program targets at-risk students

With a smile and a lively attitude, **Bryan Miller** makes his way through the halls of **Lima City's** Lima Senior High School on a Friday morning.

Like most days, he greets nearly everyone, but often his message is more poignant than just a simple "hello." That was his intent when he stopped a 17-year-old African-American student on his way to class.

The boy explained his lengthy absence from school: "I've been on vacation in Michigan," he told Miller, who knew better.

"He's likely been incarcerated," Miller said. "He's made some mistakes. A lot of our kids come from trauma — there's trauma in the home. I've reached out to him, so when I saw him come back into the school building this morning, I say, 'Hey, son, I'm still here.'"

graduation gap

Scott Gerfen,
assistant editor

For many African-Americans in the district of about 3,500 students, there are barriers such as poverty, socioeconomic challenges and a lack of parental involvement that deter graduation.

Pursuing a college degree is even more of a challenge.

Miller leads a six-person team that's trying to break down those barriers and is having success.

With grant funding from former Gov. **Ted Strickland's** administration in 2007, Lima City initiated Closing the Achievement Gap (CTAG), a program first designed for African-American freshmen males who were at risk of not graduating from high school.

At the time, less than 50% of the district's black males were graduating from high school. That number has averaged 78% since the program began eight years ago.

"When Gov. Strickland left office, the funding changed," Superintendent **Jill Ackerman** said. "At the time, we were going through some bad financial times, and we had to cut staff. But we preserved (CTAG) because we found value in it."

Not only did the district find value in the program, but it also was expanded to help *any* at-risk student, regardless of race or gender. The youngest CTAG participants are in the fifth grade.

Currently, 105 students in grades five through nine are enrolled in CTAG. Mentors maintain contact with 100 former CTAG students until graduation.

Staff in the district's middle schools can recommend students to participate in the program. Other criteria include poor grades, truancy, school suspensions, pregnancy, violence in the home and single-parent homes.

There are many different scenarios students encounter.

"Maybe mom hasn't been in the home for three or four days because she's drug-addicted," Miller said. "Mom's boyfriend might be abusive or might even be molesting family members. There's gang involvement. I had a student whose entire family

was literally involved with a gang — even the grandmother."

Miller can relate to the challenges faced by CTAG students.

Growing up in Warren, near Youngstown, he was the youngest of six children. While both parents were in the home, there was abuse, Miller said.

That environment was left behind when he joined the Marines.

Following his military service, Miller earned a degree in criminal justice at the University of Northwestern Ohio and began his path to CTAG at the former Lima Correctional Institution.



Angel Cowan, right, was a teen mother who struggled to stay focused on schoolwork. As the leader of CTAG's girls program, she helps girls balance many responsibilities, including caring for siblings.



CTAG students not only have group discussions but also one-on-one mentoring with staff who address emotional needs that might be ignored in the home.

“I was literally in there talking to adults and doing the same thing I’m doing now,” Miller said. “I had a captain who came to me and said, ‘You know what? You should be doing this before they come in here.’”

Miller’s team interacts with CTAG students daily, addressing emotional needs that likely go unnoticed in the home. What makes the program most useful is getting to know students on a more personal level, he said.

In class, it’s not uncommon for both staff and students to shed tears.

A typical session begins with students reciting CTAG proclamations, which include “confidentiality, amnesty, respect, no put downs, no cross-talking, use ‘I’ statements, listen, honesty, right to pass and apologize.”

On this particular Friday, Miller reinforced that “knowledge changes behavior, and knowing makes you responsible.”

For 17-year-old senior **Justice Ford**, such messages and mentoring have saved him from the fate of many friends who have dropped out or are in jail.

“Growing up was a challenge,” he said. “You don’t want to blame race, but sometimes it could get hard. My mother always told me that you have to be your own man. Not having a father in my life really took a toll on me. I felt like I was missing out on that manhood or being taught to be a man.”

Ford, who was referred to CTAG as an eighth-grader, said his mother works many jobs to ensure the family has what it needs. He has two sisters, one older and one younger.

“I’ve literally said, ‘I’m done with school,’” Ford said. “But when I talk to (CTAG mentors), they always give me that one reason to (get my diploma). I see being part of CTAG as a privilege.”

Ford has plans for college, where he intends to pursue a degree in criminal justice.

At West Middle School, 14-year-old **Justin Sledge** views

middle school program coordinator **Emmanuel Curtis** not only as a mentor but also a father figure.

Sledge, who became emotional when describing his connection to Curtis, said his father was both physically and verbally abusive. His 15- and 16-year-old brothers “run the streets,” he said.

For Curtis, it’s about providing what students like Sledge need.

“But the No. 1 thing I try to instill in them is to be a good person,” Curtis said. “Become a good person, make good choices and then, eventually, things fall into place. For the student who may struggle academically, if you can get them on track socially ... if you can get them in school every day ... I just tell them that you have a chance.”

While CTAG mentors provide the parental guidance that might be lacking at home, there are CTAG students who also serve in that role.

That’s especially true for female CTAG students, according to **Angel Cowan**, who coordinates the girls program.

“These young girls who we work with have a lot more responsibility than they should have for their age — whether it’s helping mom or grandma or just dealing with adult situations,” Cowan said. “They’re taking care of (siblings) and the home. They shouldn’t be.”



CTAG students play a game of Jenga to help emphasize the program’s teachings.

Cowan, who was a teen mother, remembers her struggles to stay focused on schoolwork. College was “up in the air,” she said.

“I was determined to be the best mom,” said Cowan, who became involved in the CTAG program after working security at Lima Senior High School.

The goal is to keep students like 17-year-old **Arianne Rufus** motivated to finish school. She has a 1-year-old son.

“I thought, ‘How am I going to do this?’” Rufus said. “But my mom told me just because you’re having a child doesn’t mean you can’t keep doing the stuff you were doing before.”

Rufus, with the help of her mother and CTAG mentors, has developed a balance between being a mother, academics and playing volleyball.

Students involved in CTAG have increased participation in extracurricular activities, which in turn has resulted in better academic work and attitudes and fewer disciplinary problems.

Along with CTAG, Lima City provides alternative programs for students with smaller class sizes and personalized instruction. Students can take classes online or in the evenings.



Bryan Miller, who leads the six-member CTAG program, speaks to program graduate Justice Ford following a class session.

In some cases, students recommended for expulsion are placed in alternative programs. The aim is to identify at-risk students as early as the third grade.

“We’ve been able to grow the (CTAG) program a little bit more,” Ackerman said. “We think it could be better, and we’re looking to perfect it. We’re not hitting students early enough. We want to go back even further.” ■

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Tackling the school



Funding is a constant challenge for Ohio public school districts. The lingering aftereffects of the Great Recession on property values and wages continue. State support remains uncertain amid repeated changes to the school-funding formula. Money diverted from public schools to support charter schools is expected to reach nearly \$1 billion a year by 2017.

School districts also are dealing with unfunded mandates, rising health care costs, ever-changing academic standards, student poverty and the overall complexity of Ohio's school-funding system. As districts try to head off budget deficits, they are forced to cut staff, eliminate programs, reduce transportation services, increase class sizes and implement pay-to-participate policies.

Faced with these challenges, schools must rely more and more on their local communities for support. That means

continually asking their residents — many of whom are struggling themselves — to approve tax issues to fund the schools. Without that vital support, student achievement declines and educational outcomes diminish.

Ohio public schools are funded based on a system of shared responsibility between the state and local school districts, with some federal support. An Ohio Legislative Service Commission study released last year reported that 46.2% of Ohio's school funding comes from local sources, 47.8% from the state and 6% from the federal government. The local support is in the form of levies and bond issues.

A special section in this issue of the Journal takes a look at different strategies districts can use to increase levy and bond issue success.

The section begins with an overview of the many tax options

levy challenge

*Gary Motz,
editor*

districts have to choose from. The Ohio Education Policy Institute article examines the types of tax issues and what they can be used for.

Public Finance Resources Inc. (PFR) details a step-by-step process for optimal school levy planning. Steps include identifying academic needs and program service goals, using financial forecasting to choose the right size levy and selecting what type of levy to seek. PFR is an OSBA endorsed program that focuses on financial forecasting services for government entities, including public school districts.

The **Wyoming City** School District has an impressive record of passing levies and bond issues. The secret to its success? Marketing research. John Fox Marketing Consulting shares how it has worked with the district over the years to help it decide when — and if — to place a levy on the ballot based on research of public sentiment and community tax tolerance.

Another article takes an in-depth look at key elements of successful levy campaigns. The authors discuss effective

campaign planning and execution, messaging, spending strategies, social media and community involvement. The piece is written by a current school board member, who also is a Bowling Green State University associate professor and former school district superintendent, and a nonprofit foundation director who has helped school districts conduct more than 230 school levy campaigns in the past seven years.

This issue's Boardmanship column also focuses on levy success. Written by OSBA's deputy director of school board services, who formerly served as a school board member, county board of elections member and communications manager, the article offers tips on conducting levy campaigns from a school board perspective.

To steal a phrase from one of these articles, there are two kinds of school districts in Ohio — those that are on the ballot and those that will be. Levies and bond issues are a fact of life for public school leaders. Winning local support when the need arises comes with the territory. OSBA hopes this issue of the Journal helps its readers add to their victories while keeping losses to a minimum. ■

OSBA offers a wealth of levy resources

Gary Motz, editor

It's a familiar scene — school district leaders and levy campaign committee members crowded around laptops or video screens watching closely as election results come in. Before the night is over, some will erupt into cheers while others will head home dejected.

OSBA stays up late on election nights, too, collecting school tax issue results from Ohio's 88 boards of elections. The association collaborates with the Support Ohio Schools Research & Education Foundation to compile election data. Support Ohio Schools is a nonprofit organization that works with school district levy campaigns to create successful strategies and provide advice.

Those results are entered into a database available to OSBA members, the news media and the public. OSBA's School Levy Database is frequently mentioned in journalists' postelection

coverage and has become the go-to source for reporters from around the state.

The database, which was launched in 2003, lists districts on the ballot for each election, districts' counties, levy and bond types, millage, the amount of funding sought and whether the issue passed or failed. The results are recorded by vote total and percentage.

The database can be found on OSBA's Levy Information and Resources Center Web page at <http://links.ohioschoolboards.org/57770>. Other resources on that page include a tool to compare your district's data with that of nearby districts; school levy basics; a levy campaign regulations fact sheet; an overview of levy options; absentee voting information; contact information and Web addresses for Ohio's county boards of elections; and local levy campaign websites.

Ohio districts have many levy options to choose from



Dr. Howard Fleeter, Ohio Education Policy Institute consultant

The myriad Ohio school levy options comprise one of the most complicated facets of Ohio's school-funding system.

Levies come in different types and are applied to different tax bases. They can have fixed or variable tax rates, provide an additional or fixed amount of revenue over time, be permanent or for varying durations and be new, renewal or, in some cases, replacement.

Ohio property tax levy types

The four main types of school property tax levies in Ohio are:

- Current expense levies that are used for general operating purposes. This is the typical school levy that is approved for a specific amount of millage. This levy will generate
- more tax revenue when new construction occurs in the school district and some additional revenue when property values are reappraised, depending on the district's circumstances.
- Emergency levies that also are used for general operating purposes. Emergency levies differ from current expense levies because they are fixed-sum levies that are voted for a specific dollar amount, and the millage rate adjusts up or down to ensure that no more or no less than this prescribed dollar amount is generated.
- Permanent improvement levies for maintaining and improving school facilities and equipment. These levies work like current expense operating levies and are approved for a certain amount of millage.
- Bond levies used for building construction, renovation

and site acquisition. Bond levies are fixed-sum levies like emergency levies. The millage rate will adjust as needed to ensure that the predetermined annual tax revenue amount is generated.

There also are a number of more specific types of school property levies. They are:

- Incremental or phase-in operating levies that provide increased revenue in prescribed increments over the length of the levy. An incremental rate levy works like a series of escalating current expense levies, and an incremental amount levy works like a series of escalating emergency levies.
- Substitute levies, a special kind of emergency levy that allows for revenue growth from new property development within the school district.
- School safety and security levies used to enhance school safety and security.
- Educational technology levies for enhancement and upkeep of educational technology.
- School facilities matching levies that are required to participate in the Ohio School Facilities Commission (OSFC) building construction program.
- Facilities maintenance levies, which also are required by OSFC to ensure there will be sufficient funds to operate newly built or renovated buildings once construction is completed.

School district income tax levies

Most states allow local school districts to use local property tax levies to raise funds. All the levy types previously listed can be used by Ohio school districts as property tax levies.

However, Ohio is one of a handful of states that also allows local school districts to use income tax levies. Just as property tax levies only apply to property within school district boundaries, school income tax levies are only levied against the income of residents living in the school district.

This is unlike Ohio's municipal income tax that is applied to individuals based on where they work in addition to where they live. As of January, 191 of Ohio's more than 600 K-12 school systems were using a school district income tax. Joint vocational school districts cannot use income tax levies.

Ohio school districts can use income tax levies for the following purposes:

- current expense operating levies;
- permanent improvement levies;
- school facilities matching levies;
- facilities maintenance levies.

Income tax levies *cannot* be used for bond or emergency levy purposes. An income tax levy must be at least 0.5%, and the rate can be higher as long as it is in 0.25% increments, for example, 0.75%, 1.0% or 1.25%.

Ohio school districts were first allowed to enact a school income tax for a brief period in the mid-1980s. The school income tax option was then reinstated on an ongoing basis in 1989.

There are two types of school district income tax levies: traditional and earned.

A traditional school district income tax applies to Ohio taxable income: adjusted gross income minus personal and dependent exemptions. This definition of income includes both earned income — wages, salaries, tips and self-employment earnings — and unearned income: retirement, interest, dividends, capital gains and rental income profits.

A sound knowledge of Ohio's many types of levies and their intricacies is crucial to school districts' financial planning and fiscal health.

In 2005, the Ohio General Assembly authorized a new school income tax option, the earned income tax. This option taxes only the earned income of district residents and excludes unearned investment and retirement income. The earned income tax option was designed to be more equitable to older voters who tend to have lower earned income and higher unearned income.

It is important to note that a school district cannot have both types of income tax in place simultaneously. A district with a traditional school district income tax that would like to implement an earned income tax must either repeal the existing tax or allow it to expire if it is term-limited.

A conversion school district income tax option was added in 2007 to allow districts to convert an existing traditional income tax to a new earned income tax to make it easier for many districts to adopt this new local revenue option.

The majority of school district income tax levies on the ballot in recent years have been earned income levies rather than traditional income levies.

New, renewal and replacement levies; levy duration

Most school levies can be enacted on either a continuing basis (permanently) or for a specific number of years. Levies in effect for a specific period are sometimes referred to as term-limited levies. Emergency levies, bond levies, technology levies, and safety and security levies cannot be enacted on a permanent basis. Emergency levies can be enacted for a maximum of 10 years while technology and safety and security levies can be enacted for up to five years.

The first time a specific levy is approved by voters, it is referred to as a new or additional levy. Once approved, a new continuing income tax levy, for either operating or permanent improvement purposes, never needs to be placed before voters

Overview of main Ohio school levy types

Levy type	Continuing or term-limited	Renew or replace?	HB 920 applies?
Property tax current expense levy	Continuing	Replace	Yes
	Term-limited	Renew	Yes
Property tax emergency levy	Term-limited only	Renew	No
Property tax substitute levy	Continuing	Not necessary	No
	Term-limited	Renew	No
Property tax permanent improvement levy	Continuing	Replace	Yes
	Term-limited	Renew	Yes
Property tax bond levy	Term-limited only	Neither	No
Traditional income tax current expense levy	Continuing	Not necessary *	No
	Term-limited	Renew	No
Earned income tax current expense levy	Continuing	Not necessary	No
	Term-limited	Renew	No
Traditional income tax permanent improvement levy	Continuing	Not necessary *	No
	Term-limited	Renew	No
Earned income tax permanent improvement levy	Continuing	Not necessary	No
	Term-limited	Renew	No

* There is no need to replace a traditional income tax levy; however it can be converted to an earned income tax levy.

again. It will remain in place at the initial rate in perpetuity.

In most states, the same thing would be true of a continuing property tax levy. However, due to a 1976 Ohio property tax law commonly referred to as House Bill (HB) 920, the effective tax rate of a new property tax levy can decrease over time as property values increase after reappraisal. (Note: The details of House Bill 920 are quite complex and beyond the scope of this article.)

For example, a 5-mill levy passed in 2000 may have an effective tax rate of just 4 mills by 2010. In its simplest terms, this means that levy now raises only 4 mills worth of revenue.

As a result of HB 920, school districts have the option of replacing a continuing property tax levy, which means asking voters to reset the effective tax rate to the originally voted millage. In the example just mentioned, the school district would be asking its voters to increase the effective rate of the levy back to its originally voted 5 mills. Replacement levies result in tax increases for district residents and have been used less frequently in recent years.

For property and income tax levies that are approved by voters for a specific period of years (five years is the most common length of these levies), the levy must be renewed or it will expire when the voted term ends. A property tax renewal levy will typically be for whatever the effective millage rate is at the time of the renewal, meaning that taxpayers will not pay more in taxes.

However, property tax levies also can be renewed with an increase, which means that the new levy will bring in more tax revenue if approved by voters. Income tax levies are renewed at the same tax rate that voters originally approved.

Bond levies are unique among Ohio school levies in that they cannot be renewed when their term — typically 25-30 years — expires.

A sound knowledge of Ohio’s many types of levies and their intricacies is crucial to school districts’ financial planning and fiscal health. It’s important for school board members to work closely with their treasurer, superintendent and other administrators when choosing what type of levy to seek and when to place it on the ballot. ■

About the author: Ohio Education Policy Institute (OEPI) consultant Dr. Howard Fleeter is one of the most respected public school-funding experts in Ohio. OEPI is a not-for-profit research arm of the education community and is funded through dues from members ranging from school districts to statewide education organizations. These funds enable OEPI experts to conduct research, analyze data and provide recommendations for solutions to state policy issues. To learn more, visit www.oepiohio.org.

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Examining the keys to optimal school levy planning

Stacy Overly and Mike Sobul, consultants, Public Finance Resources Inc.

So you think you need a levy? Often, the work leading up to placing a levy on the ballot will determine its success or failure.

Deciding what type of levy to seek may never go beyond the basic question of “What size and type of levy did we pass most recently?” However, optimal levy planning involves a much deeper level of understanding and preparation. It is vital to recognize there is not a one-size-fits-all answer. Each district has its own unique set of variables to consider.

Establishing academic needs and program service goals and ensuring there are adequate resources to meet them is an initial step in all levy planning. A levy solution that falls short of district goals could leave students ill served and taxpayers confused. In this critical first step, the district’s leadership team should prioritize goals with needs.

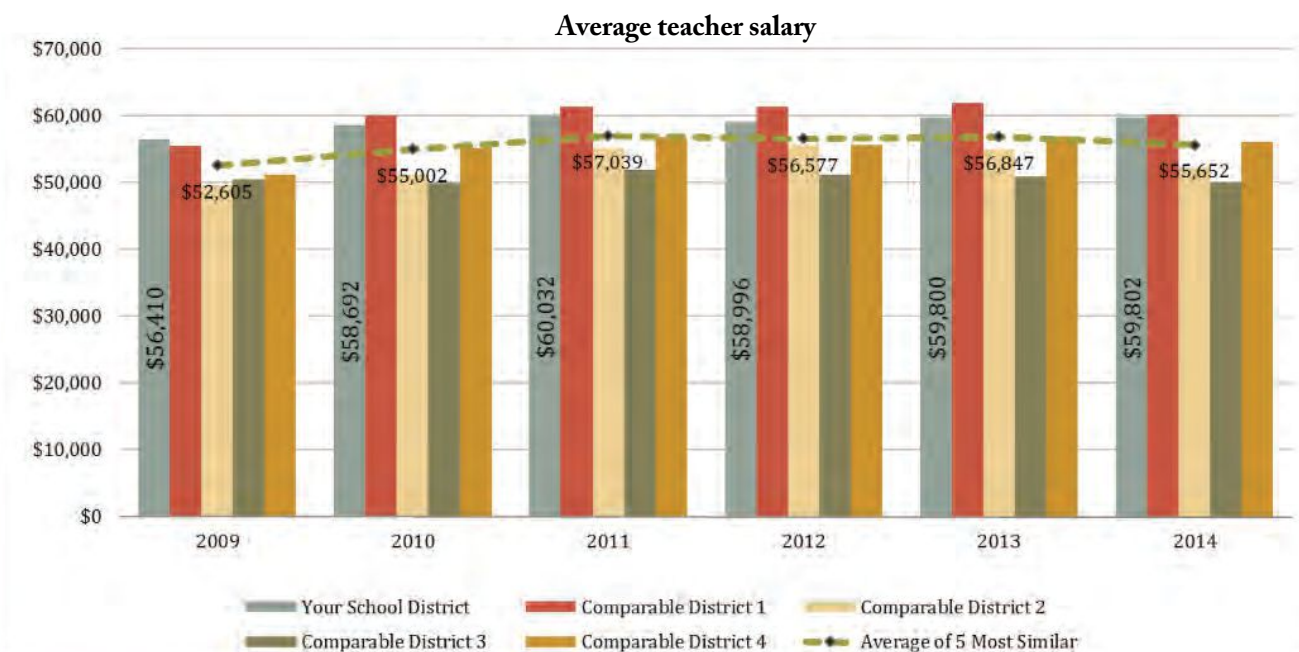
program goals include:

- operational:
 - ◆ wages and benefits;
 - ◆ staffing, either maintaining current staff or adding staff;
 - ◆ curricular and extracurricular needs and programming.
- infrastructure/permanent improvement:
 - ◆ facility/additional space;
 - ◆ efficiency;
 - ◆ safety/comfort.

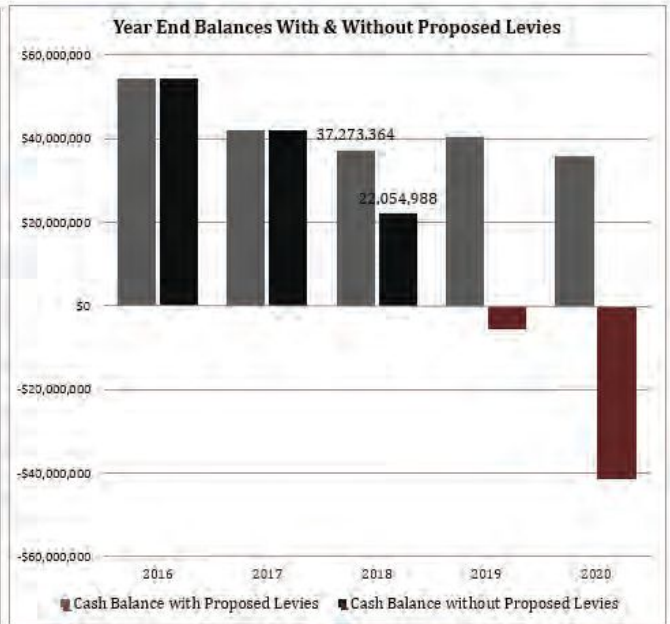
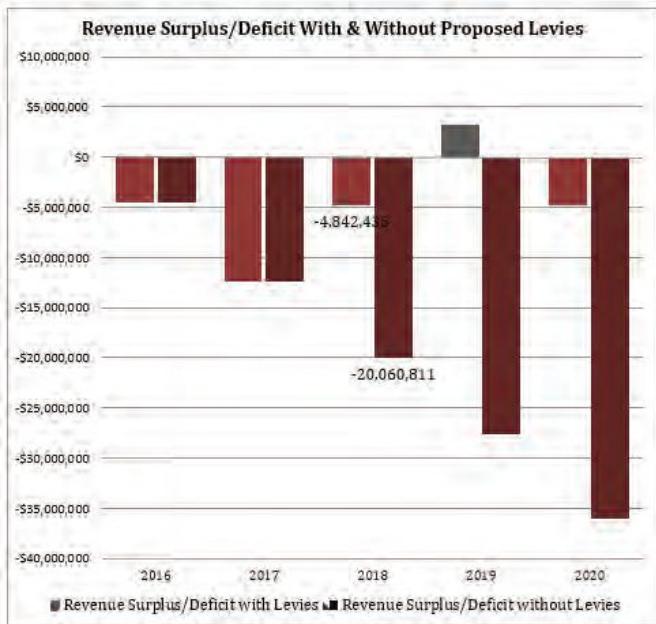
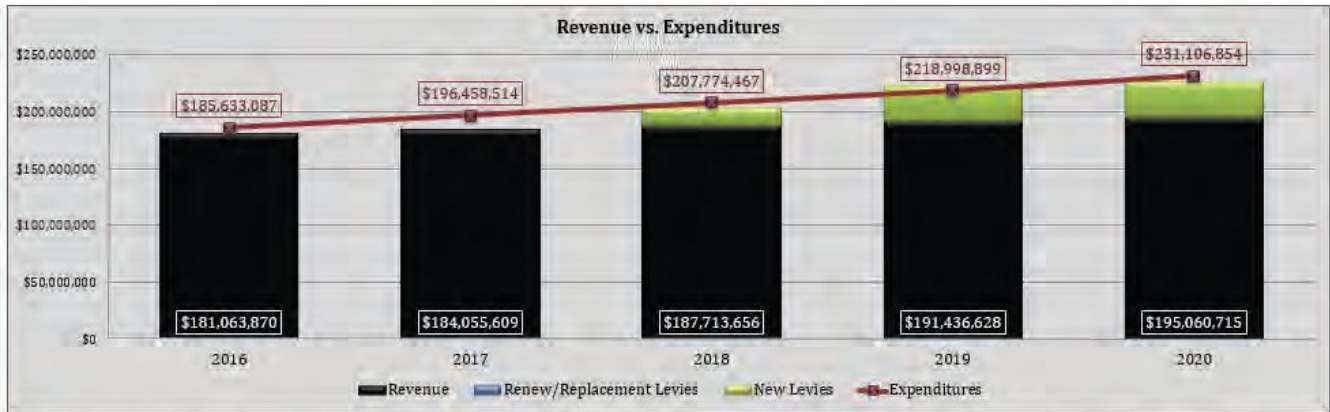
There is nothing wrong with identifying goals that may be ambitious, but prioritizing those goals and determining which are reasonable is key. Some goals may require additional analysis. For example, is the district competitive in the identified area? How do we know?

Some of the needs essential to fulfilling the academic and

Benchmarking studies, like the ones Public Finance



From PFR’s *Financial Readiness Benchmark Report*; see sample at <http://links.ohioschoolboards.org/89213>



Resources (PFR) conducts, are one example of an efficiency study. Benchmarking reports should evaluate costs in terms of comparability, consistency and trends over time as opposed to a one-year snapshot taken in isolation.

The chart with average teacher salaries (page 26) shows trends over time in similar districts (as defined by the Ohio Department of Education) and the average salary among them in each year. That brings us to the next step in the process: correctly sizing the levy. It is important to note that sizing a levy also may be contingent upon the type of levy and/or when the levy is placed on the ballot. The financial forecast becomes the crucial element in this phase. The forecast must be believable for planning to be effective.

Important revenue elements to consider include:

- current valuations and future anticipated valuation growth or decline;
- current millage, both effective and full voted rates;
- inside millage rate;
- enrollment — resident, open enrollment and community schools;

- state funding.

Important expenditure elements to consider are salaries and fringe benefits and equipment and facility needs.

Forecasting revenue and expenditures to help identify the size of a levy cannot happen in isolation and is most effective in a collaborative structure with the district's leadership team. Once reasonable assumptions have been modeled, including the goals identified in the first step of the process, the levy horizon must be considered.

If the desire is for the levy to last five years, then attention must turn to revenue compared to expenditures (line 6.01 of the forecast). The operating margin (deficit or surplus) projected in the third forecasted year is crucial to review. The charts (above) highlight the interim period of the forecast and indicate the financial state of the district that should be the target.

The charts indicate the financial impact with and without a new proposed levy. The green shaded portions in the top



chart reflect the addition of a new operational levy passed in 2017. The new levy will not generate tax collections until 2018. Therefore, only half of the levy's annual revenue will be collected by the end of fiscal year (FY) 2018. By FY 2019, the levy is ramped up to full collection.

On page 27, the bottom left chart reflects the impact of the new levy on the district's operational surplus or deficit compared to there being no new levy. The bottom right chart on page 27 reflects cash balance projections with and without a levy. In this scenario, the district remains solvent from a cash standpoint but still incurs an operational deficit in FY 2020, despite the new levy. We'll discuss the implication of this situation later.

With the district's financial forecast serving as the basis for determining the need for a levy, the district must then consider the type of levy that is right for the community and local economics. Obviously, there are implications relating to each levy type, both for the voting individual as well as the school district. And, no matter which you choose, you will not please everyone.

While each levy option can be designed to generate the same revenue levels, each has its own unique aspects. The following provides an overview of some of the most popular levy choices. There are a few others available, but they are much less common. Also included are a few of the major considerations you should keep in mind when reviewing a particular levy option.

New operating revenue levies

- Is your district's effective millage rate at or near the 20-mill floor?
 - ◆ If yes, the district can preserve its ability to remain on the floor by passing an income tax or emergency levy.
 - ◆ What is the residential/agricultural rate?
- Property tax or income tax?
 - ◆ How significant is the commercial tax base? (Income tax is only levied on residents, not businesses.)
 - ◆ Will a new income tax be in competition with municipal income taxes that already exist or are

planned?

- ◆ An income tax levy will take longer to reach full collection than a property tax levy. On the other hand, it is allowed to grow provided incomes grow. Revenues also can drop if incomes decline during recessionary periods.
- ◆ Earned versus traditional income tax. Earned income taxes generally will not impact residents on fixed incomes or farmers in years when their income is low. There is a broader tax base with a traditional income tax; however, earned income taxes have fared better recently on the ballot.

Renewal operating levies

- Renewing versus replacing a current expense levy.
 - ◆ Renewal will keep effective rates and revenue the same.
 - ◆ Replacement can increase collections but also will result in a loss of state property tax rollbacks.
 - ◆ Current expense levies do not have to expire to be replaced.
- Renewing versus substituting for an emergency levy.
 - ◆ Renewal will result in the same collections as originally approved.
 - ◆ A substitute levy allows revenue to grow with new construction.
 - ◆ A substitute levy can be approved as continuing levy.
 - ◆ Emergency levies do not have to expire to have a substitute levy.

Bond/permanent improvement (PI) Levy

- Levied to address the need for school construction or major infrastructure.
- Did you know you can borrow against proceeds of a PI levy?
- Millage is an asset. As property values rise, required millage may fall, thus providing opportunity.
- PI levies can allow for long-term capital budgeting that otherwise would be the responsibility of the district's general operating funds.

We discussed the levy horizon a bit earlier but only in the context of the current levy. However, we often hear from

Revenue vs. expenditures



Revenue vs. expenditures



clients who want to know when the district plans to be back on the ballot in the future. If this question applies to your levy decision making, then a five-year forecast view may not be enough; sometimes a 10-year forecast is necessary.

The accuracy of a financial forecast diminishes as the forecast years are extended. Applying trend analysis to the current school finance framework can provide a useful glimpse into when — and if — the next levy may be necessary. This discussion can be based on analytical methods that are credible and does not have to be a shot in the dark.

Thinking beyond a current levy may be very useful and help avoid ballot fatigue. No district wants to find itself in the situation of having to renew a levy at the same time they need to place a new levy on the ballot.

The first chart (page 28) shows the results of only one levy passed in 2017 extended to 10 years. The second chart (above), also extended to 10 years, shows the results when a

second levy is passed in 2021.

The charts demonstrate that a single levy passed in 2017 will not sustain the district through 2025. Within that context, has the district made it clear that it may need another levy within five years? Understanding the implications of the next levy both from a timing perspective, as well as a public relations standpoint, could be very important issues to address prior to the first ballot issue.

There are many considerations leading up to placing a levy on the ballot. That is why it is essential to start early. A year or more in advance is not too soon. The work, if done correctly, is not easy. The results of that work may even lead you in a direction you had not considered.

The experts at PFR, in concert with OSBA, are here to help. If your district is considering a levy and could use assistance with one or all of these very important steps, please keep PFR in mind. For more information, visit <http://pfrcfo.com>. ■



What can PFR do for you?

OSBA is working with Public Finance Resources Inc. (PFR) to offer district financial forecasting services. This is an OSBA service, provided exclusively for OSBA by PFR.

PFR can:

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- develop customized reports to make your financial information understandable and believable;
- provide effective and efficient financial modeling to identify options and results;
- build local capacity that is based on understanding, believing and planning.

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Wyoming City’s secret to success at the ballot box

John Fox, marketing consultant

In 2012, the small suburban Cincinnati city of Wyoming passed another school bond issue. If it seems like Wyoming has never voted down a tax levy for operations or a construction bond issue, that is almost correct. It’s been nearly 50 years since the nays outnumbered the yeas.

Since 1998, most districts have seen multiple levies fail. However, in that same time, the **Wyoming City** School District has passed four issues: two for operations and two for construction.

How does this city with a population of under 9,000 and one high school of fewer than 600 students consistently pass school tax levies and bond issues?

The secret is research, but not the typical political polling that accompanies most campaigns. Nor is it a survey fielded by a specialized firm that focuses on educational issues. It is *marketing* research I designed, implemented and analyzed based on my prior experience as a Procter & Gamble Co. brand manager and ad agency principal.

I have lived in Wyoming for 29 years. My two children attended Wyoming schools from kindergarten through high school. I have volunteered for countless community activities in sports, music, theater and fundraising. But I feel my greatest contribution has been in the area of tax levy and bond issue research.

It started in 1998, when the school board and administration were not sure if citizens would be willing to take on a sizable property tax increase to fund improvements to the five Wyoming schools. The proposal included construction of a new high school and renovations to the other buildings.

To gauge public sentiment, I designed quantitative research with several objectives that included:

- determining the pulse of the community in favor of or against a basic construction plan;
- assessing the appeal of various add-ons to determine how high a

- cost and tax voters would tolerate;
- uncovering reasons for and against the plan and testing hypothetical reasons from district leadership so these opinions could be addressed in marketing, public relations and other communications efforts before the vote;
- identifying the awareness of key selling points, again with marketing in mind;
- involving community members in the decision and using research to let them know that what is on the ballot is what *they* want, not what the school board and administration want to force on them.

The study was conducted by telephone a few months before the election. The district had the results before deciding to put the issue on the ballot.

If research indicated the issue would fail, it would not be placed on the ballot. This, in and of itself, would be a benefit since there are large fees associated with seeking a tax issue. It also would avoid the stigma of losing a levy vote.

The extremely education-oriented Wyoming community does not like to lose a vote for its schools, which are the main reason families live in the district. To promote levy success, the community and district work together on an independent campaign committee that raises funds for voting-related efforts, including research.

The 1998 study showed 62% in favor of



RESEARCH SPOTLIGHT

An in-depth look at what works in public education

This article is part of an OSBA initiative designed to share the latest education-related research with school board members and administrators. The association is working with Ohio colleges, universities and education organizations to disseminate studies about what works in K-12 public education. In addition to the “Research Spotlight” section appearing in the Journal, OSBA has dedicated a page on its website to serve as a research repository for members at <http://links.ohioschoolboards.org/66017>. For more information about this initiative, contact **Gary Motz**, OSBA senior editorial manager, at (614) 540-4000 or gmotz@ohioschoolboards.org.

the plan and that some, but not all, of the add-ons were appealing. The issue was put on the ballot at the appropriate tax level, the public relations campaign addressed the issues uncovered in the research and the issue passed with 60% in favor. A new high school was built, the other four schools were improved and Wyoming now had a template for future tax levies and bond issues.

In 2002 and 2005, the district needed operating funds. Each time, I was asked for research similar to 1998, customized for each levy's issues. As before, the studies were conducted a few months before committing to the ballot. Both times research predicted within 1%-2% of the actual vote. Again, approximately 60% voted for the levy, and the schools secured the needed tax funds.

In early 2009, Wyoming turned its attention toward its middle school, which was built in 1928. The district wanted to totally renovate the building or raze it and construct a new one. Research was clearly necessary given the depth of the recession at that time.

I routinely conduct new product research for companies that might be about to spend millions on manufacturing and marketing. I tell them, "If the research tells you to go ahead, it's important.

But if it tells you not to go ahead, it's even more important." This was clearly expressed to the Wyoming district.

The 2009 Wyoming Middle School research was the first study to show less than 50% in favor of a proposed plan, with the poor economy being the main reason for the opposition. With only 43% of voters favoring the project, it simply was the wrong time to ask for a tax increase. The community, despite its confirmed backing of education and the recognized need for a new middle school, expressed this strongly. I recommended that the issue not be placed on the ballot, and it was tabled.

By 2011, the board and administration felt the time might be right to reconsider the new middle school but still weren't sure whether to renovate or build new. This time we used a two-step process.

The first study in mid-2011 tested three alternate plans. It showed that the community preferred renovation with an addition on the back of the school versus tearing down the facility and constructing a new one. It also revealed a major change in some of the negative opinions from the 2009 research.

The second study in late 2011 tested one specific plan. This time a whopping

74% said they were in favor. There was additional encouragement from answers to questions about the timing, the economy and other previously negative issues. The recommendation was to proceed with a vote in March 2012.

A few days before the election, I talked to the district's public information officer who had been involved in every one of these votes and research studies. We agreed the bond issue would pass. But I felt there was no way it would get 74% of the vote — and I was technically right. It passed with 73% of the vote and, once again, came within the magic 1-2% of the research's prediction.

The newly renovated Wyoming Middle School, a model for modern design and technology, opened in 2015.

I've also been involved with similar projects for 12 other Ohio school districts, each with its own educational issues. Online research has made the entire process much more efficient in terms of significantly lower costs, larger sample sizes and faster results. I hope to be helping school districts with this research for a long time. ■

About the author: John Fox is principal of John Fox Marketing Consulting in Cincinnati.

I can make your next tax levy or bond issue painless!

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Uncovers The WHY

- Secures voters' reasons for intending to vote for or against, in their own words
- Tests your hypotheses on why a vote might pass or fail

Tells You HOW to pass it

- What to communicate to ensure passage
- The best way to communicate this message

EXPERIENCE in 13 Diverse Ohio Districts (and 2 municipalities for parks/recreation)

- Community-wide research (on awareness, opinions voting intent)
- Preliminary constituents' research (a great, inexpensive first step)

People stopping by my booth at OSBA in November offered these types of comments about having future ballot issues: "Oh gosh, I hope not!" "Thankfully, no." "Whew!" (how they feel when they finally pass a vote). "Thank heavens" (there's no need). "Painless would be good!"

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How to make your next levy campaign a successful one

Jerry Rampelt and Dr. Paul Johnson

Editor's note: Jerry Rampelt and Dr. Paul Johnson have been involved with public education in Ohio for more than 40 years. Rampelt is the creator and executive director of the Support Ohio Schools Research & Education Foundation, a nonprofit organization that helps school districts with levy campaigns. Over the past seven years, he has worked on more than 230 Ohio school levy campaigns. Johnson is an associate professor at Bowling Green State University, a school board member at Bucyrus City and Pioneer Career and Technology Center and a former school superintendent. Both have extensive experience in conducting research about Ohio school district levy campaigns.

An important point to remember is that there are two kinds of school districts in Ohio: Those that are on the ballot and those that will be.

Levies take time, effort and money that could be better used to support student learning. It makes sense to take advantage of what both research and practice have taught us about what makes a difference in levy campaigns.

For the past eight years, we worked on identifying and implementing the campaign practices that make a difference in levy campaigns. Support Ohio Schools was involved with 13 levy campaigns in August and November of 2015, with a record of 12 wins and 1 loss. Three of the school districts had three consecutive losses prior to winning with Support Ohio Schools.

Here's what we have discovered makes a difference: Money, direct voter contact, messaging, community involvement, planning and execution.

How much you spend makes a difference

Our research indicates that successful levy campaigns spend more money than those that are not successful. In fact, successful campaigns spend at least \$1.51 per registered voter while those that are not successful spend less, often significantly less.

We also notice that successful campaign committees have

become very effective and creative in raising significant campaign dollars through initiatives such as payroll deduction programs, corporate donations and fundraising activities like bowl-a-thons, pancake breakfasts, kids' resale events, scrapbook events, golf outings and, yes, even cocktail parties. One of the keys for long-term success is to make fundraising annual affairs, not just when there is an issue on the ballot.

What you spend it on makes a difference

What a campaign spends money on makes a significant difference. Our research indicates campaigns that spend money on direct voter contact are more successful than those that don't.

Examples of direct voter contact are door-to-door canvassing (not just dropping off literature); mail to a voter's home; printed messages; and personal phone calls (not automated calls) from volunteers. There are decades of research that show a clear relationship between how many voters were contacted face-to-face and election success. Radio, TV and newspaper ads; buttons; bumper stickers; and trinkets are not direct voter contact.

Yard signs in voters' lawns are a public display and visible measure of support for the levy. There is a high probability of someone with a yard sign voting "yes." If you can't reach a "critical mass," it's better not to do any yard signs. A few signs just remind "no" voters to go to the polls and vote against the levy.

Social media makes a difference

Social media is the place where your supporters go for levy information, but it is not a substitute for face-to-face campaigning. Volunteers can keep up-to-date about the campaign and see what their friends are doing in almost real time. Posting a photo of a campaign activity with lots of people is energizing.

Who you spend money on makes a difference

If direct voter contact is important, so is targeting whom you are directly contacting. One very effective way to do



Successful campaigns are well organized and have a plan that is well thought out.

this is by using voter modeling. Through sophisticated polling and extrapolation techniques, voter modeling enables campaigns to target individual “yes” voters with a specific message that resonates with them. Such messages can then be delivered through direct mail, phone calls and door-to-door canvases.

Your message makes a difference

The levy campaign has to have a compelling message to be successful. In developing a message, two critical questions have to be answered:

- Need — can you briefly answer why the levy is needed?
- Importance — why is the need for a levy important for your students, community and school district?

Voters are not going to support a levy they believe is not needed or important. Too often, campaigns only tell how much the levy will cost and do not communicate the need and importance of the ballot issue.

Polling voters is helpful in crafting a meaningful message. Another useful approach is using a modified SWOT (strengths, weaknesses, opportunities, threats) analysis technique designed for political campaigns. Conducting such an exercise will help develop a message that speaks to the strengths of the school district while focusing on future opportunities.

Once developed, the message must be communicated truthfully, concisely, clearly, consistently and repetitively using the direct voter contact methods previously described. A rule of thumb for effectively communicating any message is 27 words, nine seconds and three points. One final note: Volunteer training is critical with messaging.

Community involvement makes a difference

We can almost predict the outcome of a levy campaign when we walk into the levy meeting. If the room is full of eager, passionate volunteers who want to “own” the campaign, that’s a good sign. In addition, if the volunteers in the room reflect the natural diversity that exists in any district, that’s a *very* good sign. If the room holds only administrators, board members and a few staff, that’s not a good sign at all.

Planning makes a difference

Successful campaigns are well organized and have a plan that is well thought out. Money, time and people are scarce commodities in most districts. A plan helps you use them wisely. A campaign without a plan is almost doomed before it begins. Planning should begin long before election day.

The last step is a get-out-the-vote strategy. Campaigns cannot afford to have “yes” voters stay home and not vote. If you have taken advantage of voter modeling and board



of elections data for your district, you know who they are, where they live and if they have voted right up until the polls close on election day.

Campaign execution makes a difference

We have been in districts that like to play “skeet shoot” with campaign strategies. We mention a strategy and they shoot it down while exclaiming, “Tried that! Didn’t work.” But usually, when probed about how they actually implemented the strategy, it becomes clear it was implemented in name only.

There are two questions that cut through the skeet shooting. How much money did you raise? How many people volunteered at least two hours for the campaign?

Take door-to-door canvassing. Done well, it consists of planned and targeted walking lists, preferably using voter modeling data; volunteer training, with a special focus on the importance of staying on message; canvassing in pairs in familiar precincts; and actually engaging voters instead of just dropping off literature.

Done poorly, it usually is not planned, has no walking list, provides no training on messaging, allows individuals to work alone (safety concerns aside, how do you know if they ever knocked on a door?) and encourages volunteers to just drop literature on the porch. When asked, both campaigns

can claim they did door-to-door canvassing. The difference is that the former was much more likely to be successful than the latter.

There are two kinds of school districts in Ohio: Those that are on the ballot and those that will be.

If there is a silver lining in the fact that Ohio leads the nation in the frequency of school ballot issues, it is that we have had an opportunity to study and then apply what makes a difference in levy campaigns. The time, energy and resources that communities expend on levies are too valuable to be wasted on ineffective campaigns.

While there is no magic formula that guarantees levy success, we believe campaigns that use what we know makes a difference have a much better chance of success than those that don’t. ■

Editor’s note: For more information on conducting successful levy campaigns, contact Johnson at pjohnso@bgsu.edu or Rampelt at jerryrampeltsos@gmail.com or (614) 783-5809.

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Plan for a brighter future

Forecast a bright financial future

Amanda Finney, senior marketing and trade show manager

Does your district have a sound financial plan in place for next year, or how about five years? Are you planning to put a levy on the ballot? Do you currently understand all the financial aspects facing your district? On the surface, those questions may be difficult to answer. However, they don't have to be.

OSBA understands school districts face daily financial challenges, and the landscape of school finance is always changing. To help navigate these



We can help you reach agreement

OSBA's bargaining consultation services offer your district comprehensive representation services during negotiations, and/or traditional and alternative bargaining styles.

Bargaining consultation clients receive:

- low-cost service fees;
- flexible rates;
- experienced negotiators;
- statewide experience.

For more information on how bargaining consultation can work for your district, contact OSBA's management services division at (614) 540-4000 or (800) 589-OSBA.

fiscal issues, OSBA provides valuable resources to help your district plan for a successful financial outlook. For over four years, OSBA has partnered with Public Finance Resources Inc. (PFR), a group centered on district financial forecasting.

An exclusive endorsed program of OSBA, PFR complements your district's financial knowledge with its consultants' experience of serving hundreds of local government entities, including school districts. Highly experienced experts who have more than 100 years of combined strategic financial experience lead PFR's team.

"PFR is a critical tool in our forecasting process," **Jefferson Area Local (Ashtabula) Treasurer Patricia A. Smith** said. "The company helps us understand the financial management and funding challenges we face as a local school district. At the same time, it allows us to communicate to our community that we understand those challenges and are making informed decisions. We are very pleased with PFR's services."

Whether you are a board member, treasurer, superintendent or administrator, PFR has something to offer and can:

- analyze internal and external data to identify key financial indicators for your district;
- develop customized reports to make your financial information understandable and believable;
- provide effective and efficient financial modeling to identify options and results;
- build local capacity that is based on

understanding, believing and planning.

PFR offers several services to ensure your district's financial future is successful. They include:

Consulting

- revenue and expenditure modeling and long-range strategic planning;
- levy consulting, analysis and training;
- special projects;
- board meeting presentations;
- communications and public messaging.

Forecasting modeling


- five-year forecasting software and tools;
- cash-flow tracker;
- revenue and expenditure analysis.

Training

- communicating forecast/financials to your stakeholders;
- custom workshops.

"I have been a client and have attended PFR's seminars for over 15 years," **Bethel-Tate Local (Clermont) Treasurer Karen R. Royer** said. "(Its) expertise and depth of knowledge is worth its weight in gold. The software and information I receive, as well as the constant improvement of the product they produce, is second to none. I also appreciate the fact that whenever I have questions they are always there to lend a hand."

Plan today for a successful financial future for your district. To learn more about these services and how PFR can help your district's financial future, visit www.pfrco.com or call (614) 732-5948. ■



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Legislative conference focuses on ESSA, charter schools

► *Rep. Andrew Brenner (R-Powell) discusses the current work of the House Education Committee at the March 16 Ohio School Boards Association/Buckeye Association of School Administrators/Ohio Association of School Business Officials State Legislative Conference.*

▼ *Senate President Keith Faber (R-Celina), left, answers questions about changes to Ohio's education system during a panel discussion with House Minority Leader Fred Straborn (D-Dayton).*



▲ *Sen. Peggy Lehner (R-Kettering), chair of the Senate Education Committee, encourages attendees to provide input on Ohio's state plan for the federal Every Student Succeeds Act (ESSA).*

► *Rep. Gary Scherer (R-Circleville), center, speaks with constituents during the lunch with legislators.*





◀ *Sen. Randy Gardner (R-Bowling Green) talks with attendees at the State Legislative Conference. Visit OSBA's Flickr page at <http://links.ohio-schoolboards.org/30960> to view more photos from the conference.*

◀▼ *House Speaker Pro Tempore Ron Amstutz (R-Wooster) answers questions after his presentation.*

▼ *Greene County ESC Superintendent Terry Graves–Strieter shares concerns during the conference luncheon. An article covering the State Legislative Conference appears in the April 11 OSBA Briefcase.*



▲ *Rep. Bob D. Hackett (R-London), left, discusses education issues with Urbana City and Ohio Hi-Point Career Center board member Warren Stevens, center, and London City Superintendent Louis A. Kramer.*

◀ *East Cleveland City board member Tiffany Fisher asks a question during the State Legislative Conference.*

Honoring 'A Work



Rossford EV board members, from left, Jackie Huffman, Dawn Burks, Tiffany L. Densic, Sharon Belkofer and R. Kent Murphree receive OSBA certificates of appreciation from Superintendent Daniel E. Creps, far right.

Board members recognized in fun, creative ways

Lancaster City showed much love for its board of education during School Board Recognition Month in January with a video; articles published in local newspapers and on Facebook and the district's website; and local radio announcements. Also, Lancaster Mayor **Brian S. Kuhn** stopped by to personally thank board members.

Kuhn read a proclamation at the board's monthly meeting, and representatives from each of the district's school buildings presented board members with thank-you cards, while Superintendent **Steve Wigton** handed out certificates of appreciation made by OSBA. All five board members are graduates of Lancaster City, so the district posted their school pictures on Facebook on "throwback Thursday."

The thank-you video, produced by Lancaster Schools Network Station Manager **Kyle Lewis**, asked kindergarten students, "What is a school board?" You can find links to the video, the district website's thank-you page and images of throwback Thursday Facebook posts by visiting the School Board Recognition Month Page on OSBA's website at <http://links.ohioschoolboards.org/52515>. All pictures and videos mentioned in this article also can be found on that Web page.

Each January, Ohio school districts recognize board members in fun, creative and, like Lancaster City, sometimes high-profile ways. Ohio's annual celebration runs concurrently with the national campaign, which was initiated by the National School Boards Association in 1995 to highlight board

of Heart'

*Crystal Davis,
assistant editor*

members' significance to public education.

To support recognition activities across the state, OSBA provided members with a Web-based resource kit, which included tips on ways to honor board members; sample news releases, editorials, newsletter articles, public service announcements and resolutions; a proclamation from Gov. **John R. Kasich**; and a poster. This year's theme — A Work of Heart — highlighted the significant educational, motivational and emotional impact board members have on the future of Ohio's 1.7 million schoolchildren.

Nearly 3,500 Ohio school board members perform their Work of Heart by researching issues and studying reports that pertain to board service and participating in school and community events while promoting public education and their schools. They do all of this while balancing their own personal, professional and family responsibilities. Board members' decisions have the power to change a community's future, yet members often are not thanked for their important work and dedication.

That's why OSBA is committed to helping districts honor these hardworking public servants. In addition to the resource kit, the association provides personalized certificates signed by OSBA's president and executive director to every board member in the state.

School districts' celebrations are featured in the Journal and on OSBA's School Board Recognition Month Web page (link on page 40). Districts submit information and photos, and OSBA gathers information from stories written by local news media.

While most districts honored board members with a proclamation, OSBA certificates and small gifts, others, like **Forest Hills Local (Hamilton)**, launched creative thank-you campaigns to honor board service.

Forest Hills initiated a three-pronged recognition effort: Board members were given golf shirts bearing the district's new logo, a thank-you press release was sent to the media and posted on the district's website; and a guess-who-this-is contest was held on social media. The contest helped the community get to know the board.

"Forest Hills Local Board of Education members demonstrate

an extraordinary dedication to our district and its students," Superintendent **Scot T. Prebles** said. "They work closely with parents, education and business professionals and community members to create schools and educational experiences that allow students to excel. Their contributions reflect a year-round commitment on their part to serve the best interests of students."

Fairless Local (Stark) Superintendent **Broc A. Bidlack** thanked his board by putting together an extra-special gift, which included packs of Extra gum with the message, "Thanks for always going the extra mile!"

Mid-Ohio ESC Superintendent **Linda T. Keller** delivered fresh flower bouquets and leatherette portfolios to board members. The leatherettes were laser-engraved in the Mid-Ohio print shop, and students in the horticulture program at **Pioneer Career and Technology Center** designed the flower bouquets.

"At Mid-Ohio ESC, we appreciate our dedicated board members who are committed to providing quality and cutting-edge services to our client districts," Keller said. "Their enthusiastic support and thoughtful guidance is so important to our continued success."



Using props, Mogadore Local (Summit) sixth-graders recited a jingle telling the school board what they would do if they were board members.



Fairless Local (Stark) Superintendent Broc A. Bidlack thanked his board with a gift package, which included packs of Extra gum with the message, "Thanks for always going the extra mile!"

At **Olmsted Falls City**, board members were given goody bags, and students wrote thank-you cards for each board member. Olmsted Falls boosters, the PTA Safety and Wellness Committee and the food service department contributed a variety of healthy snacks, a cafeteria recipe book and Bulldog paraphernalia to put in the goody bags. Board members received OSBA certificates, and an article honoring their service was featured on the district's blog.

Bucyrus City board members were recognized prior to the start of a varsity boys basketball game and received OSBA certificates during their January board meeting.

"Our district is incredibly fortunate to have a dedicated board of education that works closely with parents, education professionals and community members to create the educational vision we want for our students," Superintendent **Kevin D. Kimmel** said.

Franklin Local's (Muskingum) students and staff came bearing gifts for board members.

Superintendent **Sharon McDermott** presented OSBA certificates, and board members received a rose and a card signed by district office employees.

Staff members at Philo High School presented a smiley face certificate to the board, and Philo Junior High School gave board members a key chain made in the STEM lab. Roseville Elementary School presented a poster signed by students and staff members and gave board members a Superpower shirt. Duncan Falls Elementary School delivered to board members the message, "We 'DONUT' know what we would have done without you," and Franklin Local Community School staff made cards to thank the board.

To honor its school board, **Tuscarawas Valley Local (Tuscarawas)** put together a variety of gifts and a fancy program featuring students. The Tuscarawas Valley High School and Fourth-grade Select Choirs performed, and board members heard an original oratory speech, watched Project Lead the Way (PLTW) demonstrations and viewed Tuscarawas Valley Primary School's thank-you video.

Board members also were treated to meat-and-cheese boxes and floral arrangements by **Buckeye Career Center** students, PLTW thank-you ornaments and framed word cloud photos. Art students created several large paintings to express their appreciation of the board's service.

Some enthusiastic **Bellefontaine City** Bellefontaine Elementary School students brought armloads of treats as a special surprise to honor board members. Students distributed to each board member baskets of candy, thank-you cards and a banner that read, "Thank You For Making Our School Great." Bellefontaine Middle School provided a 2016 calendar featuring student artwork, and Bellefontaine Intermediate School presented the board with thank-you cards and lip balm because "our school board is the balm!" In addition, the Furry Friends Club presented the board with a certificate, stating it had adopted an animal at the Columbus Zoo and Aquarium in the board's name. Finally, central office leaders presented each board member with a large candy bouquet and a gift certificate to a local restaurant.



Franklin Local's (Muskingum) students and staff gave gifts to board members, from left, James B. Swingle, Marc Carpenter, Susan L. Lent, John Coler and Larry McCutcheon.

Mogadore Local (Summit) celebrated with a skit performed by sixth-grade students. Using props, students recited a jingle telling the school board what they would do if they were board members.

Wellston City Superintendent **Karen P. Boch** honored the board by presenting OSBA certificates to members, along with a heartfelt speech.

"I just want to thank you for your endless hours of dedication and commitment to our student's families and staff," Boch said. "There's a poster on the wall that says, 'A Work of Heart.' It takes heart to be a board member, especially with all of the endless hours that you put in well beyond the monthly meetings, all so that we can all realize one common goal, which is allowing our students to achieve the highest that they can achieve. I encourage all citizens to publicly and privately

thank the school board members for serving this community and for their dedicated service to our children.”

Sidney City Superintendent **John F. Scheu** echoed Boch’s speech during the board’s January meeting as he presented each board member with an OSBA certificate of appreciation.

“A Work of Heart describes the members of the Sidney City School Board,” Scheu said. “A board member has to have A Work of Heart, because the dedication and the time commitment they make (creates) a better place for our students.”

Cincinnati City’s Hyde Park School gave each board member a clay vase. Giving student-made gifts to board members in January has been a Cincinnati City tradition for about 15 years.

Princeton City’s board also started the new year with gifts and gratitude. Board members received cards, posters and tokens of appreciation from students at Heritage Hill Elementary School. Administrators of Princeton’s 10 schools also attended the January board meeting and helped present the gifts.

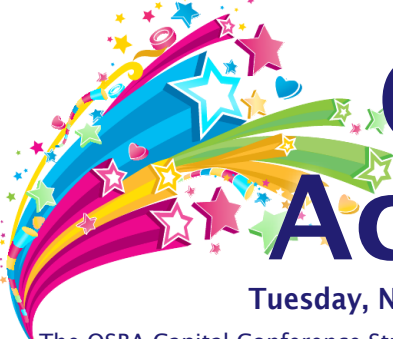
Graham Local (Champaign) Superintendent **Matt Curtis** gave outgoing board members a commemorative clock bearing their names and the number of years served on the board. The district newsletter also contained a section profiling each board member with information about goals, occupations and their



Tuscarawas Valley Local (Tuscarawas) students created a program to honor their board members using the School Board Recognition Month theme “A Work of Heart.”

favorite Graham memories.

“Our school board members are ordinary citizens — your friends and neighbors — with extraordinary dedication to our community and our children,” Curtis said. “Each member is a strong advocate for continuous improvement in student learning and provides a vital service in our community ... The job of a school board member is tough, the hours long and the thanks few and far between. Too often, we forget about the personal sacrifices school board members make.”



Celebrate the stars in your district at the OSBA Student Achievement Fair


Tuesday, Nov. 15, 2016 • 11:30 a.m. to 3 p.m. • Greater Columbus Convention Center

The OSBA Capital Conference Student Achievement Fair highlights outstanding student performance groups and fresh, innovative initiatives from school districts across the state. The fair will be held from 11:30 a.m. to 3 p.m. on Tuesday, Nov. 15, 2016, during the OSBA Capital Conference and Trade Show.

OSBA will choose one school district performing group from each of the association’s five regions to perform during the Student Achievement Fair. Each group will perform for 20 minutes. To nominate a performing group, submit a nomination at <http://conference.ohioschoolboards.org/saf-nominations> and email a video audition or YouTube link to **Teri Morgan**, deputy director of school board services, at tmorgan@ohioschoolboards.org. Only electronic recordings will be accepted.

OSBA also is accepting nominations for district programs that improve student achievement. For more ideas, visit <http://links.ohioschoolboards.org/60021> to view the list of 2015 Student Achievement Fair district programs. One hundred programs highlighting student achievement will be selected. Nominate your program at <http://conference.ohioschoolboards.org/saf-nominations>.

The nomination deadline is Friday, June 24. Nominate a student performing group or district program today!



The **Jefferson County JVSD** Board of Education enjoyed the fruits of their efforts at a recognition dinner. Superintendent **Todd Phillipson** said board members have a combined 129 years of board experience.

“We continue to improve the school,” Phillipson said. “We have an outstanding board with a great deal of knowledge and experience ... these are dedicated servants to the educational community.”

Rossford EV students created thank-you cards, posters and banners, which were displayed throughout the boardroom at the January meeting. Superintendent **Daniel E. Creps** also presented each board member with an OSBA certificate of appreciation.



Cincinnati City board member Carolyn L. Jones thanks students for the vase they made for her for School Board Recognition Month.

Coventry Local's (Summit) 4th Grade Academy Show Choir performed three songs for board members at the district's January board meeting. Each board member also was presented a certificate recognizing their years of board service.

Springfield Local (Summit) Superintendent **Chuck Sincere** posted a thank-you to board members on the district's website.

Students from **Chardon Local's (Geauga)** Maple Elementary School, Chardon Middle School and Chardon High School gave presentations recognizing board member service, according to the Geauga County Maple Leaf. **Hannah Mean**, a member of the middle school's Student Principal Advisory Council, gathered quotes from fellow students to share at the meeting because she is passionate about sharing what the middle school loves about Chardon Schools.

“Chardon Schools has an extremely solid sense of community,” Mean said. “They have high academic standards and push their students to success. They truly care about each and every student. I love that you can be free to express yourself ... you don't have to change your personality to fit in. There are all types of students here at Chardon that can't wait to make new friends.”

Buckeye Local (Jefferson) held an appreciation dinner for board members prior to its Jan. 11 organizational meeting at the district office. Superintendent **Mark S. Miller** highlighted some of the board's achievements as well as its commitment.

To see how other districts celebrated School Board Recognition Month, visit links.ohioschoolboards.org/52515. Photos and videos of celebrations also are posted on the page. ■

You really can make a difference ... because kids count!

Children are our future and there is no greater investment than a child's education. By joining OSBA's political action committee, **Kids PAC**, you are helping to ensure all children in Ohio receive the quality education they deserve!

You can donate online at www.kidspac.org. To learn more about **Kids PAC**, contact **Marcella Gonzalez** at mgonzalez@ohioschoolboards.org or call (614) 540-4000 or (800) 589-OSBA.



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Members connect at region conferences

► *Wellsville Local's (Columbiana) Garfield Elementary School Chorus performs at the OSBA Northeast Region Spring Conference. More than 1,000 people attended the six region conferences, which were held throughout March.*

▼ *Attendees network at the Northwest Region conference. The conferences feature updates from OSBA officers and staff and a number of awards and recognitions. A recap of the events will appear in an upcoming issue of the OSBA Briefcase.*



▲ *Southwest Region President Sue Steele, Goshen Local (Clermont) and Great Oaks Career Campuses, right, honors Madison Local (Butler) Coordinator of School-Community Relations A.J. Huff and the district for its strong response to a shooting at Madison Junior/Senior High School.*

► *Southeast Region President Bruce D. Nottke, Athens City and Tri-County Career Center, left, and OSBA President Eric K. Germann, Lincolnview Local (Van Wert) and Vantage Career Center, right, congratulate Corby Leach, Logan-Hocking Local (Hocking), for earning Master Board Member status at the Southeast Region conference in Pomeroy.*





◀ Northeast Region President Thomas F. Brophy, Wellsville Local, left, and OSBA President Germann recognize Hong Zenisek, an Ohio Teacher of the Year nominee from Cleveland Heights-University Heights City.

◀▼ State Board of Education member Stephanie Dodd speaks with attendees at the Southeast Region conference in Senecaville.

▼ Southwest Region Immediate Past President Gail Martindale, Cedar Cliff Local (Greene) and Greene County Career Center, left, congratulates Dr. Hazel G. Rountree, Dayton City, on her second Award of Achievement. View more photos of the spring region conferences at <http://links.ohioschoolboards.org/81312>.



▲ Everett Harris, Springfield Local (Lucas), second from right, receives the inaugural Dr. Neil Pohlmann Award of Excellence in Education at the Northwest Region conference. He was recognized with members of Pohlmann's family, including Pohlmann's widow, Mary Pohlmann, third from left.

◀ North Union Local's (Union) NUAge a cappella group performs during the Central Region Spring Conference.



Leadership training takes center stage at BLI

Institute focuses exclusively on board members

Scott Gerfen, assistant editor

If you want to know what's on the mind of Ohio's public school board members, OSBA's Board Leadership Institute (BLI) has been a constant sounding board for recognizing the most pressing issues in public education.

Why?

Because BLI is designed *by* board members and is exclusively *for* board members.

Over two days — April 29 and 30 at the Hilton Columbus/

Polaris in north Columbus — the institute will bring board members together with experts who have the solutions. In return, board members develop the skills and strategies needed to meet the ever-increasing demands of school district governance and network with colleagues to share success stories.

In its 15th year, BLI is planned at the Board Leadership Focus Group meeting during the Capital Conference and, based on board members' recommendations, further developed by OSBA staff.



Attendees share a laugh during a session at the 2015 Board Leadership Institute.

Workshops feature topics ranging from student achievement, finance and school law to legislative issues, curriculum and board development. There are 18 innovative breakout sessions in six learning tracks.

Sessions on Friday, April 29, will cover student achievement, school finance and critical issues, including:

- the Every Student Succeeds Act (ESSA) and what local school boards need to know and what it means for their districts;
- a school-funding overview of what's new and different in fiscal years 2016 and 2017;
- the hidden costs in labor contracts;
- the Ohio Ethics Law and conflicts of interest and how to respond;
- concussion management and defining the safe return to participation and the classroom;
- the 2016 elections and the Ohio General Assembly's lame-duck session.

Sessions on Saturday, April 30, will focus on board development, leadership and hot topics, including:

- preparing for and leading your district through change;
- healthy superintendent-treasurer partnerships;
- inappropriate relationships between student athletes and coaches;
- the opioid epidemic and its impact on the school community;
- school bus safety;
- accommodating transgender students.

C. Ed Massey, a past president of the Kentucky School Boards Association and the 2012-2013 National School Boards Association president, will kick off the institute as the Opening General Session speaker.

Massey, who also served on the National PTA board of directors, has been involved in public education for more than 20 years, first as a substitute teacher. He currently is a director on the board of the New York Says Thank You Foundation. The foundation has become one of the nation's largest volunteer service organizations on the 9/11 anniversary and focuses on survivor empowerment in disaster relief, education and the arts.

An avid NASCAR fan, Massey will talk about what school boards have in common with the sport.

The practicing partner in the Kentucky-based Blankenship Massey & Associates law firm has served his community in many ways, including football coach, CPR instructor, emergency medical technician and firefighter.

The speaker for BLI's Closing Luncheon is Ohio Rep. **John Patterson** (D-Jefferson), who is in his second term



School board members network before the 2015 BLI Opening General Session.

in the Ohio House of Representatives. He serves on the House Education Committee and the House Finance Subcommittee on Primary and Secondary Education.

After teaching U.S. history for 29 years at **Jefferson Area Local's (Ashtabula)** Jefferson Area High School, Patterson retired in 2012.

During his time at Jefferson, he was active in the Jefferson Area Teacher's Association. He has been honored as an Ashtabula County Teacher of the Year, Ashland Oil Teacher of the Year, Jefferson Village Citizen of the Year, Kent State Ashtabula Alumnus of the Year and Jefferson Area Schools Alumnus of the year.

Patterson also served as a Model United Nations adviser at Jefferson. His teams won numerous regional conferences and placed high at national conferences at Harvard University and University of Chicago and at The Hague International Model U.N. Conference held in the Netherlands.

The cost to attend BLI is just \$245, which includes breakfast and lunch both days and workshop materials to share with others back home in your district. The luncheons are sponsored by CompManagement and CompManagement Health Systems Inc.

Attendees also will receive 20 credits toward OSBA's Award of Achievement and Master Board Member distinctions.

Don't miss this one-of-a-kind training and networking opportunity. Register online at <http://links.ohioschoolboards.org/33166> or by contacting **Laurie Miller** at (614) 540-4000, (800)-589-OSBA or Lmiller@ohioschoolboards.org. ■

When Violence Strikes at School, You **CAN** Be Prepared!

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- **NO-COST TRAINING** – This is a nonprofit program sponsored by Buckeye Firearms Foundation, a 501(c)(3) public charity. There is no cost to your school district. Since 2013, thousands of educators have applied for this specialized training.
- **COMPREHENSIVE PREPARATION** – Training also includes crisis management and hands-on emergency medical training for life-threatening injury.
- **ON-CALL ASSISTANCE** – Program experts can meet with school board members at no cost to answer questions and provide assistance for policies and procedures, insurance issues, legal and union concerns, and local police / EMT drills and coordination.

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