

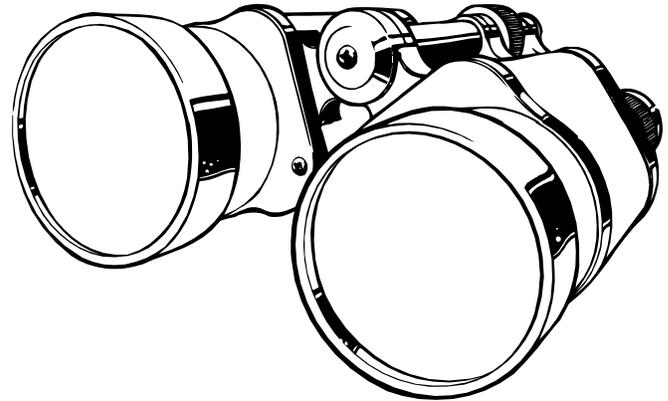


# Taking Care of Business

*"By the end of the decade, the Wisconsin Association of School Business Officials shall be the most influential organization on significant Wisconsin school business management issues."*  
WASBO Vision

A Bi-Monthly Publication of the Wisconsin Association of School Business Officials - Volume 8, Number 5 - October 2004

## LET'S HAVE ANOTHER LOOK AT OUR BUSINESS TAKING CARE OF BUSINESS SEMINAR NOVEMBER 17, 2004



The most severe critics and the most ardent supporters of our public schools would find it easy to agree that there exists a direct relationship between the quality of our schools and our nation's economic well being. As one moves outward from that conceptual agreement, things seem to get cloudy in every direction. Therefore, it is good for us go back and revisit that very fundamental concept. We need to make sure that relationship doesn't get lost in the discourse of differences. We must nurture and maintain what has made both our schools and our economy world leaders.

This year's Taking Care of Business Seminar, which will be held on November 17, 2004 at the Country Springs Hotel & Conference Center (formerly Country Inn) in Waukesha, will merge some viewpoints and practices from the private sector that will be of interest and value. School business, by its nature, is closer to the world of business than are the more instructional aspects of the educational enterprise. It behooves us to stay in touch. To that end, we have included some

presenters from among those who look at our endeavors and practices from the outside.

To kick things off, we will hear from our keynoter, Tim Cullen, the Senior Vice President of Wellpoint

(Blue Cross Blue Shield). Tim is the former Wisconsin State Senate Majority Leader, former Secretary of the Wisconsin Department of Health and Human Services, Chairman of Government Health Services, and most recently, a member of Governor Doyle's Task Force on Educational Excellence. Tim tells it like it is, so he was asked to take a look at our state's financial problems, how they are impacting our schools and then tell us, from his perspective what's broke and how we need to go about fixing it.

Our luncheon speaker is Jim Haney, the Executive Director of Wisconsin Manufacturers & Commerce. Jim has a keen interest in public schools. He has been asked to tell us what the business community expects of its public schools. Joining Tim and Jim from the private sector will be Scott Wallace, Senior Vice President of the Institute of Best Practices, an affiliate of eSchool Solutions. Scott will come to us from Scottsdale, Arizona. In a phone conversation, Scott indicated that he and his colleagues do not come from school administration backgrounds. He went on to say that they have implemented a number of practices from the private sector that are working well in several public schools. We invited him to tell us about them.

In addition to the private sector presenters, you will have the opportunity to hear a panel of public school colleagues suggest ways in which you might get more



*Continued on page 12*

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Editor: Don Mrdjenovich

# A Message from the President

## *Food for Thought!*

Would you know a leader if you saw one? Would you be able to distinguish how a leader is different from a manager? What do followers look for in a leader?

If we were to ask these questions to a number of public or private executives, school superintendents or even business managers who have been working in the field for more than just a few years, their response might be that a manager **“does a thing right”** and a leader **“does the right thing”**. However, adopting this definition would mean that leadership would only be observed after-the-fact and not before or as it happens.

Tom Stevens, Esquire Leadership LLC, suggests that a more useful definition of leadership is the act of gaining willing followers for a course of action when the way is unclear, uncertain and not yet defined.

The most common definitions of leadership usually state what leadership includes. However, it may be more useful to look at what leadership might not include. In Steven’s article he states that:

1. Leadership does not require being the head of the company or school district nor does it need to be a director, captain or boss. Anyone can initiate the act of leadership.
2. Leadership does not require any special qualities although several are highly valued such as integrity (moral soundness, ethical values & honesty), wisdom, perseverance, compassion and common sense.
3. Leadership is not defined by outcomes or being successful every time. The path that is chosen by leaders may not always be the right one, so no wonder it is associated with risk.

Leadership can further be defined by distinguishing it from other processes such as management. One way management can be defined is the act of organizing resources within established goals. Being a manager can be distinguished from a leader when the followers simply comply because of the established relationship with the manager or there is a predetermined course of action.

One way to develop or improve leadership qualities is to provide activities and opportunities that enhance our ability to identify a path or course of action through the use of vision-thinking, increased knowledge, applying creative thoughts or developing an eye for opportunities. Another way to improve leadership is to find ways to develop willing followers through influence thinking, passion, interpersonal skills, enthusiasm and humor.

As we continue our journey towards that “Vision for the Future”, these qualities and values of leadership in addition to management skills must continually be defined, acknowledge and practiced in order for WASBO to become as influential as the vision suggests.



Mark Van Der Zee  
WASBO President

-Mark Van Der Zee-



*Don Mrdjenovich*  
*WASBO Executive Director*

## Exec's Reflections Sitting in Front of the House is not a Good Thing

"Sin- Eater, a man who for trifling payment was believed to take upon himself, by means of food and drink, the sins of a deceased person. The custom was once common in many parts of England and in the highlands of Scotland, and survived until

recent years in Wales. Usually each village had its official sin-eater to whom notice was given as soon as a death occurred." He would sit on a stool at the front of the house and eat a crust of bread and drink an ale. He would then rise and pronounce the ease and rest of the dead person for whom he thus pawned his own soul. He took on their sins.

Being assigned the fault for the failures of others has cast many school business officials into the unwanted and unwarranted role of "sin eater" for the school district. If a supply order is late, if a clerical error is made, if the Board of Education or the Superintendent fails to heed the recommendations or warnings of the school business official, it often comes back to him or her in the form of blame. Every staff member, Board member and colleague has an agenda. That agenda most often involves the financial and human resources which are administered through the business office. If the business official is still around after those who initiated problems, such as the Superintendent or Board members, guess who gets to "sit out front and eat the bread and drink the ale."

People are not inclined to deal with times past, circumstances or the extent of information available at the time a decision was made. They want a live body to focus on. They want to lay their discontent, disappointment or the blame on someone. If you have unfortunately been that "someone" you already know how trying, stressful, and unfair it can be. If you haven't had the experience, now is the time to prepare for it. Start a log. Let it be your private record. Have it include the date, time, place, setting of every

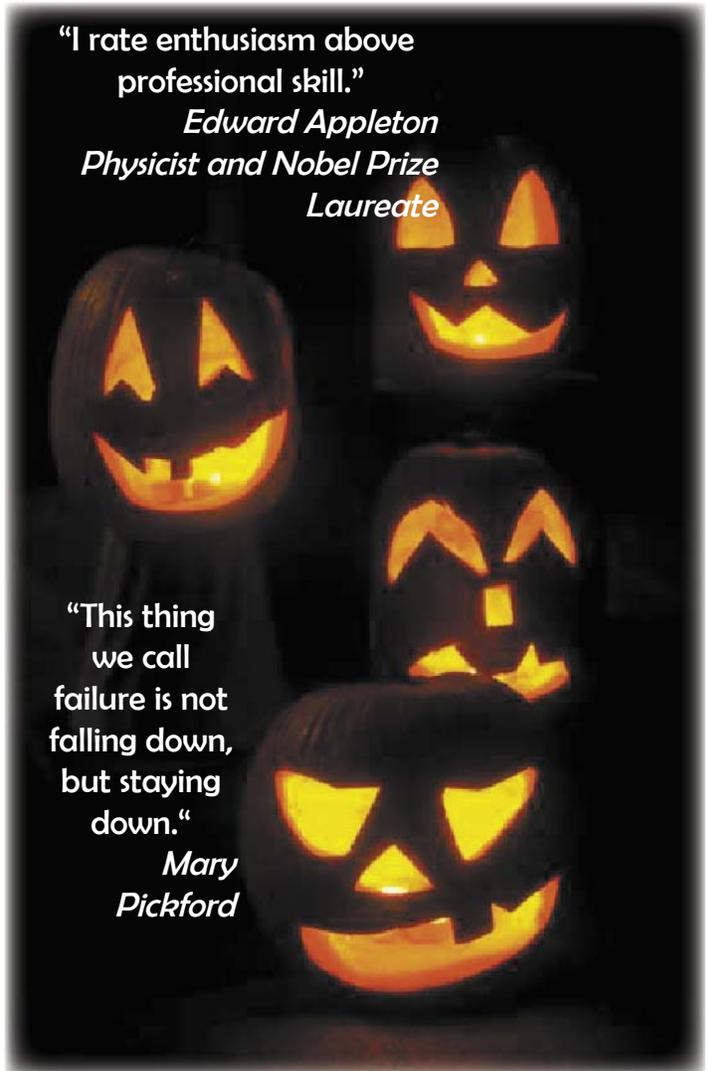
instance in which you believe your recommendations, suggestions, calculations, warnings, or advice are going unheeded by the decision makers. You never know when it might come in handy if you sense that you are being asked to "sit in the front of the house". Hopefully, you will never have to refer to your log, but if you do, as Martha Stewart so often says, "It's a good thing," to have a log. I think perhaps she could have used one.

**"I rate enthusiasm above professional skill."**

*Edward Appleton*  
*Physicist and Nobel Prize Laureate*

**"This thing we call failure is not falling down, but staying down."**

*Mary Pickford*



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*Allées Piétonnières by Jean-Pierre Stora, 1995*



# BOOK REVIEW

## Leadership Development

By Orvin R. Clark, EdD, RSBA  
University of Wisconsin-Superior

John C. Maxwell, known as America's expert on leadership, is founder of the INJOY Group, an organization dedicated to helping people maximize their personal and leadership potential. He is the author of twenty-four books, including the *Success Journey*, *Developing The Leader Within You*, *Leadership 101*, *Attitude 101*, *The 21 Irrefutable Laws of Leadership*, and the complementary companion to *The 21 Indispensable Qualities of A Leader*.

Dr. Maxwell in his book, *The 21 Indispensable Qualities of A Leader*, notes that understanding leadership and actually leading are two different activities. The key to transforming yourself from someone who understands leadership to a person who successfully leads is character. Your character qualities activate and empower your leadership ability. Dr. Maxwell says, "Part of any leader's development comes from learning the laws of leadership, for those are the tools that teach how leadership works. But leaders are effective because of who they are on the inside. To go to the highest level of leadership, you must develop these character qualities from the inside out."

The 21 indispensable qualities of a leader are: character, charisma, commitment, communications, competence, courage, discernment, focus, generosity, initiative, listening, passion, positive attitude, problem solving, relationships, responsibility, security, self-discipline, servant hood, teachability, and vision. To define a few of the indispensable qualities will give you a hint as to their meaning: **Character**- "Be a piece of the rock"; Dag Hammarskjold stated "Never for the sake of peace and quiet deny your own experience or convictions"; **Discernment**- "Put an end to unsolved mysteries"; Dr. Maxwell says "Smart leaders believe only half of what they hear. Discerning leaders know which half to believe"; **Generosity**- "Your candle loses nothing when it lights another"; Calvin Coolidge was quoted as saying "No person was ever honored for what he received. Honor has been the

reward for what he gave"; **Listening**- "To connect with their hearts use your ears"; Woodrow Wilson stated "The ear of the leader must ring with the voices of the people"; and **Positive Attitude**- "if you believe you can, you can." William James says "the greatest discovery of my generation is that human beings can alter their lives by altering their attitude of mind." Character, discernment, generosity, listening and positive attitude are just five of the 21 indispensable qualities of a leader. John Maxwell's *21 Indispensable Qualities of A Leader* is an excellent piece of work on leadership by giving the reader practical tools and insights into developing the qualities found in great leaders. But to be a leader you must have these qualities on the inside; therefore, if you desire to be a leader activate these character qualities and empower your leadership ability.

### A Call to Leadership Ralph D. Mitchell

#### A Creative Leader

A creative leader is one who recognizes the potential in people and strives to establish and maintain a climate where individuals may develop and maximize their contributions. Within this creative environment, they involve others in the process of identifying and pursuing meaningful goals that bring both short-term and long-run benefits to all.

The task of the creative leader is to envision and bring about changes which have beneficial long-term consequences not only for his or her part of the organization, but for the organization as a whole and total society of which that organization is a part. An inseparable part of this mission is to help each individual in the organization develop his or her full potential, not only as a contributing member but as a unique human being.

# What is the Green & Healthy School Program?

By Elizabeth Kane  
Wisconsin Department of Public Instruction

The Department of Public Instruction and the Department of Natural Resources have coordinated efforts to encourage public and private schools to “lead by example” as they strive to conserve our natural resources and maintain healthy and safe school environments for successful learning and cleaner living. Green & Healthy Schools is a web-based, voluntary program available to all elementary, middle and high schools across Wisconsin. The program encourages teachers, staff, students, and parents to work together to use the school, its grounds and the community as learning tools to teach, promote and apply healthy, safe and environmentally sound practices.

The Green & Healthy Schools program recognizes Wisconsin schools that become models in their community for health, safety and environmental excellence. Though Green & Healthy Schools appears to be a new program, it is really a compilation of many DNR and DPI education initiatives linked to Wisconsin’s education standards and is placed on the web for easy access by all educators.

Besides recognition, schools participating in the program will see:

- a healthier, safer learning environment,
- an increased sense of ownership by teachers, students, and staff in the school,
- economic savings associated with reduced consumption and operating costs,
- increased protection of natural resources,
- use of the school grounds as a teaching tool,
- increased connections between the community and the school, and
- enhanced learning opportunities in all subjects.

I invite you to review the program information on the Green and Healthy Schools web site at [www.dnr.state.wi.us/org/caer/ce/greenschools](http://www.dnr.state.wi.us/org/caer/ce/greenschools). See how you can form a team and sign a pledge to show your intent to be recognized as a Green & Healthy School. Participating schools that complete the

program requirements will receive a 3’X5’ “Green & Healthy School” flag recognizing their leadership in environmental education in their communities and be acknowledged on the Wisconsin Green & Healthy Schools web site.

At this site you’ll find that becoming a Green & Healthy School is a three-stage process:

1. **Pledge:** Review the program information, form a Green & Healthy Team to coordinate the effort, sign and submit a pledge to work toward being recognized as a Green & Healthy School.
2. **Discovery/Inventory:** Conduct self-assessments to identify and inventory current health, safety and environmental practices.
3. **Action/Implementation:** Develop and implement an action plan using the self-assessment results for the 10 topic areas. Once the criteria have been met for each topic (some of which may already be in place) the school may apply for Green & Healthy Recognition.

Assessments are not required to be submitted to either the DNR or DPI. Under the coordination of the “Green Team,” the development and implementation of various action projects are determined by the program participants.

## Grant Opportunity

Schools that have met the criteria for Green & Healthy School recognition and have submitted a completed grant application prior to May 1, 2005 will be reimbursed for some of the expenditures for the time and/or resources they may have incurred in the first year of the implementation of the program. Eligible expenditures may include, but are not limited to, team work, personal protection equipment, pedestrian and/or parking signs, record keeping supplies, the purchase of monitoring equipment, recycling signs, decals and/or containers. See the Green & Healthy Schools website for additional information on grant eligibility

*Continued on page 9*

## Around the Regionals



### WEST CENTRAL REGIONAL MEETING IN SPARTA

Some tips on how to get your message out prior to a referendum were shared with those in attendance by Woody Wiedenhoeft of La Crosse. The referendum passed so the advice was quite credible. Several other agenda items were carried over due to the absence of the person submitting them. Such is the life of a school business official. When you work for others, you are not always able to control your time. The most common thread running through regional agendas continues to be concerns about negotiations, health care costs, and managing ever shrinking resources. The sharing and problem solving aspects of the regional meetings continue to make them a value adding use of time. If you aren't attending, you are missing out on an opportunity to take advantage of the knowledge and experience of your colleagues.

### CONGRATULATIONS TO ERIN GAUTHIER-GREEN OF GREENDALE AND DAN HARTSTERN OF BELOIT

Erin is WASBO's 2005 School Business Official of the Year. We will feature Erin in the February issue of *Taking Care of Business*. We look forward to seeing Erin on stage at the Joint Convention in January.

Dan is one of fifteen people chosen to receive a scholarship from the MetLife/ASBO International, Bridges to the Future Program. These new scholarships are available to new business officials who are interested in developing their knowledge, skills and leadership abilities. Recipients receive a \$430 registration fee to the annual conference and \$570 in travel expenses. A special program is planned for the recipients at the conference and networking and mentoring opportunities are also made available. Interested WASBO members can learn more about this new scholarship on the ASBO International website, [www.asbointl.org](http://www.asbointl.org).

## WASBO Shining Star Award Deadline Extended October 31, 2004

Nominate someone who has contributed to WASBO through leadership on a committee, project or other service to the association.

Recipient will receive a \$750 Award compliments of Quarles & Brady, LLP

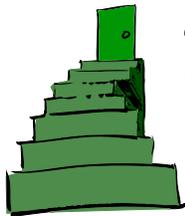
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## What is the Green & Healthy School Program?

and application: [www.dnr.state.wi.us/org/caer/ce/greenschools](http://www.dnr.state.wi.us/org/caer/ce/greenschools).

This grant, funded by the Department of Natural Resources through the Department of Public Instruction, is only applicable to the 2004-05 school year. A total of \$20,000 will be available. The awards will be pro-rated dependent upon the number of schools that apply for the grant. The maximum award per school would be \$1,000. Grant awards will be distributed by May 31, 2005.

For further information, contact Christal Winter, DNR, (608-264-8976, [christal.winter@dnr.state.wi.us](mailto:christal.winter@dnr.state.wi.us)) or Elizabeth Kane, DPI, (608-266-2803, [elizabeth.kane@dpi.state.wi.us](mailto:elizabeth.kane@dpi.state.wi.us)).



**“When you are looking for obstacles, you can’t find opportunity.”**

*J.C. Bell*

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- Shirley Wiedenhoef  
Oconomowoc Area  
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*Gail Moesch*  
*WASBO Director*

## Director's Corner Self-Funded Health Insurance

Finding the proper funding for school districts becomes more difficult each year. With all of the uncertainty in the financial picture, districts need to look at every option to save money and still provide the benefits that your staff currently has. This may be the time to look at self-funding

your health insurance or perhaps even looking at a consortium to increase your buying power in the health insurance industry.

There are some considerations that should be carefully studied before you enter the self-funded health insurance picture. The first issue in self-funding has the potential to save money; unfortunately this is not a guarantee. Secondly, self-funded insurance has to be looked at as a long-term financial arrangement of at least five years. The other issue of self-funding your health insurance is that you will have to access to claims data. This will allow you to solicit bids/quotes when necessary. Claims data of your group also lets you determine how your group is using their health insurance dollars. You can alter your policy slightly to curb some of the excess spending. For example, we were finding that our employees were using the emergency room for non-emergency matters. We initiated a deductible on emergency room coverage to keep our costs down and deter them from using the emergency room for medical matters that could be taken care of in the doctor's office.

Shawano-Gresham School District began participating in a self-funded policy in the mid 1980's. We were looking for ways to hold our cost of health insurance down. Our coverage at that time was with Wisconsin Physicians Service, the Health Maintenance Plan. We did not change the coverage that our employees were enjoying. We only changed the way it was funded. Employees of the district did not see any differences. That is an extremely important concept. Changes in coverage have to be negotiated, so we were extremely

careful to be sure that the transition was seamless.

We changed to the self-funded policy in July. We had already paid the premium for July in June. The practice is to always pay the premium one month in advance. This gave us a pool of money to start. In addition, WPS wanted an amount that was equivalent to another month's premium. We paid this amount early in July. This gave WPS an amount of money where they could make withdrawals as the bills came in. At the end of each month they billed us the amount of money they actually paid out in claims in addition to the third-party administrative fee plus the stop loss insurance premium.

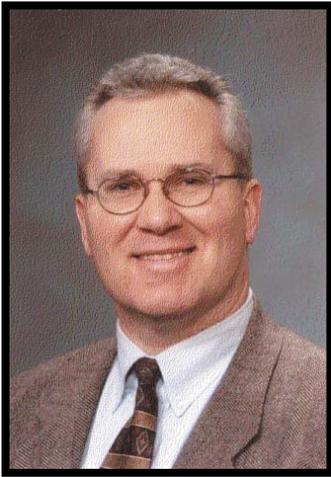
With modern technology we have made some changes. We no longer are required to have a pool of money at WPS. Instead, they deduct the actual claims and administrative costs from our checking account on a weekly basis. Therefore, the claims that they pay for us this week are taken out of our checking account the following week.

Following are some of the specifics in regard to the plan. It is necessary to have at least 250 policyholders to be self-funded. A third-party administrator will pay the bills according to your contract. You will want your contract written specific to the coverage that you have negotiated and coverage that is mandated by law. You will also want to consider buying an aggregate stop loss and a specific stop loss policy. Let me explain those terms.

An aggregate stop loss looks at the entire group as to the maximum cost. For example, you have 300 policyholders and the aggregate amount per policyholder is \$10,000 for medical bills. Medical costs also cover the cost of prescription drugs. The aggregate stop loss in this example would be \$3,000,000. This would be the maximum amount that you would be liable for in one fiscal year.

In addition to this, it is recommended that you have an individual stop loss. We currently have our individual stop loss set at \$50,000 per person. If a claim for an

*Continued on page 18*



John Forester  
SAA Director of  
Government Relations

# Legislative Update

## SAA Legislative Committee Meets

### *DPI 2005-07 Budget Request Highlighted*

The SAA Legislative Committee held its first meeting of the 2004-05 school year on Monday, October 4<sup>th</sup> at the Stoney Creek Inn in Wausau. The primary objective of this meeting was to review and consider modifications to the 2005-06 SAA Legislative Agenda to reflect changing political/fiscal reality. The Committee also discussed the state of the SAA and current political/legislative issues. The SAA Legislative Committee will meet again in Wausau on Monday, December 13<sup>th</sup> to make final adjustments to the SAA Legislative Agenda for the 2005-07 legislative session which begins in January.

The DPI's 2005-07 budget request, unveiled by State Superintendent Burmaster on September 22<sup>nd</sup>, was a major topic of discussion for the SAA Legislative Committee. The SAA's summary of the DPI's budget request appears below for your information.

### **SAA Summary of Major Provisions DPI 2005-07 Biennial Budget**

September 22, 2004

- **Overall Proposed Funding Increase** – about \$211 million in 2005-06 and an additional \$165 million in 2006-07, for a biennial increase of about \$587 million (add the \$211 million into the 2006-07 base as well).
- **General Equalization Aids** – provide a 2.5% increase in general aid (\$108 million increase in 2005-06 and \$218.6 million increase in 2006-07). This amount includes continuation of \$60 million transportation SEG in the 2005-07 biennium.
- **SPED Categorical Aid** – reimburse 30% of the prior year's aidable costs; increase \$25.7 million in 2005-06 and \$48.3 million in 2006-07. In addition, DPI is requesting a statutory change that would permit guidance counselors to be included as one eligible category for cost reimbursement under categorical aid.
- **High Cost SPED Initiative** – create a categorical aid program to educate children with high-cost special needs (\$5 million annually). Costs reimbursed by IDEA funds, Medicaid and special education categorical aids are deducted. Reimbursement is then calculated at 90% of the eligible cost exceeding \$30,000 in the prior year.
- **Bilingual/Bicultural Aid** – increase aid to about 30% of prior year costs for districts required to offer programming (\$14.4 million increase in 2005-06; \$16.4 million in 2006-07).
- **Bilingual/Bicultural Aid for Currently Ineligible Students** – create a new categorical aid program to award \$400 per LEP student to districts that currently do not qualify for aid (\$5.44 million in 2005-06; \$5.64 million in 2006-07).
- **Transportation Aid** – increase aid \$21.13 million annually to:
  1. Fully fund the current transportation aid appropriation
  2. Double the current reimbursement rates to all schools
  3. Provide even higher reimbursement rates to districts transporting students more than 12 miles each way.
- **Declining Enrollment Revenue Limit Exemption** – change the current 75% hold harmless non-recurring exemption to a recurring exemption that districts could retain in their base revenue limit for the forthcoming year. This would provide roughly \$25-30 million in additional annual statewide revenue limit authority.

*Continued on page 12*

- **Unused Revenue Limit Carryover** – increase the allowable percentage of unused revenue limit carryover from 75% to 100% beginning in 2005-06. There is not state fiscal impact.
- **Low Revenue Ceiling** – increase the low revenue ceiling by \$400 annually, to \$8,200 in 2005-06 and to \$8,600 in 2006-07.
- **Mentoring Grants for Initial Educators** – create a new mentoring categorical aid program (\$2.625 million annually).
- **4K Start-up Grants** – create a new categorical grant program for districts wishing to start a 4K (\$3 million). The grant would be \$3,000 per student and districts would be eligible for 2 years.
- **Additional 4K FTE Authority for Community Approaches** – districts adopting “community approaches” to 4K would be eligible for an additional 0.1 FTE toward each 4K student. Additional revenue limit authority.
- **Strengthening SAGE** – increase FTE low income pupil aid from \$2,000 to \$2,500; and add 10 new SAGE schools in 2006-07. (\$27 million increase in 2005-06 and \$29.3 million in 2006-07).
- **Sparsity Aid** – create a new sparsity categorical aid program in 2006-07 (\$24 million) establishing the following eligibility criteria:
  1. District enrollment of 2000 or less
  2. Less than 15 students per square mile
  3. FRL eligibility of at least 20 percent. Aid would be \$300 for districts with FRL above 40% and \$150 for districts with FRL between 20% and 40%.
- **P-5 Funding** – increase aid \$367,700 annually.
- **Elimination of the QEO.**
- **Milwaukee Parental Choice Program** – increase funding \$6.4 million in 2005-06 and \$8.6 million in 2006-07.
- **Milwaukee/Racine Charter Schools Program** – increase funding \$3.9 million in 2005-06 and \$7.6 million in 2006-07.
- **School Breakfast Program** – increase per meal reimbursement rate from 10 cents to 15 cents (\$500,000 increase in 2005-06; \$830,000 in 2006-07).
- **Reduced Price School Breakfast** – create a new grant program to pay the 30 cents charged to each student for reduced-price breakfast thus allowing the student to eat a free breakfast (\$1.2 million annually).



The SAA's Director of Government Relations, John Forester, presents WASBO's Sue Schnorr with a plaque indicating the SAA's appreciation for her chairing of the SAA Legislative Committee the past two years. Sue passed the gavel to Nissan Bar-Lev of WCASS.

#### BOARD OF DIRECTOR CANDIDATES WANTED

The Nominating Committee is in the process of developing a slate of candidates for the Board of Director positions. The names of the candidates are required to be presented to the membership at the January Joint Convention. Any active WASBO member who desires to have their name placed on the ballot should contact a member of the Nominating Committee before November 30, 2004. Members of the Nominating Committee are: Wendy Brockert, Lake Mills, Jan Carlson, Somerset, Mike Garty, Germantown, Dianne Meyer, Milton, Bonnie Stegmann, Ashland, Sue Schnorr, Fond du Lac, Mary Ellen Van Valin, Stevens Point, Tom Wohlleber, Middleton-Cross Plains and Howard Sampson. The Board Liaison to the committee is Gail Moesch.

If you should have any questions please feel free to call my office at 920-648-2215.

Sincerely,  
Wendy Brockert, Business Manager

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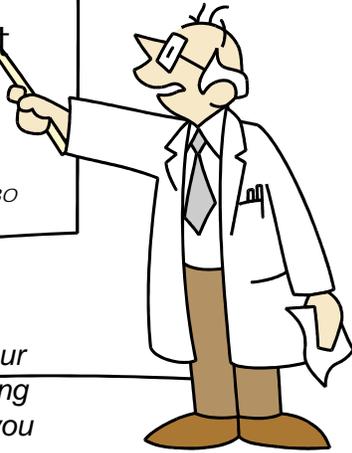
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## Another in a Series of Management Short Courses

By Professor Wilhelm WASBO



### People Skills

1. *If you have spent your lifetime not developing them, chances are you don't have many.*
2. *If you don't have many, chances are you don't know it, or you would have done something about it by now.*
3. *However, other people do know about it and you can only determine from their behavior, not your own, if you lack them.*
4. *But then, if you read others well, you probably have passable people skills.*
5. *You therefore present a tough case. I suggest you count your friends. If you don't have many, that is a good clue.*
6. *If you don't have many friends, and if people seem to be irritated by what you say or how you say it, don't say so much.*

*Continued from page 1*

### Let's Have Another Look at Our Business

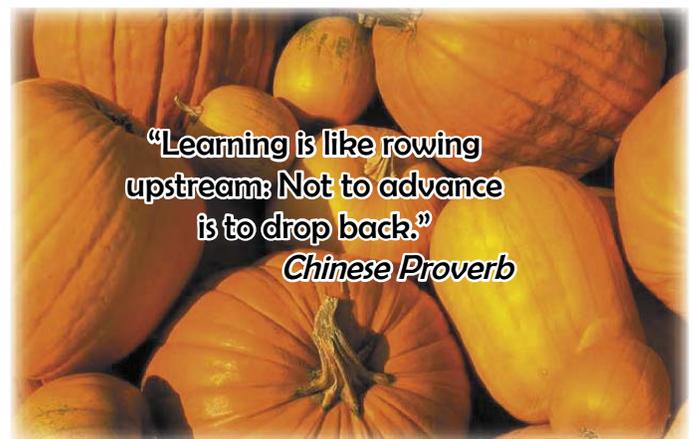
involved with your community, including its business people. Kirk Strang of the Davis and Kuelthau Law Firm will present a comprehensive overview of the new laws which affect school business operations. He will allow time for Q&A. PMA will have completed its focus group feedback on a new long range planning and investment model that might come in handy at the negotiations table or in preparing for med-arb. The SAA's Director of Government Relations, John Forester, will present a comprehensive update on what is happening or will soon happen at the Capitol. We missed John at our Fall Conference and we are pleased that he will be able to join us as we, "Take Care of Business". We hope that you will also be there. We are a community of learners.

## Insurance Fraud on the Rise

The average household paid \$200-\$300 in additional insurance premiums last year due to insurance fraud. Insurance fraud costs Americans \$30 billion each year and workers compensation costs have raised sharply in the last two years for many school districts. There are several indicators of possible insurance fraud and while their presence may not specifically indicate fraud exists, it may warrant additional investigation.

- Monday morning injuries.
- Employment change - the alleged accident occurs immediately before or after a strike, layoff, or termination.
- There are no witnesses to the alleged incident.
- There is a history of filing numerous claims.
- Employee is not compliant with medical treatment.
- The accident is not reported timely without any reasonable explanation for the delay.
- Accident details are vague with no specifics.
- Accident occurs in area where employee should not be.
- Disability is not substantiated by objective medical findings.
- Employee cancels/misses a lot of appointments or refuses diagnostic test to confirm injuries.

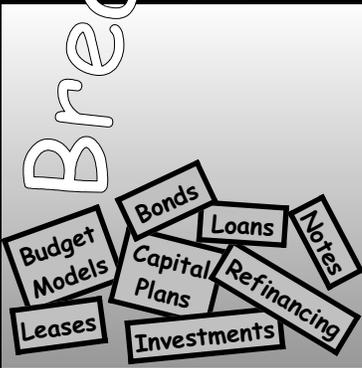
*The above is reprinted with permission from Ruth Seymour, the Glatfelter Agency, York, Pennsylvania and Pennsylvania ASBO.*



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# Looking Back at the Fall Conference

From everything we heard and saw, the 2004 Fall Conference was a success. The weather was beautiful, the Blue Harbor Resort was the most beautiful venue we have used to date, The Bull golf course exceeded our expectations and golfing skills, and the professional development activities were varied and appropriate. We learned new information and skills that helped us to “Keep our ships afloat in troubled waters,” which also was the theme of our conference. Diane Pertzborn and her crew did an outstanding job of planning and conducting the conference.

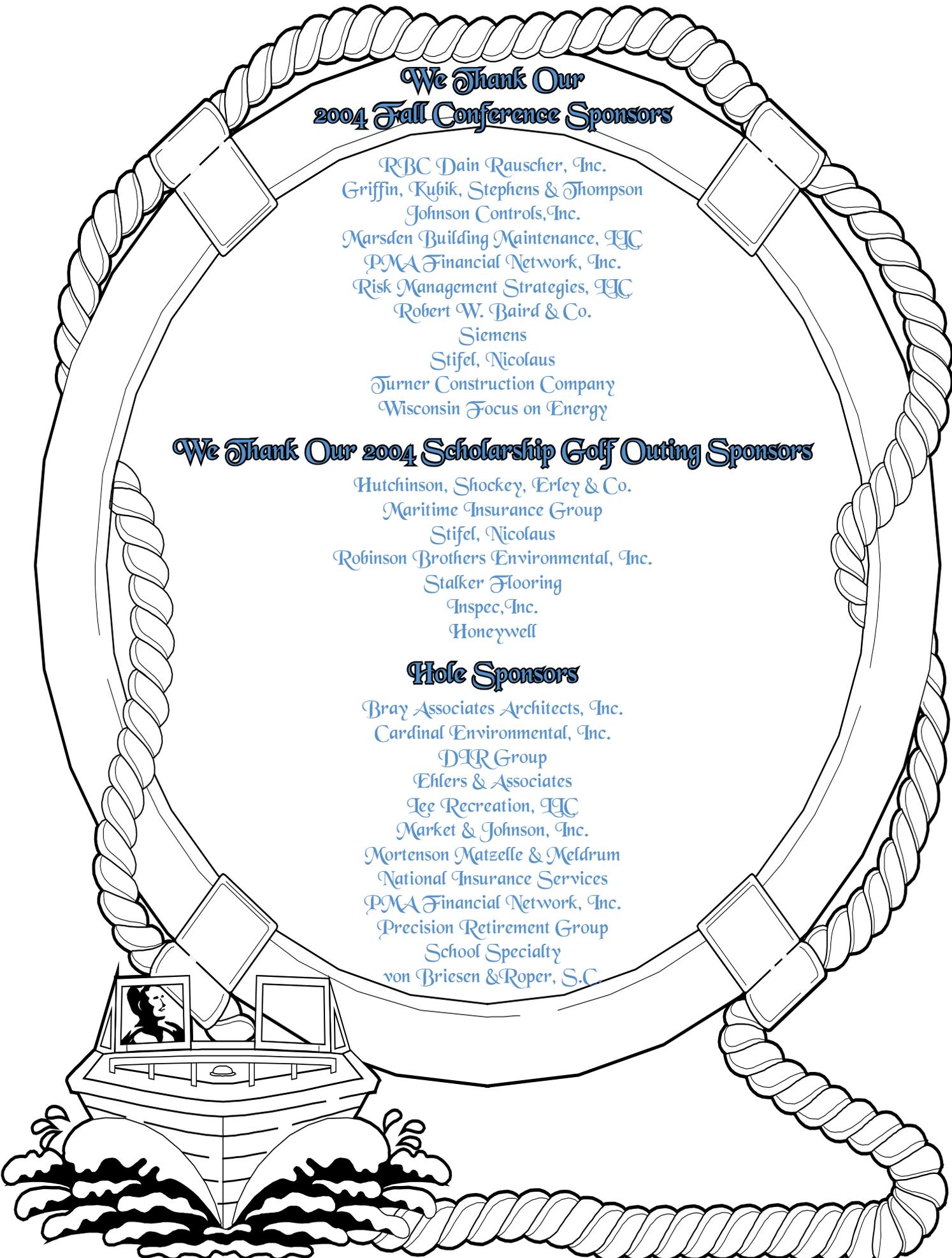
More than 150 registered for the conference, a new record. The WASBO Foundation Scholarship Golf Outing was a sell out. The Foundation awards more than \$10,000 in student scholarships annually. That wise investment in the future is sure to yield dividends for years to come.

This year’s youth charity event was unique. The team building exercise was challenging as the crewmates raced each other to assemble ten brand new Schwinn bicycles which were then donated to the Sheboygan area YMCA to be used at their Camp Y-Koda, located near Sheboygan. The bikes will be used for those children who could not afford their own bikes. WASBO thanks PMA and WISC for their sponsorship of this event.

The quiz show which featured school business officials taking on final exam quality questions was both informative and entertaining. Speaking of entertaining, what about that Bottom Line band! WASBO’s own Gary Siegman and Patrick Acker and the rest of the band provided great entertainment. Would you believe that Willie Nelson even dropped in and sang a few of his favorite songs? Well it was almost Willie if you shut your eyes.

Diane and her committee are already looking ahead to next year’s program. After Billy Riggs last year and Greg Risberg this year, their work is cut out for them to find another home run hitting keynoter. The committee will continue to offer high quality professional development opportunities next year. Plan on joining them.





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2004 Fall Conference Sponsors**

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## Self-Funded Health Insurance

individual goes over \$50,000 in one year, we are not responsible for any additional costs. The stop loss insurance picks up the additional costs for the balance of the year.

When it comes to budgeting, we use the anticipated funding level which is the aggregate stop loss divided by 1.20. In our example above, we would budget \$2,500,000 (\$3,000,000/1.20). In addition to the \$2.5 million, we need to budget for the administrative, stop loss and aggregate stop loss costs. This would be the cost that is budgeted for health insurance. If you offer vision and dental coverage, it would be necessary to add that to the cost.

In the 17 years that we have had self-funded health insurance in effect, we have only gone over the anticipated funding level twice, once by about \$50,000 and once by about \$10,000. Most years we fall under the anticipated level meaning we are actually under the budgeted amount. In recent negotiations with teachers we have agreed to give back to the teachers whatever is saved in their health insurance costs. This year we were able to give a one-time payment of \$155,000 that the teachers could decide how they wanted to distribute in their salary schedule. Because we had this one-time

amount to give to the teachers, we were able to settle our contract for the 2001-03 school years.

Overall, we have been very happy with the self-funded concept of funding health insurance coverage for our employees. We find that the anticipated funding level has been set high enough that we rarely hit it. We also find that our rates are less than the premiums the insurance companies are charging. Therefore, we are saving money and still offering a high level of benefits. We understand that if we have an extremely bad year, and we go over our anticipated funding level, we will have to fund the amount over the anticipated level, up to as much as the aggregate stop loss, from our fund balance. With the excellent experience we have had, and the cost restrictions we have in effect, we are willing to take the risk and continue offering the self-funded health insurance to our employees.

Self funding insurance may not be the best solution for every school district; but, with the ever increasing budget restrictions we are facing, this may be the time to take a look at this avenue of providing health care coverage to your employees.

## Employment Opportunities

*Please go to [www.wasbo.com](http://www.wasbo.com) for complete information about the listings. The position, district and closing dates are provided here.*



School Administration Consultant - Department of Public Instruction (November 3)

Accountant - Cedarburg School District (October 8)

Business Manager - South Milwaukee (October 4)

Director of Business Services - Rhinelander School District (Until Filled)

Bookkeeper or Bookkeeper Assistant - Lake Country School District, Hartland (October 19)

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# Investment in Education Best Route to Fairer Economy

As state and local governments face tight budgets, a new Economic Policy Institute report shows adequate and effective funding of education is the best way to achieve faster growth, more jobs, greater productivity, and more widely shared prosperity. "Smart Money: Education and Economic Development," by economic development expert William Schweke, shows how more investment in education, from preschool to college, spurs economic development through increases in productivity, learned skills, technology and workers' average earnings. At a time when our knowledge-based economy demands increasingly higher skills to stay competitive, support for well-resourced schooling and training is key, Schweke says. This strategy is also an important tool for advancing economic equality. As more public school students are poor, minority, or new immigrants, they need good education as a foundation to avoid many social problems stemming from poverty and inequality, and to eventually become productive, highly-skilled workers.

<http://www.epinet.org/newsroom/releases/2004/07/20040708-schweke-pr.pdf>

Source: Public Education Network Weekly Newsblast Public Involvement. Public Education. Public Benefit



**Have You Renewed Your 2004 - 2005 WASBO Membership?**  
**If not, this will be your last issue of Taking Care of Business.**  
**For renewal information contact the**  
**WASBO office at 608-249-8588 or [wasbo@wasbo.com](mailto:wasbo@wasbo.com).**

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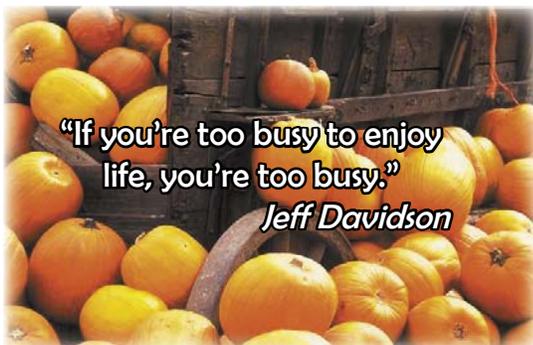


# A Beautiful School is a Caring School

Beautiful school buildings are often associated with higher cost, extravagance, or both. However, few studies in educational facilities have actually focused on the relationship of school building aesthetics and student learning, writes Delbert Jarman, T.C. Chan, and Linda Webb. Chan first introduced the conceptual framework of school building aesthetics and student learning. He stated that the relationship between and aesthetic environment and student learning can be analyzed directly or indirectly. Carol Cash conducted a study of the relationship between school building design and student achievement. One of her major findings was that cosmetic factors appeared to have more of an effect on student achievement than did structural factors. In addition to promoting student achievement, a beautiful school building serves as a school missionary to spread the educational gospel to the community. It sends the message to parents and community leaders that the school district cares about the education of the children by creating an attractive environment to support student learning. The community's appreciation may lead to constructive support of the school and its educational process. Consequently, the positive effect of constructing an attractive school for educational use cannot be underestimated. It is a pity that aesthetic designs in school planning are often mistaken for cosmetics and are the first to be cut in times of budget constraints. However, an ugly school building is like a body without a soul: it is simply a shell that houses students without kindling a desire to learn.

<http://asbointl.org/EducationLinks/LinkList.asp?i=249>

Source: *Public Education Network Weekly Newsblast Public Involvement. Public Education. Public Benefit*



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 is not where you're going,  
 it's what you're creating"  
 - Bill Stuart

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# WASBO Taking Care of Business Seminar Let's Have Another Look at our Business

**November 17, 2004**

**Country Springs Hotel & Conference Center  
(Formerly Country Inn) - Waukesha**



8:00-8:30 Registration &  
Continental Breakfast

**8:30-9:25 The Schools,  
The Economy and Politics  
Wisconsin's Other Three-Legged  
Stool**

*Tim Cullen is currently the Senior Vice President of Wellpoint (Blue Cross Blue Shield) of Wisconsin. He is a former Wisconsin State Senate Majority Leader, Secretary of the Wisconsin Department of Health and Human Services, Chairman of Government Health Services, LLC and most recently a member of Governor Doyle's Task Force on Educational Excellence. Tim is a native of Janesville, Wisconsin and has an extensive background in government, business and education issues.*

9:30-10:30 Breakout Sessions

**Legal Issues Update**

*Kirk Strang of the Davis & Kuelthau Law Firm is well-known to school administrators throughout the state. He has made numerous presentations at conferences and seminars and is considered to be an expert on school law issues. He annually prepares school law updates regarding state and federal laws that impact public schools.*

**Private Business Practices that  
Work in Public Schools**

*Scott Wallace of eSchool Solutions Institute for Best Practices has a private sector background and brings that perspective of the institute which was founded in 1991 by a group of leading educators. The institute's mission is to conduct research around how schools operate and select best practices that can be successfully implemented in other school districts. The institute is based on a fundamental belief that collectively, school districts have a tremendous amount of institutional knowledge about school district management.*

10:30-10:45 Break

10:45-11:45 Repeat Breakout  
Sessions

11:45-1:00 Lunch and Address  
**What Does Business Expect from  
the Public Schools?**

*Jim Haney is the Executive Director of the Wisconsin Manufacturers & Commerce. WMC is a statewide, non-profit business association representing nearly 4,300 members. The association includes both large and small businesses, chambers of commerce and the Wisconsin Council of Safety. The association has been promoting a positive business climate since 1911.*

1:00-2:00 Breakout Sessions

**Improve Your Management  
of School Finances Using an  
Investment and Planning Model**

*Jeff Carew recently joined PMA Financial Network, Inc., a firm well-known to Wisconsin School Districts. PMA manages the former Wisconsin Liquid Asset Fund, now known as the Wisconsin Investment Series Cooperative (WISC). PMA has recently completed work on a new long-range investment and financial planning model. Jeff is serving his second term as a member of the WASBO Board of Directors representing the Service Affiliate Membership.*

**The Value of Being Involved with  
Your Local Business Community**

*Scott Brown, former Business Manager and now Superintendent at McFarland Community Schools will head a panel consisting of Marge Crawford of CESA #1, Linda Wickstrom of Elmbrook School District and Mary Pat Pfeil of Wauwatosa School District. Scott was chosen for the panel due to his community involvement efforts in McFarland where he served as President of the Chamber of Commerce.*

2:00-2:15 Break

2:15-3:15 **Legislative Update**

*John Forester is the Director of Government Relations for the Wisconsin School Administrators Alliance. John has built an excellent working relationship with legislators and lobbyists working for organizations that support public education in Wisconsin. John has worked successfully to have the SAA recognized as a credible source for information and consultation on school management issues.*

**WASBO  
Taking Care of Business  
Seminar Registration**

Name \_\_\_\_\_  
Title \_\_\_\_\_  
School Dist./Company \_\_\_\_\_  
Address \_\_\_\_\_  
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Phone \_\_\_\_\_ Fax \_\_\_\_\_  
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Registration Fee includes continental  
breakfast, breaks and lunch.

- \_\_\_\_\_ \$125 WASBO Member (single  
attendee)
- \_\_\_\_\_ \$115 Per person for districts bringing  
more than one person
- \_\_\_\_\_ \$150 Non member
- \_\_\_\_\_ One WASBO Seminar Coupon

**Cancellation Policy:** Full refund of fees will  
be made on cancellations received prior to  
November 10, 2004. Following that date  
a 50% administrative fee will be retained.  
There will be no refunds for no shows or  
cancellations on the day of the event.

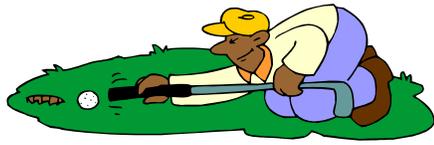
\_\_\_\_\_ Please check here if you have a  
disability that requires special provisions or  
service.

**Registration forms should be sent to:**  
WASBO Foundation  
Taking Care of Business Seminar  
4797 Hayes Rd., Suite 101, Madison, WI 53704  
Phone (608) 249-8588 Fax (608) 249-3163

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# Short Shots



**Where are they?** Darren Clark—from Shorewood to Mukwanago, Judy Orłowski to Shorewood, Cathy Cramer – from South Milwaukee to Oak Creek – Franklin, Lori Ames—from DPI to Southwestern Wisconsin Technical College, Scott DeYoung to Poynette.

**Procurement Card:** The WASBO Board of Directors has voted to participate in a program with Illinois and Indiana ASBO affiliates to make procurement cards available to Wisconsin school districts. The anticipated volume will enable smaller districts to receive rebates and not have to pay fees. The program will also save a significant amount of business office time by eliminating paperwork and the current level of bookkeeping. Districts will have complete control of their cards and can receive reports designed to best serve their needs. An information program will be launched in the near future. This WASBO initiative is not intended to result in any significant financial benefit to the association. Rather, it is being offered as a service to all of Wisconsin's school districts.

**Joint Convention:** Mark your calendars to be in attendance at the Joint Convention in Milwaukee on January 19-21, 2005. WASBO will be offering seven sectionals on a variety of topics. To conserve time and travel, a number of committee meetings will also be scheduled.

**TCB Seminar:** Also plan to be on hand for the Taking Care of Business Seminar which will be held at the Country Springs Hotel & Conference Center (formerly County Inn) in Waukesha on November 17, 2004. This seminar will provide you with an opportunity to hear from representatives of private business as they view their relationships with the public schools. You can use this opportunity to be brought up to date on the new laws pertaining to school district operations. John Forester of the SAA will bring you up to date on legislative matters.

**Common Ground:** Representatives of the SAA, WEAC and the School Boards Association have scheduled a series of three meetings to identify those areas of common interest that they can pursue in the upcoming legislative session.

# Welcome New Members



- **Nelson Edmonds**, Student, UW-Whitewater
- **Martin Hintz**, Facilities Coordinator, Appleton Area School District
- **Jim Hoese**, Student, Associate Principal, Marshfield School District
- **Lee Pao**, Student, UW-Whitewater
- **Brent Richter**, Business Manager, Argyle School District
- **Michele Rosen**, Business Services Clerk, Hurley School District
- **Caroline Rossing**, Student, UW-Whitewater (Argyle Schools)
- **Ruthie R. Rumpff**, Office Manager, Kiel Area School District
- **Matthew Slowinski**, Student
- **Brian Walters**, Student, Business Teacher, Green Bay Area Schools
- **Brian Williams**, Facilities Coordinator, Appleton Area School District
- Cardinal Environmental, **Scott A. Hanson**
- Griffin, Kubik, Stephens & Thompson, **David L. DeYoung**, Senior Vice President & Manager
- La Salle Banks, **Linda S. Ciaglia**, Vice President
- RBC Dain Rauscher, Inc., **Mark T. Gannon**, Vice President
- RBC Dain Rauscher, Inc., **Carol Ann Wirth**, Managing Director



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# WASBO Calendar

## Professional Development

October 15-19

ASBO International Annual Meeting & Exhibits  
*Cincinnati, Ohio*

November 17

WASBO Taking Care of Business Seminar  
*Country Springs Hotel & Conference Center (Formerly Country Inn) - Waukesha (Location Changed)*

January 19-21, 2005

WASB/WASDA/WASBO Joint Convention  
*Midwest Airlines Center - Milwaukee*

February 22-23, 2005

WASBO Facilities Management Conference  
*Ho-Chunk Convention Center - WI Dells*

March 8, 2005

WASBO Transportation & Bus Safety Workshop  
*Ho-Chunk Convention Center - WI Dells*

March 16-17, 2005

WASBO Accounting Seminar  
*Ho-Chunk Convention Center - WI Dells*

May 18-20, 2005

WASBO Foundation 58th Annual Spring Conference & Exhibits  
*Marriot Madison West - Middleton*

## Regionals

Bay Area - Meetings start at 9:00 a.m.

December 17 CESA #7 in Green Bay  
March 18 Shawano-Gresham  
June 17 Seymour

Northeastern/Fox Valley

November 19 (Tornado's in Appleton),  
February 11, April 8

Northwest - Meetings are usually held at

Lehman's Supper Club in Rice Lake  
October 13, November 10, December 8,  
February 9, March 9, April 13, June 8

Southeastern - Meetings are from

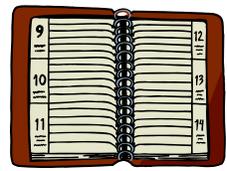
9:45-11:30 am with lunch following.  
October 15 - Whitefish Bay, November 12  
- South Milwaukee, December 17 - Whitnall,  
February 11 - Cudahy, March 11 - New Berlin,  
April 22 - Hamilton

West Central - Meets the first Thursday of every month except January and May. Meetings are held from 10 am - 1 pm at the Sparta Area School District Administration & Education Center, 201 E. Franklin St., Sparta

Wisconsin Valley - Coffee at 9:00, Meeting at 9:30.

November 5 - Antigo, December 3 - Wausau,  
February 11 - D.C. Everest, March 11  
- Auburndale, April 8 - Waupaca, August 19-  
Stevens Point

Madison - Meetings are held at the Middleton-Cross Plains District Office. October 14,  
December 17, February 24, April 22



## Board of Directors Meetings

November 16 - Waukesha  
December 16 - Madison  
January 19 - Milwaukee  
February 17 - Madison  
March 15 - Wisconsin Dells (Strategic Planning Meeting w/ Committee Chairs)  
May 20 - Middleton  
June 10 - Madison

### Business Meetings

January 20, 2005 - Milwaukee  
May 20, 2005 - Middleton

## Committee Meetings

School Facilities Committee

November 9 - Madison (9 am)  
January - Milwaukee  
February - Wisconsin Dells  
July - TBD

Spring Conf. Planning Committee

November 16 - Waukesha (10 am)  
December 16 - Madison (10 am)  
January 20 - Milwaukee (3-4:30 pm)  
Dates in February, April & May TBD.

Safety Committee

October 20 - Madison (1:30 pm)



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