



# 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 10, Number 2 - April 2006

**Improving  
on  
History**

## WASBO Foundation 59th Annual Spring Conference & Exhibits

**Back  
to the  
50's**

**Improving on History  
Back to the 50's in Green Bay**

No, it's not all about the Packers, it's all about you and why you will want to be in Green Bay for the 59<sup>th</sup> Annual WASBO Spring Conference & Exhibits at the KI Center. Join your colleagues on May 16-19, 2006 for an excellent professional development experience. You will also have an opportunity to trade in your experience for graduate credit from Viterbo University, WASBO's partner in higher education. In addition to the great learning opportunities, you will have numerous chances to network and enjoy several social activities. The WASBO golf outing will take place on Wednesday, May 17, at two challenging golf courses, Royal Saint Patrick's Golf Links and the Ledgeview Golf Course. Registration at the golf courses begins at 8:00 with a shotgun start at 10:00. This is a fun team event so you don't have to be a good golfer.

You will also want to attend the WISC-PMA Opening Mixer, honoring WASBO retirees, on Tuesday, May 16, starting at 8:00 p.m. Wednesday is full day of networking with your colleagues with the Robert W.



Baird Reception after the golf outing, and the Stifel Nicolaus Auction and Dance later that evening. It wouldn't be right if we didn't take advantage of the opportunity to visit Lambeau Field, so plan to ride the double decker bus or the coach bus provided by Lamers to this newly renovated, historic stadium on

Thursday for the total Lambeau Experience which is sponsored by Digital Office Solutions, Skyward and Johnson Controls. Last, but not least, plan to participate in the Siemens Walk For Kids. The proceeds from the Walk are used to sponsor a high school musical group selected to perform at the annual Joint Convention held in Milwaukee in January.

So much for the social events. Let's turn our attention to the most important reason you should attend the conference and exhibits. We will begin with a powerful keynote address from a nationally recognized speaker and author, John Powers. He will address the very core of your professional life as he explains why you should "Do What You Love; Love What You Do". John will

*Continued on page 16*

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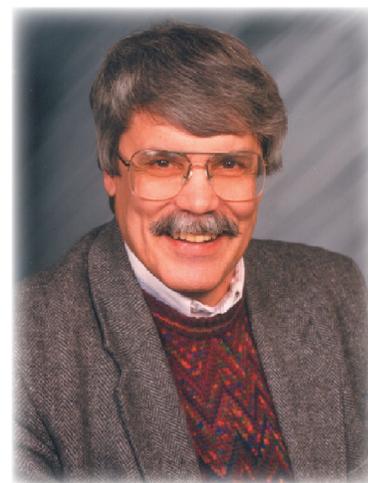
Editor: Don Mrdjenovich



# A Message from the President

## **Chapter Seven in the Chronicles of the WASBOnians**

The old Sage had again called for a gathering of all the inhabitants in the Serfdom of Childrenian. A young Wasbonian and Wean helped the aging Sage to a seat in front of all the Wasbonians, Weans, Wasdans, Dpians, and others assembled. All could tell that the long, protracted winter had taken a toll on the once vibrant, energetic body. As he started to speak, everyone realized his body might be failing but his mind was still as sharp as flint.



*Michael R. Garty*  
*WASBO President*

He started his speech by telling the gathered he was stepping down as Sage for the Serfdom of Childrenian. He noted he had enjoyed his life by growing up a Wasbonian and having the opportunity to serve as apprentice to the former Great Sage before becoming the Sage himself. He started to reminisce about his apprentice years. He told about one of his turning points.

“After several years serving as apprentice to the Great Sage, I was building up enough courage to ask him why I was picked as apprentice from all those in the Serfdom. I knew that I was not the top honor student; others had done a much better job academically.”

I was about to ask the question when he responded, “You are about to question why I selected you over all the others even when you were not at the top academically.”

“That’s right!” I responded, “How did you know what I was thinking?”

The Great Sage responded with a laugh, “that’s why I am the Sage! The reason I selected you was you have always had an inquiring mind, are always looking for solutions, and you know how to get the best out of those around you. Besides, I knew you would always be an **amateur** in whatever you did.”

“An amateur?” I questioned.

The Great Sage responded, “An amateur! Have you not studied the roots of the words we use? I would much rather be an **amateur** than a **professional** for amateur comes from the old root word *amare* which means *to love*. I knew that you and I would always **love** what we were doing!”

The Sage looked out at the crowd. The corners of his lips rose in a smile as he recalled the lesson learned many years ago. “Now,” said the old Sage in an interrupted voice, “I have a challenge to all assembled. It might help if you know logic or the spoken language well. I learned this from the Great Sage and I am now passing it on. It is what has guided me since I was an apprentice.”

*Continued on page 5*



*Don Mrdjenovich*  
*WASBO Executive Director*

## Exec's Reflections Reflections on Retirement

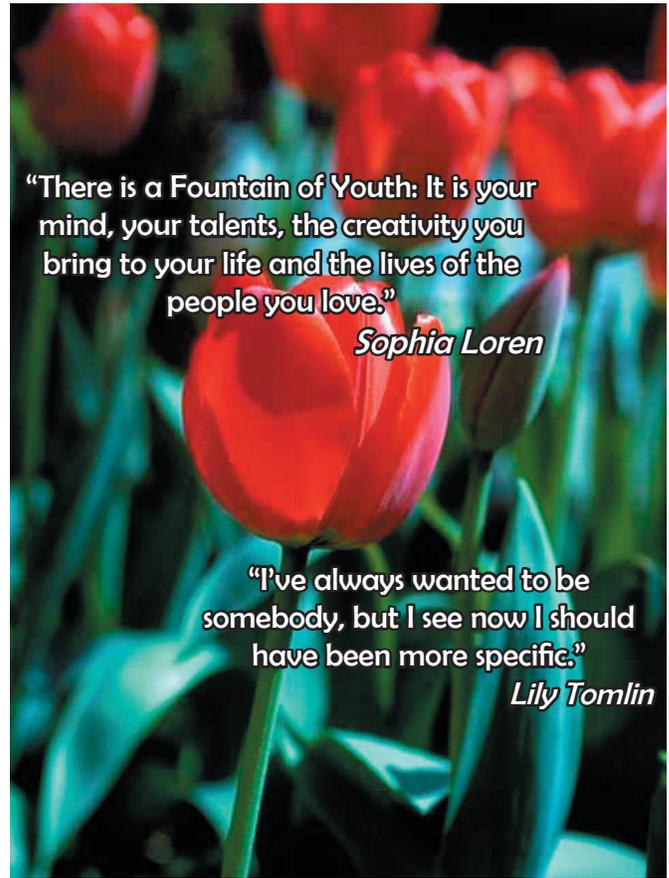
At the February meeting of the Board of Directors I announced my intention to retire at the end of August. I chose to make the announcement at that time because that is when the Board begins the annual update of its

strategic plan. Having the knowledge that it will be replacing its executive director is an important consideration in planning for the future.

In my letter to the Board I reminded them that when I assumed the position of executive director I didn't see myself staying on beyond the age of 65. I have stayed five years beyond my self imposed limit. I explained that the reason I did so was because I enjoyed working with and for a great group of people. I found support whenever I needed it in following my first directive from the Board when I began this "retirement" job. Very simply, I was asked to grow the association. I interpreted that to mean not only in membership, but to grow in influence, reputation, recognition and accomplishments. We have all come a long way and WASBO is now poised to provide a new level of service and professional development opportunities.

The Board of Directors has an opportunity to refine and define where it wants the association to go and grow. With that task accomplished, they will be able to better define what kind of leadership they will need from their new executive and the WASBO staff. A smooth transition is always preferable to an abrupt change in moving an organization forward. The Board will have the time it needs to plan the transition.

I'll still be around awhile so I won't be saying goodbye this early, but I do want to say it has been a great 11 years. I celebrated my 70<sup>th</sup> birthday in February and Betty and I have less than a year to go to celebrate our 50<sup>th</sup> wedding anniversary. It is time for us to start doing whatever it is that retired people do. I plan to keep in touch and let you know what that is, but something tells me it won't be as enjoyable as the 11 years we have spent with all of you. We will miss you.



### Mentors For The Mentors

Dick Peterson and Diane Pertzborn recently completed the DPI's Facilitator Training for PI34, the new licensure law for teachers, administrators and other certificated school employees. As a result of the implementation of the new law this year, it was necessary to revise the WASBO handbook for mentors. Dick and Diane recently put the final touches on the revisions and are now ready to conduct two training sessions. WASBO began its mentorship program prior to PI34. WASBO recognizes the responsibility that every profession has to provide its members with mentors and support networks.

## President's Message

*Continued from page 3*

The group strained to hear the Sage's words. "The guiding phrase was simply -- Anxieties yield at a negative rate, increasing in smallness the longer you wait."

Questioning frowns crossed the many faces as the gathered began to whisper among themselves trying to figure out what the Sage meant.

"What a great saying." Said a young Wasbonian.

"Don't tell the others," demanded the Sage. "Let's see how many others can solve the phrase." He asked his apprentice whom the young Wasbonian was?. She also took note that someday in the not too distant future she would have to find her own apprentice.

The Sage used this time to rest and collect his thoughts as he watched the antics of many trying to solve the saying. Finally the apprentice quieted the group indicating that the Sage wished to speak again.

"There was another lesson given to me years ago by the Great Sage. It involved a certain number, I was to start by writing down the number 1 and, counting by ones, continue the sequence daily. The Great Sage told me that the devil was in the details of a certain number and I had to think outside my own shell. Each day I would write down the number. 1- the first day, 2 - the second, etc. It took 21 years, 2 months and 11 days to finally hit the number 7734. I studied that number like I had studied all the rest, but I saw nothing special. I approached the Great Sage as I had done for all the days and years in the past, and I told him I had not found any special meaning in the number. This was the first time that a twinkle came into the Great Sage's eyes. I knew that there was something special in that number.

The Great Sage spoke. "Remember the insight that I gave you years ago? Use it accordingly and you will discover the long sought after solution!"

I remembered the Great Sage's point that the devil was in the details. I studied and studied that number, not seeing any significance from the ones that preceded it for all those years. Finally, I removed myself from the shell that contained my known references,

manipulated my thoughts and actions into a different plane, and it came to me in a flash!! I told the Great Sage what I had discovered. It was true the devil was in the details.

The Great Sage's lips raised in a knowing smile. "The lesson that you have finally learned today will be the last, for I am stepping down as the Sage and you will become the new Sage of the Serfdom of Childrenian. You have finally learned to think outside your shell and have taken a paradox shift to a level that few have obtained."

Remembering the Great Sage's words and lessons, the Sage spoke to those assembled. "Solve what's hidden in this number and you will be on the same plane as I am. I have given a harder challenge to my apprentice, and she has met that final challenge. It is her turn to carry on the history and wisdom of those before and improve upon it for the future."

With that, the Sage asked the young Wasbonian and Wean to help him off the stage and back to his hut. Those watching the Sage leave the gathering noted a renewed kick in his step as he headed for the door.

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# 10th Annual Accounting Seminar

## Rivals Spring Conference

“They just keep getting better”, that was the consensus opinion of the 245 attendees at the 10<sup>th</sup> Annual Accounting Seminar. Attendance at the seminar has grown every year so one can only conclude that the committee, headed by Ken Mischler of Manitowoc, has a pretty good understanding of what their colleagues need and want to know. Accounting, reporting requirements and other school finance issues are constantly in need of updating. Rules, regulations and statutes are never static, and the consequences of not knowing and complying often make the headlines in local communities. Lay school boards rely on competent and professional staff to keep their school districts solvent and in compliance with the law. The most tender nerve in the taxpayer’s anatomy is a purse or pocketbook, depending on gender.

This year’s offerings included a number of hot bottom issues including post employment benefits, health care trusts, borrowing and investing, IRS rules, collective bargaining, preparing for audits and working with the DPI School Finance Team, just to name a few. For those who thought they were neck deep in problems to solve, the Roslyn, New York story, as related by Steven Hancox, Assistant Comptroller in the New York State’s Comptroller Office, had their world’s put in a brighter light. The story of how 11.5 million dollars was embezzled from a school district of less than 4,000 students was fascinating. Lack of due diligence and stewardship reached almost unbelievable heights in Roslyn. Ken and his committee have their work cut out for them if they hope to top the standard they have set this year.



Stephen Hancox tells the Roslyn, New York, School District embezzlement story to the Accounting Seminar luncheon attendees.

**“If you have integrity,  
nothing else matters.  
If you don’t have  
integrity, nothing else  
matters.”**

*Alan Simpson*

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Fond du Lac’s Sue Schnorr delivers her popular presentation, Avoiding Costly Pitfalls. Sue has also made this presentation to the WASBO/WASDA/DPI School Finance Academy and the WASDA Small Schools Conference. Bring in more chairs was the order of the day at the 10th Annual Accounting Seminar.

## Investing in Employee Benefit Trust Funds



Roger Dickson, Assistant Superintendent in Kettle Moraine and Brian Brewer, Vice President at Stifel Nicolaus, recently did a Business Brief on the topic, Investing Employee Benefit Trust Funds. With the passage of Act 99, school districts now have the opportunity to take advantage of a broader range of investment instruments. Roger and Brian presented some practical information, including caveats, to those wishing to establish a trust. Also serving on the task force which developed a sample policy and guidelines were Mike Clark - Robert W. Baird & Co, Inc., Jim Hintz - Precision Retirement Group, Inc., Dave Branback - National Insurance Services, Tom Owens - D.C. Everest, and Bob Borch - Elmbrook. Act 99 resulted from the joint efforts of Jim Hintz and Bruce Nelson of the PRG Group and John Forester of the School Administrators Alliance. You can view this Business Brief by going to the wasbo website where there is a link for Business Briefs on the home page. You can also access the sample policy and guidelines from there.

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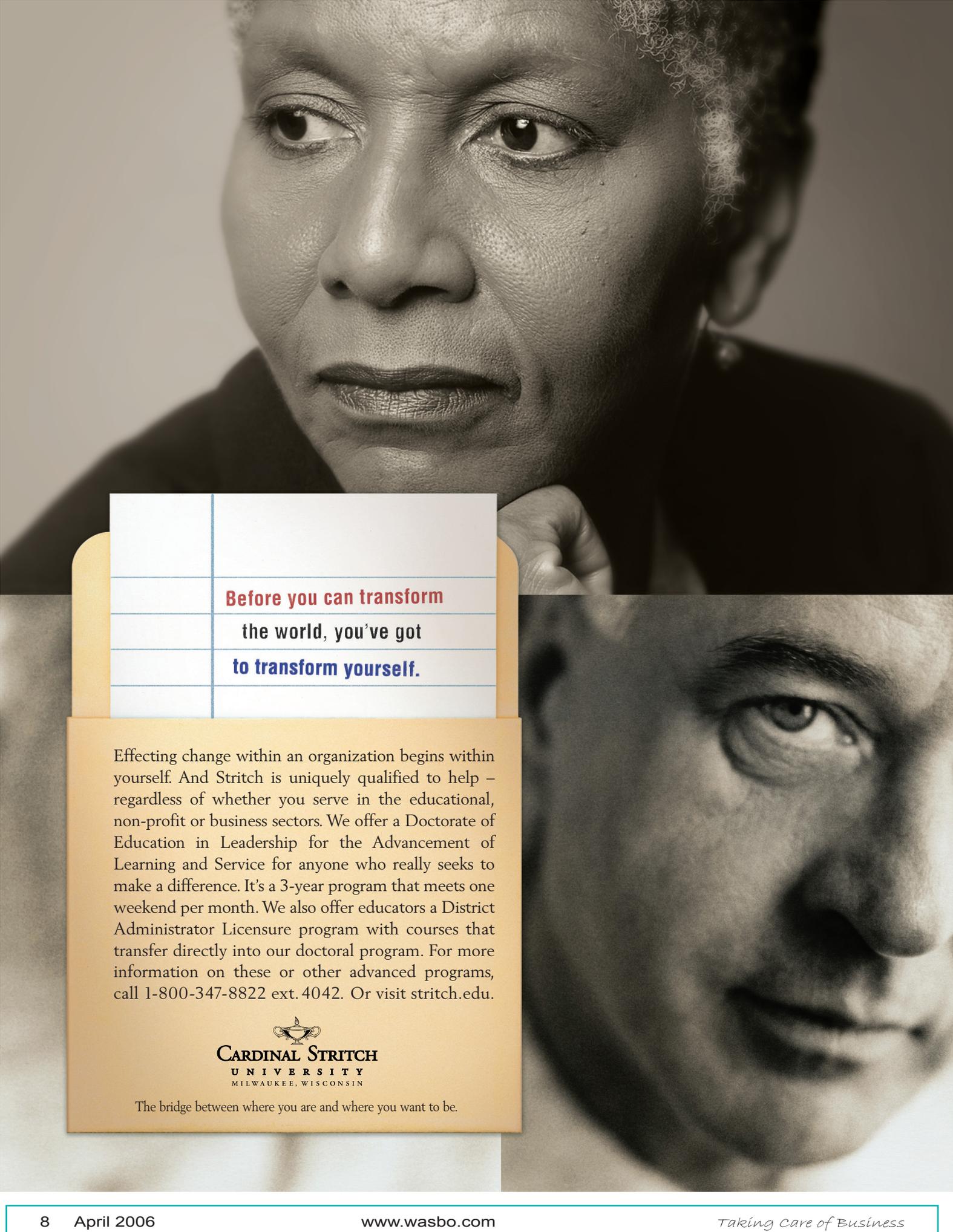


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## BOOK REVIEW Attitude 101

*Attitude 101* was written by John C. Maxwell. Who is known as America's expert on leadership and is founder of the INJOY Group. He has authored more than thirty books, including *The 21 Irrefutable Laws of Leadership*, *The 21 Indispensable Qualities of a Leader*, *Developing the Leader Within You*,

*The 17 Indisputable Laws of Teamwork*, *Failing Forward*, and *Your Road Map for Success*.

*Attitude 101* is 97 pages in length and is in a quick, easy to read pocket book format. This book is designed to give you the essentials of attitude. He teaches that anyone can be a real success if he/she masters skills in four areas: Relationships, Equipping, Attitude, and Leadership. Dr. Maxwell recognizes that as an individual, your attitude has a profound impact on your life. As a leader, you cannot ignore the attitudes of the people you lead and expect to achieve success-whether you're leading a business, a family, a sports team, or a group of volunteers. A person's attitude impacts their relationships, colors their view of failure, and defines their approach to success. Attitude can make or break you!

*Attitude 101* is presented in three parts:

### The Impact of Attitude

- How Does Attitude Impact Leadership?

- How Does Attitude Impact an Individual?

### The Formation of Attitude

- What shapes a Person's Attitude?
- Can an Attitude Be Changed?
- Can Obstacles Actually Enhance an Attitude?

### The Future with the Right Attitude

- What is Failure?
- What is Success?
- How Can a Leader Keep Climbing?

Attitude is contagious! Continually saying positive statements strengthens belief and causes action on that belief. Learn to use the following vocabulary:

- "I can" **not** "I can't."
- "I will" **not** "if."
- "Expect the best" **not** "doubt."
- "I know" **not** "I don't think."
- "I will make time" **not** "I don't have the time."
- "Positively" **not** "Maybe."
- "I'm confident" **not** "I'm afraid of."
- "I do believe" **not** "I don't believe."
- "Promote You" **not** "I."
- "All things are possible" **not** "It's impossible."

*Attitude 101* is designed to empower you and your team to succeed by helping you become equipped with the right kind of attitude. Here's to your success – and to reaching the next level!

*ask listen solve*

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Mary Jo Filbrandt  
WASBO Director

## Director's Corner

### Communities Helping School Districts Face Financial Challenges

During times of tight budgets and general lack of public support for education, our jobs as business managers become quite tenuous.

During the recent April

election many of the fifty referendums failed. However, in every community there always is a bright spot, a core group of community members that want to do something good for kids and the community as a whole. These projects bubble up from the bottom and take off before you even know what is happening. This is optimism in its true sense.

The Antigo school district is like most northern communities: 40-50% poverty level, declining enrollment, large geographic area, and budget cutting nightmares, including school closures. Over the last 10 years, however, Antigo community members and local businesses have raised 100% funding for a \$4 million aquatic center, \$300,000 for an 8-court tennis facility, \$80,000 for a green house, \$650,000 for a theater and the renovation of our football field. These projects would have never survived a referendum, but became very viable recreational and educational facilities for our students and our community.

Orchestrating a major building project, funded solely with donations, definitely offers challenges to a district. Specifically, the Business Manager and Building and Grounds Supervisor need to balance the concerns of highly committed fundraisers and donors with the interest of the district. After recently finishing one major project, the \$4 million aquatic center, and in the midst of a \$300,000 tennis court project (both on district property and under the control of the district at completion), several key concepts emerge as essential for success

- Establish an educational foundation or use an existing established one for all fundraising purposes. The district should stay out of the collection and receipt of donations and pledges.
- Support and approval by the Board of Education is needed right from the start. Establish a dollar

level the fundraising committee needs to reach prior to commencing the project.

- Participation by district representatives on the fundraising committee to ensure consistent communication regarding the project and representation to the donors is essential.
- Communicate to the fundraising committee regarding the appropriate use of good business procedures and school board policies during the project. This includes bidding of construction contracts, purchasing processes, hiring of professional consultants to write specifications, etc.
- Don't agree to shortcuts or inferior building materials or products; ensure full funding of what is required to do a good and complete job. Don't bid a project until you are confident fund raising efforts will cover the construction costs along with appropriate contingency funding.
- Require an independent accounting firm to confirm and authenticate pledges as a condition of project commencement.
- Confirm a sustainable operational budget including sources of revenue.
- Discuss with your board their willingness to use a Fund 80 levy for operational costs if other community revenue sources fail to match expenses. Don't wait until a community player, such as another governmental partner, backs out of their financial commitment.
- Obtain long-term commitment from the fundraising committee to remain active in establishing an endowment fund for future maintenance needs.
- Consider filling the gap from construction completion and receipt of pledges through a short-term loan requiring the fundraising committee to have a financial commitment from a financial institution secured by collateral.
- During construction require that all decisions for change orders be made by the district

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*John Forester  
SAA Director of  
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## Legislative Update SAA Testifies on TABOR (TPA)

On April 4<sup>th</sup>, John Forester, SAA Director of Government Relations, presented the following testimony in opposition to the Taxpayer Protection Amendment (TABOR TPA). At the time of this writing, legislative leadership plans to take up TPA when the legislature comes back into

session on Tuesday, April 25<sup>th</sup>.

I understand that many people believe that taxes are too high in Wisconsin. And I am under no illusion that what I am about to say will be so brilliant as to change their minds. However, I would like to make a few comments on the tax issue that is so central to the pro-TABOR argument.

TABOR supporters contend that taxes are completely “out of control” in Wisconsin. But, according to the nonpartisan and highly respected Wisconsin Taxpayers Alliance (WISTAX), Wisconsin state and local taxes as a percentage of personal income have declined from 13.5% in 1994 (14.1% in 1984) to 12.2% in 2005.

I realize that, in this case and on this issue, many of you view Wisconsin school administrators as simply defenders of the status quo. But, I want to make something very clear. I’m not afraid of a debate on the appropriate level of taxation in Wisconsin, as long as the debate is open, honest and comprehensive. Such a debate requires linking the taxation question to two others: What services should Wisconsin citizens receive for their tax dollar? And, what mix of taxes, fees or other charges should taxpayers pay to cover the cost of those services? It’s my understanding that the current TABOR (TPA) proposal (and debate) addresses only the first question regarding taxation, disregards the issue of services and essentially locks in the current mix of government revenues.

The SAA holds deep reservations about TABOR (TPA) including:

- **TABOR (TPA) creates two conflicting sets of revenue limits for schools;** one constitutional, the other the current statutory revenue limit. Schools will always receive the lower or more restrictive revenue cap. The current statutory school revenue caps are already making it difficult to meet the needs of all Wisconsin school children. School districts across the state have been cutting programs, staff and building maintenance for years to balance budgets. Finally, we are convinced that TABOR will dramatically reduce the revenues available for public school children in Wisconsin.
- **TABOR (TPA) will lock the status quo in place – with all of its flaws.** According to WISTAX, nearly 60 percent of Wisconsin school districts are now in declining enrollment. A district that loses students also loses state aid and, under revenue caps, can only turn to overburdened property taxpayers to support vital services for local school children. **Contrary to current pro-TABOR misinformation, declining enrollment districts will not benefit from TABOR. The statutory per-pupil revenue limit will continue to penalize declining enrollment districts – even under TABOR.** Consequently, TABOR (TPA) will exacerbate the fiscal pain and “lock in” the downward fiscal spiral for districts in declining enrollment.
- **TABOR (TPA) will disqualify school spending – and favor property wealthy districts.** Under the statutory formula, every district receives the same increase per student. Under TABOR (TPA), the revenue for property wealthy districts, which receive comparatively little state aid, will grow faster than highly aided districts.
- **TABOR (TPA) does not belong in the Wisconsin Constitution.** Rigid constitutional limits on taxes and spending are simply inappropriate to achieve sound fiscal management, tax fairness or tax relief. The

*Continued on page 33*



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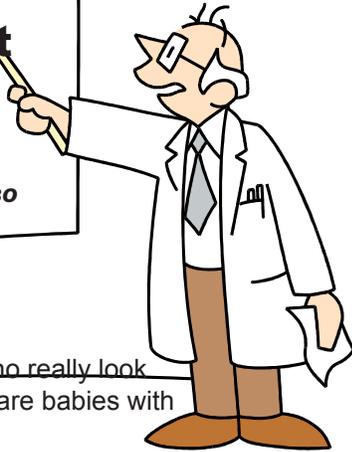
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By Professor Wilhelm WASBO



### Wet Diapers

1. "The only people who really look forward to change are babies with wet diapers."
2. Perhaps not, but unless change is presented with reason and understanding, expect overt and covert resistance.
3. It is natural to not want to sacrifice that with which you have grown accustomed to and appears to be working well for you.
4. The Luddites fought and sabotaged the introduction of milling machines in England and the newspaper typesetters fought the computer to no avail.
5. Employees need to know that change focused on efficiency, productivity and improved products are as difficult to ignore as wet diapers.

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- Wanda Celt, Glenwood City SD
- David DiSera, Hayward Community Schools
- Eric Franzen, Student
- Ginny Gilbert, Gilbert Cost Control Consultants & Contractors
- Vernon Green, BelPro Fire Specialists, Inc.
- Michelle Harvat, Arbor Vitae-Woodruff SD
- Kurt Jorgensen, Union Grove UHS
- Mike Karrels, Grafton SD
- Marsha Kjelland, Mineral Point SD
- Dennis Kuchenmeister, Fort Atkinson SD
- Paul Mennen, Lamers
- Renee Messing, Clifton Gunderson, LLP
- Tom McIntosh, The Garland Company
- Mike Meyers, Rice Lake Area Schools
- Bruce Nelson, Palmer Company
- Jane Nikolai, Racine Unified SD
- Katie Place, Closed System Labs, Inc.
- Bryan Plautz, Merrill Area Public Schools
- Dale Rhodes, Wisconsin Heights SD
- Kenneth Roelke, Sauk Prairie SD
- Chris Schmelzer, Minnesota Life
- Bill Schwartz, Community Unit SD 220
- Kristine Stibb, Kenosha Unified SD
- Matthew Tourtillott, Menominee Indian SD
- John Turpin, Sodexo/Oshkosh SD
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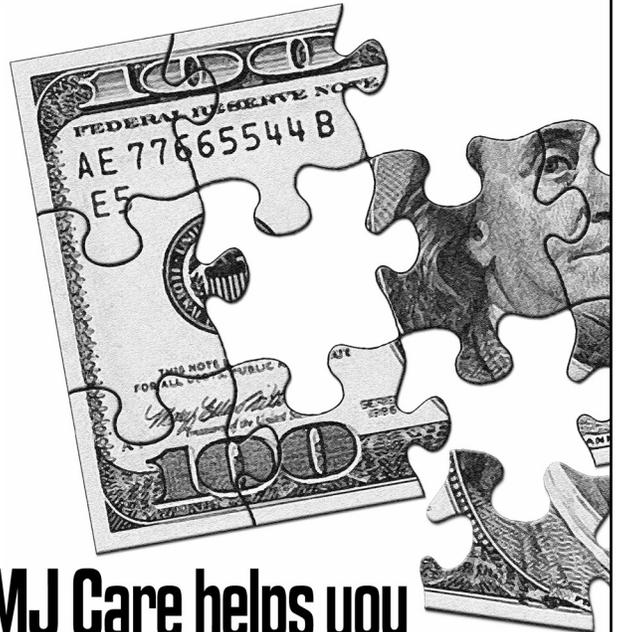
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also do follow up breakout sessions. If you have not already counted them, there are 35 breakout sessions on topics too numerous to mention, but all are targeted to specific areas of school business management. Gateway Computers will also host an Internet Café for those of you who need to touch base with the office during the day. The School Facilities Managers have scheduled two additional opportunities for those pursuing their WASBO certification. The DPI has approved the certification program and State Superintendent, Libby Burmaster has affixed her signature to the certificates which will be presented on her behalf, to the first graduating class on Friday morning.

What else can you expect? Several WASBO standing committees have scheduled meetings. Mentors and mentees will meet. The SAA's John Forester and the Wisconsin Taxpayers Alliance, Todd Berry will present a legislative update at the Friday noon luncheon. Student scholarships will be presented at the Thursday luncheon. On Thursday at 9:30 you will be greeted by more than 110 exhibitors who will bring you up to speed on new products and services. The conference and exhibits has been planned to make maximum, productive use of your time. The Spring Conference Committee, led by Sue Schnorr and John Sackett, and the WASBO staff has put in a significant amount of time and effort to bring you a quality professional experience. WASBO owes them and the committee a big THANK YOU! Did I forget to mention the dress code? It's back to the 50's. That goes for the exhibitors as well. For a personal, authentic apparel consultation you can contact your Executive Director, his spouse, or perhaps your parents. For all other inquiries or to register on line, go to the new WASBO website, [www.wasbo.com](http://www.wasbo.com). See you in Green Bay.



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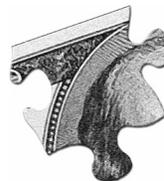
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# End of the Third Dynasty is Near

Yes, rumors are running rampant that Don Mrdjenovich is retiring as Executive Director at the end of August. I wish I could deny those rumors, but they are true!!! A President's worst nightmare, and the announcement happening on my birthday no less. I could not talk Don out of retiring even though I reminded him he was only a fourth as old as he claims since he was born on February 29<sup>th</sup>.

**Now for the Short Version** - The Board met on March 29<sup>th</sup> and approved the process to find that unique person to serve as the next Executive Director. Some points are:

- The time line is tight.
- Members will be contacted for interest in serving on the Ad Hoc Selection Committee.
- Requires a solid commitment from the WASBO members on the Selection Committee appointed by the Leadership Team.
- An online survey will be sent out to determine Executive Director qualities the membership is looking for.
- Selection process will start under the current WASBO Board and finish under next year's Board.
- YES, we will find a new Executive Director and YES, YES we will have a great retirement party for Don to send him off like we brought him in!

**Now for the Long Version** - At the February 15, 2006 Board meeting, Don Mrdjenovich called me into his office before the start of the meeting. Since the day was my birthday, I thought he was going to wish me a "Happy Birthday." He slipped me a letter and silently watched the expression on my face as my lips turned from a smile to a frown. It was the one letter that no WASBO President wants to receive from the Executive Director. Especially during his watch. Don was notifying me that he would be retiring at the end of August. Thinking quickly, I told him that he was four times too young to retire since he was born on February 29<sup>th</sup>. That didn't work, so, I reluctantly informed the Board about the contents of the letter. Sad faces were seen around the table and a few tears shed during my announcement. The ball was now in our court to find a replacement of equal stature to serve as Executive Director during the fourth dynasty.

The Leadership Team - comprised of the President, President Elect, and Treasurer - met prior to the March 29<sup>th</sup> Board meeting in order to formulate an orderly plan to have a new Executive Director selected by August 1<sup>st</sup>. A review was made of the process used to select Don Mrdjenovich. Following review at the March 29<sup>th</sup> Board of Directors meeting, the agreed upon the summary time line as follows:

- A. Board directed that the appointment of members to the Selection Committee, determination of qualifications, and other tasks be handled by the Leadership Team.
- B. April 2006
  1. E-mail to all WASBO members, including Board Members, inquiring as to interest in serving on Ad-Hoc Selection Committee with emphasis on required time commitment in June and July for interviewing and recommended selection.
  2. Survey Monkey to be sent out to determine qualities in an Executive Director that WASBO members are looking for.
  3. Leadership Team meets to review and select interested WASBO members for an Ad-Hoc Selection Committee. One member would be Tina Hafeman to represent Office Operations and Co-Chaired by Mike Garty and Gail Moesch. Leadership Team also to work on development of brochure, qualifications and advertising format in preparation for April 21, 2006 Board Meeting. Board of Directors to determine pay range for position.
  4. Input from Survey Monkey to be used to finalize job description and/or criteria to help Ad-Hoc Selection Committee in interview process
- C. Ad-Hoc Selection Committee Meeting Co-Chairs Mike and Gail to call meeting(s) of Ad-Hoc Selection Committee to set interview calendar firm dates and review list of questions to ask candidates.
- D. May 15<sup>th</sup> - June 15<sup>th</sup> Advertise position in designated locations.

*Continued on page 19*

- E. June 2006 Ad-Hoc Selection Committee to review applications, determine candidates to be interviewed, and set interview timetable.
- F. June 20<sup>th</sup> - July 15<sup>th</sup> Interviews by Ad-Hoc Selection Committee with finalized recommendation to board.
- G. July 1, 2006 Board of Directors change over.
- H. July 15<sup>th</sup> - August 1<sup>st</sup> Ad-Hoc Selection Committee makes recommendation to Board: Board to appoint the individual to start the Fourth Dynasty of Executive Director of WASBO.
- I. September 1, 2006 - new Executive Director starts.

Oh yes - another Ad-hoc committee will be forming for the sole purpose of organizing a retirement party for Don and Betty. If interested let Tina Hafeman know.

**From an historical perspective**, the first dynasty of WASBO's organizational growth was under the guiding arm of Wally Zastrow. Wally was the WASBO President in 1964 and served as Executive Director through 1987. During his term WASBO had two International ASBO Presidents and the State Legislature agreed with the organization that School Business Managers should be licensed in the state. Hence the start of the School Business Management program at the University of Wisconsin - Whitewater. The second dynasty started with Wally's retirement as Don Hafeman took over the helm. The organization continued to grow with one member of the organization serving as a Director for ASBO. The Badger for ASBO Committee was formed along with WASBO joining the SAA. One significant change was that Service Affiliates were allowed to join the organization. In 1995 Don Hafeman retired. A lengthy search was made to find the right person for the Executive Director's role in taking the organization to the next level. WASBO wisely chose Don Mrdjenovich to serve that role and start his own third dynasty. Two additional members have served or are serving as Director for ASBO. The organization has grown exponentially under Don's leadership along with two Wasbonians serving as Directors for ASBO.

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## Do Medicare and OPEB Go Together?

How does receiving a Medicare Part D subsidy impact your Post-Employment Benefit obligation?

Linda R. Mont, RHU  
Key Benefit Concepts, LLC The answer is “it doesn’t.”

At the Joint Convention in January 2006, there was a presentation on the topic of Post-Employment Benefits. At one point, one of the presenters asked the audience how many Districts had filed for a Medicare Part D subsidy. The presenter implied that the Medicare Part D subsidy could be used as a means to offset the cost of the post employment benefits and/or the cost of the valuation. I was not surprised when no one raised their hand because very few Districts in Wisconsin are eligible to file for subsidy or have already filed for one. Later I came to discover that many in the audience did not understand the question, let alone how to apply it to their District. Thus, I present this article as a means of further explanation of the Part D benefit and to give you a deeper understanding of how it relates to your District.

### Medicare Part D Prescription Drug Coverage

As you know, Medicare Part D is part of the recently enacted regulation calling for all individuals eligible for Medicare Part A and/or Part B to seek prescription drug coverage through a Medicare Part D insurance plan and/or obtain confirmation that he/she has *creditable coverage* through an employer prescription drug program. The government has defined *creditable coverage* as a benefit whose value is equal to or greater than that of the standard Medicare Part D benefit. If the Medicare eligible individual does not have *creditable coverage* and does not purchase a Medicare Part D prescription drug benefit by May 15, 2006; he/she will not be able to purchase a Medicare Part D benefit until January 1, 2007 (open enrollment begins in November 2006). Furthermore, the late enrollee – those who could have purchased the benefit in May 2006 or prior and had not – will have a higher premium rate than those that had purchased the coverage when first eligible. This penalty will be 1% of premium per month for each month from May 2006 until first enrolled. This penalty will permanently be added to the enrollee’s Medicare Part D premiums.

Of course, those who become eligible during this period of time, and enroll when first eligible, will not be penalized. Additionally, those who currently have *creditable coverage* and should later lose this status and enroll in Medicare Part D will also not be penalized. Due to the importance of *creditable coverage*, every employer health plan was required to issue a Notice of *Creditable Coverage* to those covered by the health plan that were Medicare eligible. This initial notice was to be issued by November 15, 2005 and was to indicate whether the employer’s health plan was or was not deemed as *creditable coverage* – that means either the value of the health plan prescription drug benefit was equal to or greater than that of the standard Medicare Part D benefit (*creditable coverage*). Note that every health plan is required to file their notice with the Centers for Medicare and Medicaid Services (CMS) by March 31, 2006. Subsequent notices must be provided annually to Medicare-eligible plan participants prior to the Medicare Part D open enrollment period each year (which is intended to begin each November).

### Medicare Part D Prescription Drug Subsidy

If an employer health plan (whether insured or self-insured) has *creditable coverage* and meets actuarial attestation, the employer may file for a Medicare Part D subsidy with Retiree Drug Subsidy (RDS), a division of CMS. The employer plan is then eligible for reimbursement of 28% of the prescription drug claims cost above \$250 and less than \$5000 per Medicare eligible participant. Filing for 2006 had to begin prior to October 31, 2005 and needed to be completed within a specified period determined by the initial filing date.

### The Subsidy and Post Employment Benefits

Approximately 75% to 80% of school districts in the State of Wisconsin have their health insurance with WEA Insurance Trust. The Trust explored the Medicare Part D regulations as it pertained to prescription drugs and decided in early 2005 that the Trust as a whole would not provide a prescription benefit to those retired participants that were Medicare eligible. Thus, the Districts with the Trust would not be eligible for the Part D subsidy. The notice of *creditable coverage* would have indicated that the health plan was not *creditable coverage*.

*Continued on page 21*

## Do Medicare & OPEB Go Together?

Continued from page 20

Given that some districts had a responsibility, through bargaining and other agreements, to provide a benefit to retirees beyond Medicare eligibility, the Trust later gave these Districts the opportunity to identify classifications for which it wanted continued prescription drug benefits beyond Medicare eligibility. Due to the fact that this opportunity was not provided until after the initial Medicare Part D subsidy filing was required, even if those Districts that continued the benefit would have been eligible, it was too late to file for the subsidy 2006 plan year.

So, you see, the majority of Wisconsin school districts did not file for a Medicare Part D subsidy.

For those Districts who were not with the Trust and actually filed for the subsidy, GASB has proposed Guidance on the Accounting of the Medicare Part D payments (the subsidy). As currently proposed, reimbursement from RDS (the subsidy) should be reported as additional revenue, and therefore, will not affect or reduce a District's post-employment benefits liability.

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## ASBO Update

Erin Gauthier Green  
Director, ASBO International  
Director of Business Services  
Greendale School District

Following such fine leaders as Roger Price, Doug Johnson, and Jim Clark, I feel very honored to continue the tradition of Wisconsin providing leadership to ASBO International in a time of rapid change.

First let me thank the superb effort displayed by our tireless WASBONIANS in their continuing efforts to elect a Wisconsin candidate to the ASBO Board! The journey has begun, and I am off to South Dakota and Kansas as the ASBO representative in April. Lucky me!

You need to get Pittsburgh, PA on your calendar for October. It's not a steel town anymore! The conference site is right downtown, within walking distance of excellent shops, culture and out of this world food. It's truly a cosmopolitan city, having undergone an urban renaissance in recent years. It is an easy and inexpensive flight in. To help you plan your calendar, these are the upcoming national conventions:

- 2006 Pittsburgh
- 2007 Toronto (get a passport)
- 2008 Denver
- 2009 Chicago
- 2010 Orlando- ASBO's 100<sup>th</sup> birthday and on site Disney lodging!

In reaction to the Futures Task Force suggestions, the Board is considering a four city rotation with the 5<sup>th</sup> year a wild card, and every 10 years in Canada. Our highest draws have been the popular Sunbelt cities, such as Orlando, Phoenix, Las Vegas, and San Antonio. We are considering various high draw cities, pricing and facilities to allow ASBO more leverage in booking. Stay tuned!

What I have learned so far is that Wisconsin is highly regarded nationally for our leadership and contributions to the profession. We are one of only (17) states with a certification program. Thank you George Gray and Bambi Statz for making us highly qualified and respected by our peers. We are one of a handful of states with a Masters Program in School Business Management. Wisconsin is one of (10) states with the highest membership (218) in ASBO. This is

fantastic! If you are not yet a member, take a minute, call the WASBO office and they'll send you an invoice for both dues, WASBO and ASBO on one invoice. Priced at \$135, ASBO membership is a bargain.

Wisconsin is represented at the ASBO leadership level by Roger Dickson (Kettle Moraine), Vice Chair of the Accounting Committee, Joel Green (McHenry County Cooperative for Employment Education) on the Professional Development Committee, Dave Mitchell (Siemens) is on the Environmental Aspects Committee, and Doug Johnson (Madison Metropolitan School District) is the Chair of the By-Laws Committee. There is room for many more of you. I encourage you to join a committee of your choice. It is one of the first things I did upon joining ASBO, knowing that being part of the leadership team would better justify my attendance. For information about the various committees do not hesitate to call me or WASBO.

Speaking of justifying your attendance at ASBO, remember, professional development and growth should never be looked upon as an expense. It is an investment that pays dividends to your school district. Recently the ASBO Board met in Pittsburgh and did a long range (10-15 years out) plan. Our three most important goals distilled out of two days of work were:

- (1) Further engaging our members in ASBO's services and leadership roles, and better publicizing and enhancing services.
- (2) Working toward a goal of a national credentialing or certification of the profession.
- (3) Increasing public awareness of the role of the SBO, to enable the profession, ASBO and your local affiliate to be the "go to" people concerning educational resources, problem solving and guiding the future of education.

When the Packers win the next Superbowl and the ASBO ad is the highest watched commercial, we will have succeeded! Or more seriously, when NCLB is either rewritten or abolished, ASBO will be consulted BEFORE new legislation is drafted.

ASBO hopes to engage you in committee work, writing articles, making presentations, and planning

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## ASBO Update

Continued from page 22

conferences. Fear of committing ourselves beyond our time commitments may hold us back from jumping in, but from personal experience I can say the time commitment is minimal and much can be gained. If you join a committee and become a Chair or Co-Chair, ASBO foots the bill for you to attend the Leadership Conference once a year, and it is a world class professional development opportunity.

In short, if you want to travel, meet interesting people, get out of a rut and the small corner of the world you are in, get world class professional development, and expand your horizons, get involved!

Join me and your colleagues as ASBO re-invents itself! Thank you WASBO for your support!

*Erin Gauthier Green*  
*ASBO Director 2005-2008*



Dan Moberly joined his former Wisconsin colleagues Roger Dickson, Gail Moesch, Erin Gauthier Green and Tom Wohlleber at the annual ASBO International Leadership Conference. The conference was held in Pittsburgh which is the site of the 2006 annual conference and exhibits in October. In addition to an interesting offering of leadership training sessions, the conference provided an opportunity to visit and select hotels for the October conference. WASBO has a small room block at the Westin which is connected to the convention center by an enclosed walkway. The rooms must be booked by May 1 or they will be surrendered. Watch for future information about the Annual Conference and Exhibits.

The following ASBO Committees are looking for members: Risk Management; Pupil Transportation; and School Food and Nutrition. WASBO offers a Professional Development Grant for WASBO members who serve on ASBO committees to assist in covering their expenses. For an application contact the WASBO office.



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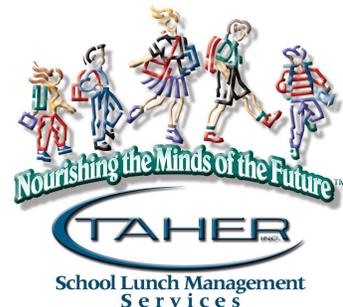
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# EPA Grant Will Reduce Exposure to School Bus Diesel Exhaust

**14 school districts, 5 bus companies & Clean Air Coalition are project partners**

The Madison Metropolitan School District (MMSD) and participating partners (see sidebar) have been awarded a grant from the U.S. Environmental Protection Agency (EPA) in the amount of \$291,470 to support the procurement and installation of pollution control mufflers in 300 school buses.

Part of the “Clean School Bus USA” EPA program, this grant project involves a consortium of 14 school districts and five private bus companies in southern and central Wisconsin. The MMSD is the project leader and fiscal agent.

All 14 of the districts participating in this project contract with private bus companies, rather than owning their own fleets, to provide student transportation services.

253 of the school buses will be retrofitted with EPA-verified diesel oxidation catalysts (DOC) and 47 buses will receive crankcase filtration systems (CFS). The DOCs will be installed in buses with engine model years between 1997 and 2004, that segment of the older buses in each fleet that are likely to be in service for at least another five years.

The DOCs and CFSs will be installed within the next 12 months.

According to the EPA, the installation of DOCs can reduce hydrocarbons by 50%, carbon monoxide by 40% and particulate matter (PM) by 20%. In addition to the project’s DOC component, Johnson School Bus Service in Fond du Lac will retrofit its entire 47 vehicle fleet with CFS that promise to provide substantial additional PM reductions in on-bus exposures.

“This Clean School Bus USA grant is part of EPA’s effort to get rid of that all-too-familiar black puff of diesel smoke and reduce the harmful health effects of diesel emissions,” said Tom Skinner, administrator of EPA Region 5. “Children are among the most susceptible to health problems caused by the smog and the soot that diesel emissions produce, so the



Jeffrey Fedler, Transportation Coordinator, Madison  
Tom Skinner, EPA Region 5  
Renee Bremer, Transportation Manager, Madison

retrofitting of school buses is an important step.” The EPA is working toward a goal of every school bus in America being a “clean bus.”

This grant -- one of 37 grants worth \$7.5 million recently announced by the EPA -- is the only one awarded in Wisconsin.

The MMSD will be responsible for competitively procuring the DOC and CFS equipment, while each participating bus company will be responsible for installation and maintenance of the retrofit equipment.

**Participating school districts and bus companies:** The project involves a consortium of 14 school districts in southern and central Wisconsin. These districts have a combined K-12 enrollment of over 56,700 students. Of these, 20,900 students (37%) ride the bus fleets targeted for improvement through this project.

“The grant request took place because of the initiative of Renee Bremer and Jeff Fedler in our transportation office,” said Madison School Superintendent Art Rainwater. “We’re glad to be working with such a large partnership on this important clean air effort.”

The MMSD was one of just four winners of the 2005 Wisconsin Partners for Clean Air Award which recognizes organizations that have taken voluntary actions to improve air quality.

“Cleaner school buses mean healthier Dane County children,” said Dane County Executive Kathleen Falk. “Thousands of our Dane County kids who ride a bus

*Continued on page 25*

to school everyday will soon be breathing easier.”

“I would like to give Art Rainwater and the Madison Metropolitan School District an A+ for making Madison a healthier place to learn and live,” said City of Madison Mayor Dave Cieslewicz. “Our yellow school buses will have a ‘green’ future by becoming low-polluting and air-friendly for our children.”

Dane County and the City of Madison are two of the 13 members of the Dane County Clean Air Coalition, which formally supports this grant project. (All members are listed below.)

The project manager for the grant is Renee Bremer, MMSD Transportation Manager.

Dane County Clean Air Coalition members:

- City of Madison
- Dane County
- Greater Madison Chamber of Commerce
- Kraft Foods
- Madison Area Metropolitan Planning Organization
- Madison Gas & Electric Company
- Madison Metropolitan School District
- Wisconsin Petroleum Marketers and Convenience Store Association
- University of Wisconsin-Madison
- Wisconsin Department of Administration
- Wisconsin Department of Health and Family Services
- Wisconsin Department of Natural Resources
- Wisconsin Petroleum Council

**For more information contact:**

Ken Syke  
Madison School District  
663-1903

Dave Merritt  
Dane County Clean Air Coalition  
266-9063

Elissa Speizman  
U.S. EPA Region 5  
312-353-2073

## WASBO Loses Two Past Presidents

**George Beres**  
Past President, 1988-1989



WASBO Past President George Beres of New Berlin recently passed away while on vacation in Florida. George, who was 69, is well known in the Southeast Regional and kept in touch with many of his colleagues since his retirement from the position of Supervisor of Building and Grounds for the New Berlin Public Schools. Prior to assuming the presidency of WASBO, George chaired the WASBO Buildings and Grounds Committee. He was an active and supportive WASBO member. He told his colleagues that he was a bit apprehensive about being the first facilities manager to be elected to the Presidency of WASBO, but those who knew him well had no doubt that he would be an effective leader. In addition to being active in WASBO, George was also active in the Knights of Columbus and President of the Catholic Knights Branch #245. He was a member of the Holy Apostles Alter Society for 40 years, his parish council and the Holy Name Society.

George is survived by his wife Patricia and six children. Patricia resides at 17725 W. Beres Road, New Berlin, WI 53146. The family has requested that any memorial contributions be made to Holy Apostles Endowment Fund of the Knights of Columbus Council #3095. Gary Siegman, a WASBO Past President and personal friend of George, was told that George was buried with his WASBO Past President's pin affixed to his lapel. We will miss George who was a good friend and colleague to many.



**William A. "Bill" Young**  
Past President, 1966-67

William Young passed away on February 1, 2006 at the age of 84. Bill and your Executive Director were personal friends. Bill served as Janesville's Director of Business Services for 8 of the 17 years I served as Superintendent of Schools. His tenure in Janesville spanned several decades where he

began as an Industrial Arts teacher. I always gave Bill credit for teaching Crazy Legs Hirsch a few things about football. They both played on the Wausau High School team. Bill was hard working, loyal and accurate. He kept me out of trouble on numerous occasions. He was a good person and great business administrator. Bill is survived by his wife Doris and a son and daughter. WASBO sent a memorial contribution to the Wisconsin Parkinson's Association. Bill was active in many community and service activities both during his working years and after his retirement in 1984. His giving and serving spirit will be missed by all.

## WASBO Travels to Moscow and St. Petersburg, Russia

My 10 day trip to Russia began on October 28, 2005 leaving Green Bay very early in the morning to embark on a 1 ½ day excursion of plane rides to take me to New York. There I met with my traveling companions and finally landed 10 hours and many, many miles away from New Holstein, Wisconsin in Moscow, Russia. I traveled with a group of 11 school business managers and guests from New York to Colorado. The group was organized through People to People International. My love for travel and curiosity of how schools run in other states and countries, as well as my genuine interest in seeing a part of the world that had always intrigued me led me to embark on the journey.



While in Russia, we were treated very well through the People to People International group. We had organized tours of all of the greatest parts of Moscow and later in the week St. Petersburg. We had a wonderful guide who gave us a very in depth look at the country as it is today. We were able to experience the different variations of Russian food through all of the coordinated meals at various Russian establishments. Of course I tried the famous Russian vodka.

The most interesting part of the trip was visiting the various schools in Moscow and St. Petersburg. We were able to visit a traditional public school in the heart of Moscow and a very elite “Anglo-American”

school made up of the children of diplomats of mostly American, Canadian and British students. We also visited a Private School, which was run as a mini business with the students excelling based on their performance and real world simulations. Finally, we visited a Teacher’s College, which showed us how teachers are prepared to teach by Russian standards. In many ways, their teachings, structure, and curriculum are very similar to our own, however I think that we were each able to learn from each other.

I learned so much from my traveling companions as well as all of the Russian students, administrators, teachers, and others that we met along the way. I really enjoyed my journey. But in the end, seeing other parts of the world definitely made me appreciate what I have here in the good old USA.

### A Triple Header

With a little cooperation and a lot of work, it really is possible to schedule and conduct three major conferences in the same place at almost the same time. That was the case with the annual WSSCA conference leading off, closely followed by the 8<sup>th</sup> Annual WASBO Facility Management Conference and the Annual WASBO Transportation and Bus Safety Workshop. It all happened in Wisconsin Dells at the Kalahari Convention Center at the end of February. Because so many, about 60, WASBO members wear the hat of the safety coordinator for their school districts and also serve as facilities managers, both time and money were saved by cooperative scheduling. The WASBO Transportation Committee also thought it might be worth a try to include their one day workshop as well.

The result was record setting attendance for all three conferences. The new Kalahari Convention Center easily accommodated the conferences and the economy of scale also contributed to both associations getting the state rate for lodging, a savings of more than \$70 a night over their normal rack rate. Most attendees were lodged in the new condominium units at the Kalahari. Similar arrangements have been negotiated for 2007.

The quality and timeliness of the professional growth opportunities offered at the conferences were frequently cited by the attendees. The faculty members were exceptional and included a mix of practitioners and professionals drawn from WASBO Service Affiliate members. WASBO thanks its planning committees, its exhibitors and its faculty members. The triple header is a good example of how time, money and human resources can be used in an effective and efficient manner.

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One hundred and sixty facilities managers filled the room to attend sessions leading to their Facility Manager Certification. The evaluations indicated that they were pleased with the faculty and they took away useful and timely information.

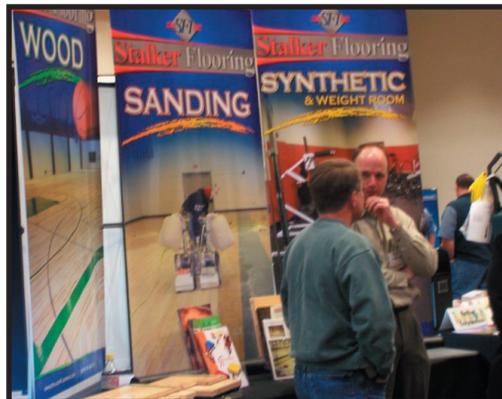


**We Thank Our Sponsors**

**Wisconsin Bus Sales & Service, Inc.**  
(Transportation & Bus Safety Workshop)

**Siemens Building Technologies and Stalker Flooring**  
(Facilities Management Conference)

A record number of exhibitors were on hand during the two day Facilities Management Conference. Stalker Flooring, shown here, has been a long time supporter of WASBO functions. Stalker Flooring and Siemens, another long time supporter, sponsored an evening social event for the attendees.



Chad Trowbridge held the attention of his audience as he described how the Chippewa Falls School District dealt with the tragic bus/semi truck accident which took the lives of several students, faculty and adult passengers. Chad indicated that they had 136 media contacts from throughout the United States and several foreign countries. Chad will repeat this session at the Spring Conference.

# Sound Mortgage Choices in a Rising-Rate Environment

*By Larry Washington, Chairman and CEO of Merrill Lynch Credit Corporation*

Rising interest rates have been making headlines lately. Look a little closer and you will also see that shorter-term rates—such as those used as benchmarks for popular adjustable-rate mortgages (ARMs)—have been rising faster than longer-term rates. The narrowing of the “spread” between rates on ARMs and fixed-rate mortgages has potentially significant financial implications for anyone shopping for a new mortgage, as well as for homeowners who currently have an ARM and are concerned about the impact of higher rates.

The good news is that interest rates are still relatively low by historical standards, giving nervous ARM holders a chance to refinance and lock in reasonable fixed rates. Locking in a fixed-rate loan is an increasingly attractive option for some homeowners, since a flattening yield curve has pushed up rates on many ARMs to the point where they are only a hair lower than fixed-rate options. And for some homeowners, having an adjustable-rate mortgage is the right mortgage for them (for example, if they expect to be in the home for only a few years, or if they think they may be able to pre-pay some principal periodically to reduce the balance on which ARM interest is calculated).

Homeowners exposed to the risk of rising ARM payments should consider the features of various types of mortgages that can provide financial flexibility and a buffer against subsequent rate hikes. Assessing your personal situation now, before rates move higher, allows you to manage your real estate ownership and personal liabilities while staying on track to achieve long-term financial goals.

## **Shrinking Interest-Rate Advantages**

If you took out an ARM back in 2000, your interest rate—and monthly payments—shrank as the value of your home likely shot skyward. Indeed, ARMs were big bargains for home buyers during most of the current real estate boom. The rate on ARMs dropped steadily as the Federal Reserve cut the short-term federal funds rate from 6.5% in January 2001 to a low of 1% by June 2003. The average rate on a one-year ARM over that same period fell nearly four percentage points—from 7% in late 2000 to 3% by early 2004.

In June 2004, however, the Federal Reserve reversed course and began hiking rates to fight potential inflation. After a dozen quarter-point hikes over the next 16 months, the federal funds rate was back up to 4% by November 2005. The six-month London InterBank Offering Rate (LIBOR), on which many ARMs are based, nearly quadrupled from 1.16% in March 2004 to 4.6% by November 2005, while the average interest rate on a one-year ARM rose from 3.0% to 4.5%.<sup>1</sup>

As the Fed boosted short-term rates by 3%, longer-term interest rates such as the yield on the 10-year Treasury note—a popular benchmark for fixed-rate mortgages—barely budged. The quicker rise in shorter maturities has resulted in a flattening of the yield curve and a shrinking of the once substantial interest-rate advantage offered by ARMs versus fixed-rate mortgages. For example, in 2003, the rate on a one-year ARM was 2.5% lower than the average fixed rate; by late 2005, the spread between the ARM and the fixed rate had narrowed to 1.25%.

## **Weighing Fixed-Rate Timeframes**

A traditional rule of thumb that is still appropriate for most home buyers and owners who are weighing mortgage options is to match the time you expect to own a property with the period of time that the rate is fixed. For example, if you expect to own a home or investment property for less than five years, an ARM with a rate that is fixed for the first five years and adjusts thereafter might be appropriate and give you sufficient insulation from rising rates. If you plan to own a home for the long haul, a longer-term fixed rate might be a better choice.<sup>2</sup>

With such a small rate differential between short- and long-term rates, it costs relatively little to be conservative and lock in the rate for a longer period if you are uncertain how long you will own the property. While a one-year ARM may have been a winning proposition in a falling-rate environment, the opposite is true as rates rise.

If you currently have an ARM that is nearing the end of the fixed-rate period, consider locking in a fixed long-term rate. You may be comfortable with the idea of fluctuating payments and rates on your ARM, but you should calculate the real dollar impact they will have on your cash-flow situation and long-term

*Continued on page 30*



financial goals.

### Maintaining Cash-Flow Flexibility

The right mortgage for your needs depends not only on rates, but also on the specific loan terms. In today's lending market, there are many varieties of mortgages and tailored solutions—from interest-only products to short- and long-term loans. Interest-only loans are available as both fixed-rate and adjustable-rate loans and allow for cash-flow flexibility since borrowers are only required to pay interest each month. However, you could also pay the loan according to a standard amortizing schedule and pay only interest when you need extra cash.<sup>3</sup>

Another source of cash is a home equity line of credit. Although home equity rates have moved sharply higher, interest on most forms of home equity debt is typically tax-deductible, making it competitive with other borrowing options. Home equity lines generally are inexpensive to establish and can be particularly helpful as a ready source of funds in the event of unforeseen circumstances.<sup>4</sup> However, you should always consider your ability to pay off a line of credit before you establish one.

A home mortgage is one of the largest debts you are likely to incur. The right option for you needs to consider your entire financial picture, lifestyle

and goals. It can also potentially improve your cash flow, free up resources for other financial goals and increase your potential tax deductions.

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Submitted by WASBO member Peter Cavi

### (Footnotes)

<sup>1</sup> From Bankrate.com (November 28, 2005); <http://www.bankrate.com/brm/ratewatch/other-indices.asp>

<sup>2</sup> If interest rates increase, your monthly mortgage payments may also increase. When deciding whether an adjustable-rate mortgage is right for your situation, you should consider the potential risk of rising rates and such factors as how long you plan to own your home.

<sup>3</sup> After the interest-only payment period, monthly payments will increase because they will be based on a fully amortized repayment schedule of principal and interest.

<sup>4</sup> Merrill Lynch does not provide tax advice. Please consult your tax advisor regarding the deductibility of mortgage interest. Interest expense may not be deductible for all taxpayers.

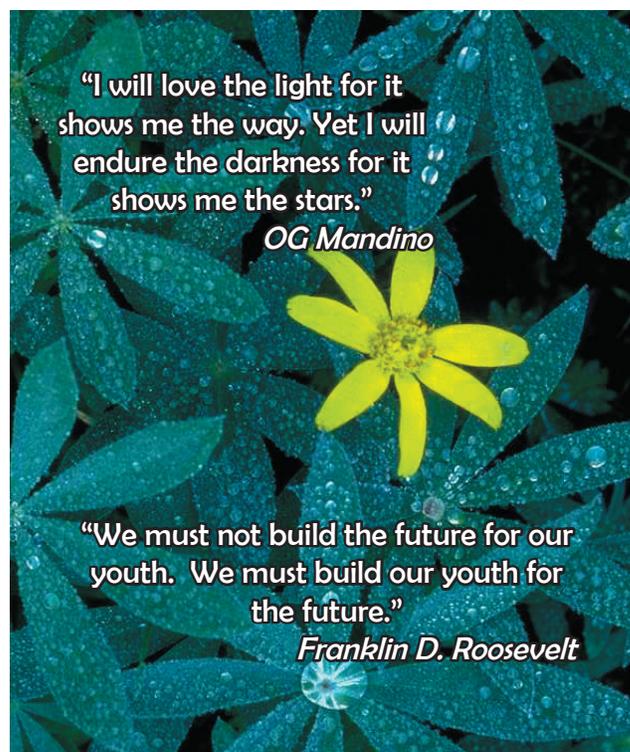
### Director's Corner - Communities Helping School Districts Face Financial Challenges

Continued from page 10

representative, the Supervisor of Building Grounds, rather than individual fundraising committee members having authority on the job site.

- Establish an accounting procedure to request funds from the foundation to pay construction costs as they come due.

Once a district is perceived as being interested in these types of partnerships, is fair, and communicates effectively with community members, projects like these will be successful for districts experiencing financial challenges.





# It's Auction Time!

## WASBO Foundation (No So) Silent Auction & Sock Hop



At the WASBO Foundation Spring Conference  
 Wednesday, May 17, 2006  
 Sponsored by Stifel Nicolaus

This event has been great fun and very successful for several years and we are looking forward to a Rockin' Around the Clock great time. **The Bottom Line Band** will get the Sock Hop jumping with WASBO's very own Gary Siegman and Patrick Acker. They're fast becoming the "WASBO Band" after playing at the 2004 Fall Conference, 2005 & 2006 Joint Convention and the 2005 Spring Conference. There will be food, drinks and socializing with your WASBO friends. To top off this evening you can bid on a wonderful selection of auction items. The live auction during the band breaks was a hit last year so look for it to return. You won't want to miss this!

Proceeds from this event will continue to support our activities with ASBO International. We were successful in electing **Erin Gauthier-Green**, Director of Business Services for the Greendale School District, to the **ASBO International Board of Directors**. We look forward to supporting her again in 2008 when she will run for Vice President! The Auction also supports the **WASBO Foundation Professional Development Grant** which provides funding to assist WASBO members who serve on ASBO International committees. This grant enables those who may not have the means to participate at the International level for financial reasons. It also encourages greater participation at ASBO International for WASBO members. The expertise gained from serving on an ASBO International committee benefits all of our members as that expertise is brought back to the state.

Continue the **FUN!** You can help by bidding on auction items **AND** by donating auction items. Let your creativity flow! Tickets, handcrafted items, gift certificates, baskets filled with goodies. You may want to incorporate the Spring Conference Back to the 50's theme into your items. All price ranges are necessary to make this a success. All contributors will be listed on bidding sheets distributed at the conference and in a future issue of **Taking Care of Business**.

If you have something to contribute to the Silent Auction please submit this form to the WASBO office today!

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Company/School District \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_

Auction Item \_\_\_\_\_  
 Estimated Value \_\_\_\_\_

Donor name as it is to be listed \_\_\_\_\_

\_\_\_\_\_ Auction item will be brought directly to the Spring Conference

\_\_\_\_\_ Auction item will be shipped in advance to:  
 WASBO Foundation - Silent Auction, 4797 Hayes Road, Suite 101, Madison, WI 53704.  
 Items must arrive in the WASBO office by Friday, May 12, 2006.

RETURN THIS FORM TO:  
 WASBO Foundation - Silent Auction, 4797 Hayes Rd., Suite 101, Madison, WI 53704  
 Phone (608) 249-8588 Fax (608) 249-3163 wasbo@wasbo.com www.wasbo.com



# WASBO Spring Conference Schedule at a Glance

## Tuesday, May 16

|   |                   |
|---|-------------------|
| Board of Directors Meeting (Tentative)                  | 2:00-5:00         |
| Registration  | 6:00-9:00         |
| President's - Past Presidents' Dinner                   | 6:00-8:00         |
| <b>WISC - PMA Financial Network, Inc. Opening Mixer</b> |                   |
| <b>Honoring WASBO Retirees</b>                          | <b>8:00-11:00</b> |

## Wednesday, May 17

|  |                   |
|--|-------------------|
| Golf Registration (Ledgewick Golf Course & Royal St. Patrick's Golf Links) | 8:30- 10:00       |
| Golf Shotgun Start   | 10:00             |
| Conference Registration  | 3:00-6:00         |
| <b>Gateway Internet Café</b>   | 3:00-7:00         |
| <b>Robert W. Baird Reception</b>   | <b>5:30-7:30</b>  |
| <b>Stifel Nicolaus Silent Auction &amp; Dance</b>                          | <b>7:30-10:30</b> |

## Thursday, May 18

|   |                   |
|---|-------------------|
| Conference Registration                                 | 7:00-5:00         |
| <b>Gateway Internet Café</b>                            | 7:00-5:00         |
| Committee Meetings                                      |                   |
| & Mentor/Mentee Meeting                                 | 7:00-8:00         |
| Conference Welcome                                      | 8:15-8:30         |
| <b>Passion: Do What You Love; Love What You Do</b>      |                   |
| <b>Keynote John Powers</b>                              | <b>8:30-9:30</b>  |
| <b>Exhibits - Back to the 50's</b>                      | <b>9:30-12:00</b> |
| WASBO Strategic Plan, Scholarship Presentations & Lunch | 12:00-1:00        |
| Breakout Sessions                                       |                   |
| <b>Session I</b>  | <b>1:15-2:05</b>  |

### Insurance for Dummies

*Kathy Johnson, Risk Management Strategies*

### Five Disciplines of Powerful People - How to Achieve

*Anything You Want to Achieve - John Powers*

### HRA's - David Branback, National Insurance Services

### Transportation Legal Issues

*Gilbert Berthelsen, von Briesen & Roper, s.c.*

### Indoor Air Quality Boring? No Way!

*Dan Moberly, ASBO International*

### Doing Business with School Districts - Defining our

*Expectations - Panel Session for Service Affiliate Members*

*Michel Clark, Robert W. Baird & Co., Don Hietpas, Appleton Area School District, Don Mrdjenovich, WASBO*

### Energy Management - Part 1 - Natural Gas Market: Is

*There an Energy Crisis? - David Voss, WI Focus on Energy (Facilities Certification Session)*

### Session II

**2:15-3:05**

### Health Insurance Choices

*Mary Jo Filbrandt, Antigo Unified School District*

*Matt Kolling, Benefit Partners, Inc.*

### Five Disciplines of Powerful People - How to Achieve

*Anything You Want to Achieve - John Powers*

### 403(b) Update - Bob Simandl, Gardner, Carton & Douglas

### Issuing Debt to Address OPEB Obligation

*Michel Clark & Vincent Lyles, Robert W. Baird & Co., Inc. Quarles & Brady*

### Performance Based Budgeting (PBB) - How to Put Your

*Money Where Your Priorities Are!!*

*David Shapley, Valley Elliehausen & Keith Brightman, West Bend School District*

### Medicare Part D

*Emily Conard & Manal Rizek, Key Benefit Concepts, LLC*

### Energy Management Part 2 - Real Energy Management

*Tad Beeksmas & Bill Findlay, Wisconsin Focus on Energy (Facilities Certification Session)*

### Session III

**3:15-4:05**

**Politics of School Aid and Taxes - Jack Norman, Institute for Wisconsin's Future**

**Identity Theft - Officer Duke Munger, Green Bay Police Dept.**

**Procurement Cards - Hear From Districts Using Them**

*Sandy Jacobson, Viroqua Area SD, Aaron Nelson, D.C.*

*Everest Area SD, Mark Lindem, Kaukauna Area SD*

**Paperless Meetings - Dan Honoré, Kenosha Unified SD**

**Student Activity Accounts - Best Practices and Safeguards**

*Evelyn Eagle, KEV Software, Inc.*

### Asbestos - Part I

*William Freeman, Environmental Management Consulting*

*David Schmidt, WI Dept. of Public Health & Family Svcs*

*(Facilities Certification Session - Repeat from SC 2005)*

### Energy Management Part 3 - Case Studies: Share the Success

*Dietmar Braune & Nate Nygaard, WI Focus on Energy*

*(Facilities Certification Session)*

Shuttles to Lambeau Field by Lamers 4:00-8:30

**Lambeau Field - The Total Experience 4:00-8:30**

**Sponsored by Digital Office Solutions, Inc., Skyward, Inc. & Johnson Controls, Inc.**

## Friday, May 19

|  |                  |
|--|------------------|
| <b>Siemens Walk for Kids</b>                 | <b>7:00-8:15</b> |
| Conference Registration                      | 7:30-12:00       |
| <b>Gateway Internet Café</b>                 | 7:30-12:00       |
| General Session - Business Meeting, Awards   |                  |
| Facility Certification Program Presentations | 8:30-9:30        |
| Breakout Sessions                            |                  |

### Session I

**9:45-10:35**

### Politics of School Aid and Taxes (Repeat Session)

*Jack Norman, Institute for Wisconsin's Future*

### Health Care Costs and Options in the Marketplace

*Linda Mont, Key Benefit Concepts, LLC*

### Bond Rating: What It Means to Your District & Current

*Issues Affecting It*

*Hetty Chang, Moody's Investors Service*

### Act 99

*Robert Borch, Elmbrook SD, Thomas R. Owens, D.C.*

*Everest Area SD, David Branback, National Insurance S*

*Services, James Hintz, Precision Retirement Group, Inc.*

### Professional Development Plans (PDP's)

*Ken Starkman, WI Dept. of Public Instruction*

### ADA Part 1 - Review of the Americans with Disabilities

*Act and Related Requirements*

*(Facilities Certification Session)*

### Round Table Discussions

### Session II

**10:45-11:35**

### Marching Band Coach Bus Accident

*Chad Trowbridge, Chippewa Falls Unified School District*

### Worker's Compensation

*Tim Patterson, A.N. Ansay & Associates, Inc.*

### Act 99 - (Repeat Session)

### ADA Part 2 - Updating Your ADA Compliance

*Assessment (Facilities Certification Session)*

### Custodial Supervision & Evaluation

*Charlie Kramer, Eau Claire Area School District*

*(Facilities Certification Session - Repeat from SC 2004)*

Lunch and Legislative Update 11:45-1:00

*John Forester, School Administrators Alliance*

*Todd Berry, Wisconsin Taxpayers Alliance*

This preliminary schedule is subject to change. More sessions may be added. Go to [www.wasbo.com](http://www.wasbo.com) for updated information.



Constitution is our basic framework of government, and changing that framework is serious business. Fiscal policy changes should be advanced through statutory change. State legislators' willingness to include a provision in TABOR making it easier to change the TABOR amendment if it is adopted in the Constitution demonstrates their concern that TABOR will create unintended problems.

- **We need a comprehensive analysis of how TABOR (TPA) will impact all 426 school districts.** Since January, school administrators throughout Wisconsin have been asking their legislators for a detailed analysis of the TABOR (TPA) proposal's impact on Wisconsin school districts. We greatly appreciate and respect the work of the Legislative Fiscal Bureau (LFB). However, the level of analysis in LFB's 3/13/06 report is insufficient to clearly gauge the impact on each school district. We understand that Wisconsin Manufacturers & Commerce (WMC) is a strong supporter of this proposal. However, I would bet that there isn't a WMC member in the state that would undertake a fundamental change in business operations of the magnitude that TABOR (TPA) promises to local units of government without first fully investigating the potential ramifications. Finally, if this proposal is so complicated that the sharpest public finance minds in the state cannot produce a definitive analysis of this proposal's impact on all 426 school districts, then that is a clear indication that TABOR (TPA) should not be considered for inclusion in our Constitution.

I think our founding fathers created an absolutely ingenious form of government that has served us extremely well for more than two centuries. It seems to have just the right mix of direct democracy and representative democracy. I

would think that real conservatives would have real concerns about TABOR (TPA). The founding fathers had serious concerns about two major things as they crafted our government – consolidation of power in a central government and the rule of the mob. TABOR (TPA) provides a substantial dose of both in the form of consolidation of power in state government at the expense of local control and increased reliance on direct democracy through referenda. I don't understand why we would turn our backs on the wisdom of the founding fathers.

Finally, I appreciate the diligence with which the committees have worked to try and correct problems and find improvements in this proposal. However, the SAA finds SJR 63/AJR 77 to be fundamentally flawed and we believe the approach should be abandoned. I can foresee no possible amendments that would change the SAA's position.



**WASBO Walk for Kids**  
At the WASBO Foundation Spring Conference  
Fox River Trail  
Friday, May 19, 2006 7:00 a.m.  
All proceeds will benefit *Charities for Kids*.  
We support the high school musical group selected to perform at the Joint Convention.



**Participation Donation - \$15.00**  
(Includes Limited Edition Long Sleeve T-shirt donated by Siemens Building Technologies, Inc.)

**I can't wait to Walk for Kids!**

Enclosed is my check payable to the WASBO Foundation

Enclosed is \$15 Cash

Please invoice me at the address below.

Please charge the Participation Donation to my credit card  
 \_\_\_\_\_ MasterCard \_\_\_\_\_ VISA \_\_\_\_\_ American Express \_\_\_\_\_ Discover  
 Exp. Date \_\_\_\_\_  
 Card Number \_\_\_\_\_  
 Name on Card \_\_\_\_\_  
 Billing Address on Card \_\_\_\_\_  
 Signature \_\_\_\_\_

**T-Shirt Size (circle one):** M L XL XXL

I (also) would like to **DONATE** \$ \_\_\_\_\_ to this charity (enclose check payable to the WASBO Foundation)

Name \_\_\_\_\_ District/Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

The undersigned participant in the WASBO Walk for Kids hereby waives for myself and my heirs, executors, administrators, and personal representatives, all rights and claims for personal injuries, property damage, and property loss while traveling to and from, and participating in this event. I certify that I am physically fit and prepared to walk the distance that I am registering for, and I am aware of the hazards associated with such an event.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Please return this form and check to:**  
 WASBO Foundation – Walk for Kids  
 4797 Hayes Road, Suite 101, Madison, WI 53704

Thank you to our major sponsor Siemens Building Technologies, Inc.

## Short Shots



## A Heads Up from the WASBO Safety Committee

### Wausau Insurance Encourages School and Park Administrators to Certify Playground Safety Coordinators

WAUSAU, WI (April 3, 2006) The U.S. Consumer Product Safety Commission estimates more than 200,000 injuries and 15 fatalities occur each year on playgrounds—and that's a significant risk for school districts and municipalities. Fortunately, thanks to the National Recreation and Park Association, the Wisconsin Park & Recreation Association and Wausau Insurance, a National Playground Safety Inspector Certification Course will be held this summer in Wisconsin. Participants will learn how to make their playgrounds safer and perhaps avoid the tragedy and cost of a serious playground accident.

The 15-hour training session, which includes an on-site playground visit, will be held at the Hilton Garden Inn, 1801 Deming Way, Middleton, Wis., June 6-7, 2006. The course is pre-approved for 1.2 CEUs and will be conducted by nationally known playground safety experts from 8 a.m. to 5 p.m. both days. An optional certification exam will be held in the same location the following day from 9 a.m. to 11 a.m.

The course will provide information on how to:

- identify hazardous playground equipment,
- test for protrusion, entrapment or entanglement exposures,
- use appropriate risk management tools, and
- meet legal obligations and national safety guidelines.

Anyone whose job includes playground safety responsibilities is invited to take the course. It is the only National Playground Safety Inspector Certification Course held in Wisconsin in 2006. Costs for the two days of classroom training are \$370 per person, plus \$100 per person for the certification examination. Registration forms can be obtained from Edward Steele, senior loss prevention managing consultant at Wausau Insurance (715.847.8826 [edward.steele@wausau.com](mailto:edward.steele@wausau.com)) or by visiting [www.nrpa.org](http://www.nrpa.org). Pre-registration is required and must be completed by May 8.

Wausau Insurance, a national property/casualty company, is the endorsed insurance carrier for the Wisconsin Association of School Boards and is a WASBO Service Affiliate Member. It provides safety services to more than 170 schools in Wisconsin. Wausau is a member of the Liberty Mutual Group, which ranks 111 on the Fortune 500 list.

**Congratulations** To the WASBO new award recipients. To be awarded at the 2006 Spring Conference: Roger Price of Madison – Wallace Zastrow Award, Becky Doerr of New Holstein – New Business Official of the Year, Gary Baier of McFarland – Facilities Manager of the Year. To be awarded at the 2007 Joint Convention: Bob Buchholtz of Waukesha – School Business Official of the Year, Sue Schnorr of Fond du Lac – Shining Star Award. The Business Services Award nominations are in the hands of the selection committee.

**Thank You DPI School Finance Team** We shouldn't take them for granted. They have been valued partners. Not only do they make numerous presentations, but they are always available as a resource or for consultation. Of equal importance, they see consulting as a two way street. When it is time to make changes and improvements, they seek input from those in the field. WASBO sends its condolences to DPI's Kathy Guralski and her family. Kathy recently lost her daughter to an auto accident.

**Bill 529** The Governor has signed Bill 529 which aligns Wisconsin's special education requirements with those of the Federal government. This change saves money and gives school districts the flexibility they have long sought. Good work by the SAA, which initiated the change and carried it through from beginning to end, is much appreciated.

**New Locations** This year the WASBO New Business Administrator and Bookkeeper Seminar will be held at the new Holiday Inn and Conference Center in Stevens Point. It is located on Highway 10, east of the interstate. WASBO will also be using the Chula Vista Resort for the 2007 Accounting Seminar. This Resort and Conference Center is undergoing additions and renovations at a cost of \$200 million, including the additional meeting and expo space and expansion of the golf course.

**Mentorship Training** A training session is being planned to be held in conjunction with the 2006 Fall Conference.

**Online Registration** Try doing your next registration on WASBO's new website. We take credit cards!

**Viterbo Credit: Need graduate credits?** You can get them at the Fall Conference, Spring Conference, Joint Convention or in combination with two seminars.

# HALL OF FLAME?

## HOT TIPS FOR SCHOOL SAFETY.



Do you know today's fire prevention guidelines for displaying student artwork in school? For that matter, were you aware that such guidelines exist? The National Fire Protection Association (NFPA) recommends that art and teaching materials in halls and classrooms not exceed

20% of the wall area in school

buildings lacking automatic sprinklers throughout, and a maximum of 50% wall coverage in schools with approved automatic sprinkler systems. These codes, enforceable by local fire inspectors, are in place to help prevent the rapid spread of fires and to save lives. Wausau and the Wisconsin Association of School Boards work together to



communicate issues to help school districts enhance their safety programs and cut risk-  
**PRICE  $\neq$  COST<sup>SM</sup>** related financial losses. With our A(Excellent) A.M. Best rating and depth of experience, we can help you keep things cool in school. To learn more about the Wausau TotalValue<sup>SM</sup> and the WASB Insurance Plan, contact Mark Meeks, Wausau Signature Agency, at 715-847-8120.



**BOTTOM LINE, A BETTER VALUE.<sup>SM</sup>**

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COMMERCIAL AUTO GENERAL LIABILITY PROPERTY UMBRELLA WORKERS COMPENSATION

# WASBO Calendar

## Professional Development

May 16-19, 2006

WASBO Foundation Spring Conference  
& Exhibits, *KI Convention Center - Green Bay*

June 21, 2005

WASBO Custodial & Maintenance  
Summer Conference, *Hosted by Muskego-Norway School District and Wisconsin Rapids School District*

July 25-26, 2006

New Business Manager & New  
Bookkeeper Workshop  
*Holiday Inn Hotel & Convention Center, Stevens Point*

August 2 (Madison) & August 3, 2006 (Appleton)

Educational Support Professionals'  
Workshop

September 27-29, 2006

Fall Conference & Scholarship Golf  
Outing  
*The Osthoff Resort & Conference Center, Elkhart Lake*

## Business Briefs

Go to [www.wasbo.com](http://www.wasbo.com) and click on "Resources" for the latest Business Briefs.

## Regionals

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

June 16 Seymour (Jt. Meeting with NEASBO)

Northeast

April 7 Manitowoc

June 16 Seymour (Jt. Mtg. w/ Bay Regional)

Northwest - Meetings are usually held at Lehman's Supper Club in Rice Lake

April 12

May 10

June 14 Tentative

Southeast - Meetings are from 9:45-11:30 am with lunch following.

April 14 Hamilton

June 12 TBD

West Central - Meets the first Thursday of every month except January, May and July.

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.

April 7 Wausau

August 18 Antigo

Madison Area - Meetings are held at the Middleton-Cross Plains District Office.

April 21

Southwest - All meetings will be held at the CESA #3 office in Fennimore. Lunch at noon is optional. Meetings begin at 1:00 p.m.

April 19



## Board of Directors Meetings

April 21 - Madison

May 16 - Green Bay (If needed)

June 16 - Madison

### Business Meetings

May 19, 2006 - Green Bay



## Who is on the WASBO Ballot?

### Treasurer (1 Position)

- Diane Pertzborn-Sauk Prairie

### Director (2 Positions)

- Wendy Brockert-Lake Mills
- Pete Ross-Seymour
- Gary Kvasnica-Kimberly
- Tom Helgestad-Wisconsin Rapids
- Paul Buchholz-Beaver Dam
- John Gahan-Pewaukee

Go to [www.wasbo.com](http://www.wasbo.com) to check out the candidate resumes. Online voting will be available April 1-30th. You should receive an email with the link to vote.



## Wisconsin Association of School Business Officials

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