



# Taking Care of Business

Wisconsin Association of School Business Officials

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## Inside This Issue

President's Message .....	3
Executive Director's Report .....	5
"Fixing" K-12 Education.....	7
Charter Schools in Perspective .....	9
ASBO New Members/Milestones.....	9
To Eat or Not to Eat: That is the Question .....	11
Stakeholder Involvement in the Budget Development Process .....	13
Eliminating the Gap...What is Your Role? .....	14
C'mon Facilities People - Get Involved!.....	16
The Flu and Your School .....	18
Get Ready for Winter .....	20
WASBO Sessions at the State Education Convention.....	23-24
Understanding the Laws Governing Conduct by School Business Officials.....	25
Bus Safety Tips for Parents and Children.....	29
What Could Your District Do With \$3,000?.....	30
About Those Drones.....	31
Highlights: Midwest Facility Masters Conference .....	32-33
IRS Scrutinizes Public Employer PTO Plans.....	34
WI School District Referendum History 2000-15.....	35
Highlights: WASBO/WASPA School Personnel Academy; WASBO Winter at a Glance.....	37
Thank You .....	38
Book Review: <i>People Can't Drive You Crazy if You Don't Give Them the Keys</i> .....	40
Member Moves and Retirements .....	42
Welcome New Members.....	42
Stay Connected .....	43

## Advertisers

A'viands Food & Services Management.....	30
Community Insurance Corporation .....	15
e~Funds for Schools .....	41
EMC/M3/Tricor .....	12
Focus on Energy .....	4
Groth Design Group .....	30
Hawkins Ash CPAs.....	21
Hoffman Planning, Design & Construction.....	39
Miron Construction.....	21
National Insurance Services .....	10
PBBS .....	39
Security Health Plan.....	8
ServiceMaster .....	6
Strang, Patteson, Renning, Lewis & Lacy.....	17
WEA Trust.....	2
WEA Member Benefits .....	19
WI OPEB Trust.....	38

## Nominations for WASBO Awards Accepted Through Jan. 11

**N**ominate a peer for one of the WASBO Professional Recognition Awards. The nomination deadline has been moved up this year, to Jan. 11. You can find more information at [WASBO.com/awards](http://WASBO.com/awards).

Four awards will be presented at the WASBO Spring Conference May 26-27 in Wisconsin Dells: the Wallace E. Zastrow Award, School Facilities Manager of the Year, Business Services Award, and Safety, Security & Wellness Award.

Two others will be presented at the WASBO Fall Conference Oct. 6-7 in Elkhart Lake: the Tina Hafeman Friend of WASBO Award and the Shining Star Award.

The final two awards are presented at the State Education Convention in Milwaukee: School Business Manager of the Year and New School Business Manager of the Year. The recipients selected earlier this year are being recognized at the upcoming convention

next month. Erik Kass, Elmbrook School District, will receive the School Business Manager of the Year Award at the General Session on Wednesday, Jan. 20. He and the New Business Manager of the Year, Erin Wheeler of Middleton-Cross Plains School District, will speak during the WASBO Luncheon on Thursday, Jan. 21.

To make a nomination for 2016-17, visit [WASBO.com/awards](http://WASBO.com/awards) — links are available to each nomination form. Return your form with supporting documentation to the WASBO office, 4797 Hayes Road, Suite 101, Madison, WI 53704. You may also email scanned documents to Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com).

WASBO is currently accepting applications for high school student scholarships as well as the Bambi Statz Academic Scholarship for a graduate student working towards certification in school business management. Applications are due Feb. 1. See [WASBO.com/scholarships](http://WASBO.com/scholarships) and [WASBO.com/statz](http://WASBO.com/statz) for details. 🇺🇸

## 2016-17 WASBO Professional Recognition Program

Nominations accepted through January 11, 2016  
[WASBO.com/awards](http://WASBO.com/awards)



**WASBO Vision** - To be the most influential Wisconsin organization for state and national school business management and leadership.

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Editor: Woody Wiedenhoef

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**President's Message**

# Reaching Out — Pulling Together

*By Bob Avery, Director of Business Services,  
Beaver Dam Unified School District  
President, WASBO Board of Directors*



*Bob Avery*

**E**lection time is right around the corner for WASBO. At our business meeting next month at the Joint Convention in Milwaukee, the Nominations Committee will be announcing candidates for Board seats and officer positions that will be open in the spring. This year, we will have three board seats open, two three-year terms and one two-year term, as well as the President-Elect position. Any district professional member may run for the Board of Directors. To run for the President-Elect position, individuals must have previously served on the Board.

Service on the Board is a privilege. The members are placing their organization in your trust as a board member. And it is the opportunity to give back to the organization that provides many valuable resources for its members. The commitment is to five meetings each year (September, December, February, April and June). Of course, there is homework if you are going to arrive at the meetings prepared. But the time commitment is not overwhelming. As the Association moves into a policy governance model, the amount of time for meetings is being reduced. Where meetings used to last five to six hours in my first year on the board, our meetings lately have been under four hours.

As an officer, there is a greater commitment. Officers have a leadership team conference call ahead of the board meetings to discuss/set the meeting agenda. The leadership team also serves as the WASBO audit committee to review the independent audit and to meet with the auditor to ask questions or get further clarification. During the year as President, any additional time commitment is discretionary. Some Presidents are very active and work closely with the executive director, while others focus on the meetings listed above.

So I encourage members from across the state to consider running for the Board. It's good for the organization and it's good for the individual. I especially want to encourage members in the Southwest, Northwest, West Central and Wisconsin Valley regionals to run. While the work of WASBO is state-wide, I believe it is important to have voices represented from across the state. And, frankly, these regions are under-represented in our governance model.

I want to take this time/space to thank our third year Directors for their service. Thank you, Kathy Davis, Jason Demerath and Kent Ellickson! I look forward to seeing one (or more) of you throwing your hat in the ring for the President-Elect position (HINT!). All three of you would make a great WASBO President.

If you're not sure that you are up for running for the board yet, please consider joining a committee. The work of the association relies on the volunteer work of the membership. The conferences and publications are the work product of the membership. We need to continue to involve members in these committees to keep the conferences relevant and informative. And we have (over-)relied on a handful of members for a number of years to organize these events. For example, the Fall Conference Committee is now down to four members with the previous co-chairs stepping down after years of service. (Thanks Jill and Jennifer!)

Finally, I want to wish you the happiest of holiday seasons and a wonderful new year. I hope 2016 proves to be one of the best yet for you. 🍷

# NEW YEAR NEW OPPORTUNITIES

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# Reflections, and Looking Ahead

By Woody Wiedenhoeft, Executive Director, WASBO



Woody  
Wiedenhoeft

Happy Holidays and best wishes to all WASBO members and their families from all the WASBO staff. Enjoy taking a moment to appreciate reflecting about people and events that have helped define us in a positive way. And then remember to evaluate if our personal compass and goals are pointing us in a direction in which we will be personally proud the next time we think back and reflect. Most of us do this around this time of year.

I was a bit surprised that my reflection earlier this week took me back decades to when my Dad taught me to drive. I had not thought about the 1949 Ford F1 pickup since I left the farm. It was a three-speed with a stick shift on the floor and a 226 CID Flathead 6 producing 95 horse power. That means it didn't go very fast — ever — except in my hands and head.

My Dad asked me to go pick up some tools on the other side of the farm one winter evening and it was already dark. I wanted to hurry because the cows needed milking; I was hungry and also wanted to go play on a Friday night. So I took a shortcut rumbling along through a rough field instead of using the longer route of a smooth road. It became a very short truck ride. I drove that F1 up on top of a field disk. F1s look a bit ridiculous sitting on top of a field disk. So what would all of this have to do with any positive reflection other than I was a normal kid? My Dad saw his opportune moment and simply said, "I wanted those tools as quickly as possible, but do not overdrive your headlights. Nothing good comes of it."

We all live in a world where we are many times defined by how much we stretch ourselves, how fast we get tasks done, and how well they are done. And even then, we know we will learn from our mistakes when

we make them. But maintain some capacity to be situationally aware that there are "field disks" out there, in the dark. As WASBO members think about next year's SMART goals as New Year's resolutions and the processes that are going to be used, remember the R stands for realistic results and the T stands for time. Don't let these decisions land our Ford F1 on top of a field disk.

On another set of topics, here are some ideas for holiday gifts that you might want to give to others, or even yourself.

- **Either run or ask one of your colleagues to run for the Board.** Let Mary Ellen Van Valin, John Gahan or the WASBO staff know if you or someone else is interested. (See below.)
- **Participate on a WASBO committee.** Contact Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com) if you are interested.
- **Nominate one of your colleagues for one of the WASBO Professional Recognition Awards.** Nominations are due to the WASBO office by January 11, 2016. Leave time to involve all the appropriate people in your Regional and the

Superintendent and significant people who work with the nominee.

- **Let the correct people in your district know there are WASBO scholarships available for education costs after high school.** These applications from our students are due by February 1, 2016.

In the holiday spirit of giving thanks, I wish to thank WASBO members for their proactive positive activities to help our children grow up to be valued adults.

This is Don Mrdjnovich's last article scheduled for the WASBO newsletter *Taking Care of Business* (see page 38). I personally want to thank him for his mentorship and coaching that he has provided all of us. WASBO as an organization and WASBO members have all benefited from his work that help enhance our culture and mission.

Last, but not least, I wish to thank Jeanne, Deb, Áine, Kristin and Kaitlyn to help us move WASBO activities forward.

Please have a great holiday.

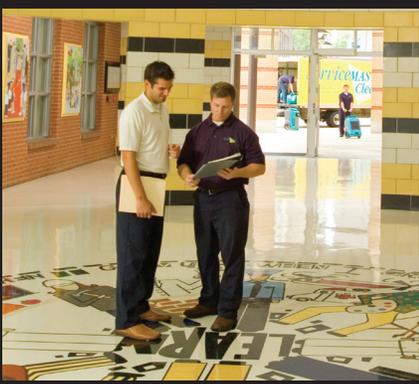
*Woody*

## The WASBO Board Needs You!

The WASBO Nominating Committee is searching for nominees to run for the Board of Directors. This is an opportunity to grow your leadership skills for your district, affect the future of WASBO and give back to your colleagues.

If you know of someone or would like to be a nominee for a position on the Board, contact the Nominating Committee Chair Mary Ellen Van Valin at [vanvalinm@milton.k12.wi.us](mailto:vanvalinm@milton.k12.wi.us) or John Gahan at [gahajoh@pewaukeeschools.org](mailto:gahajoh@pewaukeeschools.org).





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# “Fixing” K-12 Education

By John D. Musso, CAE, RSBA, Executive Director, ASBO International



John Musso

For the past several months, my mailbox has been full of expensive, glossy ads touting candidates for various public offices, assuring me that they care about me and my family and want to make our lives better. While I'm sure the U.S. Postal Service appreciates the revenue, I can't help but think that the resources spent on these ads would be better served in our schools.

However, given the choice, I would much rather receive those ads in the mail than the multitude of phone calls – often four or five a night. In an attempt to make it interesting (and fun), I began asking the callers about their candidates' views on K-12 education and what they would do for our public schools.

Although it was amusing to catch them off guard, it was also depressing. Clearly, these candidates and their supporters had given little if any thought to the local education system. The responses they gave ranged from promising clean schools and good teachers to criticizing administrators' and teachers' high salaries. The most common quip was that teachers and administrators “need to be held more accountable.” When I asked what they meant by that, most referenced accountability in terms of higher test scores and better use of funds.

Everyone wants to fix public education because “it's broken,” but how do we begin fixing it when we don't know the reason for the break? Most candidates running for office at the local, state, and federal levels espouse grand ideas to fix our education system without having a clue about what's ailing the system in the first place.

For example, six Republican presidential candidates – Ted Cruz, Carly Fiorina, Mike Huckabee, Rand

*Everyone wants to fix public education because “it's broken,” but how do we begin fixing it when we don't know the reason for the break?*

Paul, Marco Rubio, and Donald Trump – have said (repeatedly) that if elected, they would abolish the U.S. Department of Education (ED). They ignore the fact that the ED oversees myriad important programs, including Title I grants. Without the ED, there would be no agency to provide the oversight required to administer these funds effectively to the students who need them. Candidates who don't understand the complexities of K-12 issues like accountability, the achievement gap, school funding, and education equity will simply pander to their base and say they will abolish the department in the name of “smaller government” without considering the widespread consequences.

Consider the Common Core State Standards (CCSS). Every Republican candidate save two – Jeb Bush and John Kasich – oppose the CCSS, claiming they are federally imposed standards that have allowed the ED to function as a national school board. Yet in reality, the standards were developed by the National Governor's Association and the Council of Chief State School Officers as a state-led effort, not a federal mandate.

What's more, for many K-12 schools, the issue is less the standards and more their assessment process. Students are spending more time on test preparation than on actual learning, and teacher evaluations are tied to student performance on these

tests, which creates a high-stakes testing environment that discourages students and teachers alike.

Wouldn't it be wiser to come up with policy proposals to reduce high-stakes testing and find better metrics for teacher evaluations than to reject the idea of uniform academic standards altogether?

Which brings me to my main point: ASBO International members have a much better idea of what's needed to improve our education system than our legislators do. I encourage you to use ASBO's legislative resources to communicate to your election officials about the issues affecting your district. Keep the lines of communication open and advocate for your students' needs. Visit [asbointl.org/Legislative](http://asbointl.org/Legislative) and learn more.

Our education system may be broken, but who is more qualified to fix it than the district leaders who operate within it every day? 🤔

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## ASBO International New Members

### September 2015

- **Michael Gerlach**, Hustisford SD, Hustisford, WI
- **Sarah Thiel**, Iola-Scandinavia SD, Iola, WI



### October 2015

- **Erin Wheeler**, Middleton Cross Plains SD, Middleton, WI

## ASBO International Membership Milestones

### October 2015

#### 30 years

- **David W. Wuebben**, Hortonville SD, Hortonville, WI

### November 2015

#### 35 years

- **Woody Wiedenhoef**, WASBO

#### 20 years

- **Marlene Clark**, Menomonie Area SD, Menomonie, WI

#### 10 years

- **Mark Worthing**, SD of Cambridge, Cambridge, WI
- **John T. Stellmacher**, SD of Hartford Jt #1, Hartford, WI

#### 5 years

- **Brent Richter**, SFO, Lodi SD, Lodi, WI

### December 2015

#### 10 years

- **Pat Finnemore**, Kenosha USD, Kenosha, WI

#### 5 years

- **Joan Hauser**, Shared Purchasing Solutions, La Crosse, WI

# Charter Schools in Perspective

How fluent are you when it comes to discussing charter schools? They currently serve more than 5% of U.S. public school students, constitute nearly 7% of U.S. public schools, and continue to be a valid option in school improvement efforts. Yet they also continue to spark controversy among policymakers, educators, and community members.

Public Agenda and the Spencer Foundation joined forces to create Charter Schools In Perspective, an interactive website designed to contribute to “a more informed, civil dialogue about charter schools.” It does so through various elements.

A **Research Guide** begins with key facts about charter schools, including their history, numbers, and demographics. It goes on to explain why charter school research matters and presents terms and concepts that help users understand the research. It also discusses challenges and guides individuals on how to interpret findings. The guide includes sections that summarize and explain key charter school topics, such as student achievement; diversity and inclusion; teachers and teaching; innovation; finances; governance and regulation; charter school operators; families; and public opinion.

A **Discussion Starter** informs voters about charter schools with the goal of helping communities hold civil, productive dialogue about them. It offers general information on charter school trends as well as overarching questions and broad perspectives to consider about the advantages and disadvantages of charter schools.

A checklist of **10 Questions for Journalists** provides questions and story ideas about charter schools, broaching subjects that include student performance, operators, finances, goals, governance, rules and regulations, and more.

*Continued on page 21*

## ASBO Call for Proposals

ASBO International is gearing up for its 2016 Annual Meeting & Expo, Sept. 23–26, in Phoenix, Arizona! Share your expertise with an international audience and earn recognition in the school business profession by leading a session at the meeting. Find out more at <http://asbointl.org/meetings/annual-meeting-expo/call-for-proposals>.

Submit your idea at <https://www.intheorious.net/asbo4/manuscript/login.reg>.



## ASBO MEETING DATES

**2016 Annual Meeting & Expo**  
Sept. 23-26, 2016 - Phoenix, AZ

**2017 Annual Meeting & Expo**  
Sept. 22-25, 2017 - Denver, CO

**2018 Annual Meeting & Expo**  
Sept. 21-24, 2018 - Kissimmee, FL

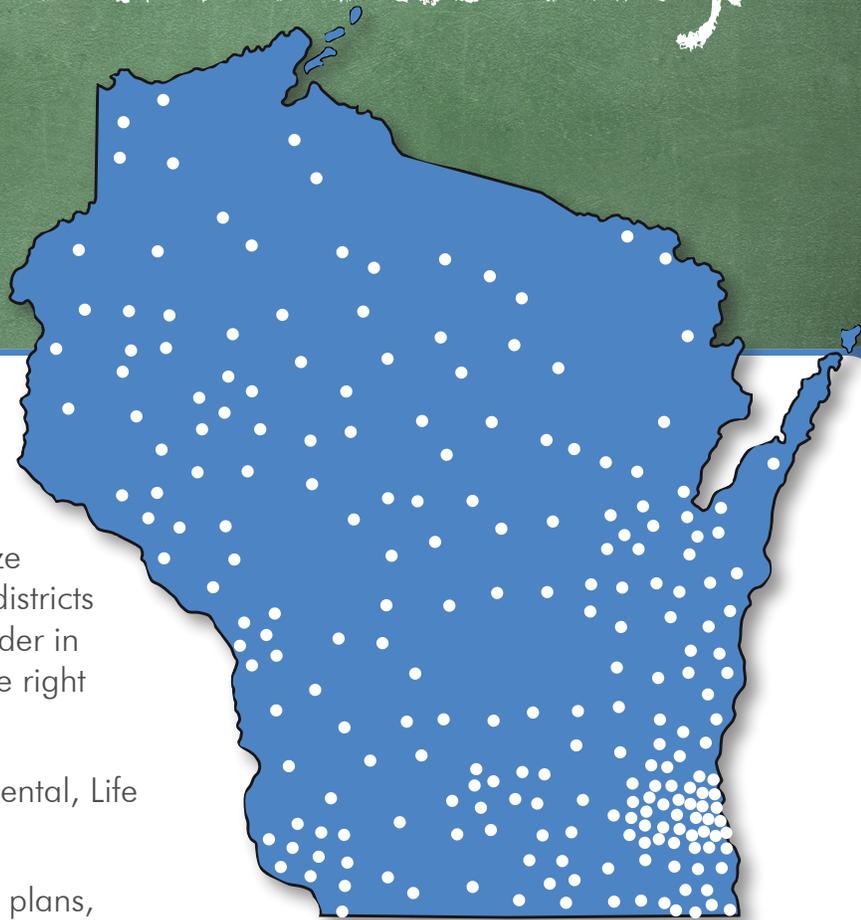
**2019 Annual Meeting & Expo**  
Oct. 25-28, 2019 - National Harbor, MD

**2020 Annual Meeting & Expo**  
Oct. 2-5, 2020 - Nashville, TN





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## To Eat or Not to Eat: That is the Question

By Brian Adesso, Director of Business Services, Menasha Joint School District; WASBO Director



Brian Adesso

The night before each school day, a ritual happens in our home where we pull up the school lunch menu for the next day. My child then decides if the menu is to her taste buds' liking or not. This same ritual happens in family homes all over the state. In some areas with higher poverty, the ritual might provide an extra source of happiness that comes from being able to know for certain that you have a meal waiting for you tomorrow.

Menasha Joint School District is one of the districts within the state of Wisconsin that has a higher poverty rate. When I arrived at the district, I got to see first hand what it meant to be in a district with high poverty. My child attended a school with a 76% free and reduced rate. The students in that school loved the universal free breakfast and also the warm meal that always allowed them to select from two different lunch options. After seeing this, I made it my goal to make sure as many students were getting fed as many times a day as possible. With that goal, came the idea to feed children dinner.

The dinner idea actually evolved out of one of my crazy ideas to figure out a federal program to feed kids on the weekend. I still have not found a program to do this other than the generosity of local churches packing food in backpacks for our students and families to eat over the weekend. In addition to local churches feeding some of our families, we also developed the dinner program. However, the dinner program is still only available to the students during the week, not weekends.

The dinner program was launched initially at the middle school and paired with our afterschool program. When we met with the afterschool program coordinator, we were told to expect

125 students daily. We were overjoyed with that estimate since we could provide a high level of service and still break even. Reality kicked in and we were serving around 30-40 a day. The program was still able to break even and ended the year serving 4,000 meals. This year we decided to expand the program to the high school. The high school is serving around 240 dinner meals four days a week. Taking the month of October as an example, the dinner program served over 4,000 meals in one month's time. It is amazing to me how incredibly useful this program has become over time.

Another program that was expanded last year was universal breakfast at the middle school. The confidence level in this program was pretty high due to the already 70%+ participation rate for lunch. The program was started in the classroom and we were quickly over 85% participation. Some days only 40 students in the entire building chose not to eat.

The last big change for the district was a total remodel of our high school. With that came a brand new kitchen that was larger than the last kitchen. It also provided food service with a café space. Through the remodel process, daily student participation climbed to 50% from around the 40% mark. This is with every student in the building being able to leave at lunch and walk about 5 minutes to about six fast food options. The current participation rate flirts with 60% each week. The café has proved very successful in raising the participation rate.

How could a café have such a big impact? The café is open from the time the students arrive in the morning until around 1 PM each day. This allows the district to be able to serve USDA qualified breakfasts and lunches during those hours. The

café also serves as a classroom the first couple of hours out of the day. Recently, the café has been servicing 350 breakfasts or around 35% participation rate. We are quickly discovering that students need to be educated about free and reduced and its inclusion of breakfast as well as lunch. Our number of breakfasts keeps increasing each week with the support of the building principal and the teachers in the building. The café also gives us the ability to feed students after the traditional lunch hour. This assists our students who want to hang with their friends at the fast food joints, but do not have the resources to pay for a proper meal. When they return to campus, they can pick up a very nutritious meal that will keep them learning throughout the day.

All of the programs or changes above did not come without some controversy during discussions with some citizens. They felt like we were doing too much and this was the responsibility of the parents to feed their children. What the citizens did not understand was that the families were usually working more than one job and the students were on their own for the night. Please take a moment and consider what this would be like for your family. Why would we not take the opportunity to feed the students so that they can compete in co-curricular activities or just go to bed without feeling hungry? The board of education was in 100% support of the items above and looks forward to what the future holds.

I pride myself on supervising a program that strives to feed all students at the lowest cost possible while maintaining quality. Our students deserve the dedication and hard work that goes into starting new programs that might

*Continued on page 17*



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# Stakeholder Involvement in the Budget Development Process

By Nathan Jaeger, Business Manager, Whitewater Unified School District; WASBO Director



Nathan Jaeger

A school district's budget is its financial plan communicated in revenues and expenses. Resource allocation should align with the priorities of the community and reflect the district's mission, vision, and core values. To meet these objectives, a certain level of stakeholder involvement in the budget development process is necessary. Who is involved and at what level will vary by district based on its unique characteristics. In the end, it is important to find a level of stakeholder involvement in your budget development process that ensures a desired level of transparency so that your community feels involved, informed, and confident in the budget process.

## Variables to consider

Every district and community is different in terms of the level of stakeholder involvement included in the budget development process. The size of the district, level of staffing, operational stability, expectations of the community, and overall financial position of the district may all be factors to consider when determining the appropriate level of stakeholder involvement to include in your process. A larger district may be able to support a more involved budget development process than a smaller district with staffing limitations. A district that relies heavily on community support through an operating referendum may want to plan for a higher level of stakeholder involvement, as it will be important to build support with voters and help them in making an informed decision. Anticipated financial changes as a result of increasing or decreasing enrollment, facility needs, or a major strategic shift in resource allocation

may also be a good reason to ramp up stakeholder involvement.

## Potential stakeholder groups

Although the business office is primarily responsible for developing the budget for the board's consideration and final approval, there are many opportunities to involve other stakeholders in the process at varying levels. Most districts seek the input of the more obvious groups, such as parents, staff, and district leadership, but there are many other stakeholders who can be easily overlooked. You may want to find a way to involve your senior community, municipalities, service organizations, local representatives, students, or business community, or consider other demographics such as a university or ELL population. Although some of these groups may seem further removed than others from your everyday operations, their input and involvement can be just as valuable. Each group will likely offer a different perspective, so you will want to be thoughtful in how you involve them in your process.

## Ideas to get people involved

There are many different ways to involve your various stakeholder groups in the budget development process. In some cases you will want to gather information from them, while in other cases you may simply want to share information. At any rate, it is helpful to have a clearly defined budget development process so everyone is aware of when tasks are to be completed, by whom, and how they are to be done. This also helps your community know how and when they can get involved in the process

or become informed about the district budget. Below are a few ways to either share or gather information from your community:

- Host public forums or listening sessions
- Distribute a community priorities survey
- Seek input from a citizens financial advisory committee
- Lead community focus group meetings
- Seek the expertise of financial advisors and co-present to community members, using a budget projection model
- Distribute an annual report about the district's accomplishments and future plans
- Post financial information on the district website
- Mail informational fliers
- Welcome input by making contact information highly accessible
- Present an annual State of the District presentation to municipalities and service organizations

The budget development process is an opportunity to demonstrate transparency, build community support, and strengthen the relationship between the community and the district. You should be thoughtful in your approach and find a level of involvement that is tailored to the unique needs of the district and the expectations of the community. 🐼

# Eliminating the Gap... What is your Role?

By Lori Ames, Fiscal Services Manager, Middleton-Cross Plains School District; WASBO Director



Lori Ames

Two years ago, I found myself in a meeting, looking at the picture at right. The presenter challenged me to reflect on what this picture represented to me.

At first, I couldn't go deep enough within myself to articulate my true beliefs. But now, having been on an equity journey the last two years, I better understand my beliefs and am confident enough to communicate those beliefs.

When I look at this picture, I see the difference between equality and equity. This difference between equality and equity, I believe, is one of the major contributing factors to the achievement/opportunity gap.

Students enter our districts with varying backgrounds, experiences, and needs. While we are aware of these differences, many districts allocate resources on an "equal" basis. Implementation of "equal" means class size maximums are based solely on the total number of students, operational budgets are based on equal per pupil amounts, and support services are based on the total numbers of students in a building. As a result, our students perform as shown in the left-hand side of the picture. All students receive "equal" resources, but because of varying needs, only some students can actually see and interact with the game.

I believe we should allocate resources in a more equitable manner. Allocating resources equitably means considering the varying backgrounds, experiences, and needs of our students and allocating resources based on those factors. As a result of equitable resource allocation, our students will



perform as shown in the right-hand side of the picture, where all students receive the resources they need to see and interact with the game.

Stating my beliefs in writing for people to read means that I am running the risk that people will assume I do not support the allocation of resources for students who are performing well. Nothing could be further from the truth. I firmly believe we should have high expectations for all students, with the understanding that some students will need more resources to meet those high expectations.

I am not so naive to believe that changing budgetary philosophy will be easy. If this process were easy, many more districts would already do it. Society as a whole is engrained in the idea of equality. Having conversations with our school community, especially parents, to explain why one student or group of students needs a resource that their children may not get is extremely difficult. Explaining that we have high expectations for all students, but we have limited resources is daunting. Essentially, equitable

resource allocation means admitting that we cannot provide everything to everyone in exactly the same way.

As firmly as I believe in this budgeting philosophy, my district is still on its journey. We are not there yet, but I am proud to say that with the support of our Board of Education, our superintendent, and fellow administrators, we are having the conversations and pushing the envelope.

I know that not everyone will see the picture as I do. I know that others will not perceive the picture's message of equality versus equity as I do, and I appreciate and respect our differing opinions. What's important is taking the time to look at this picture and truly reflect. Closing the achievement/opportunity gap is critical and necessary for the greater good, and the work is going to take contributions from all of us. So I challenge you to consider...when it comes to eliminating the gap, what is your role? 🐾

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### Professional Development

#### WASB-WASDA-WASBO State Education Convention \*\*

Jan 20-22, 2016 - Wisconsin Center, Milwaukee

#### Wisconsin Federal Funding Conference \*\*

Feb 16-17, 2016 - Kalahari Resort & Conference Center, WI Dells

#### Facilities Management Conference \*\*

March 8-9, 2016 - Kalahari Resort & Conference Center, WI Dells

#### Transportation & Bus Safety Conference

March 9, 2016 - Kalahari Resort & Conference Center, WI Dells

#### p-Card Users Group

March 15, 2016 - Madison Marriott West, Middleton

#### Accounting Conference \*\*

March 16-17, 2016 - Madison Marriott West, Middleton

#### Spring Conference \*\*

May 26-27, 2016 - Kalahari Resort & Conference Center, WI Dells

### Scholarship Fundraisers

#### Spring Golf Fundraiser

May 25, 2016 - Trappers Turn Golf Course, WI Dells

#### Spring Bike Fundraiser

May 25, 2016 - 400 Trail

### Certified School Risk Managers (CSRM)

#### Courses \*\*

#### Fundamentals of Risk Management

Feb 24, 2016 - Wisconsin School Leadership Center, Madison

#### Handling School Risks

Feb 25, 2016 - Wisconsin School Leadership Center, Madison

#### Measuring School Risks

March 15, 2016 - Madison Marriott West, Middleton

#### Funding School Risks

April 5, 2016 - Wisconsin School Leadership Center, Madison

#### Administering School Risks

April 6, 2016 - Wisconsin School Leadership Center, Madison

#### School Safety from A to Z

April 7, 2016 - Wisconsin School Leadership Center, Madison

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# C'mon Facilities People – Get Involved!

By Pat Finnemore, Director of Facilities, Kenosha Unified School District; WASBO Director



Pat Finnemore

Earlier this fall, I reached my 15th anniversary working for the Kenosha Unified School District; that also marked 15 years of involvement with WASBO.

When I think back to the role of facilities professionals in our organization at that time, it was definitely very limited both in the number of us involved in WASBO as well as what we offered in terms of training and other services. What we did have was a core group of about 15 school district facilities managers that saw an opportunity to make a real impact in our organization, and that we did. The Facilities Management Conference grew from a small gathering to a major show, the Facilities Certification Program was developed and implemented, and facilities managers became active in almost all aspects of WASBO.

The majority of those trailblazers are now retired, some have passed away, and there are still a couple of us youngsters (yes, Gary Siegman I am classifying you as a youngster) from that group still working. There was a second wave of folks that took the baton from that first group and they created something even better. The addition of a second major facilities conference, the Midwest Facility Masters Conference, under the leadership of Jim Beckmann and Dale Zabel has provided what I believe to be the best school facilities-related conference in the country.



This second wave of facilities managers was a little smaller than the first, and every member of that group now has more gray hair than brown or blond, and some are just hoping to hang onto what little hair they have left. At our last Facilities Committee meeting, which was hosted by M3 Insurance in their beautiful office building overlooking Lake Monona, only six school district facilities managers attended. Considering the large number of facilities professionals that have joined WASBO in the past 15 years, this is a pretty small number of people making decisions on the direction of facilities for WASBO. We are lucky to have seen a growth in the number of WASBO Service Affiliate members that have joined our committee over the years, for without them I am not sure we would be able to get everything taken care of.

The co-chairs of our committee are Joe Ledvina of La Crosse and Ed Butzen of Green Bay. Joe and Ed have great ideas and a strong desire to improve on what their predecessors have done. What they need is your help! Because I am one of the core group of presenters at the conferences, I have had the pleasure of meeting many people over the past few years that are relatively new to school facilities and/or WASBO. Many of you come with a great deal of experience working for other employers along with expertise in areas that I wish I had. My goal is to introduce you to three areas where we could use some new blood: serving as an active member of the Facilities Committee, presenting at WASBO conferences, and hosting or supporting the summer Custodial Conferences.

First, the Facilities Committee. We would love to have the problem we once did where we would have to scramble to find enough chairs for

everyone who came to the meetings. Involvement can start slowly; maybe you do more listening than anything for the first meeting or two looking for opportunities that match your interests and skill sets. We only have 4 formal meetings each year, the dates are selected a year in advance and the meetings are generally hosted at the WASBO offices in Madison. I do know that Joe and Ed are also looking at meeting at some of the conferences, which is something we used to do, to try to make it easier for people to get involved. There are a number of initiatives that the committee is looking at tackling including reviewing and updating all of the core certification session presentations. I think there are several of you that have expertise in specific areas of the program that could help improve the end product. If you are interested in becoming active in the committee contact the WASBO office and they can help get you started.

Presenting in front of a large audience is not for everyone, but I find it to be very rewarding as do others who regularly present at our conferences. We really do need some folks to step up and join our group of presenters. New voices and new perspectives are needed to supplement the handful of us that regularly present multiple sessions at every conference. We have added some new speakers the past couple of years and they have been a welcome addition. Laurie Krueger and Andy Stefancin stepped up and filled the void left when Charlie Kramer announced his retirement. The custodial staffing session they present is one of the most important sessions in the certification program. John Stangler and Jeremiah Johnson did a great job presenting a session on identifying and communicating

successes at the Midwest Facility Masters Conference last month.

We would be glad to help you get involved in speaking at a conference by partnering you with a more seasoned presenter like Jim, Dale, myself or others. If you are interested, you could contact any one of us, or just contact the WASBO office. I truly believe that our conferences will be even better if we can expand the number of new voices presenting the sessions.

The final item I want to talk about are the custodial conferences offered each summer, generally at multiple regional sites. This program was on its deathbed a couple of years ago due to a lack of school districts wanting to host the conferences and dwindling attendance. To be honest, I was ready to have Woody pull the plug, but to their credit there were others that didn't want to give up on the custodial conferences without a fight. Joe and Ed have taken the lead in this effort

and some of the changes made the past few years have included lowering the registration fee, expanding to more regional sites each summer to reduce the travel time for attendees, and standardizing the curriculum to help make the planning easier for the host district. There is still quite a bit of work to be done from a planning and organizational perspective in regards to the future of the custodial conferences, and Joe and Ed would welcome new members to their planning team.

One of the best things I did when I took my current job 15 years ago was getting involved in WASBO. A number of people provided me encouragement and direction when I first started. We have a terrific group of people involved in the facilities aspects of WASBO, and we would love to work with more of you to create the next great wave of volunteers. 🇺🇸

## To Eat or Not to Eat: That is the Question

*Continued from page 11*

not be completely successful during their first year. Please take some time to examine your food service program to see if your district is doing everything possible for the students that we serve. I understand that this is a very controversial issue but, when it comes down to it, we are taking care of our youngest citizens so that they can grow up and be the next successful generation. 🇺🇸

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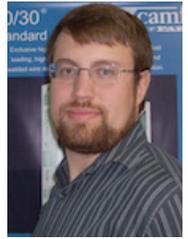
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# The Flu & Your School

By Ben Klawitter, Certified Air Filter Specialist, Filtration Systems, Inc.



Ben Klawitter

With colder temperatures settling in flu season has gone into full swing. Throughout the year the American Journal of Infection Control publishes articles on influenza and had a couple that were directly related to K-12 school buildings.

Shortly after the 2013 flu season ended, an eight-building suburban Cincinnati, Ohio school district was selected by the Center for Disease Control for an anonymous survey of district employees to determine how many worked with flu-like symptoms. Of those that had either flu-like symptoms or confirmed flu illness 77% reported that they worked while ill. The main reasons were that they felt an obligation to the students to go to work and they did not think that they were contagious.

Influenza is a particularly difficult pathogen to manage, especially since it occurs more in the December-

February time period when buildings are being heated and the use of outdoor air is commonly reduced in order to save energy. This means buildings are re-circulating more air and potentially spreading the virus throughout the building. With a diameter of just 0.1 micron influenza is a very small particle that MERV-8 filters won't capture, they are only rated down to 3 microns and even MERV-13 filters are only 60% efficient at removing particles that small. If synthetic media filters are used, the capture efficiency is even lower due to their documented drop in efficiency during use.

A different study at the University of Minnesota (also published in the AJIC) looked at whether HVAC filters were capable of catching these small virus particles. There were ten AHUs that had filters pulled for testing, each AHU was equipped with high-efficiency filters (MERV-11 or MERV-13) with

anti-microbial media and there was a mix of AHUs that operated with 100% outside air and AHUs that recirculated air. None of the filters that used 100% outside air were contaminated, while 75% of the AHUs that re-circulate air contained active influenza virus.

So what does this mean for facility maintenance professionals? Because district employees are going to come to work ill and modern HVAC systems recirculate air to save energy, the task of trying to prevent a flu outbreak is difficult. With the virus being so small high-efficiency filters can help but do not offer complete protection, and using anti-microbial filter media was shown to have no impact. From a ventilation side, as the U of M study showed, bringing in as much outside air as possible and exhausting the indoor air is the best way to limit the distribution of the flu around your building. 📌

If you have questions about this article, contact Ben at [ben@fsmn.com](mailto:ben@fsmn.com).

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~ John Wooden

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# Get Ready for Winter

By Ted Hayes, Senior Risk Manager, M3 Insurance; WASBO Director  
Submitted on behalf of the WASBO Safety & Risk Management Committee



Ted Hayes

**W**ith winter time quickly approaching, now is the time for your school district to ensure your snow/ice removal program is in place. As a reminder, address the following snow/ice removal controls:

Does your school district:

**Prepare all equipment for readiness condition before the snow/ice season?**

**Distribute snow/ice removal equipment to the designated schools?**

**Develop an action plan that addresses snow/ice accumulation at building entrances, on sidewalks, parking lots, etc.?** Main entrances where students and staff enter the building and student/staff parking areas should be cleared first.

**Utilize a local radio and TV station for prompt weather reports and school closing information?**

**Post school closing information on your school district's website?**

**Develop time guidelines when snow/ice must be removed?** As mentioned earlier, main building entrances should be addressed first. Students and staff should be reminded to always use these main entrances when entering or exiting the school during winter conditions.

**Instruct all school employees to wear proper winter footwear when entering or exiting the school building?** Tennis shoes and dress shoes do not prevent slip and fall accidents; wear proper slip resistant footwear and change to your other shoes once you are in the school building.

**Develop a snow storage plan for each school facility?** Snow should be stored where it does not create additional exposures – blocking a pedestrian's view of vehicle traffic, creating blind spots for drivers, etc.

**Level off snow piles to reduce the "attractive nuisance" exposure whereby children view snow piles as a play area?** It may be difficult to keep children off snow piles. Especially during recess, playground supervisors must closely monitor children and keep them from playing on large snow piles. Children should never be allowed to 'tunnel' through large snow piles – there have been many student injuries where these tunnels have collapsed and the excessive weight of the snow falling on a child has caused injury.

**Obtain written agreements/certificates of insurance from sub-contractors who are used for snow/ice removal?** Ensure all of your snow/ice removal sub-contractors maintain appropriate levels of workers compensation, general liability, and auto liability insurance.

**Meet with your buildings & grounds staff to review removal procedures and safety controls?**

**Require building and grounds personnel to wear proper personal protective equipment when operating snow removal machinery?** In many instances, besides warm clothing, proper footwear, eye and ear protection should be worn.

**Mark hydrants/other fixtures that need to be protected?** This is important to reduce the chance that these objects are struck by plow blades or other vehicles.

**Clean leaves from drainage paths/pedestrian areas to clear for snow and ice handling/melting of pathways?**

**Develop a procedure to quickly respond to complaints/problems?** This entails developing "spot salting" procedures for trouble areas such as entrance ways, walk ways, stop signs, curves, entrances, etc.?

**Maintain a daily log of conditions and treatments?** During wintertime conditions, spot checks of the building entrances should take place throughout the day. Pay particular attention during the time when it is just getting dark each day – as the sun disappears, ice will build up; potentially dangerous when students and staff are exiting the building between 3-5 pm.

**Periodically clean/replace entrance door rugs/mats to reduce the amount of water brought in to the school?** During extreme snow and ice conditions, replacing entrance rugs/mats may be a daily task.

Please use a snow/ice removal log (see below) to monitor weather conditions and treatments at each of your school's main entrances. (Download from <http://bit.ly/WASBOsnow>.) During snow and ice conditions, a designated school employee should periodically monitor entrances for snow and ice accumulation. ❄️

If you have questions about this article, contact Ted Hayes at [ted.hayes@m3ins.com](mailto:ted.hayes@m3ins.com) or 715.849.9400 x5517.

Snow Removal/ Treatment Log							
Building Name/Number: _____							
Time (00:00 AM/PM) & Type/Amount of Treatment (Ice Melt-Sand)	Street Name	Sidewalks	Other Walkways	Parking Areas	Building Entrance	Employee Initials	Comments

## Charter Schools in Perspective

Continued from page 9

And another checklist of **10 Questions for Policymakers** helps elected officials and staff, as well as regulators and school district administrators, think through decisions regarding charter schools in their jurisdictions. These questions focus on a variety of subjects, including: the specific goal or problem charter schools are designed to address; the effect of charter schools on other education initiatives; the number of charter schools needed; the relationship between charter schools and traditional public schools; expected outcomes; operations and oversight; voter perspectives; and the potential for polarization.

Read more at <http://www.in-perspective.org>.

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~ Lyndon B. Johnson

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# WASBO Sessions at the State Education Convention

## Tuesday, Jan. 19

### 2-5 PM

#### **School Finance Puzzle . . . . . Hyatt Regency D**

Presenters and attendees will use a hands-on, interactive approach to take the confusion out of school finance. Gain a conceptual understanding of the major components of the Wisconsin school finance system. Participants will have an interactive discussion that provides background on constitutional issues, court cases and today's laws. Attendees will become acquainted with the basics of revenue limits, equalization aid, property taxes and referendums. Attendees will learn how these components interrelate and how they impact board decision-making. Leave the workshop with increased confidence in discussing school finance concepts and using this knowledge to help foster an environment of trust in your community for the benefit of the students.

## Wednesday, Jan. 20

### 8-9 AM

#### **Managing Multiple Construction Projects . . . . . 101CD**

After a thorough master planning process, the Sauk Prairie School District successfully passed a referendum in April 2014 to fund multiple building projects. The district then engaged Plunkett Raysich Architects, LLP (PRA) to provide architectural and interior design services for a new elementary school, an addition to Tower Rock Elementary School, and multiple smaller renovation projects. Hear school district leaders and projects managers discuss how they worked collaboratively to ensure all goals and expectations were met and exceeded while keeping each project on schedule and within budget.

*Steve Kieckhafer, Plunkett Raysich Architects, LLP; Cliff Thompson, Sauk Prairie; Judy Weinstock, Sauk Prairie; Jeff Wright, Sauk Prairie*

#### **Cash Reserve (Fund Balance) and Long Term Fiscal Health . . . . . 102DE**

Presenters will provide information about explaining the importance of fund balance and illuminating criteria for why sustaining a strong fund balance is crucial to the fiscal health of a school district. Learn about proportionality, the effect of cash reserve on cash flow, and related board policy that should be in place. Get a better understanding of how the overall budget works and the general concepts of fund accounting. Gain confidence when discussing these concepts with local citizens and state legislators. Presenters will hold a Q&A period at the end of the session.

*Bob Borch, CESA 1; Tom Owens, Stevens Point Area; Debby Schuffletowski, Baird Public Finance*

### 10 AM

#### **General Session . . . . . Ballroom**

Erik Kass, Elmbrook School District, School Business Manager of the Year, will be among those recognized.

### 1:30-2:30 PM

#### **SAA Legislative Update . . . . . 102AB**

There is always something going on in the state Capitol that directly impacts school board members and administrators. Learn how the SAA's rationale for change and several components of its new proactive approach to advocacy are working. Time will be provided for questions and answers and informal information sharing.

*John Forester, School Administrators Alliance*

#### **What to Take Away from Your Fiscal Audit . . . . . 201B**

This session is designed to give board members a thorough understanding of the financial audit process and the role board members play in an audit. School administrators will share experiences through the board member and business manager lens to give board members a solid foundation of their responsibilities in response to the audit process. This session is designed for board members of all skill levels.

*Robert Chady, Marshall; Daniel McCrear, Clinton Community; Natalie Rew, Wegner CPAs*

### 3:30-4:30 PM

#### **School District Budget Cycle . . . . . 201A**

The school district budget is one of the primary management tools for school administrators and school boards. Its primary purpose is to translate the district's strategic initiatives into programs and services that support student learning. Referencing the WASB/WASBO Budget Cycle Handbook, this presentation will discuss revenue sources and limits, budget planning and development, reconciliation and approval, budget management and reporting. Board members in attendance will have an opportunity to share their best practices.

*Kenneth Mischler, Manitowoc; Susan Schnorr, Oshkosh Area*

## Thursday, Jan. 21

### 8:45-9:45 AM

#### **Equalization Aid . . . . . 102AB**

State equalization aid makes up one of two major pieces of school funding in Wisconsin. State equalization aid is calculated based on a district's spending, their property tax base, and number of students. If you have questions about your district's equalization aid, this session is for you. The Department of Public Instruction Finance Team will discuss the variables and factors influencing each district's share of equalization aid and what your district can expect in the future based on current law.

*Karen Kucharz Robbe, WI DPI*

*Continued on next page*

# WASBO Sessions at the State Education Convention

Continued from previous page

## **Funds 41 and 46: Tools to Manage Your Budget and State Equalization Aid . . . . .201B**

School districts have a few options to address long term capital projects beyond simply borrowing the money. One of the options, “Fund 41” (Capital Expansion Fund) has been available for several years; and another, “Fund 46” (Long Term Capital Improvement Trust Fund) was created recently under 2013 Act 336. Each of these tools has its own set of requirements, processes and impacts on a district’s budget and state equalization aid. Come to this session to learn about the important factors a district should consider when weighing its options to implement long term capital projects. *Brittany Altendorf, West Bend; Carey Bradley, WI DPI; Erik Kass, Elmbrook; Ted Neitzke, West Bend; Debra Towns, WI DPI*

### **10:45-11:45 AM**

## **Revenue Limits . . . . . 102AB**

The school revenue limit is the major base for school funding in Wisconsin. The revenue limit sets the total dollars that can be raised through state equalization aid and local property taxes and is based directly on the number of residents attending a public school within a school district’s boundaries. Learn how the revenue limit is calculated and what variables are included in the calculation beyond student membership. This session will cover every level of experience.

*Debra Towns, WI DPI*

## **WASBO Luncheon**

**Thursday, Jan. 21**

**12-1:15 PM, Hilton Crystal Ballroom**

*Pre-registration required - \$38*

Join WASBO for its annual luncheon. Hear from the 2016 Wisconsin School Business Manager of the Year, Erik Kass, and the New School Business Manager of the Year, Erin Wheeler.

### **1:45-2:45 PM**

## **Impact of Vouchers on Wisconsin Public Schools . 102DE**

Learn about the effects, issues and concerns about school vouchers at the local and statewide levels. Information will be shared about specific local school districts as well as statewide information.

*Kim Kaukl, Wisconsin Rural School Alliance; Susan Schnorr, Oshkosh Area; Bob Soldner, WI DPI*

## **Sustaining 1:1 Initiative - Using Technology to Leverage Achievement . . . . .101B**

Learn how to transform your district and the practices in your classroom to accurately reflect current technologies and how students will use them.

*Ryan Krohn, Waukesha; Amy Pugh, Pewaukee*

## **Best Practices and Tips for Affordable Care Act Reporting . . . . . 103AB**

Join us to fully understand how to overcome the complexities of collecting good data, which will help districts meet their reporting compliance obligations under the Affordable Care Act and mitigate the potential for a penalty assessment.

*Al Jaeger, Associated Financial Group; Bret McKittrick, Associated Financial Group*

## **Collaborative Approach to Alternative Teacher Compensation . . . . .103C**

In 2013, the Wausau School District committed to develop a new teacher compensation model that supports student success. Using an interest-based problem solving approach, the district enlisted a team of school board members, teachers and administrators. This collaborative effort has taken the district through many steps, including: researching teacher compensation models, migrating 700 teachers onto the new pay matrix and defining how future pay increases are earned. The team will share how the model values professional development and keeps costs in check.

*Jeffrey Gress, Wausau; Michael Schwei, Wausau; Robert Tess, Wausau; Kathleen Williams, Wild Rose*

## **Friday, Jan. 22**

### **8-9 AM**

## **Wisconsin School Districts Preparing for Unwanted Intruders. . . . .102C**

More and more schools are being affected by unwanted intruders. No one is exempt. What steps has your school district taken to train your first responders? Panelists will share proactive steps they’ve taken to train their administration, staff and students. Come with your questions. You will leave motivated to implement safety procedures in your district.

*Allen Behnke, Howard-Suamico; Deputy Mike Calmes, Brown County Sheriff’s Office; Barbara Dorff, Green Bay Area; Pat Finnemore, Kenosha Unified*

# Understanding the Laws Governing Conduct by School Business Officials

By Richard F. Verstegen, Partner, Boardman & Clark LLP



Richard Verstegen

When interacting with vendors and other third parties, school business officials must be aware of the different laws that affect their conduct. In particular, there are different laws that restrict school business officials from accepting gifts or items of substantial value, that impose criminal sanctions when school business officials take actions that constitute misconduct in office or bribery, and that prohibit selling goods and services in the schools when the official receives a personal benefit from the sale of these goods or services. By gaining an understanding of these laws, school business officials will be able to interact with vendors and other third parties without being concerned about the legal implications of their actions. Below is a brief summary of the significant laws that govern the conduct of business officials in this regard.

## Code of Ethics

Section 19.59 of the Wisconsin Statutes is the Code of Ethics for local public officials. The term “local public official” has been interpreted to include public school district employees in positions that involve the exercise of discretion, such as school business officials. The Government Accountability Board (GAB), formerly the Wisconsin Ethics Board, is the state body that regulates conduct under this statute.

The Code of Ethics prohibits several types of conduct by a local public official. In particular, it prohibits a local public official from using his or her public position or office to obtain financial gain or anything of “substantial value” for the private benefit of himself, herself, or his or her immediate family or for an organization with which he or she is associated. The term “substantial value” has been interpreted to mean anything of

more than inconsequential or token value based on the totality of the circumstances. A local public official is also prohibited from soliciting or accepting from any person, directly or indirectly, anything of value if it could reasonably be expected to influence his or her vote, official actions or judgment, or could reasonably be considered as a reward for any official action or inaction. The statute also restricts local public officials from voting and taking official actions in exchange for valuable contributions. There are civil and criminal penalties for violations of the Code of Ethics.

According to the GAB, however, an official may attend conventions and participate in convention-related activities without violating the Code of Ethics. Specifically, while attending a convention authorized by and on behalf of a school district, a local public official may accept meals, refreshments, and the like without charge that are provided, sponsored, and/or sanctioned by the event organizer. During any convention, however, school business officials must be cautious about accepting food, drinks and/or entertainment, without charge or at less than fair value, that are offered at social events sponsored by entities or organizations other than the event organizers when the entities or organizations may be current or prospective school district vendors. Beer, wine, meals, and the like have more than token value, and a purely social event provides a primary benefit to the official, rather than to the district that authorized his or her attendance. Officials may attend such an event and avoid a Code of Ethics violation, but only if they pay the vendor for the full cost of the meal, refreshments, and the like offered at the event.

Similarly, school business officials may, while attending a convention,

accept educational or informational materials, prizes, or other giveaway items for the purpose of conveying the item to the school district for the use or benefit of the school district. However, if the school business official wishes to keep the item for himself or herself, the item must be of nominal or insignificant value, in order avoid a violation of the Code of Ethics. Items such as tote bags, mugs, pens, refrigerator magnets, and key chains are likely to be of inconsequential value, but items such as watches or jackets are likely to have more than inconsequential value.

## Misconduct in Public Office and Bribery of Public Employees

School business officials must also be aware that, under certain circumstances, the solicitation or acceptance of anything of value by a public employee can result in criminal sanctions. Specifically, under Wis. Stat. s. 946.12, a public employee will be guilty of a felony if he or she, while in his or her official capacity, does an act which the employee knows is in excess of the employee’s lawful authority or which the employee knows the employee is forbidden by law to do in the employee’s official capacity. The statute also prohibits an employee from intentionally soliciting or accepting for the performance of any service or duty anything of value which the employee knows is greater or less than is fixed by law. In essence, this statute proscribes conduct that is sometimes treated under the separate headings of malfeasance, misfeasance, or extortion.

Section 946.10 also prohibits bribery by public employees. The statute states that it is a felony for any public employee to directly or indirectly

*Continued on next page*

# Understanding the Laws Governing Conduct by School Business Officials

*Continued from previous page*

accept or offer to accept any property or any personal advantage, which the employee is not authorized to receive, pursuant to an understanding that he or she will act in a certain manner in relation to any matter which by law is pending or might come before the employee in his or her capacity as such employee or that the employee will do or omit to do any act in violation of her lawful duty. Any public employee who violates the statute is guilty of a felony, which is punishable by a fine or imprisonment, or both.

## Sale of Goods and Services at School

Section 118.12 of the Wisconsin Statutes prohibits school district employees from receiving anything of value for their own benefit that results from selling, soliciting, or promoting the sale of any goods or services to any public school pupil while on school property or at school-sponsored events. Prohibited items of value include gifts, benefits, or compensation, in the form of money or otherwise, but do not include employer-provided compensation or benefits. For example, if a high school band director is recruiting students in class to take part in a trip to Pasadena to play in the Rose Bowl Parade, and in return for recruiting students to take part the director will receive free air fare and hotel accommodations from the Rose Bowl officials, the receipt of such benefits would clearly be a violation of the statute. The band director is acting as a solicitor for the sale of the trip, to school students, on school property, and is receiving a personal benefit from someone other than the school district.

An employee, however, may receive a benefit from the sale of goods or services if the benefit is provided directly to the employee by the school district. To avoid the pitfalls of the statute, the school district should negotiate any and all benefits

from third parties who wish to sell or promote goods or services at school to students. The district, not the employee, must be the one who negotiates and decides who will benefit from such arrangements.

Except for the prohibitions against employee sales set forth above, any person may sell or promote the sale of goods and services on school district property. Under Wis. Stat. s. 118.12, however, a school district may adopt written resolutions or policies that prohibit, restrict, or provide guidelines for the sale and promotion of goods and services on district property. School business officials must be aware of any policies and carefully follow such policies.

In the event that section 118.12 is violated, the offending school district employee will be subject to a forfeiture of not more than \$200 for each offense. The school board president will have the responsibility of prosecuting an action for the recovery of the forfeiture and must do so in conjunction with the State of Wisconsin through the Attorney General's office.

## Pecuniary Interest In Contract

Section 946.13 of the Wisconsin Statutes prohibits public employees from participating in contracts in which they have a private financial interest and establishes criminal penalties for violations. The statute is a strict liability statute which means that the state does not have to prove that an employee intended to violate (or knew he or she was violating) the statute in order to prove a violation.

Public employees can violate the statute in their private or public capacities. An employee violates the statute if he or she, in a private capacity, negotiates for, bids for, or enters into a contract in which the employee has a private pecuniary interest, direct or indirect, and at the same time the employee is authorized or required by law to participate in

his or her capacity as an employee in the making of that contract or to perform in regard to that contract an official function that requires the exercise of discretion of the employee. An employee also violates the statute if he or she, in a public capacity, participates in the making of a contract in which the employee has a private pecuniary interest, direct or indirect, or performs in regard to that contract a function that requires the exercise of discretion of the employee.

Even if an employee does not participate in the contracting process, he or she may be liable for taking any subsequent action on the contract. Such actions might include authorizing payment under the contract, negotiating disputes over contract terms, or inspecting the quality of materials or services under the agreement. The statute does not apply to certain types of contracts. There is no violation if an employee is privately interested in a contract that involves receipts and disbursements by the state or its political subdivisions totaling less than \$15,000 a year. The statute lists several additional exceptions.

Employees that violate the statute are subject to criminal and personal liability. If section 946.13 is violated, the statute provides that the contract is void and the state or political subdivision on whose behalf the contract was made incurs no liability thereon. This language generally has been interpreted as giving the public body (school board) the discretion of voiding the contract or requiring its enforcement. A violation of section 946.13 is a felony punishable by a fine or imprisonment, or both.

## Conclusion

School business officials must be aware of the legal issues that can arise from their relationship with vendors and third parties. Such officials should also review any applicable school

*Continued on next page*

# Open Enrollment Policies Should be Reviewed Before January Board Meeting

By Alana Leffler, Attorney, Buelow Vetter Buikema Olson & Vliet, LLC



Alana Leffler

As the February - April 2016 regular open enrollment application period approaches, school districts should review their open enrollment policies to confirm that they are in compliance with the open enrollment statute (Wis. Stat. § 118.51) and DPI regulations (Wis. Admin. Code Chapter PI 36), both of which have undergone recent changes. Any policy revisions should be made before the January school board meeting at which the board will designate the number of regular education and special education spaces available in the district.

Beginning with the 2016-17 school year, 2015 WI Act 55 (the state budget bill) modified the open enrollment program for students with disabilities. The budget bill created a new transfer amount of \$12,000 for open enrolled students with disabilities. DPI will make the aid transfer payments for open enrolled students with disabilities in the same manner as for open enrolled students without disabilities. As a result of this change, the nonresident school district will no longer be required to send an estimate of the costs of educating a student with a disability to the resident school

district. In addition, the nonresident school district will no longer bill the resident school district for these costs. Any policy provisions requiring the nonresident district to send a cost estimate to the resident school district should be removed, as well as any policy provisions requiring the resident school district to pay tuition to the nonresident school district.

Because the resident school district will no longer be required to pay the cost of educating students with disabilities who have open enrolled in a nonresident school district, the budget bill also eliminated school districts' authority to deny resident students' open enrollment applications based on undue financial burden. Accordingly, any policy provisions authorizing the resident district to do so should be removed.

In addition to making the above revisions, school districts should confirm that their open enrollment policies contain all of the provisions required by the open enrollment statute and DPI regulations. The DPI regulations underwent major revisions in the summer of 2014, and the new regulations went into effect Sept. 1, 2014. If your district's open enrollment

policy has not been reviewed since then, significant revisions will likely be necessary.

The open enrollment statute and DPI regulations require open enrollment policies to include the following provisions, at a minimum:

- A procedure to receive and date applications received during the regular application period;
- The school board's acceptance and rejection criteria for open enrollment applications that are submitted by nonresident students who wish to attend school in the district;
- The criteria/method for determining the number of regular and special education open enrollment spaces available in each grade in the district;
- A statement that currently-attending students and their siblings are entitled to a preference (but may instead be guaranteed space - see next bullet point) in the selection of applicants when the number of nonresident applicants exceeds the number of available spaces;
- A statement of which pupils, if any, will be guaranteed approval;
- The method of random selection used to determine which applications will be approved when the number of nonresident applicants exceeds the number of available spaces;
- If the school board establishes a waiting list, the procedures for creating and accepting students from the waiting list;
- The school board's reapplication requirements, if any;

## Understanding the Laws Governing Conduct by School Business Officials

*Continued from previous page*  
board policies as they may be more restrictive than state law. Officials who are unclear on these issues should seek legal advice to ensure that they are proceeding appropriately. 📌

For further assistance on any of these matters or for answers to any questions regarding the information in this article, please contact Richard Verstegen (rverstegen@boardmanclark.com).

Boardman & Clark LLP provides this material as information about legal issues. It does not

offer legal advice with respect to particular situations and does not purport that this article is a complete treatment of the legal issues surrounding any topic. Because your situation may differ from those described in this article, you should not rely solely on this information in making legal decisions. In addition, this material may quickly become outdated. Anyone referencing this material must update the information presented to ensure accuracy. The use of the materials does not establish an attorney-client relationship, and Boardman & Clark LLP recommends the use of legal counsel on specific matters.

*Continued on page 41*

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Administrators, Human Resources

# Bus Safety Tips for Parents and Children

By Ted Hayes, Senior Risk Manager, M3 Insurance; WASBO Director  
Submitted on behalf of the Transportation Committee



Ted Hayes

Nationally, over 450,000 yellow school buses provide student transportation on a daily basis. Over 23.5 million students ride school buses throughout the United States. This equates to about 10 billion individual student rides or 20 billion boardings and deboardings annually. Remarkably, the injury rate involving children is quite low. The National Highway Traffic Safety Administration reports that 96% of the estimated 8,500 to 12,000 children injured in school bus accidents annually are considered minor - scrapes, bumps, bruises, etc.

Unfortunately, an average of 11 children a year are fatally injured inside the school bus and about 15 children a year are fatally injured as pedestrians in the loading and unloading zone around the school bus. That's a 200% improvement from the 75 school bus fatalities in 1975; however, it is not good enough.

At mid-year, it is still a great time to educate parents and children of the do's and don'ts of bus safety. Let's review some effective bus safety tips:

## Parents' Bus Safety Tips

- Ensure that children always get to the school bus loading area in plenty of time. If as a parent, you see there is not enough time to safely load the bus, stop, and safely drive your children to school. Never attempt to flag down a moving bus so your children can enter the bus.
- Do not dress your children in loose fitting or baggy clothing (especially small children) that can get caught in handrails, in swinging doors, and on seats.
- The most dangerous area is where children board and deboard the bus. Instruct children to avoid horseplay and stay back away from the bus (at least 15 feet) and wait for the bus to come to a complete stop.

### Service Affiliates: Is Your Company Missing from this Issue?

If you aren't advertising in *Taking Care of Business*, you're missing an opportunity to reach over 1,200 WASBO members, including individuals in virtually every Wisconsin K-12 school district.

Past issues of the newsletter are archived at [WASBO.com/newsletter](http://WASBO.com/newsletter) for continuous exposure.

For rates, more information, and an ad contract, email Áine Calgáro at [aine.calgáro@wasbo.com](mailto:aine.calgáro@wasbo.com) today.

- Instruct children to refrain from horseplay or from being noisy while on the bus. The bus driver has a difficult enough job in driving the bus; don't ask them to be a bus monitor too.
- Stop for all school buses when the warning lights/signs are activated.
- Don't dress children in yellow clothing or raincoats - simply dress them in another color. Yellow raincoats have a tendency to blend in with the yellow school bus making it difficult for the driver and other motorists to see the child.
- Provide a safe area where children must stand while waiting for the bus (at least 15 feet away from the road). Paint a yellow line on your driveway/sidewalk and instruct children never to cross that line until the bus has come to a complete stop.
- During the winter months, knock down snow banks near the bus pick up area. Snow piled high creates significant blind spots for the bus driver.

## Children's Bus Safety Tips

- Ensure that you are on time for the bus pick up.
- Never run to or from the bus. This is especially important during wintertime conditions.
- Don't push or shove when getting on and off of the bus.
- Always stay in your seat when riding on the bus.
- Don't yell or shout when on the bus.
- Always obey the bus driver's directions.
- Wait for the driver's signal before crossing.
- Always cross at least 10 feet in front of the bus.
- Never crawl under a school bus.

Although bus accidents involving students are rare, the results can be terrible. Spend the time to educate parents and children - during student registration, through safety information sent home with children, and during parent/teacher conferences. Let's keep Wisconsin a safe place for busing our children. 🐾

# What Could Your District Do With \$3,000?

“It was remarkable to see the expressions of the students who were part of the project,” reflected 2015 Forward Together Award winner and English teacher William Harvill. “Instead of hopelessness and helplessness, there’s a sense of hope and pride that’s been instilled in my students through the implementation of this project.”

Harvill won a \$3,000 Forward Together Award from WEA Trust earlier this year. The grant financed a service learning project that connected community gardening, sustainable cooking, and entrepreneurship for his high schoolers. Harvill was one of three Forward Together Award winners in 2015.

The next WEA Trust Forward Together Award is right around the corner!



*William Harvill, a 2015 Forward Together Award winner from Milwaukee Public Schools, teaches his students how to garden. This year, his students are meeting with local chefs to learn how to cook healthy food using their own produce. In the spring of 2016, they will sell or donate their produce to area residents who live in food impoverished neighborhoods.*



Applications will be accepted from January 1-31, 2016 online at [WeaTrust.com/Award](http://WeaTrust.com/Award).

Recognize your colleagues for their vision and drive by jumpstarting their passion projects. As part of the 3rd Annual Forward Together Award, WEA Trust will give three Wisconsin school districts \$3,000 grants to support

school projects. WASBO Executive Director Woody Wiedenhoft will join the Forward Together judging panel again this year.

To enter, visit the WEA Trust exhibit booth at the State Education Convention or go to [WeaTrust.com/Award](http://WeaTrust.com/Award). 🇺🇸

The logo for Groth Design Group, featuring a stylized white 'G' shape composed of vertical lines on a green background.

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# About Those Drones...

By Joy M. Gänder, CPCU, ARM on behalf of the WASB Insurance Plan  
Reprinted from the November 2015 Wisconsin School News



Joy M. Gänder

No doubt you've heard reports about the increased use of drones for commercial and personal (hobby/recreational) purposes. The number of drones flying around will multiply dramatically as many are purchased over the upcoming holiday season.

Accompanying the drone-usage uptick will be a higher number of drones interfering with commercial aircraft, purported invasion of privacy claims, and more debris as drones unintentionally crash, sometimes on inaccessible premises, including lakes and forests.

The question we've heard recently is: Should my school district have a policy on drones? Before answering 'yes' or 'no,' evaluate what's going on in your district.

- Are faculty and classes building drones? Running test flights? Where? Start with your STEM faculty.
- Are faculty and/or staff bringing personally-owned drones to school, flying them around (where?), or conducting experiments on them with student participation?
- Whether owned, rented or borrowed, is your school district using drones for any purposes?

We recommend keeping the following in mind as you contemplate this issue:

1. The Federal Aviation Administration ("FAA") regulates drones because drones are considered aircraft. The FAA is charged with the safe and efficient use of U.S. airspace, referred to as National Air Space ("NAS"). NAS extends to the ground.
2. Drone usage is split into a few categories: hobby/recreational, commercial, and civil (i.e., law enforcement). Let's focus on the first two:

**Hobby/Recreational Use** – This is the only category in which users do not need authorization from the FAA before flying drones. Generally, the FAA limits hobby operations to aircraft weighing no more than 55 pounds; flying below 400 feet; away from airports and air traffic; and within sight of the operator.

**Commercial Use** – Before using a drone for commercial purposes, drone users must obtain authorization or a Certificate of Authorization or Waiver ("COA") from the FAA. **This is where public school districts' use of drones falls.**

3. What problems may arise out of building and flying drones? From a risk management perspective, what should districts be concerned about?
  - a. Loss of the value of the unmanned aircraft system ("UAS")/drone and attached equipment.
  - b. Bodily injury and property damage caused by drones.
  - c. Invasion of privacy concerns.
  - d. Collision and/or interference with other aircraft, objects and people.
  - e. Operating drones without proper authorization may be considered criminal, and fines may be assessed.
4. What about insurance? Presume You're Flying Bare - No Insurance Coverage for Losses/Claims Arising Out of the Use, Maintenance, etc., of Drones.

Unless specifically (and recently) endorsed to provide coverage for losses associated with drones, do not expect your property or general liability insurance policies to respond to losses arising out of the building, use, maintenance, etc., of drones.

- Standard property policies exclude coverage for aircraft.
- Standard general liability policies contain the following aircraft exclusion:

*"This insurance does not apply to Bodily Injury or Property Damage arising out of the ownership, maintenance, use or entrustment to others of any aircraft...owned or operated by or rented or loaned to any insured..."*
- Most standard general liability policies limit the scope of invasion of privacy claims to oral or written publication of material, and/or invasion of the right of occupancy of a private residence.
- Insurance does not typically respond to losses arising out of criminal activity, i.e., flying without authorization (even if merely alleged), or pay fines.

Long story short: School districts should expect to self-fund any adverse financial implications arising out of the use of drones. 🇺🇸

## Resources

1. Your district's insurance agent.
2. FAA UAS FAQ - <https://www.faa.gov/uas/faq/>
3. <http://knowbeforeyoufly.org/for-business-users/>
4. WASB, Inc. Policy Services (sample Drone policies) – Nancy Dorman – (608) 512-1706.
5. Gänder Consulting Group, LLC – Joy Gänder, CPCU, ARM – (608) 286-0286 – Complimentary risk management counsel available to all Wisconsin public school districts due to membership in WASB, Inc.

# Midwest Facility Masters Conference

More than 340 attendees utilized this year's theme, *Clues to Your Success*, to find solutions to bring back to their districts at this year's Midwest Facility Masters Conference at the Kalahari Resort and Conference Center in Wisconsin Dells Nov. 2-3. Attendees were given opportunities to network with over 119 exhibitors in the extended exhibit hall, gain knowledge on SchoolDude products while visiting the Learning Lab, and attend concurrent sessions that covered a wide array of subject matter.

Kelly Swanson (right) started the conference on Monday morning with hilarious positivity, giving attendees tips on how to deal with the constant change and stress that comes with their jobs each day. The audience was then sent on their way to the 70 concurrent sessions.



In addition to continuing education credits towards Certified Plant Manager (CPE), Certified Plant Maintenance Manager (CPMM) and Certified Plant Supervisor (CPS) designations through the Association for Facilities Engineering, attendees had the opportunity to complete Module 2 of the WASBO Facilities Certification Program. More than 80 attendees took advantage of these 6 course offerings on HVAC and Electrical Systems.



The second day of the conference began with the newly formatted Gold Mine Session, where the audience was able to share the challenges they are facing in their districts and receive feedback on best practices

from their peers. Additional concurrent sessions were also offered before everyone made their way home.

Exhibitors and attendees raised \$2,465 for next year's attendee scholarships by participating in the exhibit hall raffle. The \$2,555 raised last year was put towards five attendee scholarships. Focus on Energy generously sponsored three additional scholarships this year, allowing 11 scholarship recipients to attend the conference for the first time. Each recipient received \$500 to cover registration and travel to the conference. The 11 attendee scholarship recipients were Tom Beaver, Forest Ridge SD #142, IL; Pete Geffers, Oshkosh Area SD, WI; Bill Hennessy,

Alamakee Community SD, IA; Loren Mason, Dolton SD #149, IL; Tamara Mitchell, Bradley Elementary SD #61, IL; Brian Rominski, Burbank SD #111, IL; Eric Smith, West Des Moines Community SD, IA; Chadd Starkey, Oshkosh Area SD, WI; Brian Weintraub, Itasca SD #10, IL; Michael Williamson, Hartford Union High SD, WI; and Gary Wolfe, River Bend CUSD #2, IL.

Networking opportunities were abundant at this year's conference, starting with a Welcome Reception on Sunday Evening where repeat attendees could connect with colleagues they met at previous conferences. Attendees were able to visit the exhibit hall to network with both peers and exhibitors during lunch on Monday, as well as after sessions concluded. Later in the evening attendees came together for the Tailgate Social, sponsored by SchoolDude.com, Stalker Flooring and McKinstry. While networking with attendees from Illinois, Iowa, Minnesota, Missouri,

New Mexico and Wisconsin, colleagues were able to take part in a friendly game of corn hole, watch Monday night football and enjoy beverages and snacks.



Above: Attendees enjoy networking Monday evening.

Right: Networking participants had a chance to win theme baskets donated by the various state co-hosts.



A record number of exhibitors participated in the exhibit show, which was expanded into three adjacent areas.

This conference is hosted by Wisconsin ASBO and SchoolDude.com in partnership with Illinois ASBO, Iowa ASBO, Minnesota ASBO, Minnesota Educational Facilities Management Professionals (MASMS) and our newest partner organization, Missouri School Plant Managers Association (MSPMA). The Midwest Facility Masters Conference would not be possible without the help of more than 105 presenters, the support of our sponsors (listed below) and the dedication of the planning committee members. Thank you to all those who helped make this year's conference another successful professional development opportunity for all attendees.

Planning for the 2016 Midwest Facility Masters Conference began as soon as the last concurrent session ended with a wrap-up meeting. If you would like to be part of the planning committee, please contact Kaitlyn Hafeman at kaitlyn.hafeman@wasbo.com. If you are interested in presenting at next year's conference Nov. 7-8, 2016 at the Kalahari Resort and Conference Center, watch for the Call for Presentations to

open Feb. 15 – March 31, 2016. Mark your calendar and plan to join us for the 2016 Midwest Facility Masters Conference. 🇺🇸



Right: Jim Beckmann presents during the conference.



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# IRS Scrutinizes Public Employer PTO Plans

By Andrew T. Phillips and Daniel S. Welytok, Attorneys, von Briesen & Roper, s.c.



Andrew T.  
Phillips



Daniel S.  
Welytok

Public employers in Wisconsin have traditionally provided employees with some sort of paid leave program whereby employees would receive salary continuation on days when an employee was ill, on vacation, or celebrating a holiday. In many cases, public employers would allow employees to “bank” unused leave time for future use. In some cases, employees would be granted the privilege of converting unused leave time to cash or contributing the financial value of the time to an extended health coverage benefit upon retirement.

In recent years, public employers have questioned the administrative and financial viability of the traditional leave plans, which separate leave entitlements into various categories – vacation, sick, holiday, personal, bereavement, etc. Many public employers began transitioning to a paid time off (PTO) plan whereby employees were allotted a specific number of days away from work without regard to the reason for the absence. But even with the transition to PTO, public employers typically continued to allow employees to contribute to a “bank” of unused hours that could be converted to cash or some other benefit upon separation of employment or retirement.

2011 Wisconsin Act 10 provided a significant opportunity for public employers to continue to evaluate changes to their traditional leave plans as changes to those plans are no longer a mandatory subject of collective bargaining. As a result, the past four (4) years have seen a proliferation of PTO plans implemented across the state as public employers attempt to create administrative and financial efficiency.

Many public employers are aware of the tax concept of “constructive receipt” of income for an employee. In simple terms, federal tax law requires an employer to treat payments made to an employee’s “bank” as income for tax purposes if the employer also provides the employee with an option to receive the contribution as cash.

For example, if an employer provides a retiring employee with a current option to apply her sick leave bank to health insurance premiums (pre-tax) or receive the value of the bank in cash, the employee is in “constructive receipt” of the money that is paid for health insurance premiums and the contribution is a taxable event – meaning it results in the employee being taxed on the value of the leave – even though the employee received no actual money.

The constructive receipt doctrine is taking on renewed significance as public employers have created new conversion options for “extended leave,” retirement accounts, health insurance continuation, and the like, some of which have at least a limited “cash out” option. But even in situations where the cash option is limited or capped, the IRS is clear that the “constructive receipt” rule will continue to apply.

The IRS is currently conducting an initiative focusing on benefits, and accordingly is increasing its scrutiny of public employer PTO and benefit plans. IRS agents are reviewing employer handbooks and policies made available on county, municipal, and school websites as one method of determining whether to initiate a formal audit into a public employer’s benefits practices. Therefore, we recommend that counties,

municipalities, schools, and other local governmental entities immediately review their leave or PTO plans to insure that constructive receipt is not an issue and to determine compliance with the Internal Revenue Code. As is true with most matters relating to IRS enforcement, interpretation and application of federal tax law to any specific circumstance can be tricky and counsel should be consulted to ensure that the public employer is placed in the best possible position if an audit is forthcoming. 📌

If you have any questions about this article, contact Andrew at [aphillips@vonbriesen.com](mailto:aphillips@vonbriesen.com) or Daniel at [dwelytok@vonbriesen.com](mailto:dwelytok@vonbriesen.com).

von Briesen & Roper Law Update is a periodic publication of von Briesen & Roper, s.c. It is intended for general information purposes and highlights recent changes and developments in the legal area. This publication does not constitute legal advice, and the reader should consult legal counsel to determine how this information applies to any specific situation.

“ Say and do something positive that will help the situation; it doesn't take any brains to complain .

~ Robert A. Cook

# WISCONSIN SCHOOL DISTRICT REFERENDUM HISTORY – 2000-2015



Election Month	Issue Debt			Non-recurring			Recurring		
	Failed	Passed	Pass Percentage	Failed	Passed	Pass Percentage	Failed	Passed	Pass Percentage
February	41	60	59.4%	26	37	58.7%	27	20	42.6%
April	180	179	49.9%	131	176	57.3%	91	45	33.1%
August/September	19	20	51.3%	14	18	56.3%	8	5	38.5%
November	60	110	64.7%	28	55	66.3%	24	24	50.0%
Special	103	80	43.7%	32	54	62.8%	50	34	40.5%
<b>Total</b>	<b>403</b>	<b>449</b>	<b>52.7%</b>	<b>231</b>	<b>340</b>	<b>59.5%</b>	<b>200</b>	<b>128</b>	<b>39.0%</b>

Election Year	Issue Debt			Non-recurring			Recurring		
	Failed	Passed	Pass Percentage	Failed	Passed	Pass Percentage	Failed	Passed	Pass Percentage
<b>Presidential Election</b>									
2000	45	67	59.8%	16	17	51.5%	23	26	53.1%
2004	17	32	65.3%	9	16	64.0%	13	10	43.5%
2008	27	30	52.6%	23	32	58.2%	19	10	34.5%
2012	11	29	72.5%	10	19	65.5%	3	4	57.1%
<b>Total</b>	<b>100</b>	<b>158</b>	<b>61.2%</b>	<b>58</b>	<b>84</b>	<b>59.2%</b>	<b>58</b>	<b>50</b>	<b>46.3%</b>
<b>Non-Presidential Election</b>									
2001	49	35	41.7%	13	16	55.2%	33	20	37.7%
2002	35	24	40.7%	13	11	45.8%	18	2	10.0%
2003	44	13	22.8%	13	8	38.1%	24	5	17.2%
2005	25	17	40.5%	14	16	53.3%	13	10	43.5%
2006	22	40	64.5%	22	32	59.3%	11	10	47.6%
2007	25	31	55.4%	18	22	55.0%	14	9	39.1%
2009	14	13	48.1%	17	19	52.8%	10	3	23.1%
2010	16	26	61.9%	18	19	51.4%	8	2	20.0%
2011	20	13	39.4%	10	22	68.8%	1	4	80.0%
2013	16	19	54.3%	11	21	65.6%	3	1	25.0%
2014	18	33	64.7%	15	39	72.2%	7	8	53.3%
2015	19	27	58.7%	9	31	77.5%	0	4	100.0%
<b>Total</b>	<b>303</b>	<b>291</b>	<b>49.0%</b>	<b>173</b>	<b>256</b>	<b>59.7%</b>	<b>142</b>	<b>78</b>	<b>35.5%</b>

## UPCOMING REGULAR ELECTION DATES<sup>1</sup>

	2016		2017		2018	
	Primary	General	Primary	General	Primary	General
<b>Spring</b>	02/16/2016	04/05/2016	02/21/2017	04/04/2017	02/20/2018	04/03/2018
<b>Fall</b>	08/09/2016	11/08/2016	No Fall Elections		08/14/2018	11/06/2018

**Brian C. Brewer**  
(414) 298-7030  
[bbrewer@rwbaird.com](mailto:bbrewer@rwbaird.com)

**Michel D. Clark**  
(414) 765-7326  
[mdclark@rwbaird.com](mailto:mdclark@rwbaird.com)

**Lisa M. Voisin**  
(414) 765-3801  
[lvoisin@rwbaird.com](mailto:lvoisin@rwbaird.com)

**Debby A. Schufletowski**  
(715) 552-3567  
[dschufletowski@rwbaird.com](mailto:dschufletowski@rwbaird.com)

**Diane N. Pertzborn**  
(608) 886-8572  
[dpertzborn@rwbaird.com](mailto:dpertzborn@rwbaird.com)

<sup>1</sup>The governing board required to file adopted referendum ballot resolutions with their municipal clerks at least 70 days prior to the election date indicating the amount and purpose.  
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Source: Department of Public Instruction

risk damage my school budget.  
risk damage my school budget.

I will not let unexpected risk damage my school budget.  
I will not let unexpected risk damage my school budget.  
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## Certified School Risk Managers Designation Series

All classes at the WI School Leadership Center, Madison  
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**Fundamentals of Risk Management** • Feb. 24, 2016  
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**Funding School Risks** • April 5, 2016  
**Administering School Risks** • April 6, 2016

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### Who should attend?

Risk managers, business managers, safety personnel, HR and benefits personnel, facilities managers, athletic directors, administrators, and anyone else working in school risk management.

Register at [WASBO.com/riskmanagement](http://WASBO.com/riskmanagement)

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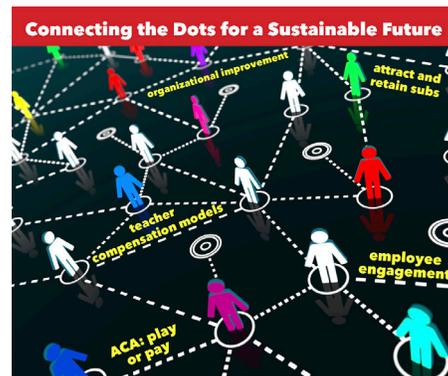


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1-800-633-2165

## Highlights

# WASBO/WASPA School Personnel Academy

Once again, WASBO collaborated with WASPA to host the 2015 School Personnel Academy – *Connecting the Dots for a Sustainable Future* – held at the Madison Marriott West on Dec. 2-3. Sessions focused on various areas of the Affordable Care Act, wellness plans, and staff compensation. Participants had an opportunity to participate in an interactive polling session and share what their districts were doing in regards to teacher compensation. In another session, attorneys were invited to provide practical advice and best practices in administering post-retirement benefit programs. WASBO and WASPA commend the planning committee on their work in providing another successful conference. Special thanks are due also to the sponsors listed at right. If you would like to participate on next year's planning committee, contact Kaitlyn Hafeman at [kaitlyn.hafeman@wasbo.com](mailto:kaitlyn.hafeman@wasbo.com). Mark your calendar and plan to join us on Dec. 7-8, 2016. 📅



### Gold Sponsors



### Bronze Sponsors



## Year of Success: Winter at a Glance Conference

### Gold Sponsor

#### Year of Success Program



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As part of the Year of Success Program, attendees joined WASBO and DPI for Winter at a Glance on Dec. 1 at the Madison Marriott West. This one-day conference provided both those new to the profession and seasoned business managers with areas of focus for the business office during the winter months. Presenters received high marks for information provided which ranged from the Revenue Limit and Equalization Aid to Fees and an Overview of Employee Benefits.

If you know of someone new to the business office, including district administrators, be sure to let them know about the Year of Success Program. Learn more at <http://www.wasbo.com/success>. The next offering of sessions in the Year of Success Program is scheduled at the Wisconsin Federal Funding Conference Feb. 16-17 at the Kalahari in Wisconsin Dells.

WASBO thanks Key Benefit Concepts and Performance Services for supporting the conference, as well as Focus on Energy for sponsoring the Year of Success program. 📅

# Thank You

By Don Mrdjenovich, Retired WASBO Executive Director



Don  
Mrdjenovich

Come February 29 and God willing, I'll be celebrating my 20th birthday. Among the best of those years are the 11 when I was fortunate enough to serve as WASBO's Executive Director. It was a complete career change for me coming from the background of teacher, principal and superintendent of schools. What made those years so special and rewarding for me was, in a word, people. The people in the office and the entire membership, all of whom supported me with their patient guidance and encouragement.

I began my WASBO career working twenty hours a week from my home in Janesville, with a phone and a typewriter. One of my Board of Directors nicknamed me Whiteout. Then AWSA made room available in their office suite and I became a commuter. That was followed by a much needed rescue mission in the person of Tina Hafeman who took work home and did her best to slow me up

on a dictation machine. It wasn't long before we had the good fortune to find a partner to share the current office suite across the hall from AWSA. With the acquisition of a computer and Tina on board to teach me to use it, we were off and running on our way to meet the WASBO Board's goal of being one of the best professional educational organizations in the state.

We started that endeavor with a membership of 220 licensed school business administrators. We later expanded the membership to other business related job titles and included our Service Affiliate members. All of the Board of Directors I served were supportive, focused and willing to give of their time and talents to take WASBO forward. They developed goals, strategies, expectations and ambitious timelines. They then refrained from any micro management and gave Tina and me the latitude to translate their vision and mission statement into action. Having served nine-member

school boards in three school districts, I can't adequately express how refreshing it was. Free at last. The best job anyone could ask for.

The other most significant reason being your Executive Director was the best job I ever had was the culture that developed among the membership. The caring and unselfish sharing that is the hallmark of WASBO is the envy of its counterparts both in Wisconsin and I am confident my ASBO counterparts agree, internationally.

I would be remiss if I didn't give a special thank you to our Service Affiliate members. They have supported WASBO with expert faculty, scholarships, and financial support as well as their sponsorships of special events and social gatherings. They too have been an essential ingredient in developing the special culture that is WASBO.

As the holiday season approaches, I want to thank all of you for the great years that Betty and I experienced with you. We will always be grateful for your friendship and our time together. You generate a lot of memories in 80 years, and the time I spent with all of you was the gift of a lifetime. I'm out of wisdom and current experience, so, as you may have guessed, this is my final installment to *Taking Care of Business*. May you and your loved ones enjoy a wonderful Holiday Season. 🇺🇸

*Editor's Note: Many thanks to Don for his many years of service to WASBO, as a speaker, a writer, an advisor, a leader, and most of all, a friend. Don, your words of wisdom in these pages will be missed!*

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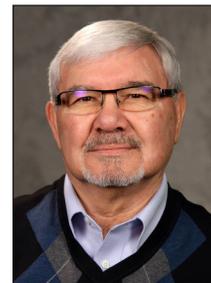
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# PEOPLE Can't Drive You CRAZY If You Don't Give Them the KEYS

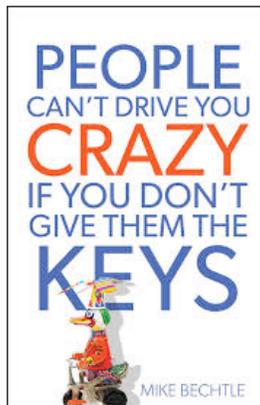
Authored by Mike Bechtle

Review by Orvin R. Clark, EdD, RSBA, Retired



Orvin R. Clark,  
EdD, RSBA

**P**EOPLE Can't Drive You CRAZY If You Don't Give Them the KEYS is by Mike Bechtle, who received a Master's Degree from Biola University and a Doctorate from Arizona State University. His experiences include teaching as a university professor at Biola University, 18 years in churches and Christian universities, serving as a senior consultant with Franklin Covey Company and giving over 3,000 time and life management seminars.



PEOPLE Can't Drive You CRAZY If You Don't Give Them the KEYS is 203 pages in length, with five parts and 23 short chapters. This book is about hope. We won't be able to eliminate the drama in our lives or escape all the crazies, but we can actually learn to live responsively instead of reactively by being positive when others are negative.

## Part One – Stuck in a Crazy World

- I'm OK. You're crazy (Who?)
- Anyone in your life that brings you drama
  - Boss
  - Spouse
  - Friend
  - In-laws
  - Parents
- What does craziness look like
  - It involves our emotions
  - It involves people
  - It's often unexpected
  - It's personal and
  - It's often exaggerated
- The most common concern - I'm stuck in a no-win situation!

Solution: Three-Step process:

- First – Try to change the situation
- Second – Change your attitude
- Third – Change the environment - Leave the situation

## Part Two – Changing Someone Else

- Who's in control?
  - What can we control?-Ourselves
  - What can we not control? – Everything else
  - Expectations vs. Expectancy
- The Bottom Line
  - If you count on others changing- we'll be disappointed
  - Our attitude can't depend on what others do
  - Expectations are the basis for pain
  - Expectancy is the basis for healing

## Part Three – Changing Yourself

- Manage your thoughts, Manage your emotions

- Changing from the inside out
  - Humility
  - Joy
  - Perspective
  - Patience
  - Kindness
  - Integrity
  - Commitment
- See yourself realistically - Keep a positive perspective
- Take yourself lightly - Don't sweat the wrong stuff
- Base your choices on integrity, not convenience

## Part Four – Changing Your Environment

- Prioritize your relationships
- No guarantees in life
- Three step process
  - Change the situation
  - Change your attitude
  - Change your environment

## Part Five – Putting it into Practice

- Fine line between excellence and perfection
- We miss 100 percent of the opportunities we never take
- Relationships survival kit - Tips for healthy relationships
- Realize you can't change the past, but you can change how you respond to it

## NOW it's Your Part...

- Go to the library (check out the book)
- Borrow the book from a friend
- Buy the book
- Don't be a CRAZY – read the book
- Practice what you learn! 📖

# Open Enrollment Policies Should be Reviewed before January Board Meeting

Continued from page 27

- Whether the Board will provide transportation to any open enrollment students under Wis. Stat. § 121.54(10) and the means, under Wis. Stat. § 121.55, by which it will provide such transportation; and
- If the policy provides that open enrollment may be denied or terminated on the basis of habitual truancy, then the policy must include:
  - The definitions of “excused absences,” “unexcused absences,” “tardiness,” “part of a school day,” “truancy,” “habitual truancy,” and any other term or concept that will be used for the purposes of denying or terminating open enrollment (these definitions should be consistent with the district’s truancy and attendance policy);
  - The criteria that will be used to terminate open enrollment, including the number of unexcused absences that may result in termination of the pupil’s open enrollment; and
  - A process for the parent or student to follow if they believe the student was erroneously marked truant.

If you would like assistance reviewing your open enrollment policy or have any questions about this legal update, please contact Alana

Leffler at [aleffler@buelowvetter.com](mailto:aleffler@buelowvetter.com) or 262-364-0267.

This Legal Update is intended to provide information only on general compliance issues and should not be construed as legal advice. Please consult an attorney if you have any questions concerning the information discussed in this Legal Update.

In order to comply with Treasury Circular 230, we are required to inform you that any advice that we provide in this Legal Update concerning federal tax issues is not intended or written to be used, and cannot be used, to avoid federal tax penalties, or to promote, market, or recommend to another person any tax advice addressed herein.

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Phone: 262-377-8306  
[rwaelti@mvpbanking.com](mailto:rwaelti@mvpbanking.com)**

# Welcome New Members • October-November 2015

## District Professional Members

- **David Bridenhagen**, Superintendent, Shell Lake SD
- **Robert Bunzel**, Facility Manager, SD of Waukesha
- **Barb Buswell**, Human Resources, West Salem SD
- **Colleen Callahan**, Bookkeeper, Rosholt SD
- **Chad Carriveau**, Facility Manager, SD of Waukesha
- **Steve Cianciolo**, Groundskeeper, Muskego Norway SD
- **Michael Fischer**, Finance Manager, West Bend SD
- **Suzi Gould**, Bookkeeper, SD of Albany
- **Eric Hidde**, Maintenance Manager, Sun Prairie Area SD
- **Thomas Hodgert**, Maintenance Staff, Germantown SD
- **Tammy Koenig**, Payroll and Benefits Manager, Shorewood SD
- **Tom McCormack**, Facilities Director, Wheatland J1 SD
- **Sean Neils**, Assistant Director of Buildings & Grounds, Germantown SD
- **Carin Pardun**, Finance Manager, Eau Claire Area SD
- **Wendy Perkins**, Director of Business Services, Wheatland J1 SD
- **Amanda Potratz**, Business Manager, Chilton Public Schools
- **Nate Prokop**, Buildings & Grounds Supervisor, St. Croix Falls SD
- **Robert Sailer**, District Administrator, Wauzeka-Steuben SD
- **Julie Schattner**, Supervisor of Budget & Grants, Racine Unified SD
- **Craig Semingson**, Educational Consultant, CESA #10
- **Jodi Smeiska**, Director of Buildings & Grounds, SD of Brown Deer
- **Ann Smith**, Director of Business Services, SD of New Richmond
- **Wendy Stauty**, HR Manager/Executive Bookkeeper, SD of Maple
- **Brenda Stevenson**, District Administrator, Union Grove J1 SD
- **Paul Vine**, District Administrator, Pittsville SD
- **Josh Wensing**, Facility Manager, SD of Waukesha
- **Kim Zabel**, Assistant Comptroller, Hamilton SD

## Service Affiliate Members

- **Jennifer Everhart**, Senior Project Consultant, Unesco Corp.
- **Drew Grant**, CEO, eznetpay, LLC
- **David Martin**, H.J. Martin and Son
- **Kevin Orcutt**, Vice President, Sales and Marketing, DIC Imaging Products USA LLC
- **Elizabeth Owen**, Attorney, Griggs Law Office LLC
- **Lacey Raines**, Business Developer - Account Manager, Stocor, LLC
- **John Rohling**, Sales Manager, Doyle Security Products
- **Emily Schutte**, Public Relations and Events Coordinator, LaForce, Inc.
- **Gary Voogt**, Access Master
- **Brett Yutka**, President, Yutka Fence

## Student Members

- **Gregory Nelson**, Teacher, SD of Maple

## Member Moves and Retirements

### On the Move

- **Andy Christensen**, from Business Manager, Waterloo SD, to unknown
- **Andrew Dyb**, from Business Manager, Wauzeka-Steuben SD, to Business Manager, Lake Mills Area SD
- **Dave Farwell**, from Custodian, Oregon SD, to Buildings & Grounds Director, Marshall Public Schools
- **Connie Heinemeyer**, from Bookkeeper, SD of Albany, to Payroll Specialist, Middleton-Cross Plains Area SD
- **Thomas Karthausser**, from Director of Business Services, Swallow SD, to Director of Business Services, Mukwonago SD
- **Brian Lee**, from Sales Director, eznetpay, LLC, to unknown
- **Sharon Peterson**, from Finance Director, Siren SD, to Business Manager, Waterloo SD
- **Terry Reynolds**, District Administrator, Pittsville SD, to Superintendent, Tomahawk SD
- **Andy Sarnow**, Director of Business Services, Hartford Union High SD, to Chief Financial Officer, Green Bay Area Public SD
- **Bob Simi**, Vice President, Milwaukee Business Development, Miron Construction, to unknown
- **Jeremy Struss**, from Bookkeeper, Kettle Moraine SD, to Director of Business Services, Swallow SD
- **Ashley Van Russum**, Maintenance and Operations Security, Menasha Joint SD, to HR Recruiter, Salm Partners

### Retirements

- **Joan Fitzler**, Director of Business Services, Swallow SD
- **Steve Lewis**, Buildings & Grounds Coordinator, Rice Lake SD

## Keep us Posted!

**Retiring?** Contact WASBO before you leave so we can update your member type to retired and get your new contact information. Email Kristin Hauser at kristin.hauser@wasbo.com. If you are interested in being added to our interim list, send an email to Woody Wiedenhoeft at woody.wiedenhoeft@wasbo.com.

**Changing Districts?** Be sure to update your profile at WASBO.com so you don't miss any communications. Call 608.249.8588 if you need help. 📞



## Stay Connected



### New WASBO Staff Email Addresses

Please note that the WASBO office has switched to a new email provider and staff addresses have been updated to provide consistency in formatting. (The old email addresses will continue to work, as they will forward to the new inboxes.)

To be sure that you receive email from our office, please ask your IT team to whitelist the domain WASBO.com. In addition, we use SurveyMonkey for conference evaluations and other surveys. If you attend a conference and do not receive an evaluation link, be sure to check your spam folder and update your filter to allow these emails.

New WASBO staff email addresses:

- Woody Wiedenhoeft, Executive Director: woody.wiedenhoeft@wasbo.com
- Jeanne Deimund, Associate Executive Director: jeanne.deimund@wasbo.com
- Áine Calgaro, Communications Coordinator: aine.calgaro@wasbo.com

### Nominations Being Accepted for WSSCA's School Safety Coordinator of the Year Award

The Wisconsin School Safety Coordinators Association is accepting nominations for its 2016 School Safety Coordinator of the Year Award through Dec. 31, 2015.

The winner receives \$1,000, underwritten by co-sponsor Community Insurance Corporation, to use towards their school district's safety program. In addition, the winner receives a one-year membership to WSSCA and complimentary registration to the WSSCA's Spring Conference for the winner and one other person from their district.

The 2015 School Safety Coordinator of the Year is Gary Siegman, Director of Buildings and Grounds for Whitefish Bay School District. Gary is involved with WASBO as well as WSSCA. Nominees for the award must be WSSCA members in good standing, and demonstrate recent, noteworthy efforts and accomplishments in the field of school safety.

Additional information about the award, along with a nomination form, is available at [www.wssca.org/awards.php](http://www.wssca.org/awards.php). 📄

- Kaitlyn Hafeman, Professional Development and Member Services Coordinator: kaitlyn.hafeman@wasbo.com
- Kristin Hauser, Membership Coordinator: kristin.hauser@wasbo.com
- Deb Saeger, Accounting and Technology Coordinator: deb.saeger@wasbo.com
- Mary Jo Filbrandt, Mentorship: maryjo.filbrandt@wasbo.com

### Interim Assignments

As school business officials (business managers, bookkeepers, facility directors and other critical positions) take new positions or retire, the districts they depart are left with a void. In addition, many districts are in need of consulting help on project or oversight work. These districts are in need of assistance from interim school business officials until their openings are filled or specific projects are completed. If you would like to be considered, please send a one-page resume and other pertinent details to Woody at woody.wiedenhoeft@wasbo.com.

### Network by Participating on a WASBO Committee

Meet professional school colleagues and service affiliates, share ideas, enhance WASBO services and enrich your professional development. Serve on a WASBO committee — you'll do all that, and more. Find out more at [WASBO.com/committees](http://WASBO.com/committees). Contact Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com).

### Mentorship Program

New professionals are entering the field regularly. If you know of someone new in your region who could use the help of a mentor, contact WASBO's Mentor Coordinator, Mary Jo Filbrandt, at [maryjo.filbrandt@wasbo.com](mailto:maryjo.filbrandt@wasbo.com).

### Share Your Expertise

Has your school district implemented a new practice? Do you have a story to tell? Share your experience by writing an article for *Taking Care of Business*. Email your submission to Áine Calgaro, [aine.calgaro@wasbo.com](mailto:aine.calgaro@wasbo.com).

**Is your WASBO membership up to date?**  
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 MADISON WI  
 PERMIT NO 801

## Upcoming Events - WASBO.com

### Professional Development

WASB-WASDA-WASBO State Education Convention  
 Jan 20-22, 2016 - Wisconsin Center, Milwaukee (Viterbo Credit)

Wisconsin Federal Funding Conference  
 Feb 16-17, 2016 - Kalahari Resort & Conference Center, WI Dells (Viterbo Credit)

Facilities Management Conference  
 March 8-9, 2016 - Kalahari Resort & Conference Center, WI Dells (Viterbo Credit)

Transportation & Bus Safety Conference  
 March 9, 2016 - Kalahari Resort & Conference Center, WI Dells

p-Card Users' Group  
 March 15, 2016 - Madison Marriott West, Middleton

Accounting Conference  
 March 16-17, 2016 - Madison Marriott West, Middleton (Viterbo Credit)

Spring Conference  
 May 26-27, 2016 - Kalahari Resort & Conference Center, WI Dells

### Scholarship Fundraisers

Spring Golf Fundraiser  
 May 25, 2016 - Trappers Turn, WI Dells

Spring Bike Fundraiser  
 May 25, 2016 - 400 Trail

**Certified School Risk Managers (CSRMM) Courses** (Viterbo Credit) - all courses in Madison unless otherwise indicated

Fundamentals of Risk Management  
 Feb 24, 2016

Handling School Risks  
 Feb 25, 2016

Measuring School Risks  
 March 15, 2016 - Madison Marriott West, Middleton

Funding School Risks  
 April 5, 2016

Administering School Risks  
 April 6, 2016

School Safety from A to Z (update credit)  
 April 7, 2016

### Buildings & Grounds Group Meetings

Coulee Region - First Thursday of the month. Meetings start at 10 am.

Milwaukee Metropolitan- Meetings are the third Thursday of the month.

### Committee Meetings

Safety & Risk Management  
 All meetings at 11:45 am, WASBO Offices in Madison. Jan 12, 2016; April 12, 2016; Aug 9, 2016

School Facilities  
 All meetings at 9:30 am, WASBO Offices in Madison. Jan 12, 2016; April 12, 2016; Aug 9, 2016

### Spring Conference

Meetings at 2 pm by conference call unless otherwise indicated. Dec. 18; Jan 21 (3 pm during Joint Convention); Feb 26; March 15 (6:30 pm during Accounting Conference)

### Regionals

Check WASBO.com for details.

Bay Area/Northeast - Meetings start at 11 am. Feb 12, 2016, Oshkosh; April 8, 2016, Fond du Lac; May 13, 2016, Manitowoc

Madison Area - Meetings start at 9 am at Stoughton Area School District. Feb 5, 2016; March 4, 2016; April 1, 2016; May 6, 2016

Northwest - Meetings start at 10 am at Lehman's Supper Club in Rice Lake

Southeast - Meetings at 1 pm.  
 Jan 8, 2016, Oak Creek-Franklin; Feb 5, 2016, Cudahy; April 15, 2016, Hamilton-Sussex

Southwest - Meetings start at 12:30 pm at CESA 3. TBD

West Central - Meetings from 10 am - 1 pm at Sparta Area SD Admin & Education Center. TBD

WI Valley - Coffee at 9 am, Meeting at 9:30 am. Feb 19, 2016, Wausau; March 11, 2016, Auburndale/Stratford; April 22, 2016, Northland Pines; Aug 19, 2016, Merrill