



# 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 Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 13, Number 6 - December 2009



President Barack Obama and Education Secretary Arne Duncan talk with students during a visit to Wright Middle School in Madison, Wis., Nov. 4, 2009. (Official White House Photo by Pete Souza)

## When President Obama Comes to Your School District

*By Erik Kass, Assistant Superintendent for Business Services, Madison Metropolitan School District*

Normally a visit by the President of the United States to your school district is a once in a lifetime experience.

Couple that with the fact that he was talking publicly about his \$4.35 billion "Race to the Top" plan for national education, and you can imagine the excitement felt by the Madison Metropolitan School District. A small charter school in Madison, Wright Middle School, was chosen by President Barack Obama to deliver more details about his plan for the future of public education in our country.

Planning and preparation for a visit from the President of the United States is no small task. The official planning for President Obama's visit to Wright Middle School in the Madison Metropolitan School District began one week prior to his official visit on November 4, 2009. Beginning on the Wednesday before the President's visit, the school district staff worked diligently with White House Staff and especially the Secret Service to cover every detail. Every possible space of Wright Middle School had to be unlocked, inspected, and

eventually re-inspected to make sure things were all in order. On Friday afternoon, an official public bid was released for



the gymnasium's full set up to include staging, lighting, fences, risers, chairs, etc. These responses were due back to the White House Staff in less than 24 hours, as the time line was extremely tight for such intricate planning leading up to the President's visit.

Two major areas that pushed this timing to the limit, involved guest parking and guest tickets. The gymnasium at Wright Middle School, a school of approximately 250 students, is only legally able to hold 850 people. With limited capacity,



the demand for tickets to see the President far outweighed the availability provided by the space. Space needed to be prioritized for all

Wright Middle School students and staff, as well as approximately 75 Wright Middle School parents. Next, prioritization needed to be made for the many public officials within the State of Wisconsin Government, most notably Governor Jim Doyle, his family and Milwaukee Mayor Tom Barrett.

For security reasons, parking had to be arranged at a remote site from the school, utilizing City of Madison busses to transport guests to the school. The parking lot chosen, would have to hold up to 150 vehicles and be within a reasonable distance from the school. This was not resolved until late in the planning process when Dean Medical Center came through with their parking lot located approximately 4 blocks from Wright Middle School.

*Continued on page 6*

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Taking Care of Business is issued bimonthly by the Wisconsin Association of School Business Officials. Send address changes to: Taking Care of Business c/o WASBO, 4797 Hayes Rd, Suite 101 Madison, WI 53704  
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Editor: Woody Wiedenhoeff



# President's Message

## WASBO Board Update

### *Meeting the Challenge Together*

I hope everybody has a chance to take some time off during the holiday season. Our jobs tend to be high stress and this year there are more new issues to deal with. It benefits everybody to take some time to relax and recharge. Before you know it, you will be in the middle of another round of budget cutting and staffing plans, some of you probably have already started that process. I wish you all a safe and happy holiday season.

Our most recent WASBO Board meeting was Wednesday November 18th in Milwaukee. The Strategic focus of the meeting was WASBO certification program offerings. With the success of the Facility Manager Certification program, the Board wanted to identify other areas where WASBO could provide programming that is beneficial to our members and school districts. Our thought is that certification programs will not replace the 08 license. Instead WASBO would provide programming to business office staff who may not be interested in pursuing the 08 license and provide more detail on topics for licensed business managers and superintendents. We all agreed that the 08 business manager license is the cornerstone of the successful business manager.

The Board started by brainstorming a list of potential certification programs. A very long list of over 30 subject areas was developed. As the Board reviewed the list it was clear that some of the subjects identified would be specific topics covered in a larger certification program. Board members will organize the potential program list into categories before our next meeting. After we have the consolidated list, the Board will discuss how we move forward with implementing certification programs. Possible implementation options include: initiating new committees to work on a program, asking an existing



*Keith Lucius  
WASBO President*

committee to take on a program, and looking outside the organization (other state ASBO affiliates or vendors) for resources to set-up a program.

Next, the Board discussed how rigorous a certification program should be. In order for a certification to have value, the Board agreed that it needs to include substantial learning time. The facility manager certification program was reviewed and the Board agreed that it provided an appropriate commitment from participants, so it will be used as a baseline for certification programs in WASBO.

As the meeting progressed, my appreciation continued to grow for the WASBO members who put together the facility certification program. This program is outstanding and WASBO is better off as a result of the hard work needed to create and maintain it. I thank all of those involved with this program for their efforts. Also, I would like to congratulate all who have completed the program. It is a significant accomplishment.

As you can tell it was another busy meeting and that was just the first half of the meeting. Other items discussed included:

*Continued on page 6*





# Exec's Reflections

## Gifts of the Season

Woody Wiedenhoeff  
WASBO  
Executive Director

Over the last month, I have had an opportunity to discuss fund balances, school levy credits and personal contracts with three experienced

and wise school business officials. These discussions ended with hoping all business administrators would actively and prudently plan in these three areas. These topics do not only affect the lives of individuals at the local level, but they also affect their colleagues around the state.

State agencies, politicians, unions, as well as local constituencies, will be scrutinizing school district fund balances. The changes in the State bargaining law and the plight of future state budgets will have everyone looking for extra dollars. Are we providing a clear message about our district fund balances to parties interested in this money at both local and state levels? The DPI will report over \$150,000,000 in unreserved, unappropriated and undesignated fund balances, as submitted by local districts and audits. It will be easy for people to assume that this money has no purpose if there is a vacuum of information. School districts must have a plan for these funds, or are they at risk of being allocated in a way that does not meet the mission and vision of educating children. One possible approach is to double check that your unreserved and undesignated fund balance is coded correctly in your annual report and audit. If the reporting aspects are correct, your district can still thoughtfully plan for the future use of such a balance in their policies, which then makes this money designated or

reserved. This strategic discussion would make better use of this money and protect the future of your district than having this discussion at the negotiating table or in the state political environment.

It was announced that school levies have increased over seven percent this year. Is that, in fact, what the taxpayers will see on the school levies in their December tax bills? The answer is no. Each district has a different set of beliefs about school levy tax credits, but there is one common denominator for all districts. The levy each local school board sets in October is not the levy local property taxpayers will pay when they send in their property tax check to their local municipality. Transparency about school funding is critical as the State continues to discuss school funding issues. School business leaders are in a position to provide a clear school funding picture, even when some politicians wish to cloud school finance issues.

The concern about contracts is more personal in nature than the first two issues. February 1 is an important legal contractual date. Thus, it is a good time to review your contract and make sure there is clarity and understanding about the contractual expectations of the parties. WASBO members spend a great deal of effort being servant leaders for their school districts. As an extension of that work, remember to have the assurances you need personally, in writing, to allow you to do that work effectively.



Marsha is pictured here with her Dad, Phil Marklein, at the 2005 Spring Conference in Middleton.

### Thank You, Marsha!

As an update to the WASBO members, Marsha Marty has decided to resign at the end of the year from the bookkeeping and payroll services she has been providing us for nine years. We will miss Marsha's quick and friendly wit. We will miss the dedication and work ethic she has demonstrated in serving WASBO members. Marsha's glass is always full. Her leadership through her daily actions and attitude has taught all of us in the WASBO office how to be better people. We wish Marsha well in the future and thank her for the lessons she has taught us about living a productive and nurturing life. As we enter the holiday season, and reflect on those things that are most important to us, Marsha's attitude on living life is truly a guiding compass. We will miss you, Marsha.

*"Management is doing things right; Leadership is doing the right things."*

Peter F. Drucker



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## When President Obama Comes to Your School District

*Continued from page 1*

Arriving at Wright Middle School around 10:30 am, I began one of the most surreal experiences I have been through in my entire life. It started with waiting in a line of approximately 30 to 40 people to enter the facility. Each individual had to empty their pockets, walk through an airport type metal detector, and have an officer use a wand as a secondary check. After these security checks were complete, we entered what was formerly the gymnasium to find it transformed into an auditorium type facility fit for the President of the United States.

The gymnasium became the home for approximately 850 people from 11:00 am until the President arrived for his public speech at 1:30 pm. It is unknown to many, but the President of the United States actually arrived at Wright Middle School at approximately 1:00 pm, and treated a select group of 40 students to a question and answer session.

During this session, the President, along with Arne Duncan, US Secretary of Education, had a very informal conversation with Middle School children, and created an experience they will not soon forget.

The experience of being 25 feet from the President of the United States, when he delivered an extremely important message about the future of education for our nation, was nothing short of amazing. The presence of our nation's leader while speaking held the attention of the entire crowd for the full half hour and concluded with him shaking hands with many in the crowd. As the President eventually exited stage left, it was hard not to reflect on everything that happened on November 4, 2009 and come to the realization that I just had a once in a lifetime experience.

## President's Message - WASBO Board Update

*Continued from page 3*

- Revised budget and accounting structure that should help make our financial reports easier to read.
- WASBO staffing in preparation of budgeting for the 2010-11 year. (This will be a focus of our next meeting.)
- Technology usage to help Board members stay up to date on future agenda items and prepare for future meetings.
- Legislative forum format planned as part of the February Board meeting.
- Negotiation partnering with WASB and WASDA
- Committee and Goal Action Team updates

As always, if you have ideas or concerns with anything that the Board is working on, please feel free to share them with me at [klucius@ashwaubnenon.k12.wi.us](mailto:klucius@ashwaubnenon.k12.wi.us).

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Brian Brewer

# The American Recovery and Reinvestment Act Borrowing Programs

## Market Update: Program Utilization Year-To-Date

By Brian C. Brewer, Robert W. Baird & Co.

The American Recovery and Reinvestment Act (ARRA) has

provided several new advantageous financing options for Wisconsin school districts. Borrowing at interest rates as low as 0 - 1.50%, or utilizing a 35% direct interest payment subsidy will enable districts to move forward with necessary capital improvements at a dramatically lower cost to taxpayers. Determining the best financing program for your school district depends on the useful life of the project you wish to complete and the overall financing plan.

### Build America Bonds

Build America Bonds (BABs) provide a 35% direct interest payment subsidy to school districts that borrow through taxable municipal bonds. Since the program began, more than \$47 billion of BABs have been issued nationally with over \$550 million in Wisconsin, \$50 million of BABs have been issued by Wisconsin school districts.

Issuers of BABs are eligible to request direct payments from the federal government in an amount equal to 35% of the interest payment. Money borrowed can only be used for capital expenditures. BABs cannot be used to refund debt – unless that debt is a temporary financing incurred after February 17, 2009.

Districts should consider using BABs if taxable municipal borrowing interest rates – less the direct payments from the federal government – provide a lower net cost than tax-exempt interest rates.

### Qualified School Construction Bonds

Qualified School Construction Bonds (QSCBs) provide school districts access to minimal or no-interest financing for capital projects in 2009 and 2010. When issuing a QSCB, the lender receives a tax credit to offset Federal taxes, effectively lowering the interest to be paid on the loan by the school district.

In 2009, Wisconsin received nearly \$171 million in QSCB Allocations for districts statewide. Over \$72 million was federally allocated to Milwaukee Public Schools and the other \$98 million was disbursed via 45 allocations to school districts through an application process conducted by the Department of Public Instruction (DPI). To date, 31 allocations have been used to sell almost \$58.3 million of QSCBs to investors.

Districts may utilize the QSCB proceeds for “qualified” projects related to new construction, repair, or rehabilitation of existing facilities and equipment or land required for the qualified capital projects.

### Qualified Zone Academy Bonds

Similar to QSCBs, Qualified Zone Academy Bonds (QZABs) provide minimal or no-interest financing to school districts. However, to meet the requirements of the QZAB program, the school district must have a facility or “academy” where 35% or more of the student population qualify for the National Free and Reduced Lunch Program. In addition, the academy must receive a 10% matching donation from a non-governmental entity.

In 2009, Wisconsin received QZAB

allocations of over \$26 million. This amount has been distributed by the DPI via 15 allocations. To date, five allocations have been used to sell almost \$7 million of QZABs to investors.

QZAB proceeds must be used for repairs or improvements to existing facilities, school curriculum or staff development. The program does not apply to new construction.

The DPI will be coordinating the application process for 2010 QSCB and QZAB allocations. Up-to-date information regarding application criteria and deadlines can be found at <http://dpi.wi.gov/recovery>.

Contact your financial advisor, bond attorney or the DPI for more information on how your school district could use these new ARRA borrowing programs.

Brian C. Brewer  
(800) 792-2473 ext 3827  
[bairdpublicfinance@rwbaird.com](mailto:bairdpublicfinance@rwbaird.com)



### SEEKING BOARD OF DIRECTOR CANDIDATES

The WASBO Nominating Committee is seeking candidates for two elected Director positions on the WASBO Board of Directors. The names of the candidates are required to be presented to the membership at the January State Education Convention. Any active WASBO member who desires to have their name placed on the ballot should contact a member of the Nominating Committee before December 31, 2009.

Sincerely,  
WASBO Nominating Committee Co-Chairs  
*Mary Ellen Van Valin*  
[maryellen\\_vanvalin@mononagrove.org](mailto:maryellen_vanvalin@mononagrove.org)  
and  
*Tom Wohlleber*  
[tomw@mcpasd.k12.wi.us](mailto:tomw@mcpasd.k12.wi.us)

Nominating Committee Members - Mike Garty (Retired), Dianne Meyer (Milton), and Bonnie Stegmann (Ashland)

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Ted Hayes

# Large Event Security Controls

By Ted Hayes, CSP, MSE, Senior Risk Manager, M3 Insurance Solutions for Business

As you know, athletic events, theatrical performances, graduation ceremonies, etc., are great

opportunities for your students to showcase their skills and for non-students to be actively involved in your school. Unfortunately large events could easily become a nightmare if a violent incident were to occur. It is critical that your school district develop controls to ensure the safety of everyone.

Your school district accepts the responsibility to control the behavior and activity of participants and spectators attending a school sponsored event. Your school district may have little control over safety/security controls of events sponsored at other schools – “away” athletic events. I strongly encourage you to contact these schools’ administrators, program coordinators, and athletic directors to ensure proper controls are in place.

With regards to controlling spectator behavior, a clear concise set of rules must be developed relating to acceptable and unacceptable behavior. Students may refrain from certain behaviors if the rules are clearly spelled out to them.

An appropriate time to instruct your students on behavioral rules is long before the event takes place. Consider these controls:

- instruct students at the beginning of the school year during an all school assembly, what types of behavior are acceptable and unacceptable. Don't forget to mention the consequences of inappropriate behavior.

- provide mailings/community announcements enforcing this message.
- have students and parents sign a copy of the “expected behavior contract” with your school.
- review how students can identify supervisors and where supervisors will be located at events.

Another critical component relates to supervision controls. Remember, there is no magical number or ratio of supervisors to spectators/students. Some pro-active supervision controls include:

- ensure the supervision is appropriate for the event-taking place. A high school football game should have high school level supervisors. Students are less likely to act up if there is a definite relationship between the students and the supervisors.
- there is no such thing as having too many supervisors.
- know what the occupancy limits are for the facilities, bleachers, etc.
- the number of supervisors needed for an event depends on a number of factors: the age/nature of the spectators, the number of spectators at the event, the size of the facility, etc.
- maintain clear walkways, aisle ways, exit doors, etc... Supervisors must be mobile, able to move freely among the spectators.
- supervisors must supervise the spectators, not watch the event.
- there is strength in numbers. Pair

up supervisors if possible.

- ensure that select supervisors have communication access to 9-1-1, police, emergency medical services, etc...
- supervise parking lots.
- encourage the police to stop by the athletic event on a periodic basis (another good reason for your school to have a police resource officer).
- ensure that select supervisors are trained in first aid/CPR.
- develop clearly defined supervisor roles and responsibilities.
- announce where supervisors are stationed.
- dress supervisors in easily identifiable attire (brightly colored windbreakers).

In conclusion, remember that acts of violence occur when students’ actions are unsupervised. Ensuring that proper effective supervisors are in place will go a long way in preventing unacceptable behavior by spectators.

*For more information on school safety and insurance programs, contact Ted Hayes at [ted.hayes@m3ins.com](mailto:ted.hayes@m3ins.com) or (715) 849-9400 (5117)*



Lynn Knight  
WASBO Director

# Director's Corner

## And the Academy Award Goes To...

By Lynn Knight, Business Manager, School District of Nekoosa

The stage is set, the audience is waiting, the lights are shining, your lines have been rehearsed and

memorized a thousand times, and you're ON! The next moment seems to last a lifetime. It's that typical "deer in headlights" look that you thought would never happen to you. But here you are and the clock is ticking slower than you ever thought possible. The people in the audience are holding their breath waiting for your first word. You could hear a pin drop. It's time for your monthly board report on the budget.

Ok, so maybe it's not that dramatic and there are only two people in the audience and one of them is yawning, but to the business manager that is responsible for a multi-million dollar budget, it sure feels that way! Once the panic subsides, instincts take over and the world's best actor/actress comes to life.

As a business manager, it's extremely important to have some sort of actor training. On a moment's notice, a range of emotions can be required, or not required. For example, a new business manager (Hank), fresh out of school, has obtained a position in a district and has inherited the responsibility of cutting a bus route for the following school year. Hank doesn't have a clue as to what the current routes are, how many or what type of students this will affect, the politics of the community, or how much money this is going to save in the subsequent budget. Oh yes, and Hank must present his proposal at the next board meeting in two weeks. Hank's superintendent has publicly stated that he/she has the utmost confidence in

Hank to get the job done.

Hank gathers the information and is completely prepared for the board meeting (or so he thinks). The board room begins to fill up with the community. The district brings in more chairs and it is standing room only. Hank begins to feel uneasy and his inner voice is questioning his information. Sweat begins to form on his upper lip and his mouth has suddenly become as dry as a desert. Hank is rehearsing his presentation to himself when he suddenly realizes that all eyes are on him. He's on. Hank strolls to the podium, takes a deep breath, and begins revealing his plan with an air of confidence. Hank appears calm as angry parents hurl their comments and questions. Hank nods his head in understanding and answers their questions in a quiet voice. That's Hank on the outside. Inside, Hank's stomach is rolling to the tune of "Rock Around the Clock". His legs are shaking and he's wondering why he ever took this job.

With constant budget cuts, reduced state aid, and declining enrollments, business managers are faced with a dilemma. A good part of their job is to look at the numbers and try not to put faces or names to the cuts that must be made. They appear cold hearted and full of factual information. What their co-workers and community don't see is that the recommended budget cuts are heart wrenching. Business managers are aware that cutting a position is a life altering event that will have a domino effect on their family and the community.

As much as acting is an asset in the business manager role, when is it a liability? Let's face it; business managers are human and have a

tendency to voice their opinions, even if it's not the most popular opinion. Depending on the environment, this can either gain the business manager respect or put him/her on an island. It can be a very gray area that each business manager must personally address.

When I was a little girl I dreamed of becoming an actress on the big screen. I could cry at a moment's notice, laugh at the drop of dime, show anger in a heartbeat, and display indifference without fail. I imagined that one day I would accept the Academy Award for Best Actress and thank my family and friends for all of their support. I may not have achieved that dream, but I am a School Business Manager and I do laugh, cry, get angry, and show indifference when necessary. So in closing, "I'd like thank the Academy for this wonderful award. I'd also like to thank my family and friends for their unending support through my journey of becoming a School Business Manager."

***"I stopped believing in Santa Claus when I was six. Mother took me to see him in a department store and he asked for my autograph."***

***Shirley Temple***



Larry Dalton  
WASBO Director

# Director's Corner

## Viterbo University "08" Certification Program

Larry Dalton, Director of Finance, School District of Onalaska

Recently, Jay Clark (Associate District Administrator, School District of Holmen) and I were asked by Viterbo University's Jim Bagniewski and Bernie Ferry to collaborate with them in formulating coursework for a graduate program leading to school business management (08) certification. (Jay is a graduate of the UW-Whitewater program, and I graduated from the UW-Superior program.) The process was both challenging and interesting, and it resulted in Viterbo joining the list of approved school business management programs which, according to Judy Peppard of the Wisconsin Department of Public Instruction, is as follows:

### Traditional Programs

- UW-Madison
- UW-Milwaukee
- UW-Superior
- UW-Whitewater
- Concordia University
- Edgewood College
- Marion University
- Silver Lake College
- Viterbo University

### Alternative Route Programs

- WiscAd (Norda, Inc.)

Our work was to help design the framework for each of the courses to:

- Cover the ASBO standards.
- Reflect real-world school business management tasks.
- Fit the logistics of the Viterbo course delivery structure.
- Form the foundation of a high quality program.

We started with a list of business manager tasks and put them on a

spreadsheet. (no surprise – the list ran to five pages). We then divided the tasks into broad categories, and within those categories grouped tasks into "topics". We then assigned an indexing system to each of the ASBO standards and listed the appropriate standard for each of the tasks.

The Viterbo master's program requires 36 credits, 24 of which (8 – 3-credit classes) would address the ASBO standards, and 12 of which are a common element in all Viterbo master's degrees. Given this framework, the list of categories, topics, and tasks needed to be transformed into 8 classes. The classes basically followed the categories we had assigned, although the category we called Financial Resource Management ended up taking two classes.

The skeleton of each of the classes is a series of 3 to 5 broad questions, through which the student demonstrates mastery of identified key concepts (which relate back to ASBO standards and real-world tasks). Once the content of the classes had been determined, the questions were composed.

The application Viterbo filed with Department of Public Instruction addressed: policies and practices, conceptual framework and standards, assessment system, clinical program, institutional evaluation of outcomes, and collaboration of the university.

The Viterbo course delivery is designed to be compatible with full-time employment. A 3-credit class during the typical school year would meet on three non-consecutive weekends, Fridays 5:00 – 10:00 p.m. and Saturdays 8:00 a.m. – 5:00 p.m. Summer courses would be offered 8:00 a.m. to 5:00 p.m.

for one five-day week. Classes will be aligned so that the program could be finished in two years. Instructors in the classes with specific school business management content would be drawn from experienced school business management practitioners.

A number of the classes will blend online instruction with on-site classes. We discussed the merits of a purely online versus a blended online/on-site delivery. I went into the discussion favoring a purely online format for the convenience of the students – for scheduling flexibility and "windshield time" avoidance. However, our discussions convinced me that the face-to-face component could be crucial in an instructor's ability to truly evaluate a student's readiness to step into a school business manager position.

The opportunity to deconstruct what we school business officials do and try to pack it into handy bundles was a fascinating exercise. My best wishes and highest regards to all of you whose job it is to prepare people to be school business professionals.

***"And the Grinch, with his Grinch-feet ice cold in the snow, stood puzzling and puzzling, how could it be so? It came without ribbons. It came without out tags. It came without packages, boxes or bags. And he puzzled and puzzled til his puzzler was sore. Then the Grinch, the Grinch thought of something he hadn't before. What if Christmas, he thought, doesn't come from a store? What if Christmas, perhaps, means a little bit more."***

**Dr. Seuss**

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# BOOK REVIEW

## The Truth About Managing People and Nothing But the Truth *Stephen P. Robbins, Author*

Review by Orvin R. Clark, EdD, RSBA

Dr. Robbins is professor emeritus of management at San Diego State University.

He is the world's best-selling textbook author in the areas of both management and organizational behavior. His books are used at more than a thousand US colleges and universities and have been translated into 19 languages.

The Truth About Managing People and Nothing But The Truth is 197 pages in length and divided into ten parts (chapters) and over 60 principles. The premiere writer of management textbooks has sifted through the research to extract the truths every manager should know. This book is an antidote for the unsupported opinions handed out in many popular management books. The Truth About Managing People and Nothing But The Truth offers real solutions for the make-or-break problems faced by every manager. You'll discover: how to overcome the true obstacles to teamwork; why too much communication can be as dangerous as too little; how to improve your hiring and employee evaluations; how to heal "layoff survivor sickness"; even how to learn charisma. This isn't someone's opinion; it's a definitive evidence-based guide to effective management and a set of principles you can rely on throughout your management career. Consider the following selected truths:

- Forget Traits, It's Behavior That Counts - The best predictor of a person's future behavior is his or her past behavior.
- Good Citizenship Counts - Employees who exhibit good citizenship behaviors outperform those who don't.
- Brains Matter, Or When In Doubt, Hire Smart People - Smarter employees, on average, are more proficient employees.
- Don't Count Too Much On Reference Checks - Personal references are easy to acquire but they're essentially worthless.
- Workforce Generations and Values - Individuals' values differ, but tend to reflect societal values of the period in which they grew up.
- Telling Employees to "Do Your Best" Isn't Likely to Achieve Their Best - Specific hard goals produce higher level of output than does the generalized goal of "do your best."
- Watch Out For Cyberloafing - the average US employee with Internet access is spending 90 minutes a day visiting web sites unrelated to his or her job.
- When Giving Feedback Criticize Behaviors, Not People - Successful feedback focuses on specific behavior and is impersonal.
- Recognition Motivates (And It Costs Very Little!) - The most powerful workplace motivator? Recognition, recognition and more recognition!
- The Essence Of Leadership Is Trust - It's impossible to lead people who don't trust you.
- Experience Counts! Wrong! - Too often 20 years of experience is nothing other than one year of experience repeated 20 times!
- Make Others Dependent On You - You don't have to be a manager or have formal authority to have power.
- There's No Ideal Leadership Style - Your job as a leader is to compensate for things lacking in your employee or the work setting.
- Hearing Isn't Listening - Hearing is merely picking up sound vibrations. Listening is making sense out of what we hear.
- Men and Women Communicate Differently - Men tend to use talk to emphasize status, while women generally use it to create connection.
- Poor Communication Isn't The Source Of Most Conflicts - The notion that "we can resolve our differences if we just communicate more" is not necessarily true.
- Beware Of Groupthink - In groupthink, if someone doesn't speak, it's assumed that he or she sides with the majority view.
- Not Everyone Wants A Challenging Job - For many people, work is something that will never excite or challenge them.
- Annual Reviews: the Best Surprise Is NO Surprise! - Managers are often uncomfortable discussing performance weaknesses directly with employees.
- You Can Teach An Old Dog New Tricks - Older workers want to learn and are just as capable as any other employee group.
- Beware Of The Quick Fix - No single new idea can make a mediocre manager excellent or lead to turning around a poorly managed company.

*Continued on page 15*

# 8 Tips for Planning and Executing Successful School Tax Elections

By: Don E. Lifo, Ph.D., and J. Bradford Senden, Ph.D.

Planning and executing successful school tax elections is one of the most multifaceted, daunting and high-stakes leadership challenges faced by school administrators. Not only are school leaders confronted with the increasingly vilified “T” word (taxes), but there are also myriad of complex moving parts all within the byzantine reality of local and state politics.

While fully understanding the danger of oversimplifying the task, after working on hundreds of school tax elections over the last 25 years, we offer the following tips for planning and executing your next operating or facility referendum.

1. Start planning early. While one could argue that school leaders should always be working on their next tax election, we recommend that planning begin in earnest no less than 12 and preferably 18 months before Election Day. And remember a plan is not a plan unless it is comprehensive and put to writing.
2. Prepare an annotated voter file. The registered voter file, electronically annotated with other key databases, (e.g., parents of school-aged children, past supporters, pre-school families) is your most important campaign resource and a prerequisite for effective communications, canvassing and GOTV activities.
3. Complete a post-election analysis. Understanding the demographics of past voting behavior of parents and other registered voters is a vital step in planning your next school tax election. The PEA includes analyses of past voting patterns by such demographic variables as parent status, gender, age, geography and voting frequency over time.
4. Complete a scientific, random – sample survey. The methodology we recommend draws a random sample from the annotated database of registered voters. The randomization is controlled to ensure that the composition of the sample mirrors the demographic characteristics of the school district as a whole (i.e., if parents represent 25 percent of all registered voters, no more than 25 percent of the random calls go to parents). In addition to collecting qualitative feedback about the district, the survey helps the school board align the ballot proposal with the community's priorities and willingness to pay.
5. Develop or update a community engagement plan using the results of the scientific, random sample survey. Community engagement planning is a good example of why we started our list of eight tips with the admonition to start early. If the survey findings indicate that only 40 percent of registered voters support building a new elementary school, the district needs time to plan and engage in order to turn what often is a big ship in a more positive direction before Election Day.
6. Start early cultivating key community members for leadership roles in campaign. If you are old enough to remember the movie *The Dirty Dozen* or the reference to *The Dream Team* from the 1992 Olympics, you will appreciate this tip. Your chances of winning are greatly enhanced if your campaign is launched from a foundation of strength in terms community – based leadership and adequate human resources for the challenging task at hand.
7. Roles and responsibilities. Take the time to develop and clearly communicate appropriate roles for the school board, administrative staff, faculty and staff and community leadership. Inherent to clarity on roles and responsibilities is delineation on how the campaign will be managed and who will make key decisions as the process unfolds.
8. Excel at the “Big Three” –communications, canvassing and GOTV. The professional literature is replete with research and best practices relevant to both partisan and issue – based referenda. These studies emphasize the vital nature and relationship to success of communications, canvassing and GOTV.

The negative consequences of unsuccessful operating and facility referenda impact students, staff and the community as a whole. Failed elections can also take a significant toll on the leadership roles of school administrators. While religiously implementing our eight tips will not guarantee a winning referendum, being a student of research and successful practices will significantly improve your odds of success on Election Day. “Good intentions, hard work, and resources are important, but they are wasted if they are not being funneled toward strategies that actually produce votes.”

*Continued on page 15*

## 8 Tips for Planning and Executing Successful School Tax Elections

Continued from page 14

(Yale Civic Engagement Website)

Learn More

For more on this topic, read *School Finance Elections: A Comprehensive Planning Model for Successful School Bond Referenda*, co-published by AASA and Rowman & Littlefield Education in Fall 2009. Advance orders now accepted -- to receive your 20% AASA member discount, enter promotion code AASA20 at checkout.

About the Authors

*Don E. Lifto, Ph.D., is senior vice president and director with Springsted Incorporated, a St. Paul – based independent financial advisory and consulting firm. He previously served as a public school superintendent, consults with school districts on election planning and is a frequent presenter and contributing writer for AASA, NSBA and ASBO. He can be reached at [dlifto@springsted.com](mailto:dlifto@springsted.com).*

*J. Bradford Senden, Ph.D., is managing partner for the Center for Community*

*Opinion based in San Ramon California. He designs, administers and interprets scientific, random – sample polls for school districts, cities, and colleges and has served as a consultant for hundreds of school tax elections in California and across the country. He can be reached at [brad@communityopinion.com](mailto:brad@communityopinion.com).*

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## Book Review - The Truth About Managing People and Nothing But the Truth

Continued from page 13

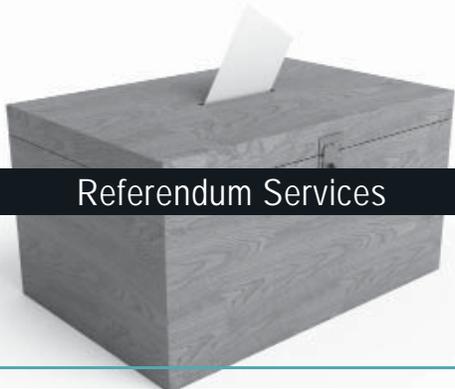
Dr. Robbins has delivered specific techniques and tactics for hiring, motivation, leadership, communications, team-building, managing change, performance evaluation, handling conflicts and more in "The Truth About Managing People and Nothing But

The Truth" that can transform how you manage people and achieve positive results. Is it a book that you should read?---YES!

*"Leadership is the art of getting someone else to do something you want done because he wants to do it."*

*Dwight Eisenhower*

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# Member Spotlight

## Steve Reinke



WASBO members know Steve Reinke as the 2009 Facilities Manager of the Year. However, did you know he is also Safety Stevie at Clintonville Public Schools? You will have to wait to learn more about Safety Stevie.

Steve Reinke has worked with Clintonville Public Schools for 26 years, fourteen of them as the Building and Grounds Supervisor. He started his career in Oshkosh where he worked with Oshkosh by Gosh for several years. In 1983, he applied for a position with Clintonville Public Schools. The Building and Grounds Supervisor hired Steve. Steve noted that he was born and raised in Clintonville and wanted to come back home to friends and family. Twelve years later that same Buildings and Grounds Supervisor retired and recommended Steve to the School Board to replace him. The School Board agreed whole-heartedly.

Steve noted that Clintonville Public Schools' citizens and employees have been great to him and his family. He enjoys that the school district is concerned and committed to community, family and friends. Clintonville has approximately 1400 children with one high school, one middle school, one elementary school and an Early Learning Center.

His proudest accomplishment at Clintonville Public Schools was to participate in the community process that led to a new high school. Originally, District leaders wanted to address the need for more gym space for Clintonville citizens and children. It was seen as a community need for the city's park and recreation program as well as a school need. A large community committee looked at all the space issues. The ensuing conversations developed into

a long-range plan for the community. Community members on the committee represented the city and all townships in the school district. They discussed all the needs, and in the end, designed a new high school. The community passed the referendum with a favorable 73% vote. Steve Reinke and Jenny Goldsmith then led the District through the construction phase. Steve is most proud of "how this new facility serves the citizens and children".

Steve is quick to note that this accomplishment is not the part of his life of which he is proudest. Steve's family, wife and children are most important in Steve's life. Steve and Holly have four children. The oldest is Sussanah who is a music teacher at Deforest middle school. Stephen, Stacy and Sarah are school age. The Reinkes live on a hobby farm, caring for a milk cow, a pig, two steers and two horses. Steve and Holly enjoy a close family life, home schooling their children, living a simple life, close to nature. Steve enjoys hunting duck, partridge, and deer (gun and bow). He also enjoys fishing. His favorite fish to cook and eat are blue gills and his favorite sport fish is trout. He loves to fly fish, enjoying the intricacies of reacting to the situation at hand. He ties his own flies. He also taught his son the art. Steve, in his usual modest style, says, "His son is better at tying flies".

Steve is deeply involved in his community. He is active in his church as a deacon and church treasurer. He is also a Sunday school teacher and is the church's song leader. Steve has been umpiring WIAA baseball and basketball for over 30 years. He is a member of the community trail committee, building a new walking trail for community

members. In addition, he has been involved in the community football stadium committee, helping to provide another new facility for community members.



Steve's indulgence is to compete in sports such as the community baseball and basketball leagues. He loves the competition and enjoys staying in shape. Steve commented, "That it is fun to compete with people half my age and be able to be competitive in games throughout the season."

When Steve was asked what he would do if money were no object, he replied, "He would get rid of it". "Possessions can be problematic and money can be the root of all evil, if one allows it. People should desire to work together instead of accumulating objects." Steve would give his money away "so we all have the same opportunities in our community".

Steve lives his life by the motto that "to be a good leader, one must be a good servant". "I work for the community and the people around me," said Steve. "I am no better than the lowest person on the totem pole."

And who is this Safety Stevie? Steve explains, "This is totally out of character for him because he is quiet and not a person who is joking or acting out". Clintonville Public Schools needed

*Continued on page 17*



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### Member Spotlight - Steve Reinke

*Continued from page 16*

to reduce its workers compensation rating. Steve wanted to deal with employees' safety and well-being as well as addressing monetary concerns. Steve organized a safety committee to address the issue. However, he also had a concern that this issue be addressed in a way where people would listen and not be turned off. Steve hit upon the idea of becoming a cartoon character, fashioned after the movie Nacho Libre, with a serious message, delivered lightly in cartoon character attire. Safety Stevie was born. Stevie Safety came on stage as the highlight in front of the full employee "start of school" session to deliver the initial safety message. Since then, the Clintonville Public School's IT Director and Steve have developed a coloring book for younger students. Students and staff remember the lessons Safety Stevie delivers when he makes his regular visits to the

classrooms. Colored pictures from the coloring book cover a wall in the High School Library. Teachers come up to Steve and point out "they are now using ladders instead of climbing up on chairs". Students comment to Steve "how they have made their homes safer places to live". Beneath the cartoon costume, Safety Stevie is a servant leader. Remember, one of the quotes from Nacho Libre is "...beneath the clothes, we find a man... and beneath the man we find his...nucleus". Steve Reinke, the WASBO 2009 Facilities Director, is also Clintonville's "hometown hero".



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# Legislative Update

## Why Your "Investment in Influence" Is So Important

By John Forester, Director of Government Relations, School Administrators Alliance



John Forester  
SAA Director of  
Government Relations

In 2003, the SAA Legislative Committee created **SAA PAC**, which is supported by members of all four SAA member associations, to strengthen the identity of the SAA and to improve the management of our combined political activities. **SAADirect**, the SAA's conduit, was formed in 2006 to provide SAA members with another opportunity for political involvement. The SAA Legislative Committee believes that **SAA PAC** and **SAADirect** are vitally important to our objective of establishing a comprehensive giving program designed to strengthen our relationships with lawmakers and influence legislation. Here are answers to some frequently asked questions about **SAA PAC** and **SAADirect**.

### What is SAA PAC?

**SAA PAC** is the SAA's political action committee (PAC). A PAC is any political committee consisting of at least two individuals, other than a candidate committee or a political party committee, which receives contributions, distributes funds, or incurs obligations for the purpose of influencing the election or defeat of candidates to state or local office. **SAA PAC** funds are used for campaign contributions designed to help reelect "friends of public education," strengthen our relationships with key legislators and, ultimately, to influence legislation. **SAA PAC** is a registered political action committee in Wisconsin.

### What is SAADirect?

**SAADirect** is the SAA's conduit. A conduit is an organization that receives

money from individuals, deposits it in a financial institution, and then transfers contributions to a candidate or campaign committee at the request of the original contributor. Conduits can be thought of as "political savings accounts" held by individuals but administered by the association. **SAADirect** has the same purpose as that of **SAA PAC**.

### How do conduit and PAC contributions differ?

Conduit contributions differ from political action committee (PAC) contributions in that they are considered by the Elections Board to be individual contributions and reported that way on candidates' campaign finance reports. Therefore, they are not subject to the same limitations as PAC contributions. However, the check to the candidate or committee is made out in the aggregate and the association gets "credit" along with the individual contributors in the transmittal letter that accompanies the check. A good example would be a \$500 check to candidate A from the association's conduit that is comprised of 10 individual contributions of \$50 each. Each contributor would be listed in the transmittal letter and candidates would report them as \$50 individual contributions on their finance reports. A key element of the conduit is that each participant retains the absolute right to decide when and where their contributions are distributed. The SAA, the administering body of our conduit, will follow political events and make suggestions as to where contributions would be most beneficial, but the ultimate decision rests solely with each conduit participant.

### Why does the SAA need a PAC and a conduit?

Conduits are such an important complement to PACs because many of the candidates that we wish to support for reelection reach their PAC limit very early in an election cycle. Therefore, the only way that we can hope to strengthen our relationship with these "PAC'd out" candidates is via individual or conduit contributions. Unfortunately, the SAA receives no "credit" for individual contributions sent directly to the candidate.

### How are SAA PAC and SAADirect funds distributed?

The SAA Director of Government Relations develops a PAC contribution plan that conforms to the following **SAA PAC** contribution guidelines. This plan is subject to the approval of the SAA Steering Committee, which serves as the governing body of **SAA PAC**. It is also reviewed by the SAA Legislative Committee. The SAA will make suggestions (generally conforming to the guidelines listed below) as to where **SAADirect** contributions would be most beneficial, but the ultimate decision rests solely with each conduit participant. The distribution of **SAA PAC** campaign contributions is limited to:

- Each of the four legislative campaign committees controlled by leadership (i.e., Committee to Elect a Republican Senate) in equal amounts.
- Incumbent legislators.
- Legislators with a proven record of support for public education and SAA positions on issues.
- Key legislators in positions of power.

*Continued on page 19*

# Safety First: Playground Maintenance Protects More Than Kids

Playgrounds are little more than swing sets and monkey bars to children. However, adults responsible for playground upkeep know otherwise. Ask any M&O professional about the most important aspect of playground maintenance, and the answer will always correctly be child safety. However, insuring the safety of the school district from lawsuits

should not be underestimated. Playground accidents are the number one reason for legal action in public K-12 schools. Good school districts follow inspection routines and fix problems to reduce the chance of injury. Great school districts, however, implement automated maintenance reminders, keep documentation, and maintain evidence to support the completion of procedures and inspections. While regular inspections are a good practice, a department's potential liability is greatly reduced with thorough documentation.



and preventive maintenance tasks. Documentation of timely upkeep is available in report format, which could prove useful if injuries occur and legal action is taken. The bottom line is that operations managers are responsible for maintaining their playgrounds. Implementing best practices and processes, identifying preventive maintenance activities, making timely repairs and documenting all tasks is key to taking on this responsibility.

## Resources:

Go to <http://pages.schooldude.com/playground> to receive a complimentary playground safety and inspection checklist or view the entire Playground Safety webcast hosted by K-12Masters, featuring the National Recreation & Parks Association, or contact Erin Tucker at 1-877-868-3833.

To maintain proper documentation, many districts are using SchoolDude's MaintenanceDirect and PMDirect work order and preventive maintenance management systems. This on-demand software allows M&O professionals to create, assign and manage work orders

## SAA Legislative Update

Continued from page 18

- Members of the Joint Committee on Finance.
- Selected members of the Senate and Assembly education committees.

No. (Sorry, but it's the law.)

### How do I contribute?

To open an **SAADirect** account, or to support the **SAA PAC**, please fill out the contribution form and return it, along with your check(s), to **SAADirect** and/or SAA PAC, 4797 Hayes Road, Madison, WI 53704. Call the SAA at 608-242-1370 if you have any questions.

Note: Contributions to both **SAADirect** and **SAA PAC** must be made with separate checks. Thank you!

### Should I participate in SAA PAC or SAADirect?

PACs and conduits each have their distinct advantages, so you should participate in both programs if possible. Many restrictions that apply to PACs do not apply to conduits. The SAA intends to use both programs to maximize SAA political influence. If you wish to "direct" where your contribution goes, and you don't mind being listed as a contributor on that candidate's campaign finance report, you may wish to support **SAADirect**. If you wish to remain more anonymous in your support of the candidates the SAA chooses to support, you may prefer **SAA PAC**.

### Are political contributions tax deductible?

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# WASBO "Gets Focused" at ASBO's Annual Meeting in Chicago

WASBO blew into the Windy City with a Wisconsin Welcome for our WASBO attendees at this year's ASBO Annual Meeting in Chicago. This conference orientation, sponsored by Wisconsin CLASS, ING, McKinstry and Standard & Poor's, provided a chance for our attendees to connect with their fellow WASBO members.

Attendees at the conference had an opportunity to hear Tim Sanders, the opening keynote speaker, discuss the reasons for working to create a sustainable world at work. Some of the compelling reasons to take steps toward sustainability and leaving a smaller footprint included saving money, improving academic performance, reducing risk, and retaining top talent. Mr. Sanders left the audience with these questions, "If not you, then who? If not now, in this time, then when?"

On Sunday, the general session offered a Town Hall Meeting on the topic of the shared responsibility of making the education stimulus work. U.S. Deputy Secretary of Education Tony Miller provided opening remarks and candid responses to audience questions about the funding cliff when stimulus dollars run out, reporting challenges and what may be in the future for additional funding. If we learned anything here it is that Wisconsin is not alone and we are probably in better shape than other parts of the country. It was stressed by all participants that this is a one-time chance in history to impact the future of education.

Monday's keynote was Tierney Cahill, a teacher from Nevada who

ran for Congress as a project for her sixth grade class. Her students did



WASBO's Erin Green is sworn in as President of the 2010 ASBO International Board of Directors. She is accompanied by Vice President Charles Linderman of Pennsylvania and Past President Angela Peterman of Oregon.

not believe that someone without a lot of money could run for office. She garnered 34% of the vote as a Democrat in the very Republican state, with \$7,000 and her students as her campaign staff. This lesson in the political process provided her students with invaluable first-hand instruction on the importance of democracy and the impact of every voice through participating and voting.

In addition to the option to attend 3 keynote sessions, WASBO members attended a variety of sessions in the areas of facility management, human resource management, financial resource management, educational enterprise, property acquisition and management, information management, ancillary services, leadership development, social responsibility/green and yes, economic recovery/stimulus. Not only did our members attend sessions, several sessions were presented by your professional colleagues and WASBO Service Affiliate Members. Wisconsin presenters included Roger Dickson, Erin Green, Spiro Hountalas, Abie Khatchadourian, Bob Simi, Bambi

Statz, and Jodi Traas. When not in sessions, there was an opportunity to visit the exhibit hall, check out the ASBO bookstore, and network.

WASBO members participated in the conference in a variety of ways beyond presentations. Bambi Statz is chairing the ASBO Certification Commission. Janice DeMeuse participated in the Certificate of Excellence Advisory Committee and Reviewers Meeting. First-time attendee Pauline Borgen joined the ASBO Choir which performed at the first general session.



Bambi Statz of UW-Whitewater is pictured second from the left. She is the Chair of the newly created ASBO Certification Commission.



Janice DeMeuse (far right) participates of the Certificate of Excellence Committee.



Pauline Borgen from the Marinette School District (pictured in red) joined the ASBO Choir seen here performing a medley of Chicago music at the first general session.

The most notable WASBO participant at the ASBO Annual Meeting was Erin Green as she presided over the third general session as ASBO Vice

*Continued on page 22*



Erin Green  
President  
ASBO International

# ASBO Update

## President's Message

By Erin Green, Director of Business Services, Greendale School District

As 2010 dawns and we attempt to guess at what the year holds for K12 education in our country or province, I welcome you to ASBO's 100th

year! .. That's right, that was the year that our forefathers (well, it was pretty much all men at that point) saw the need for collaboration to advance the profession. It is hard to wrap our heads around 100 years of school business management, much less the changes in our workplaces and schools that have continued to support imperfect, yet workable democracies around the world. We've moved from rural, agrarian economies and lifestyles, to one where 99% of all Americans live within 15 miles of a Walmart. Populations have clustered around larger cities in most countries, and we've transitioned from agrarian lifestyles to the industrial age, to the technology/information age. We now live in what is begin called "design economies".

The way it looks from here, we may be at another important "breakpoint" in K-12 education at this moment. The model of education developed in the 1950's, where 30 students sit compliantly in a classroom and listen to lectures, preparing them to work compliantly in a Fortune 500 company cubicle are probably over. It may be time to jettison that model, and realize that the jobs of today require a different model of preparation. Instead, it seems the jobs today are ever increasingly tied to global activity, come from small start up companies, and require cultural competence on the part of workers. They likely will require innovation and creativity, problem solving skills,

relationship skills, application of knowledge and working with colleagues who may live around the world. What does this mean to K-12 education and to our profession?

- It is clear that our communities and school districts are looking to us to help guide them through this transition and transformational period. They need our steady and sound leadership to make this happen. They are fearful of change, yet realize change is needed.
- Clearly all of the countries involved with ASBO are suffering the effects of the global economic meltdown, and resources for K-12 education are dwindling faster than ever.
- Schools will have to find a way to make K-12 education relevant and meaningful, and continue improving student achievement with fewer resources.
- School administrations and state and provincial governments will have to have real conversations with education unions confronting the brutal realities of wage and benefit moderation, since in many regions, the wages and benefits bargained by strong unions now far outstrip most workers in other sectors and are not sustainable.
- It is time to start meaningful collaboration with the business sectors, as business pays substantial taxes towards operation of our schools, yet is not treated like a stakeholder. As K-12 education is preparing the workers that business receives, it is time to invite their input into our curricula.
- It is time to start aligning our

curricula with the needs of today's workforce. The game has changed radically over the past 20 years. Much of the United States' and Canada's manufacturing is moving overseas. The US economy is mired in debt. Developing countries like Poland, India, China, Brazil, Eastern Europe, and Southeast Asia, produce far more highly skilled workers who will work for much less than their US and Canadian counterparts.

- Our students need to be educated in "cultural competence." The ability to understand economies, politics, religions, geographies, and cultures of key countries is necessary to be successful in the job market today and tomorrow.

Clearly, we are at a crossroads where trust in government is low and the stakes are high. At the recent ASBO Annual Meeting leadership was defined as "the fine line between defining reality and giving hope".

How will we navigate all this? ASBO and WASBO are great starts. ASBO is gearing up to realize one of our most important goals of recent years. The creation of the ASBO International credential for school business management will signify competence and lower risk for school districts. This certification will demonstrate professionalism throughout the world. Wisconsin stands tall in regard to having highly competent and well trained business officials. This is due to our excellent school business management Masters Degree programs at several universities and mentorship through WASBO. ASBO and WASBO provide professional conferences to develop

*Continued on page 22*

*Continued from page 21*

your leadership skills and the tools you need for your diverse jobs.

I have been around the US and Canada and WASBO offers some of the most comprehensive professional development around. I know of few affiliates offering a certification program in Facilities Management. The depth and number of offerings provided by WASBO throughout the year on so many topics is unmatched.

As we transform ourselves from being "managers" to "leaders" in our districts, ASBO and WASBO will stand by you and be your "network of support". I urge each one of you to get involved in some way in ASBO and/or WASBO this coming year. This could be on a committee, helping to plan a conference, writing an article, giving a presentation, or leading your regional group. There are many ways to lend a hand and learn in the process.

In these brutal economic times, this is a time to be creative, collaborate with each other, and be excited about the future with all of its changes.

What is your best creative idea that you have tried recently and how is it working? Email me at: erin.green@greendale.k12.wi.us and let me know. Here is mine: I have expanded an on-site health clinic staffed with a nurse practitioner to serve staff and students. Many children have been left uninsured due to job or cut backs in insurance coverage. This was a way to care for them as the flu season was imminent. Thus far over 250 families have signed on to receive services, at no cost to them. They can bring their children to the clinic, receive diagnosis, receive scripts, and have chronic diseases monitored. This also provides an opportunity to work on student wellness goals with our nurse. Working parents are grateful, and staff enjoys the quick

turnaround of these on-site services. The cost is minimal compared to the cost of health insurance or a \$150 doctor visit. It is a win-win as health care costs are reduced and productivity increased, and families in need are served.

I hope to hear from you!

PS: As of this writing there are still spots open for the ASBO Executive Leadership Forum at the Disney Institute. We will have outstanding programming including Tim Waters from McRel on "School Business Management That Works" and Leonard Greenberger on "Communicating When Concern is High and Trust is Low". Come ramp up your leadership skills February 4-6, 2010!

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## **ASBO Update**

*Continued from page 20*

President. It was at this meeting that Angie Peterman, ASBO President, passed the gavel to Erin. Now begins Erin's year as President of ASBO International. She represented us at this annual meeting with professionalism and pride in her WASBO colleagues.

As you budget for professional development for 2010-11, please consider designating funds to attend the ASBO Annual Meeting & Exhibits at the Disney Institute on September 24-27, 2010. We have all worked hard to put Wisconsin on the national map by electing Erin Green as Vice President and this is the year Erin will represent us as President of ASBO International. To make the occasion even more impressive, Erin will be President in

ASBO's 100<sup>th</sup> year! Let's continue to support Erin and invest in our professionalism with a strong Wisconsin presence at this conference.

ASBO members who attended the ASBO Annual Meeting in Chicago, October 24-26<sup>th</sup>.

- Patrick Blackaller (Rice Lake)
- Pauline Borgen (Marinette)
- Wendy Brockert (Lake Mills)
- Jeff Dellutri (Nicolet Union HSD)
- Janice DeMeuse (Luxemburg-Casco)
- Roger Dickson
- Chris Dupre (Edgerton)
- Tim Erickson (Hudson)
- Patrick Finnemore (Kenosha)
- Erin Green (Greendale)
- Joel Green

- Lisa Lau (Chilton)
- Keith Lucius (Ashwaubenon)
- Kathy Maedke (Cambridge)
- Jim Milzer (Franklin)
- Jeff Mueller (student)
- Diane Pertzborn (DeForest)
- Roger Price (Madison Area Technical College)
- Shelley Retzlaff (Greendale)
- Keith Rogers (Milwaukee Academy of Science)
- Andy Sarnow (Beaver Dam)
- Sue Schnorr (Fond du Lac)
- Bambi Statz (UW -Whitewater)
- Bill Trewyn (Elkhorn)
- Chad Trowbridge (Chippewa Falls)
- Mark Worthing (Edgerton)
- Betty Zimdars (Howard-Suamico)
- Brent Zimmerman (Mosinee)



Lisa Voisin

# School District Consolidation Takes a Team Effort

By Lisa Voisin, Robert W. Baird & Co.

As funding issues grow for many school districts, some are facing a change they never before considered:

consolidation. While it can be an arduous task requiring intense research and planning, consolidation can be a success if you use a team approach, take the right steps and use the right tools to make it happen.

## Weyerhaeuser-Chetek Consolidation

Weyerhaeuser School District and its neighbor in northwestern Wisconsin, the School District of Chetek, passed the state's third consolidation referendum since 1998 when their communities voted in favor of the change on Nov. 3. When the districts become one on July 1, 2010, the consolidation will be a result of several years of research and meetings.

To make ends meet, Weyerhaeuser had a non-recurring referendum in place to exceed the revenue limit. That referendum was set to expire during the 2010-11 school year, leaving the district unable to pay its bills. Meanwhile, Chetek faced the possibility of absorbing Weyerhaeuser's students without sufficient funding for the additional students.

Officials from both districts knew the only answer was consolidation. With their school boards/committees meeting more than 25 times to discuss the subject, together they created a plan that made the consolidation not only possible but also financially feasible. Voters in their communities responded, showing more than 76% support for the change.

## What to Consider

Districts considering consolidation must fully evaluate the benefits and concerns of the change. Weyerhaeuser and Chetek asked Baird for a fiscal feasibility study. The study's main purpose was to outline two important factors: tax impact for each community as a result of the consolidation, and fiscal sustainability of the consolidated district.

Subsequent scenarios enhanced the study so the districts could interactively analyze different options as questions arose throughout the process. In this case, the tax impact – evaluated by analyzing the mill rates of each district – resulted in a consolidated district's mill rate in the middle of the two, which is typical for most studies. The study also included consolidation incentive aid received for five years outside of the revenue limit. It was determined that this incentive aid could be used to lower the debt levy, resulting in a lower consolidated mill rate. This aid for Weyerhaeuser-Chetek is estimated to be over \$11 million over the five years.

Weyerhaeuser and Chetek school districts then evaluated the fiscal sustainability of the combined district. All Wisconsin school districts will most likely face a structural deficit at some point in their future. Consolidation can extend that deficit into the future,

preventing a near-term referendum or additional cuts. The study, with Baird's advice, determined that a consolidation could push any deficit farther into the future – and possibly avoid it if the funding formula changes.

As this success story demonstrates, utilizing a financial feasibility study that is consistent and accurate is a key component to the consolidation process. Having this data was essential to providing the community the information needed to make an informed decision. If considering a consolidation, take the time to evaluate the important factors that will come into question, as well as the proper procedure and team effort it will take to attain stakeholder approval.

For more information on the requirements of a Consolidation, visit <http://dpi.wi.gov/sms/rgconsld.html> or contact Lisa Voisin at 800.792.2473, [bairdpublicfinance@rwbaird.com](mailto:bairdpublicfinance@rwbaird.com)



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Sincerely,

Erin K. Green, MBA, RSBA  
ASBO International President  
Director of Business Services  
Greendale School District (WI)

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**Virgil D. Harden, RSBA**  
Director of Business  
Grand Island Public Schools (NE)

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**Angela Eisert, CPA**  
President of the Nassau Chapter of New York State ASBO

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# Legal and Ethical Standards Related to Attendance at the State Education Convention

Prepared by Michael J. Julka, Shana R. Lewis and Todd J. Hepler of Lathrop & Clark llp,

Many school districts will be sending administrators and school board members to Milwaukee to attend the annual State Education Convention (Convention) of the Wisconsin Association of Schools Boards, Inc. (WASB), in January 2010. School district administrators and school board members may have concerns about their obligations to comply with the legal and ethical standards established for local public officials that affect their participation in Convention-related events. This Legal Comment will discuss the Open Meetings Law and the Code of Ethics for Local Public Officials as these laws relate to and govern the actions of administrators and school board members while in attendance at the Convention.<sup>1</sup>

## Open Meetings Law

Convention participants whose school districts send more than one school board member to the Convention should consider how Wisconsin's Open Meetings Law may impact their ability to participate in Convention-related activities.<sup>2</sup> The Wisconsin Attorney General has issued a number of opinions that offer guidance to school board members and administrators with regard to their attendance at conferences, workshops, seminars, and conventions, including, but not limited to, the State Education Convention.

As the Attorney General explained within these opinions, the fundamental purpose of the Open Meetings Law is to ensure that the public has access to full and complete information regarding governmental affairs.<sup>3</sup> In order to advance this purpose, generally speaking, all meetings of state and local governmental bodies, including school boards, must be held in locations reasonably accessible to

members of the public and must be open to all citizens at all times unless otherwise expressly provided by law. The Wisconsin Supreme Court has held that a "meeting" of a governmental body, including a school board, occurs whenever: (1) there is a purpose to engage in governmental business, and (2) the number of members present is sufficient to determine the governmental body's course of action (i.e., a quorum, including a walking quorum, negative quorum, etc.).<sup>4</sup>

In one of the opinions on this topic, a writer specifically asked the Attorney General whether the social nature of many activities offered at the Convention allow participants to be exempt from the Open Meetings Law.<sup>5</sup> It is well-established that a "social or chance encounter" of members of a governmental body is not a meeting of the body requiring public notice and accessibility pursuant to the Open Meetings Law.<sup>6</sup> Any presumption that the members are present to engage in governmental business is rebutted when members meet in a social setting or by chance. However, according to the Attorney General, the attendance of school board members and administrators at a conference, convention, or seminar, does not constitute a chance encounter because such attendance is pre-planned. Moreover, such attendance is not a purely social gathering because such conferences, conventions, and seminars are designed for school board members to discuss issues related to the responsibilities, authority, power, or duties delegated to or vested in the school district.

Nevertheless, the Attorney General also concluded that attendance at the Convention did not necessarily

constitute a "meeting" of the school board. According to the Attorney General, the discussion at the Convention, generally, involves concerns common to all school districts, rather than a discussion about a particular school district's business. As such, even if the number of school board members present is sufficient to determine the school board's course of action, the purpose of the gathering is not to engage in the business of the particular school district, but to take advantage of the Convention-related activities. Therefore, the Attorney General has concluded that, by itself, attendance of a quorum of the school board at the Convention does not result in a "meeting" of a governmental body, as defined in the Open Meetings Law.

The Attorney General has warned, however, that, during the Convention and all related activities, including the ride to and from the Convention, when a quorum of the school board or any committee or subunit is present, the members must not discuss business specifically related to the school district.<sup>7</sup> Moreover, the school board members should not formally attempt to convene during any of the Convention-related activities.

In order to avoid the perception that a school board is violating the Open Meetings Law, many school districts choose to post a notice, in accordance with the board's policies, that is designed to communicate to the community that a certain number of school board members and/or other school district officials will be attending the Convention. The notice should explain that the school board will not conduct any school board business during the trip or at the Convention.

*Continued on page 25*

Continued from page 24

### The Code of Ethics for Local Public Officials

Regardless of the number of school board members and/or school district administrators being sent to the Convention to represent the interests of the school district, the Code of Ethics for Local Public Officials should be reviewed in order to determine how this law may restrict the activities and events in which the school board members and/or school district administrators participate during the trip.<sup>8</sup>

Generally speaking, the Code of Ethics for Local Public Officials prohibits officials (e.g., school board members, district administrators, business managers, etc.) from accepting (a) items or services of substantial value for private benefit, or for the benefit of the official's immediate family or associated organizations, if offered because of one's public position; (b) anything of value that could reasonably be expected to influence the official's vote, official action(s) or judgment;

and (c) anything of value that could reasonably be considered a reward for official action(s). The Code of Ethics for Local Public Officials is enforced by the Government Accountability Board. On January 10, 2008, pursuant to 2007 Wisconsin Act 1, the Government Accountability Board replaced the Wisconsin Ethics Board and, almost immediately, began the process of reviewing, reconsidering and, in many cases, reaffirming the formal opinions and other guidance issued by the Wisconsin Ethics Board.<sup>9</sup>

During the past year, the Government Accountability Board has explicitly reaffirmed the various opinions and other guidance issued by the Wisconsin Ethics Board concerning local public officials' attendance at conventions and participation in convention-related activities. Generally, the Government Accountability Board has opined that an official may attend conventions and participate in convention-related activities without violating the Code of

Ethics.<sup>10</sup>

Specifically, while attending a convention authorized by and on behalf of a municipality, including a school district, a local public official may accept meals, refreshments and the like without charge that are provided, sponsored, and/or sanctioned by the event organizer. According to the Government Accountability Board, when a school board authorizes a school district official's attendance at the Convention, it is fair to presume that the official's attendance is in furtherance of a public purpose or benefit and that the school board contemplates that the official will partake fully in all the Convention has to offer, including forums and receptions that are sponsored by the event organizer. Given this interpretation, as long as the school board has authorized the school district official's attendance at the Convention, he or she is not required to pay the cost of meals, refreshments and the like offered during the Convention by its organizers,



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i.e., WASB, the Wisconsin Association of School District Administrators, and/or the Wisconsin Association of School Business Officials, in order to remain in compliance with the Code of Ethics.<sup>11</sup>

However, during the Convention, school district officials must be cautious about accepting food, drinks and/or entertainment, without charge or at less than fair value, that are offered at social events sponsored by entities or organizations other than the event organizers when the entities or organizations may be current or prospective school district vendors. According to the Government Accountability Board, beer, wine, liquor, meals, buffets, and the like have more than token value, and a purely social event, such as a hospitality suite, a happy hour, or a dinner, provides a primary benefit to the official, rather than to the school district that authorized his or her attendance. School district officials, who are responsible for making or approving purchasing decisions for the school district, should not accept food, drinks and/or entertainment, without charge or at less than fair value, from current or prospective vendors because receipt of such items of value could serve as the basis for an allegation that the items influenced the officials' decisions regarding the purchase of goods or services from the vendor.

Thus, a school district official is advised to avoid attending an event that is purely social, sponsored by a current or prospective vendor of the school district, and provided to the official without charge or at less than fair value. This is true even if the event is identified in the Convention program or in the Convention materials. That said, the school district official may attend such an event and avoid a Code of Ethics violation, by paying the vendor for the full cost of the meal, refreshments and the like offered at the event.

Finally, while attending the Convention, a school district official may accept educational or informational materials, prizes or other giveaway items for the purpose of conveying the item to the school district for the use or benefit of the school district. However, if the school district official wishes to keep the item for himself or herself, the item must be of nominal or insignificant value, in contrast to an item of merchantable value, in order to remain compliant with the Code of Ethics. The statute does not establish a specific dollar value as a "merchantable" value. The determination of whether an item has more than token or inconsequential value is left to the official's discretion. That said, the Government Accountability Board has opined that some tote bags, caps, t-shirts, mugs, pens, rulers, refrigerator magnets, and key chains containing a company logo are likely to be of inconsequential value; while other items, including jackets and watches, are likely to have more than inconsequential value.

Furthermore, school district policies may address the issue of the receipt of gifts by school district officials. Accordingly, before the official accepts a prize or other giveaway item from a vendor exhibiting at the Convention, it is important for the school district official to review and apply the school district's policy on the subject to determine whether he or she may keep the item.

### **Conclusion**

The Convention offers the opportunity for school district administrators and school board members to obtain new information about the latest products, services, and developments in education. However, in doing so, it is important for them to be aware of the rules and requirements of the Open Meetings Law, as well as to understand and recognize how the Code of Ethics for Local Public

Officials regulates when they may accept food, drink, or other items of value, without charge or at less than fair value, and when such acceptance will be problematic. Moreover, under no circumstances should receipt of any such items influence the decisions of the school district officials. Finally, it is also important for school district administrators and school board members to review local school board policies for additional, more restrictive rules about Convention attendance and participation, and to direct any additional questions or concerns to the school district's general legal counsel.

### **ENDNOTES**

1. For additional information on related topics, see Wisconsin School News: "Compliance with Wisconsin's Open Meetings Law, Part I" (September 2004); "Compliance with Wisconsin's Open Meetings Law, Part II" (October 2004).
2. Wis. Stat. s. 19.81 et seq.
3. See, e.g., Office of the Attorney General, Informal Opinion to Clifford Miller (May 25, 1977).
4. State ex rel. Newspapers v. Showers, 135 Wis. 2d 77, 97, 398 N.W.2d 154 (1987).
5. Office of the Attorney General, Informal Opinion to Donald MacTaggart (May 25, 1977).
6. Wis. Stat. s. 19.82(2); see, also, Wisconsin School News: "Meeting or Chance Encounter? The Wisconsin Supreme Court Interprets the Open Meetings Law" (September 1993).
7. Office of the Attorney General, Informal Opinion to Beatrice Weiss (January 20, 1981).
8. Wis. Stat. s. 19.59 et seq.
9. See Wisconsin School News: "The Government Accountability Board" (March 2008).
10. At its January 2009, meeting, the Government Accountability Board noted that it intends to revisit 1992 Wis. Eth. Bd. 31 (November 25, 1992), wherein the Ethics Board concluded that a vendor should not sponsor a river cruise for local public officials if more than an insignificant number of the officials attending are responsible for making or approving purchasing decisions that could involve the vendor's goods. To date, the Government Accountability Board has not taken further action with regard to this opinion.
11. 1993 Wis. Eth. Bd. 8 (November 3, 1993).

*This Legal Comment was written by Michael J. Julka, Shana R. Lewis and Todd J. Hepler of Lathrop & Clark LLP, WASB Legal Counsel.*

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# Empowered together

The 89th Joint State Education Convention

## 2010 KEYNOTE SPEAKERS



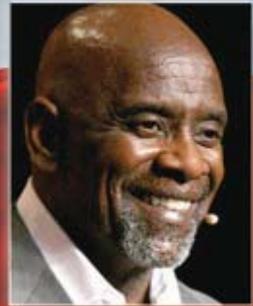
**DANIEL PINK**  
General Session  
Wednesday, January 20



**MARGARET WHEATLEY**  
General Session  
Thursday, January 21



**LEROY BUTLER**  
WASB Breakfast  
Thursday, January 21



**CHRISTOPHER GARDNER**  
General Session  
Friday, January 22

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Thursday, Jan. 21, 2010  
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Join the Wisconsin Association of School Business Officials at its annual luncheon. Hear from Wisconsin School Business Official of the Year, Mary Jo Filbrandt, Antigo Unified School District.

# Your Opportunity to Connect!

## **Elections 2010: Gubernatorial Candidate Forum, 4:45-6 pm Wednesday, Jan. 20 • Midwest Airlines Center**

All major declared candidates running for governor in 2010 will be invited.

## **WASB Breakfast Program, 7:30-9:15 am Thursday, Jan. 21 • Hilton Milwaukee City Center**

Pre-registration Required, \$30

**From Wheelchair to Lambeau Leap**  
LeRoy Butler, speaker

## **Milwaukee Public Schools Tour, 9:30-11:30 am Thursday, Jan. 21 • Leaves from Midwest Airlines Center**

Pre-registration Required, \$5

Get an inside look at MPS's Hawley Environmental School. Transportation is provided.

## **WASDA Luncheon, Noon-1:15 pm**

**Thursday, Jan. 21 • Midwest Airlines Center**

Pre-registration Required, \$30

This luncheon is your chance to hear from the Superintendent of the Year.

## **WASBO Luncheon, Noon-1:15 pm**

**Thursday, Jan. 21 • Midwest Airlines Center**

Pre-registration Required, \$30

Hear from the Wisconsin School Business Official of the Year.

## **The Future of Wisconsin's 'Knowledge Economy' and the Role of K-Gray Education, 3:45-5:30 pm**

**Thursday, Jan. 21 • Midwest Airlines Center**

*(presented jointly by Wisconsin Technical College District Boards Association and the Wisconsin Association of School Boards)*

Tom Still, president of the Wisconsin Technical Council will deliver a message about Wisconsin's economy including education's role in creating a strong Wisconsin future.

## **Networking Reception, 5:30-7 pm**

**Thursday, Jan. 21 • Hilton Milwaukee City Center**

Connect with colleagues and meet new friends.

## **Connect with Higher Education Dinner, 7 pm**

**Thursday, Jan. 21 • Hilton Milwaukee City Center**

Pre-Registration Required, \$48

*(presented jointly by Wisconsin Technical College District Boards and Wisconsin Association of School Boards)*

Come to a joint collaborative dinner especially for school board members, superintendents, technical college board members and presidents.

Check out  
[wasb.org/convention](http://wasb.org/convention) for  
details and registration.



A complete schedule is at [wasb.org/convention](http://wasb.org/convention).

## Start Your Learning Early!

Tuesday, Jan. 19, 2010

### Pre-Convention Workshops

Pre-registration required, \$45 • Space is limited.

### Reaching for All Learners: Teaching with 21st Century Learning Technologies, 1-5 pm

Paul Musegades and Helen Hoffenberg, Apple Education Team

Learn about exciting new technology that can enhance collaboration, creativity, and extend learning beyond the classroom for all students.

### The School Finance Puzzle:

#### How the Pieces Fit Together, 2-5 pm

DPI School Finance Team and Practicing School Business Officials

Become an expert on school finance! From equalization aid to revenue limits, this session will describe every aspect of public school funding in Wisconsin.

### The New Collective Bargaining Law, 2-5 pm

Bob Butler and Barry Forbes, WASB Employment and Labor Law Services; Tom Wohlleber, Middleton-Cross Plains Area School District

Confused by the new bargaining law? This session will cover those law changes and address budget development in the Interest Arbitration era.

### Relationships, Roles, and Respect: Defining the Board/Supt. Governance Model, 2-5 pm

Peggy Hinckley, Ed.D., superintendent,  
Metropolitan School District of Warren Township, Indiana

Dr. Peggy Hinckley will share her practical strategies for establishing a successful board/superintendent team that will spell success for students based on the *Keywords of School Boards*.

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This was WASBO's 2nd year hosting the Midwest Facility Masters Conference and we saw growth in attendance, exhibitor participation and professional development! The 186 attendees had opportunity to meet with 53 exhibitors and choose from 64 educational sessions at the November 12-13th Conference.

Sessions were presented in the areas of Safety and Security, Green, Alternative Energy, Purchasing vs. Leasing for Vehicles and Equipment, Legal Compliance, School Finance and more. Illinois and Wisconsin attendees received credit for their

participation toward their respective facilities certification programs. Faculty for sessions were experts in their fields, practitioners, attorneys, architects and engineers. They brought a wealth of expertise to the program. SchoolDude offered a computer lab for attendees to get specific technical assistance.

Social networking in the exhibit hall was provided by PBBS Equipment Corporation. SchoolDude.com, Stalker Flooring and Tremco, Inc. provided additional networking time after dinner in the Kalahari's new bowling alley. Focus on Energy hosted lunch with the exhibitors. Aramark provided

Friday morning's breakfast program, The World's Worst Waiter, Don Pryor. Don's message was a living example on customer service and the impression you can leave on people. We also thank Schools for Energy Efficiency for providing lanyards and name badges and the support of Premier Bleacher Repair.

Wisconsin looks forward to working in cooperation with Illinois ASBO, Iowa ASBO and the Minnesota Educational Facilities Management Professionals in offering this conference in 2010.



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| ♦ <i>Facilities Management Conference</i>               | <i>Wisconsin Dells</i> | <i>March 9-10, 2010</i>   |
| ♦ <i>Transportation &amp; Bus Safety Workshop</i>       | <i>Wisconsin Dells</i> | <i>March 10, 2010</i>     |
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3. When registering online for a WASBO seminar or workshop, indicate you wish to use coupons to pay for the registration. **SELECT THE INVOICE ME OPTION AT THE END OF THE REGISTRATION.** On the coupon please fill out the attendee's name and the name of the seminar. Mail the original coupon to WASBO to have it credited to the seminar invoice. The coupon cannot be used in place of completing the on-line registration.
4. Coupons can **ONLY** be transferred between individuals at the same school district.
5. Coupons are valid only for the above noted seminars and dates. No coupons can be used after June 30, 2010, the end of WASBO's fiscal year. No refunds will be given for unused coupons by a school entity.
6. If you do not cancel prior to one week before the seminar, the coupon will be considered used and void.
7. Once an invoice is paid in full, a refund cannot be generated by replacing the payment with a coupon.
8. If you lose your coupons, you must notify the WASBO office in writing. WASBO will issue replacement coupons with the same numbers as the original coupons previously purchased, not including the coupons already used, for an administrative fee of \$25.

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Name: \_\_\_\_\_ Title: \_\_\_\_\_

School District/Company: \_\_\_\_\_

Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

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

Email: \_\_\_\_\_

Number of Coupons: \_\_\_\_\_ Amount Enclosed :\$ \_\_\_\_\_

Coupons will not be mailed until payment is received. Return to: WASBO, 4797 Hayes Rd., Suite 101, Madison, WI 53704.

**Payment Options:**

Check # \_\_\_\_\_ enclosed

Invoice using Purchase Order # \_\_\_\_\_

Charge to MasterCard \_\_\_\_\_ VISA \_\_\_\_\_ AmerExpress \_\_\_\_\_ Discover \_\_\_\_\_

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Name on Card \_\_\_\_\_

Billing Address \_\_\_\_\_ Signature \_\_\_\_\_

**Completed by WASBO:**

Total coupons ordered \_\_\_\_\_ Coupon start number \_\_\_\_\_ Coupon end number \_\_\_\_\_



# WASBO/WASPA 5th Annual School Personnel Academy



## Is There Life After the QEO? Negotiation Strategies for Wisconsin School Districts

The 107 attendees at this 2 day joint WASBO and WASPA seminar learned there is life after the QEO - it just won't be easy. The conference included presentations by attorneys Jon Anderson (Godfrey & Kahn), Mike Julka (Lathrop & Clark), Jim Korom (von Briesen & Roper), Steve Rynecki (vonBriesen & Roper) and Dan Vliet

(Davis & Kuelthau). Also presenting were practicing school business officials and human resource directors Bob Borch, Jay Clark, Jeff Dellutri, Scott Gralla, Jon Hedstrom, Keith Lucius, Jason Olson, Tom Owens, John Sackett, Gary Swalve, and Bill Trewyn. These practitioners provided real life experiences from the pre QEO

era. Peter Davis of the WERC spoke to the mediation and arbitration process providing facts and dispelling myths.

PMA Financial Network provided a networking session at the end of the first day. M3 Insurance Solutions for Business provided the seminar breaks.



# New Prevailing Wage Law Provisions Affecting School Districts

To: Wisconsin Department of Public Instruction

From: Labor Standards Bureau - Construction Wage Standards Sections

On January 1, 2010, significant changes in Wisconsin's prevailing wage law will take effect. These changes will affect nearly every public entity in the state, including local school districts under Section 66.0903, Wisconsin Statutes. Under state and federal laws, prevailing wages must be paid to individuals who work on public works projects.

We request that you circulate this letter to all public school districts.

Any public works project that has a total estimated project cost of at least \$25,000 will require a prevailing wage rate determination issued by the Department of Workforce Development (DWD). Public works include erecting, constructing, remodeling, repairing, and/or demolishing projects for a local governmental unit, in this case a public school district. State law excludes minor service or maintenance work, warranty work, or work under a supply-and-installation contract. There is a statutory definition for each of these exclusions.

Effective January 1, 2010, a school district that has a public works project of \$25,000 or more must do all of the following:

- At least 30 days before soliciting bids or negotiating contracts, request a prevailing wage rate determination for the project from DWD. An Application for Prevailing Wage Rate Determination is available on the DWD website: [http://dwd.wisconsin.gov/er/prevailing\\_wage\\_rate/default.htm](http://dwd.wisconsin.gov/er/prevailing_wage_rate/default.htm)
- Let potential contractors know the project is subject to state prevailing wage law when soliciting bids.

- Include the prevailing wage rate determination in the construction contract, or if there is no written contract, provide a copy of the project determination to each prime contractor.
- Tell contractors that they must provide DWD certified payroll records on a monthly basis in a format that meets DWD reporting requirements.
- Post the prevailing wage rate determination on the project site.
- Notify project contractors that if DWD finds a contractor violating the prevailing wage law, DWD will assess liquidated damages of 100% of the wages owed to employees.
- Obtain an Affidavit of Compliance from each prime contractor before making final payment for the project.

If a school district currently has a prevailing wage project underway and work on that project will continue in 2010, the district must do the following:

- Inform all project contractors that effective January 1, 2010, they must file certified payroll records with DWD on a monthly basis in a format that meets DWD reporting requirements. The first certified payroll reports must be filed with DWD by the end of the first week in February 2010.

Another new provision also may affect school districts. A prevailing wage determination is required for any completed facility that is leased, purchased, lease-purchased or otherwise acquired by or dedicated to a school district in lieu of the school

district contracting for the project.

For more information, please visit the prevailing wage website: [http://dwd.wisconsin.gov/er/prevailing\\_wage\\_rate/default.htm](http://dwd.wisconsin.gov/er/prevailing_wage_rate/default.htm). For further assistance, please call the Equal Rights Division at 608-266-6860.

## Mark Your Calendars

# 12th Annual Facilities Management Conference

March 9-10, 2010

**Kalahari Resort & Conference  
Center  
Wisconsin Dells**

**Watch [www.WASBO.com](http://www.WASBO.com) for future  
information!**

**Look for these session offerings:**  
Facilities Management Certification  
- Module 6

Modern Technology and its  
Custodial Applications

Renewables for School Districts  
and Community Programs

Wisconsin's Green K12 Future  
Solar PV

Benefits of WASBO Facilities  
Management Certification Program

Update on IEQ Legislation

Pandemic Planning

How to Fund Athletic Facilities  
without Using Tax Dollars

WSSCA Session - Module  
5: Sound Risk Management  
Practices



## Welcome New Members

- **Rob Baxter**, Director of Human Resources, Watertown Unified School District
- **Dmitry Brodsky**, Owner, L & A Crystal
- **Tom Brooks**, Supervisor of Buildings and Grounds, Sun Prairie
- **Pam Casey**, Human Resources Administrator, Oconomowoc Area School District
- **Nikki Chevalier**, Administrative Assistant, Kimberly
- **Conrad Farner**, Superintendent, Greenfield
- **Joe Garza**, Assistant Superintendent, New Berlin
- **Tabatha Gundrum**, Director of Employee Services, Middleton-Cross Plains Area School District
- **Kristin Hanson**, Financial Advisor, Ehlers & Associates
- **Andrea Holschbach**, HR Director, Manitowoc
- **Robert Knadle**, District Administrator, Viroqua Area Schools
- **Robert Kobylski**, Superintendant, Kohler
- **Karen Logterman**, , Delavan-Darien
- **Anthony Marinack**, District Administrator, Tri-County Area School District
- **Suzy Matuska**, Director of Business Development, Chartwell School Dining Services
- **Michael Nault**, Director of Human Resources, Fond du Lac School District
- **Doug Pearson**, Director of Building Services, Madison Metropolitan School District
- **Scott Reiff**, Building & Ground Supervisor, Lake Geneva
- **Steve Salerno**, Associate Superintendent HR, La Crosse
- **David Schmidt**, Superintendent, Ashwaubenon School District
- **Jeff Seeley**, Financial Advisor, Ehlers & Associates
- **Julie Stunkel**, Sales & Marketing, Fahrner Asphalt Sealers, LLC
- **Joe Stutting**, Superintendent, Sturgeon Bay
- **Karen Wolfram**, Comptroller, Oak Creek-Franklin Joint School District
- **Rebecca Zechzer**, Marketing, ServiceMaster Disaster Restoration

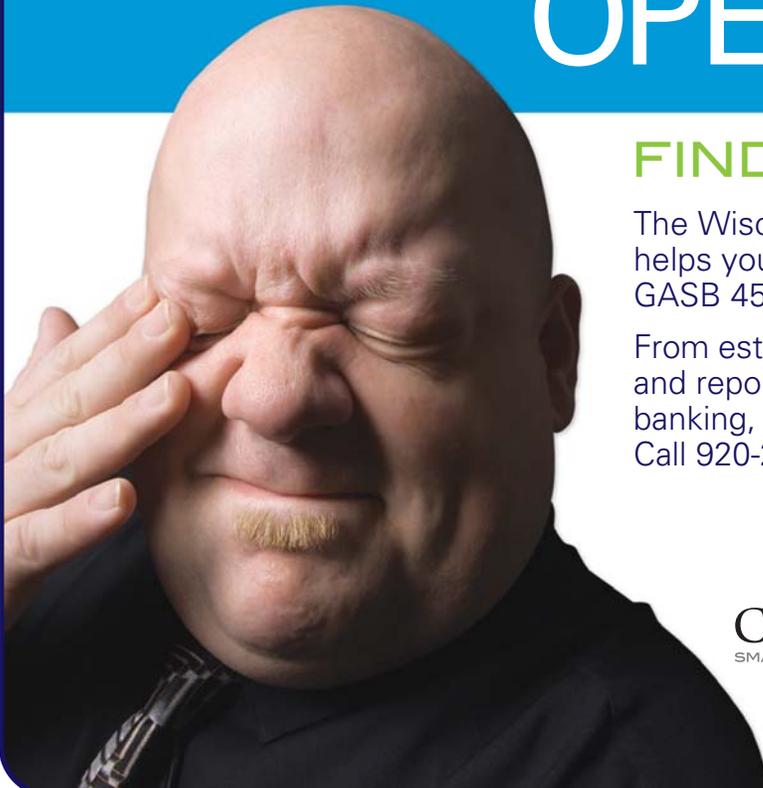
### ASBO 10 Year Anniversary in November 2009

- **Wendy Johnson**, North Fond Du Lac SD, North Fond Du Lac, WI
- **Jeff Mahoney**, McFarland SD, Mc-Farland, WI

### ASBO New Members in September 2009

- **Denise Howe**, Friess Lake SD, Hubertus, WI
- **Kurt Jorgensen**, Union Grove Union High School, Union Grove, WI
- **Jeff Lankey**, Royall SD, Union Center, WI
- **Davita Jo Molling**, West Salem SD, West Salem, WI
- **Jeff Mueller**, New Berlin, WI

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## Get Connected with WASBO

As a WASBO Service Affiliate you have several opportunities to connect with the key people responsible for the finance and operations of Wisconsin's K12 School Districts.

**Sponsorship** – As a sponsor at one of WASBO's several professional development seminars and conferences you can network, attend sessions and enhance attendees' learning opportunities. Sponsorships include ads in conference programs, prominent signage at the conference and recognition in the WASBO newsletter, Taking Care of Business. To learn more about sponsorship contact the WASBO office at 608.249.8588. To register as an exhibitor or an attendee at any of these conferences watch the WASBO website at [www.WASBO.com](http://www.WASBO.com).

### Upcoming Sponsorship Opportunities:

March 9-10, 2010 - WASBO Facilities Management Conference

Kalahari Resort & Conference Center, Wisconsin Dells

This conference had nearly 200 attendees and 75 exhibitors in March of 2009. Attendees are primarily Facilities Directors with some Business Managers. Opportunities include sponsorship of breaks, breakfasts and lunches, social networking and conference materials (flash drives and handouts). Exhibitor registration will be available in January.

March 10, 2010 - WASBO Transportation & Bus Safety Workshop

Kalahari Resort & Conference Center, Wisconsin Dells

This seminar had about 50 attendees in 2009. Attendees are primarily Transportation Directors with some Business Managers. This seminar runs concurrently with the Facilities Management Conference. Opportunities include sponsorship of breakfast, breaks and lunch.

March 24-25, 2010 - WASBO Accounting Seminar

Chula Vista Resort & Conference Center, Wisconsin Dells

This seminar had attendance of 379 in 2009. Attendees primarily included Business Managers, District Administrators and Bookkeepers. Opportunities include sponsorship of breakfasts, breaks and lunches, social networking and conference materials (flash drives and handouts).

May 25-28, 2010 - WASBO Spring Conference & Exhibits

Kalahari Resort & Conference Center, Wisconsin Dells

This conference had approximately 250 attendees and 120 exhibitors in Green Bay in 2009.

A Scholarship Golf Outing is also part of this conference. Sponsorship opportunities include conference meals, social networking, conference materials (flash drives), golf holes, beverage carts, lunch on the course, silent auction donations, golfer and conference giveaways and drawing and attendance prizes.

**Advertising** – WASBO's newsletter, Taking Care of Business, is published bi-monthly in both hard copy and electronically. Ads can be printed in color or black and white. The newsletter circulates to about 1,200 WASBO members. Rates and publication dates can be found on the WASBO website at [www.WASBO.com](http://www.WASBO.com) or you may contact Jeanne Deimund for more information at [Deimund@wasbo.com](mailto:Deimund@wasbo.com).

**Articles** – We are always seeking educational articles for the WASBO newsletter. To submit an article for consideration please send it to Woody Wiedenhoef at [wwiedenhoef@wasbo.com](mailto:wwiedenhoef@wasbo.com).

**Presentations** – Planning Committees for each conference consider potential sessions from all WASBO members. If you are interested in making a presentation please submit your presentation to the WASBO office at [Deimund@wasbo.com](mailto:Deimund@wasbo.com). Sessions will be forwarded to the appropriate planning committee for consideration. All presentations must be informational and educational. Marketing presentations will not be considered.

We appreciate the partnership of our Service Affiliate Members. It is with your support that we are able to offer timely and quality professional development opportunities to our members. It is our goal to provide the tools our members need to do their jobs and benefit the education of Wisconsin's children. Your support also provides over \$17,000 in student scholarships, professional recognition to outstanding school business officials and professional development grants to members in need. In these tight fiscal times, our members appreciate your support more than ever.

**Please contact the WASBO Office with any questions at 608.249.8588.**



### 2010 WASBO FOUNDATION SPRING CONFERENCE & EXHIBITS

MAY 25-28, 2010  
KALAHARI RESORT &  
CONFERENCE CENTER  
- WISCONSIN DELLS

CONFERENCE THEME:  
"GREEN"

LOOK FOR  
KEYNOTE - KIM CARLSON  
- THE EARTH SMART  
CONSUMER

SESSIONS  
GAINING GREEN - HOW  
THE STIMULUS ACT HAS  
HELPED AND WHAT IS STILL  
AVAILABLE.

TRENDS IN THE SCHOOL  
LUNCH ENVIRONMENT  
A 403(B) WELLNESS  
CHECK

GOOD TO GREAT FOR  
AMERICAN SCHOOLS  
DO'S AND DON'TS OF  
UNDER-LEVYING YOUR  
REVENUE LIMIT  
10 THINGS YOUR  
EMPLOYEES CAN DO  
TO HELP SAVE BENEFIT  
DOLLARS



# Discover Opportunity



Visit the WASBO Career Center  
[www.wasbo.com/careers](http://www.wasbo.com/careers)

## Job Seekers

The Career Center makes it easy to explore new employment opportunities

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- Receive job alerts via email
- Find your next career-changing opportunity

## Employers

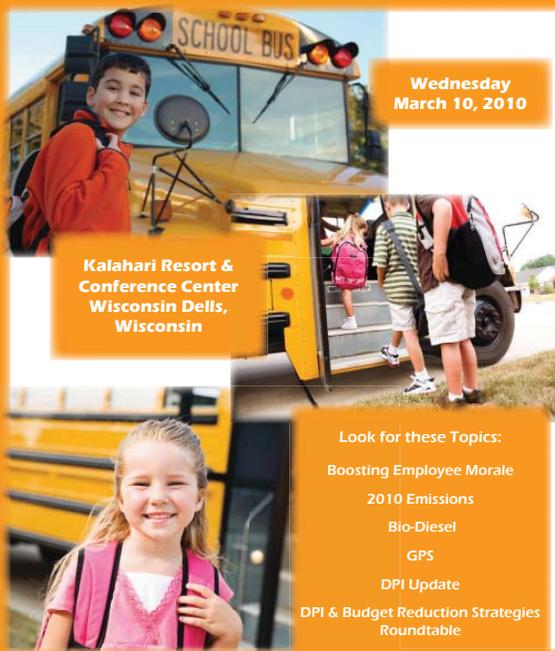
Navigate through unqualified candidates and target the industry's best

- Broadcast your job to thousands of professionals
- Sign-up for resume alerts
- Save time and money
- Hire talented candidates



## WASBO Transportation and Bus Safety Workshop

Wednesday  
 March 10, 2010



Kalahari Resort & Conference Center  
 Wisconsin Dells, Wisconsin

### Look for these Topics:

- Boosting Employee Morale
- 2010 Emissions
- Bio-Diesel
- GPS
- DPI Update
- DPI & Budget Reduction Strategies Roundtable

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*Johann Wolfgang von Goethe*

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# Changes in the WASBO Scholarship Application Process

By Wendy Brockert, Business Manager, Lake Mills School District

When the scholarship application form is distributed this year you will notice a change in the application process. The last several years the application has included one or two essay questions. The intent for the essay questions was for the applicant to meet a WASBO member and to discuss the questions with a WASBO member. As the scholarship review committee read the applications it was obvious many applicants had not spoken to a WASBO member. The WASBO Board and scholarship review committee believe it is important for a WASBO member to make a connection with each scholarship applicant. We are fortunate to distribute several scholarships and believe it is important for the applicants to get an understanding

of the WASBO organization and to develop a relationship with a WASBO member. To be able to accomplish this goal the application requests that the Superintendent, Business Manager or Bookkeeper (hopefully one of these positions is a member of WASBO) meet with the applicant to discuss the essay question and to sign the application as proof of the meeting. Because of this change you may have the opportunity to meet one or more of the seniors from your district who wish to apply for the scholarship. Please use this time to assist the student and help the student understand what our organization is all about.

**Scholarship Application Materials will be mailed to the WASBO membership mid December.**

**WASBO Award Nominations Due March 1, 2010**  
**Recognize your colleagues for their contributions to School Business & the Children of Wisconsin**  
*2010 Wallace E. Zastrow Award*  
*2011 School Business Official of the Year*  
*2010 New School Business Official of the Year*  
*2010 School Facilities Manager of the Year*  
*2010 Business Services Award*  
*2011 Shining Star Award*  
**Nomination Materials will be Mailed out Mid December!**



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Contact Richard Waelti @ 262-377-8306 or email: [rwaelti@wi.rr.com](mailto:rwaelti@wi.rr.com)

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**Group Life, LTD, Medical and Dental**

slaudon@NISBenefits.com

**David Branback**

28 Years In School Business  
9 Years With NIS



**HRA's, EBT's and Other Retirement Solutions**

dbranback@NISBenefits.com

**Ken Zastrow**

7 Years With NIS



**HRA's, EBT's and Other Retirement Solutions**

kzastrow@NISBenefits.com

## First in 90% Disability Plans

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## First in Special Pay Plans/403(b)s

2000 to present

NIS was the first to introduce the employer-sponsored Special Pay Plan/403(b) to save FICA taxes on retiree payouts. Now we are at the forefront of the new regulations with our 403(b) services.

## First in HRAs

2001 to present

NIS was the first to bring you HRA (Health Reimbursement Arrangement) solutions for the rising cost of medical insurance for both active employees and retirees.

## First in Employee Benefit Trusts

2002 to present

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## **WASBO Scholarship Applications**

are due March 1, 2010 for the WASBO Foundation Matching Scholarships (MetLife Resources \$4,000, EMC Insurance Companies \$3,000, Stalker Flooring, Inc and SchoolDude.com \$2,000, NIS/Miron \$1,000, and Essential Industries \$1,000.

If you are currently working for a degree and certification in school business management in Wisconsin, you will be able to apply for The **WASBO Foundation Academic Scholarship (fully funded by Ehlers & Associates \$1,000)**. Applications are due March 1, 2010.

It is also a good time to think about your activity in ASBO. The WASBO Foundation provides **Professional Development Grants** to WASBO members who serve on ASBO professional committees.

Those people interested in applying for scholarships or grants can receive application materials by inquiring at the WASBO office, 4797 Hayes Road, Suite 101, Madison, WI 53704, phone 608- 249-8588.

## **Mark your Calendars for future Seminars:**

There are a number of Seminars, workshops and conferences coming up this winter, spring and summer with Viterbo University graduate credit offered for updating state certification.

WASB-WASDA-WASBO State Education Convention, January, 19-22, 2010

WASBO Facilities Management Conference, March 9-10, 2010

WASBO Transportation & Bus Safety Workshop, March 10, 2010

WASBO Accounting Seminar, March 24-25, 2010

WASBO Spring Conference & exhibits, May 25-28, 2010

WASBO Custodial and Maintenance Conference, June 23, 2010

WASBO Custodial and Maintenance Conference, July 14, 2010

## **The 2009 Edition of the NCES Handbook, Financial Accounting for Local and State School Systems**

has been out since this summer. With all the conversation about reporting changes and data requirements that have come with ARRA, it could be helpful to update your edition in your school district. Interestingly, this edition provides a model for school level program cost accounting. Could this be the wave of future accounting for ARRA or other federal funds?

The handbook is designed as the national standard for state and local education agencies to use in tracking and reporting financial data and for school districts to use in preparing their comprehensive annual financial reports (CAFR'S). The purpose of the handbook is to ensure that education fiscal data can be reported in a comprehensive manner. The guidance in this edition conforms to GASB Statements, up to Statement 47. There are chapters on budgeting, governmental accounting and financial reporting. Account codes have been updated to reflect changes in the new reporting requirements and developments in technology and security. There are also special chapters on accounting for student activity funds.

## **New Wisconsin School Leadership Career Center**

- WASBO is joining WASDA, AWSA and WCASS in offering a new school administrator Career Center. Look for changes in December!

## **P-Card Improves Management Information Systems**

How long would it take you to find out how much business your school district has done at a particular store? How long would it take to find out how much each school, or a specific employee, is purchasing at a particular store? How long would it take to find out how much your school district has spent on office supplies? P-Card technology makes this information available to you online seven days a week, 24 hours a day. Do you know how much sales tax you have paid, and where you need to go to get your tax refund? Rather than sifting through every receipt, why not just go online and get a complete report. One of the big benefits of p-Cards is the internet access, and the access to details online is FREE – no charges or fees. This information will help your district be a BETTER CONSUMER. It will make sure that people can only shop for specific items, at the stores where you have negotiated (or bid) a price very favorable to the school district. This alone can save the school up to 40% on items that should be purchased under a contract. Make p-Cards work for you.

Want to learn more OR better yet get started call the WASBO office at 608.249.8588 or visit our Website at [www.WASBO.com](http://www.WASBO.com).

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*Lori Blakeslee & daughter Grace  
Health Plan Members, Green Bay*

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# WASBO Calendar

Professional Development  
Register at [www.WASBO.com](http://www.WASBO.com)

January 19-22, 2010

**WASB-WASDA-WASBO State Education Convention**  
Milwaukee (Viterbo Credit Offered)

March 9-10, 2010

**WASBO Facilities Management Conference**  
Kalahari Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

March 10, 2010

**WASBO Transportation & Bus Safety Workshop**  
Kalahari Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

March 24-25, 2010

**WASBO Accounting Seminar**  
Chula Vista Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

May 25-28, 2010

**WASBO Spring Conference & Exhibits**  
Kalahari Resort & Conference Center, Wisconsin Dells  
(Viterbo Credit Offered)

June 23, 2010

**WASBO Custodial & Maintenance Conference**  
Wausau East High School

July 14, 2010

**WASBO Custodial & Maintenance Conference**  
Nature Hill Intermediate School, Oconomowoc



*Wishing you  
Peace this  
Holiday Season!  
Woody, Tina,  
Jeanne, Deb &  
Marsha*

## Regionals

Each Regional Representative, meeting locations & directions are available at [www.WASBO.com](http://www.WASBO.com) if predetermined.

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

February 12, 2010 DePere - with Legislators  
(Joint Meeting with Northeast Regional)  
May 14, 2010 Kewaunee (Tentative)

### Madison Area

Meetings will be held the first Friday of the month and begin at 9:00 a.m.  
February 5, 2010 Sun Prairie  
March 5, 2010 DeForest  
April 2, 2010 Sun Prairie

### Northeast

December 11 - The Wave, Appleton  
February 12 - Joint Meeting with BAMBA - De Pere School District  
April 9 - Fond Du Lac School District Office  
May 14 - Manitowoc School District Office

### Northwest

Meetings are usually held the 2nd Wednesday of month beginning at 10 a.m. except July, August and January at Lehman's Supper Club in Rice Lake. Dates may be subject to change.

February 3, 2010  
March 3, 2010  
April 7, 2010  
June 2, 2010

### Southeast

Meetings are from 9:45-11:30 am with lunch following.  
December 11, 2009 - Whitnall  
February 12, 2010 - Arrowhead  
April 16, 2010 - Hamilton-Sussex

### Southwest

All meetings will be held at the CESA #3 office in Fennimore at 12:30 p.m..  
February 17, 2010  
April 21, 2010

### West Central

Meetings are held the first Thursday of the month except July & August from 10 am - 1 pm at the Sparta Area SD Administration & Education Center, 201 E. Franklin St., Sparta  
January 7, 2010



Go to [www.WASBO.com](http://www.WASBO.com) and click on "Calendar" for updated meeting information, to register or get directions.

February 4, 2010  
March 4, 2010  
April 1, 2010  
May 6, 2010  
June 3, 2010

### WI Valley

Coffee at 9:00, Meeting at 9:30.  
December 11, 2009 Stevens Point  
February 12, 2010 D.C. Everest  
New Laws Seminar  
Auberdale/Stratford  
March 12, 2010 Medford  
April 9, 2010 Antigo  
August 20, 2010

## Committee Meetings

**School Facilities Committee** (Meetings held at the WASBO Office, Madison at 9:30 a.m.)  
January 12, 2010, April 13, 2010, August 3, 2010  
October 12, 2010

### Safety Committee

Oct. 14, 2009 (1:30 p.m.), WASBO Office, Madison

### Spring Conference Committee

Dec. 4, 2009 (Time TBD), WASBO Office, Madison

### Accounting Committee

October 28, 2009, Fond du Lac

## Board of Directors Meetings

December 16, 2009 - Madison, WASBO Office  
February 17, 2010 - Madison, WASBO Office  
April 21, 2010 - Chippewa Falls SD  
June 16, 2010 - Nekoosa SD

## Business Meetings

January 21, 2010 - Milwaukee, Joint Convention  
May 28, 2010 - WI Dells, Spring Conference