



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

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Fair Funding for Our Future A Framework for School Finance Reform

"Wisconsin's school funding system is broken. Our best way to repair it is to create a fair and sustainable means to pay for public schools," said State Superintendent Tony Evers during a school funding reform press conference held on Thursday, June 24th in Madison.

Evers outlined his "Fair Funding for Our Future" framework to start debate on school finance reform before he introduces his 2011-13 education budget, which is due in September. The framework is founded on four principles: a funding system that is 1) fair, 2) sustainable, 3) transparent, and 4) accountable for results.

"Currently, our public schools are struggling to make ends meet. Across our state, school boards are cutting budgets, closing schools, laying off teachers, raising class sizes, and eliminating educational programs. This is too much turmoil for our children. Our funding system is broken, and we must start the process now to fix it," Evers stated.

The framework calls for a minimum level of state aid for every student regardless of where they live. It proposes using student poverty, not just property values, as a factor in a portion of state aid. The framework also calls

for predictable growth in state support for schools and expanded sparsity aid and transportation funding to support rural schools, which represent a significant share of Wisconsin's student population.

"Education leaders at all levels must provide adequate, predictable investments in our children's education, even in the most difficult financial times," Evers said. "Our students must attend schools that have the resources to provide a comprehensive education so they can graduate ready for the workforce or further education."

To bring transparency and accountability to Wisconsin's school funding system, Evers wants to allocate the School Levy Tax Credit, valued at \$900 million, to general school aids. This will not result in a net increase in property taxes. It will provide a significant boost in direct school aid, with a portion used to fund a new poverty factor in the school aid formula. Evers also wants to review the state's more than 40 categorical aid programs to ensure they encourage innovation, increase student achievement, turn around struggling schools, and improve school funding reform graduation outcomes as well as provide accountability for results. "If our categorical aid

programs aren't providing every child the opportunity to graduate and be successful, I will propose their elimination or consolidation so we can increase funding for programs that work and support new initiatives that improve academic outcomes," Evers said. Finally, the framework protects students and taxpayers by ensuring that no school district faces drastic reductions in state school aid from one year to the next.

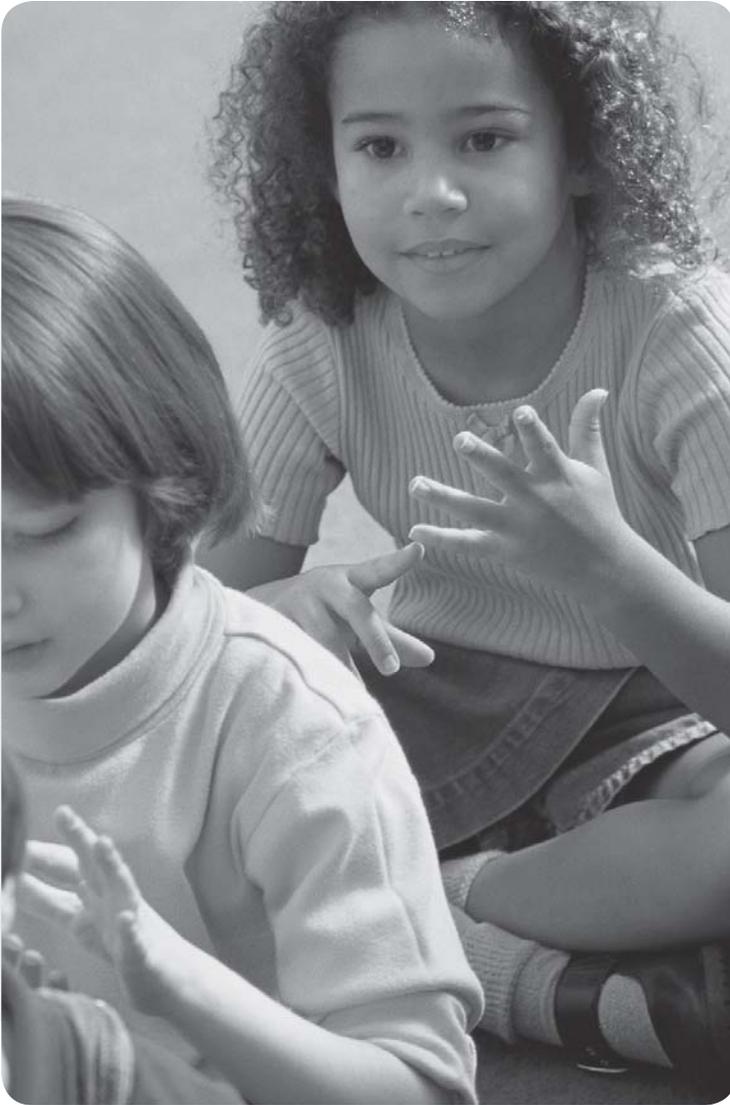
Wisconsin's audited public school funding from all sources was \$10.72 billion for the 2008-09 school year. That funding comes from a mix of state aid, federal aid, local property taxes, and some non-tax local revenue. Over the past 20 years, state support for local school costs has been calculated as low as 46 percent to as high as 66.7 percent. Since 1996, a significant portion of state school support has been directed to the School Levy Tax Credit. This money goes to municipalities to reduce local property tax bills. Popular with both political parties, the School Levy Tax Credit has grown by more than 400 percent since it began. While this money has been called state school aid, none of it actually goes to schools or pays to teach a single child.

"Very few people in Wisconsin, and

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Editor: Woody Wiedenhoeff



President's Message

WASBO Board Update

Meeting the Challenge Together

It is hard to believe that another school year is done. That also means that my time as President of the WASBO Board has come to an end. I want to thank the wonderful WASBO staff for helping me in so many ways during my six years on the Board. We are truly lucky to have dedicated, intelligent, and upbeat people who work so hard for our organization every day.

For all of you who are considering running for the Board or the President's position, I highly recommend it. It was truly a tremendous professional growth experience. I had the chance to do things outside of my normal comfort zone that I will probably never have the opportunity to do again. It has been an honor to serve this great organization and to work with so many fantastic school business officials.

The WASBO Board held a meeting on June 15th at the WASBO office with negotiations being the strategic focus. At this meeting we invited representatives from WASB, WASDA, WASPA and some attorneys that work with school districts in the area of labor and negotiations. We had over 40 professionals at this meeting. The focus of this meeting was to develop a coordinated effort to improve negotiation results.

We know that a contract settlement in one district has an impact on settlements in the surrounding districts. History tells us that arbitrators focus on comparable settlements, so we are all connected when it comes to negotiations. We also know that the unions in the state are very organized in coordinating efforts to maximize contract settlements. This group met to explore ways to improve the outcomes of district settlements by coordinating our efforts.



Keith Lucius
WASBO President

The group identified several areas where cooperation could improve results. While all attendees were not 100% sure that we could get buy-in from all districts, the group decided to move forward. A steering committee made up of the organizations in attendance will lead this initiative. The steering committee plans to begin meeting this summer.

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. Thank you again for your support this year and have a great summer.



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- Henry Boyle



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Exec's Reflections

"Head toward the light and leave your shadow behind you."

*Woody Wiedenhoeff
WASBO
Executive Director*

Please congratulate our three new Board members and our newly elected WASBO Treasurer. (See page 19.) Thank you to all the candidates for running and their willingness to serve fellow WASBO members. In addition, the WASBO staff would like to thank the membership, Regular, Service Affiliate, Retired and Student Members, for their guidance and support in meeting the WASBO Vision, Mission and Goals.

We are now entering the second decade of the 21st Century, which has caused the WASBO Board and me to reflect about the action plans implemented by WASBO members during the last decade. Have we been focused in serving WASBO members? Have our actions provided improvements that truly benefit WASBO members?

At the beginning of the decade, WASBO developed a new Vision and Mission Statement with which the organization would align its future goals. WASBO members have directly involved themselves in meeting annual goals that align with the Vision and Mission. The following data is a reflection of WASBO's Vision, Mission and Goals providing for enhanced opportunities, participation and involvement over the last ten years.

1. WASBO membership has increased 43%.
2. Attendance at conferences, seminars and workshops has increased 58%.
3. Service Affiliate participation in exhibits at conferences has increased 168%.

4. Student scholarships have increased by 83%.
5. Member recognition scholarships and donations have increased 31%.
6. WASBO members have been on the ASBO Board for nine out of the last ten years, with Erin Green being President Elect last year and President this year. In addition, a number of WASBO members have chaired and participated in ASBO committee assignments such as elections, accounting, facilities, purchasing and School Business Official Certification.
7. In 2000, WASBO had eight conferences, seminars and workshops. In 2010, WASBO has 12 conferences, seminars and workshops.
8. WASBO Legislative activities have had a direct impact on the passing and implementation of the following laws, regulations, rules and recommendations, in partnership with SAA members and WASB. Recent examples are as follows.

- a. OPEB Trusts
- b. Indoor Environmental Quality
- c. School Safety Plans
- d. Sage Flexibility
- e. ARRA Funding Activities
- f. PI 34 Content and Delivery for School Business Officials
- g. School Finance Network Recommendations
- h. Revenue Cap Modifications
- i. School Levy Credit Transparency
- j. Past State Budget Bills

In addition, WASBO has been active in modifying or killing ill-conceived legislation such as Green Cleaning, Seclusion and Restraint, Conference and Activities Leave for employees, QBS used without consideration

to costs, self funded health plan regulation, open records and meetings pertaining to associations and tax credits for contributions to public and private school programs.

9. WASBO professional development initiatives and program expansion include the following examples:
 - a. Expanded e-blast capabilities enabling WASBO members to find answers to questions from other WASBO members
 - b. Expanded the "Taking Care of Business" newsletter providing additional professional articles
 - c. Implemented the "Electronic Resource Center"
 - d. Implemented "Wisconsin Education News," a daily email of top education news in Wisconsin
 - e. Re-established the Fall Conference; initiated the Taking Care of Business Seminar, the Personnel Academy, the Midwest Facility Masters Conference, and added offerings at all conferences, including the Joint WASB, WASDA, WASBO State Education Convention. Expanded the role of Service Affiliates with additional exhibit time (two to five exhibit halls) and conference participation
 - f. Implemented the WASBO Mentorship Program and will provide a new and improved Mentorship Program in the 2010-11 school year
 - g. Implemented training on PI 34 certification
 - h. Implemented the WASBO P-card program allowing all school districts to participate in the benefits of using a Purchasing Card

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Fair Funding for Our Future

Continued from page 1

perhaps only those who work directly with the various school aid formulas, understand how we pay for our public schools," Evers said. "Calling 'credits' school aid and creating 40-plus funds for specific programs makes school finance extremely complicated and erodes public support for our schools. I want to change this. Taxpayers should be able to understand how and what they are paying for with their tax dollars," he said.

"I want the citizens of Wisconsin to have a fresh look at school funding and to ensure that candidates for elected office address school finance in real and substantial terms in their campaigns this fall," Evers said. "We need to build a brighter future for our kids by reforming our school funding system so it is fair, includes predictable investments for our children, is more easily understood, and is accountable

for results." Additional information about the state superintendent's school finance reform framework is available on the "Fair Funding for Our Future" website at <http://dpi.wi.gov/sprntdnt/fairfunding.html>.



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With the increasing responsibilities and fewer staff, the help and expertise that I gain through ASBO membership is priceless.
Peter Willcoxon Sr., RSBA, White Bear Lake Area Schools (MN)



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Mark Van Der Zee
Menasha Joint
School District

WASBO Recognizes Mark Van Der Zee 2010 Wallace E. Zastrow Award Recipient

Each year WASBO and WISC are honored to name one of WASBO's finest as the

recipient of the Wallace E. Zastrow Award. The award, named for WASBO's first executive director and a charter member of WASBO, Wally Zastrow, recognizes someone who displays leadership in his or her school district, in the community, in the profession and a commitment to lifelong learning and professional development. Mark Van Der Zee is just that person.

Mark's Bay Area and Northeast Regional colleagues have a tremendous amount of respect for his passion for education, ethical standards and willingness to mentor and share his knowledge. In their nomination they noted his professional leadership as a Past President of WASBO, an active Accounting Committee and Spring Conference Committee member, a conference presenter and a Northeast WASBO Regional leader.

Mark serves the Menasha Joint School District as the Director of Business and Personnel Services. Keith Fuchs, Mark's superintendent, had over two pages of praise for Mark. Throughout his recommendation, he focused on Mark's commitment to meeting the best interests of children while being fiscally responsible to the community. Mr. Fuchs shared some statements from a recent evaluation of Mark.

"As a veteran of our central administration team, you have truly been the glue that has brought and held our team together and you are an extremely integral component in the success of our district."

"Along with undertaking all of these various initiatives and projects, you continue to oversee an excellent staff and provide the Board of Education and myself with exemplary guidance in all financial aspects associated with running our district's personnel and programs."

"You are a life-long learner who truly believes that good is not enough if better is possible. You are also a wonderful representative of the Menasha Joint School District and reflect all of the positive aspects that our district stands for."

An example of Mark's dedication to professional development is Mark's involvement in creating a sister school and sister city relationship between Menasha and Mibashi and Ogo, Japan. Mark travelled to Japan to speak to their school business directors. He also hosted Japanese school business leaders in Wisconsin. Mark shared his experiences with his WASBO colleagues by providing sessions at conferences.

Mark's leadership goes beyond his school district. He works with the City of Menasha to achieve financial

and educational benefits for the entire community. Mark has been a volunteer firefighter for many years in the Town of Harrison and the Town of Menasha.

For fun, Mark loves the water. He has skied with the Twin Bridge Water-ski Team in Crivitz, Wisconsin. Mark was also a good sport at the 2009 Fall Conference where he volunteered to paddle hand built rafts on Elkhart Lake as part of our team building activity.

We congratulate Mark on being nominated and selected by his peers to exemplify the characteristics of the Wallace E. Zastrow Award. The Wisconsin Investment Series Cooperative (WISC) provides a \$500 award to Mark and \$1,000 student scholarship for him to award in his district. Mark selected the daughter of one of his staff members to receive the scholarship, Jacqueline Sell.

Mark will also be nominated for the prestigious ASBO Eagle Award next Spring.

Sue Schnorr may have said it best in her nomination on behalf of the Bay and Northeast Regionals. "Mark Van Der Zee is simply a good person. He has a passion for education, he is highly ethical and a valuable resource and mentor to his colleagues."

**"Integrity without knowledge is weak and useless,
and knowledge without integrity is dangerous and dreadful."**

— Samuel Johnson



Linda Mont

Health Coverage for Adult Children: Combining State and Federal Requirements

By Linda Mont, RHU, Sr. Benefit Consultant, Key Benefit Concepts, LLC

Federal health reform has changed the impact of the recent State-mandated Dependent health coverage to age 27 required in insured private and government health plans whether insured or self-insured.

As you know the recent State mandate (effective January 1, 2010) requires insured and government health plans (insured or self-insured) that offer dependent health coverage to extend coverage to adult dependent children up to age 27. If adult children do not meet the IRS definition of dependent, the employer is required to include imputed income for such continued coverage on the employee's Form W-2. Employers may also consider withholding taxes based upon the value of such coverage. The imputed income is based upon the fair market value of the coverage extended to the non-tax dependents.

As part of Federal Health Reform, the Health Care and Education Reconciliation Act of 2010 changed federal tax law making health insurance coverage to adult children (covered as dependents) non-taxable provided the child is age 26 or younger for the entire tax year.

There is lots of information out there regarding the State mandate of Dependent coverage to age 27 under government and insured medical plans as well as more recent information regarding the coverage to age 26 included in Federal Health Reform. However, I found the recent bulletin by Michael Best & Friedrich to provide the clearest direction. You can find the bulletin at <http://www.michaelbest.com/pubs/pubDetailMB.aspx?xpST=PubDetail&pub=2512>.

This bulletin clarifies that "Wisconsin employers providing health insurance coverage to adult dependent children

up to age 27 are no longer required to impute income to an employee with respect to such coverage or withhold taxes on the fair market value of such coverage, except for those taxable years in which a covered child turns 27."

Note that the Federal change occurred March 30, 2010. This means that prior to April 1, only the State-mandated benefit applied. Health plans providing coverage from January 1, through March 30, 2010 for a non-tax dependent would need to include the imputed income and consider tax withholding for coverage for that 3 month period. Beginning April 1, 2010, with the application of the Federal regulation the health plans need only look at one year of continued health coverage (age 26 to age 27) that requires determined imputed income.

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"It is time for us to stand and cheer for the doer, the achiever, the one who recognizes the challenge and does something about it."

— Vince Lombardi

WASBO Award Recipients Recognized at Spring Conference



John Stellmacher New School Business Official of the Year

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John was nominated by his District Administrator, Monti Hallberg who had this to say, "...he is young, energetic, intelligent, active and extremely efficient." His Board President, Betty Missling, shared, "John's exuberant enthusiasm for his job is a key component of his success as our Business Manager and his leadership in our district." As Business Manager for the Barron Area School District, John earned the respect of many with letters of recommendation from city leaders, community organizations and professional colleagues. John succeeded in integrating his professional career with service to the community, always with a focus on kids. He serves on the Board of Directors for the Barron County Boys and Girls Club and helps coach the high school boys' basketball team. The Northwest Regional supported John's nomination noting that he has been very active in their meetings. In her letter of recommendation Marleen Clark shared this. "I believe he truly cares about what matters most... the best possible education for all children with the resources available."



Tom Helgestad Facilities Manager of the Year

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Robert Crist, Superintendent of Wisconsin Rapids Public Schools, had this to say about Tom. "Thomas has excellent professional and personal character traits. He is honest, trustworthy and possesses leadership abilities that enable him to complete tasks on time with quality workmanship." Tom successfully managed 21 building construction and remodeling projects totaling over \$45 million dollars. He served WASBO as a Board Director for 2 separate terms and has been an active member of the Facilities Committee for many years. He is deeply committed to his community and most notably touches children every Christmas season when he and his wife become Mr. & Mrs. Claus. One supporter noted, "Whether it's serving the students and employees of the Wisconsin Rapids Public Schools or putting smiles on the faces of children Christmas Eve, Tom's optimism and dedication prevail." His willingness to serve his district, colleagues and students is evidenced by the letters of support for Tom's nomination that came from district principals, parents, maintenance staff and the district's business office.



Nicolet High School District Business Services Award

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Jeff Dellutri saw a need for school districts in the Southeast Regional and across the state and did not wait for someone else to fill that need. After attending a WASBO seminar on negotiations where he heard several attendees voice a need for statewide salary and benefit comparable data source, he went to work. He met with eleven districts in the northern Milwaukee suburbs to discuss what data they could use. He was able to use the information gathered from his colleagues when he met John Fuhs of Hewitt Associates, a health and benefit consulting firm. They were able to work with Jeff to develop a web-based salary and benefits collection tool for school districts. He hopes improved data collection will assist districts and their communities in the bargaining process. For more information on the complete development process of this tool, please see the article, *Gathering Comparables in the Post-QEO World of Mediation and Interest Arbitration* in the April 2010 issue of **Taking Care of Business**.

2010 WASBO Foundation Scholarship Recipients Recognized at Spring Conference



Chelsea Filbrandt

MetLife Resources \$4,000 Scholarship

Chelsea graduated from Antigo High School. She was a three-time varsity letter winner in both volleyball and softball. She was involved in many extracurricular activities including Student Council, National Honor Society, yearbook staff, band, solo ensemble, Fellowship of Christian Athletes as well as the boys' basketball manager. Throughout high school, she was an active member and volunteer at her local church and worked as a lifeguard and swim instructor. Chelsea plans on attending the University of Wisconsin - Madison and is interested in pursuing degrees in pre-pharmacy and business.

Courtney Elizabeth Comar

EMC Insurance Companies \$3,000 Scholarship

Courtney recently graduated from Marinette High School. She was ranked fourth in her class and participated in various activities including Student Senate, National Honor Society, Drama Club, volleyball, track and field, Show Choir, and a Barbershop Quartet. She was Co-President of her Student Senate for three years, Secretary of her class for three years, and Co-Captain of her school's varsity volleyball team her senior year. She also volunteers at her church singing in the choir and has participated in numerous volunteer efforts including blood drives and Senior Citizen's Day at her school. Courtney works as a lifeguard and fitness center supervisor for the Marinette Recreation Department. Besides her many activities she enjoys singing, traveling, and spending time with family and friends. In the fall, Courtney plans to attend the University of Minnesota-Twin Cities where she will pursue a major of biochemistry.



Sarah Kaddatz

Stalker Flooring-SchoolDude.com \$2,000 Scholarship

Sarah is valedictorian of her graduating class at Westosha Central High School. She has been a member of Tri-M, National Honors Society, and the National Society of High School Scholars and other awards with Forensics, band and choir. She has also been head of the sound and lighting crews that set up what is necessary for music and drama department performances, and other assemblies and activities at school. She had the honor of performing at Carnegie Hall with her school choir and performing in Orlando, Florida (Disney World and Universal Studios) with the band and choir. She also participated in Ping-Pong Club (and is proud of it), Forensics, pit band for the "Cinderella" musical, marching band, and both a band and choir class for every year of high school. The summer after her sophomore year, she attended a choir camp at UW Whitewater that encouraged her to keep music in her life forever. Her experiences with the sound crew were the deciding factor when choosing what to study in college. She will be attending Columbia College in Chicago, IL to further her knowledge of sound systems by majoring in Audio Arts & Acoustics.

Marissa Trzebiatowski

Essential Industries \$2,000 Scholarship

Marissa graduated from Amherst High School and plans to attend the University of Wisconsin - Eau Claire to study Nursing. Marissa was involved in activities such as Student Council, Math League, National Honor Society and National Society of High School Scholars. She participated in band and choir as well as volleyball, basketball and softball. She received the honor of being named Portage County Outstanding Youth Volunteer. She volunteered at St. Michael's Hospital, helped with the blood drive, rang bells for the Salvation Army and volunteered as a youth basketball coach and with Special Olympics. She is looking forward to college life and a career as a pediatric nurse.



Kendra Borski

National Insurance Services - Miron Construction \$1,000 Scholarship

Kendra has worked hard to enhance her leadership and time management skills while attending Amherst High School. She participated on varsity softball and volleyball teams and earned Academic Conference Awards. She was involved in speech, music and dance activities allowing her to grow her self confidence and presentation skills. She has been positively impacted by her coaching experience with Special Olympics and her participation with her church's youth group. Kendra joined two mission trips, one to Alaska. She works as a cashier. She pursued learning German on her own when not offered at her school. She plans to minor in German at the University of Wisconsin Oshkosh and major in pre-dentistry. She also plans to pursue a minor in visual arts. Kendra was a recipient of the Senator Herb Kohl Excellence Scholarship.



Kyle Seis

School Business Official of the Year \$1,000 Scholarship Presented in Honor of Mary Jo Filbrandt

Sponsored by Liberty Mutual Group



Kyle is a 2010 graduate of Antigo High School. While in high school, he participated in a variety of activities, including basketball, soccer, Key Club, Physics Club, Spanish Club, Fellowship of Christian Athletes, Forensics, Student Council, A-Club, the school newspaper, the school yearbook, and National Honor Society. He earned an Academics Letter, Forensics Letter, and Varsity Letter. Outside of school, he spent time volunteering by serving donuts at church, helping at multiple golf outings, ringing bells for Salvation Army, helping at Kettlebowl Ski Hill, and taking donations for UNICEF, helping at a charitable lip sync contest, and helping with Relay for Life. Kyle will attend the University of Wisconsin – Milwaukee where he will major in Art with an emphasis in Graphic Design.

Rachael Bain

WASBO \$1,250 President's Scholarship - Presented in Honor of Keith Lucius, 2009-10 President

Rachael, a graduate of Ashwaubenon High School, has been accepted to Northwest Technical College where she will begin her studies. She plans to transfer to a four year university with a forestry program. She is considering the University of Wisconsin Stevens Point. She would enjoy a campus with natural surroundings to support her pursuits in a forestry related career such as an arborist. She would also like to be an author. She loves to read and has been working on her writing style. It was hard to choose between two careers, so she plans to pursue both.



Christiana Brunette

WASBO \$1,250 President's Scholarship - Presented in Honor of Keith Lucius, 2009-10 President

Christiana plans to attend Concordia University Wisconsin Pharmacy School. To be admitted she must first complete pre-pharmacy school with a program of 74 credits and pass the PCAT test. To achieve this she is taking summer classes at Northwest Technical College over the summer and plans to do the same next summer to complete her pre-pharmacy classes in two years. Her most memorable times at Ashwaubenon High School were formed during band events. She enjoyed the night-time activities of playing at half time for football and basketball games and traveling to New York and Hawaii with the band. She looks forward to traveling after high school. As a child she spent much time traveling with her parents and really enjoyed the cruise she took in April.



Jacqueline Sell

Wallace E. Zastrow Award \$1,000 Scholarship Presented in Honor of Mark Van Der Zee

Sponsored by Wisconsin Investment Series Cooperative

Jackie will be pursuing a degree in Nursing at Marian University. She is also interested in the field of Occupational Therapy Assistant. She is working as a Dietary Aide at Peabody Manor, Heritage of Theda Care assisted living complex. At Menasha High School, Jackie played the flute and traveled with the Bluejay Brigade to perform and compete in New Orleans at the 2008 BCS halftime show. She played basketball, softball and volleyball. She volunteered at her church, at the homeless shelter, Vacation Bible School and at volleyball and softball camps for youth as well as coaching softball for 3rd and 4th grade girls.





**Free ENERGY STAR
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To learn more about the one-on-one technical assistance in ENERGY STAR benchmarking that is available from U.S. EPA Region 5, please contact Elham Tallackson (abdishi-tallackson.elham@epa.gov) at 312-353-8242.

The link to the site is:

<http://www.epa.gov/r5climatechange/energy-star-benchmarking.html>

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— Virgil

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Health Reform: Reinsurance for Early Retirees

By Harry L. Drake, Sr. Benefit Consultant, Key Benefit Concepts, LLC

Tucked away in the over 2,400 pages of Health Reform are barely four pages devoted to a government subsidy of early retiree medical coverage. Health plans that provide early retiree medical coverage may qualify for government reimbursements. However, plan sponsors must act quickly if they want to receive a portion of this reinsurance.

Program Provisions

The government is expected to provide payments of **up to 80% of claim costs** incurred by early retirees, their spouses, dependents and survivors. An early retiree is defined as an individual age 55 and older who is neither an active employee nor eligible for Medicare. Both self-funded and insured plans can apply, including plans sponsored by private entities, state and local governments, non profits, religious entities, unions, and other employers.

Costs eligible for reimbursement consist of:

- In 2010, claim amounts from early retirees in the range of \$15,000 to \$90,000*. The range for claim reimbursements may be adjusted in subsequent years.
- Health benefits (medical, surgical, hospital, prescription drugs and other benefits that may be specified by the Secretary of Health and Human Services, as well as coverage for mental health services) for claims of retirees and dependents who are age 55 to 65 within the plan year.
- Claims incurred between the start of the plan year (often January 1) and June 1st are credited towards toward the \$15,000 threshold for reimbursement. However, only medical expenses incurred after June 1, 2010 are eligible

for reimbursement under this program.

*Costs paid by members (deductibles, co payments or coinsurance) shall be included **in the calculations and eligible for reimbursement**.

Reimbursements are nontaxable to employers; they will not be used in determining an employer's gross income. Employers can use the savings to either reduce their own health care costs, provide premium relief to their workers and families or a combination of both. The Department of Health and Human Services estimates that the program could save families up to \$1,200 a year.

Applying for Reinsurance

Employers will need to apply for the reinsurance funds. HHS will begin the Early Retiree Program on June 1, 2010, in advance of the June 21 start date required by the Affordable Care Act, allowing more claims to qualify for reinsurance payments for plans this year.

Both self-funded and insured plans can apply, including plans sponsored by private entities, state and local governments, non profits, religious entities, unions, and other employers. Eligible employers can apply for the program through the Department of Health and Human Services. Applications will be available by the end of June.

Employers are responsible for completing the application. To do so, employers must:

- Prove they have programs and procedures in place that generate cost savings with respect to chronic and high-cost conditions.

- Have their applications approved, document claims, and implement programs and procedures that have or have the potential to generate cost savings for participants with chronic and high-cost conditions.

Apply Early

The government has granted \$5 Billion for this program and may stop receiving applications once the \$5 Billion is exhausted. The program is scheduled to end January 1, 2014.

The Department of Health and Human Services estimates 71,600 people in Wisconsin are early retirees who fall into the category of people for whom this program is designed. The number of eligible early retirees makes it difficult to understand how the amount allocated (\$5 Billion) will cover everyone in the country. Let's assume that just 10% of Wisconsin's eligible retirees have claims in the range that qualifies (\$15,000 to \$90,000) for reimbursement and that the average claim in excess of \$15,000 for these people is \$30,000. The total amount eligible for reinsurance for one year in Wisconsin alone is \$214,800,000. Wisconsin has less than 2% of the population of all the US. Because of these numbers, it is important that employers apply early for reimbursement.

Steps to Take Now

1. If you think your plan may be eligible for reinsurance, contact your insurance company or claims administrator to obtain claim data for the current plan year pertaining to early retirees. Such claim reporting will need to show each retiree's individual claims in the range of \$15,000 and \$90,000.
2. Be sure to document programs

Continued on page 19

Exec's Reflections

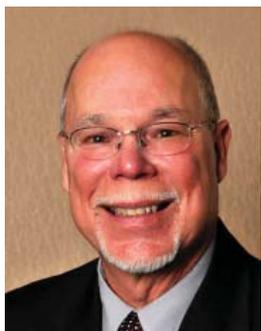
Continued from page 5

- i. The Board, committees and staff restructured the WASBO database, website, operations, budget, financial data and audits. Restructuring will continue to provide better tracking of the Facilities Manager Certification program and more intuitive operational use
 - j. Implemented the Facilities Manager Certification Program recognized by the Wisconsin DPI
 - k. Began offering Viterbo Graduate Credit at conferences for recertification
 - l. Added the Southwest Regional
 - m. Provided the leadership to update the Records Retention Document for School Districts statewide
 - n. Implemented the "Wisconsin School Leadership Career Center"
 - o. Initiated Professional Development Grants and scholarships to WASBO members to continue higher education work and/or work with ASBO
 - p. Provided leadership in bringing WASB, WASDA, WASPA, School Attorneys and WASBO together to implement strategic statewide planning for future school negotiations
 - q. Provided leadership to update the WASB Budget Cycle Book for school district school boards statewide which will be published in 2010-11
 - r. Develop new and additional recognized certification programs next year
 - s. Develop the K12QA Discussion Forum to be implemented in 2010-11
 - t. Develop new Course Content Standards with the DPI to be used by universities that provide a School Business Management Masters Degree Program that aligns with PI 34, ISLLC Standards and ASBO Standards
 - u. Participate with the DPI in developing new Course Content Standards at universities for Superintendent Certification
10. WASBO continues to collaborate with other associations, agencies and governmental units when appropriate alignment with the WASBO Vision and Mission occurs.

The power of a vital Vision and Mission becomes apparent when one looks back at the changes that have been made since the WASBO Vision and Mission were passed. Documents on WASBO's History and Strategic Plan are available at www.WASBO.com.

WASBO members will continue to use the Vision and Mission in striving for positive changes, which will enhance our work in serving children. The membership's willingness to give so much of their time and talents provides quality professional development opportunities and services for their fellow WASBO members.

Dr. Bambi Statz Academic Scholarship Recipients



Tim Stellmacher

Dr. Bambi Statz Academic \$1,000 Scholarship Sponsored by Ehlers

When we think of mentors we usually think of parents mentoring their children. In Tim's case, when it came time for a career change, his son John was his mentor. When his position as a Manager in Training Development for a manufacturing company was eliminated Tim was ready to pursue a graduate degree and licensure in school business management through the University of Wisconsin Whitewater. Tim already holds Masters Degrees in Education and Business. He is also a former high school German teacher. He looks forward to using his private sector skills in collaboration, strategic planning and change management in a future position as a School Business Manager.



Michele Seibel

Dr. Bambi Statz Academic \$1,000 Scholarship

Provided by Ardell Wiederhoeft, 2009 School Business Official of the Year

Nineteen years ago Michele had an opportunity to apply for a school Business Services Clerk position at the Hurley School District which led her to pursue a career in School Business Management. She is now the Business Services Director for the Hurley School District and is enrolled at the University of Wisconsin Superior pursuing a Specialist in Education Degree with a specialization in School Business Administration and her School Business Manager License. She enjoys enriching her own knowledge and abilities and want to be a greater asset as a team player on the Hurley School District Finance team.

Bambi Statz Recognized as Friend of WASBO

How does WASBO recognize someone like Bambi Statz? Bambi has touched students in her community as a Board member and Board president. She has touched students in Wisconsin as the Assistant State Superintendent at the Wisconsin Department of Public Instruction under two different elected state superintendents. Locally, she has been a business manager for small, medium and large districts in Wisconsin.

provides a scholarship to someone who is working toward a degree and certification in school business management in Wisconsin. The Board thought it fitting to rename this scholarship as the Dr. Bambi Statz Academic Scholarship.



Many of you know Bambi best as the Coordinator of the School Business Management Graduate Program at the University of Wisconsin Whitewater, where for the past fourteen years she has worked to prepare many of you to become licensed school business managers in Wisconsin. Ironically, she was the first woman to graduate from this program just a few decades earlier.

Bambi's contributions to WASBO have been numerous. She has provided her expertise in developing the popular State Education Convention preconference session, The School Finance Puzzle, where she has led group activities to provide a greater understanding of the state school funding formula to board members. She has also worked with Janet Rosseter to provide sessions on the mechanics of the school levy credit and where the money really goes.



Diane Pertzborn thought the perfect way to recognize such an individual was to recognize just how many people she has touched throughout her career. Then Diane set about this task by photographing everyone in attendance at the Spring Conference Business meeting with Bambi. Everyone was honored to be included in the celebration of Bambi's career.

Bambi is currently serving on WASBO's Professional Improvement Committee that is working to revise the WASBO Mentorship Program and help WASBO better serve our members in meeting the requirements of PI34 and at the same time growing professionally. This past year Bambi was named as the Chair of ASBO International's Certification Commission. The Commission is tasked with creating and setting the standards for ASBO International's the new Certified Administrator of School Finance and Operations (SFO). Wisconsin's standard for excellence has been recognized by her appointment.

When Bambi announced her retirement from UW-Whitewater, the WASBO Board of Directors felt that Bambi had done so much for WASBO and the profession of school business management that she should be recognized as a Friend of WASBO. Then they went one step further. Each year WASBO and Ehlers

Bambi is truly a leader of leaders, a mentor, a friend of education, an advocate for children and a Friend of WASBO.



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Patrick Acker

Implementation of an Effective Animal Control Policy

By Jodi L. Traas, Senior Risk Management Consultant, Community Insurance Corporation and Patrick Acker, Facilities Director, Baraboo School District

Submitted by the WASBO Safety and Risk Management Committee



Jodi Traas

Is your district prepared to answer the following questions?

Can the Middle School Science teacher raise honey bees on the roof of the building?

During the summer school class, How to Properly Take Care of My Pet, can I bring my pit bull to school on the last day?

Can the agriculture class raise chickens?

Can a new 8th grade student with a disability bring a dog to the middle school?

Can a high school teacher raise a dog at school with the intent that the dog becomes a Certified Service Dog? What if the dog has already growled at students and staff?

Can the high school students dissect cats purchased from Mexico?

Do you have a policy in place to assist building principals to make informed decisions? The new school year will approach quickly and now is a good time to consider implementing a new policy or perhaps reviewing a current one. Written policies and procedures enforced by administration are one facet of a strong risk management program.

Animals have educational value in the school setting, however, only under conditions that insure the health, safety

and well being of the students, staff and the animals. Every policy should address the following categories:

Approval

Pets brought in to school for show and tell or another special occasion must be approved by the building principal. If an animal is kept in a classroom for more than a single day, a building application form for resident animals should be completed by the staff member and approved by the principal. This application form may include items such as how the animal will fit into the curriculum, immunizations, care of animal such as housing and diet, and animal classroom rules. Animals that are unacceptable as resident animals should be identified. Examples would be poisonous animals, stray animals and wild animals.

Responsibility

Staff must have approval by all parents and the building principal prior to bringing the animal to school. Staff assumes primary responsibility for humane treatment of the animal. Staff is responsible for maintaining immunizations, providing proper care for the animal such as diet, bedding, cages, cleaning, handling, and care at night, weekends and vacations. Staff is responsible for good hygiene, proper hand washing procedures and following all classroom rules regarding the animal.

Parent & Staff Notification

Parents and other staff members should answer a questionnaire regarding animal allergies, asthma, medications and fear of animals. Parents must also provide permission to allow their student to occasionally hold or help care for a

classroom animal under supervised conditions. This form should be signed and dated by the parent or guardian.

Certified Service & Therapy Animals

For students, the need for a service animal will be documented in the individual's educational plan (IEP). The district should recognize organizations such as the National Service Dog Center when guidelines are developed to be adopted as a minimum standard. We recommend seeking attorney guidance on recent litigation in other states regarding students with autism and dogs.

Incident Procedures

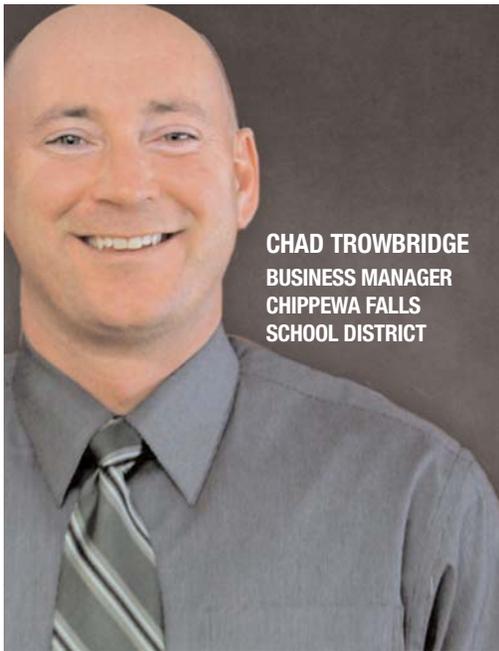
A wound must be thoroughly cleaned with soap and water if an animal scratches or bites a student or staff member. If the skin is broken the staff member must report the incident immediately to the building principal, parents and health room personnel. An incident form shall be completed.

Dissection

The use of recommended dead animals, organs and tissue shall be purchased from a reputable biological dealer and properly preserved. Staff and students must wear the proper personal protective equipment, utilize good hand washing techniques and disinfect the area.

Every school district should be prepared with policies that provide procedures and general guidelines to ensure the health, safety and well being of anyone who may come into contact with animals at school. Several districts, such as Pewaukee School District and the School District of Bonduel, offer comprehensive policies.

Chippewa Falls School District counts on EMC for responsive claims service.



With 5,100 students and 12 buildings, Chad Trowbridge has a lot to keep tabs on.

Fortunately, he counts on his insurance agency and EMC Insurance Companies to help keep tabs on any claim activity. Over the years, his insurance partners have demonstrated their ability to take charge in every type of claim situation, including a major motor coach accident the district suffered in 2005. In addition, Chad values the financial stability of EMC Insurance Companies, a company that has a proven track record of serving the needs of Wisconsin school districts like Chippewa Falls.



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Welcome New WASBO Directors and Treasurer



Janice DeMeuse
Business Manager
Luxemburg-Casco School District
 Regional Bay Area
 Office Treasurer
 Term July 1, 2010-
 June 30, 2013

Will continue through chairs of President Elect and President



Jill Collins
Director of Business Services
Black River Falls School District
 Regional West Central
 Office Director
 Term July 1, 2010-
 June 30, 2013



Betty Zimdars
Asst. Superintendent of Business and Information Services
Howard-Suamico School District
 Regional Bay Area
 Office Director
 Term July 1, 2010-
 June 30, 2013



Dave Van Spankeren
Executive Director of Finance & Operations
CESA #6
 Regional Northeast
 Office Director
 Term July 1, 2010-
 June 30, 2013

Facilities Management Certification Program 2010 Graduates

WASBO Facilities Committee Co-chairs, Jim Beckmann (Glendale-Maple Hills) and Dale Zabel (Kettle Moraine) assisted DPI's Elizabeth Kane in presenting the 2010 Facilities Manager Certification Program graduates with their certificates at the WASBO Spring Conference in May. Pictured left to right - Elizabeth Kane, Jim Beckmann, Dale Zabel, Jim Long (Baraboo), Brian Pepler (Ripon), Chris Dupre (Edgerton), Dave Hoh (Kimberly), Patrick Ruddy (Reedsburg), Jeff Hanke (Beloit), Joe Schmit (Black River Falls), George Kadamian (Racine), John



Stangler (Oconomowoc) and Dan Lauder (Southeast Missouri State University).

Not pictured - Jim DeBaker (Howard-Suamico), Tim Diermeier (Seymour), Dennis Kuchenmeister (Fort Atkinson),

Lynn Landre (Kenosha), Ken Roelke (Sauk Prairie), Mark Scharpf (Ethan Allen), Andy Stefancin (Racine) and Jerold Zamzow (Bremner School).

The WASBO Facilities Management Program was established in 2004.

Health Reform: Reinsurance for Early Retirees

Continued from page 13

and procedures implemented to generate cost savings for participants with chronic and high cost conditions (such as disease management and large case management programs).

3. Check this site: <http://www.healthreform.gov/forums/blog/index.html> for weekly updates on this provision of Health

Reform and for information on when and where applications for reimbursement will be available.

4. Review your retiree medical experience for the last couple of years. It may be that the costs to apply for this reinsurance – the costs to gather the proper information, validate claim and plan costs and administrative

charges – will outweigh the government payments for your retiree medical plan.

Information contained in this article is based upon available regulations and Key Benefit Concepts' interpretation. It is provided for informational purposes and is not intended to provide legal advice to you or your plan. Application to specific circumstances should rely on further professional guidance.



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ASBO Update

Continued from page 21

the lowest cost. The jobs in the United States may require more creative design work, as opposed to manufacturing. Jobs requiring innovation and arts education may grow. This all has great implications for K-12 education.

As we transform ourselves from being managers to leaders in our districts in this globalized economy, consider ASBO as your partner, alongside WASBO. We will stand by you and be your network of support!

**“Do more than belong: participate.
 Do more than care: help.
 Do more than believe: practice.
 Do more than be fair: be kind.
 Do more than forgive: forget.
 Do more than dream: work.”**

— William Arthur Ward



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Erin Green
President

ASBO Update

President's Message

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

During my six years on the ASBO Board, many things have happened. ASBO International developed a strategic plan, and vetted the ideas through various stakeholders including committees, affiliates and members. In order to best serve our growing membership, task forces were established. These task forces are:

- Investigate offering an International credential for our profession
- Review membership directions
- Survey the membership to determine the future for our profession and organization

I am so pleased to be able to tell you that many of the plans that were committed to are now coming to fruition.

ASBO members who are part of the Certification Commission, under the able direction of Bambi Statz, are hard at work developing the Certified Administrator of School Finance and Operations (SFO) credential for U.S. & Canadian members. This has been a 30 year vision for the organization. The program will be unveiled this year. This credential will be extremely useful to states and provinces without licensing or regulation for school business officials. It can work in tandem with existing licensing or regulation, as an added "credential", helping to insure quality candidates for SBO positions. It will add to the ease of mobility needed by younger members of our profession. The credential has been developed by practicing school business professionals with guidance from high quality consultants. The goal was to create a sustainable, world-class program. A two-part exam will

be taken to qualify for the credential as well as meeting other requirements of the program.

I am also pleased to report that ASBO membership is stable. Although we had a 4% loss of membership over last year, we continue to add new members from other professions such as accounting, business schools, banking, teaching, public administration and the business world.

ASBO continues to add services every year, such as a newly invigorated Executive Leadership Forum to be held February 23-25, 2011 in Grapevine, TX (Dallas-Fort Worth area) and our world-class summer Eagle Institute to be held this year in Gettysburg, PA. This initiative melds a reflection of Civil War history and current challenges in education leadership. ASBO Radio provides newscasts for our members. **School Business Daily** offers daily briefings on national education news and our renowned **School Business Affairs** magazine publishes monthly professional articles on topics vital to our jobs. ASBO award programs enhance fiscal credibility for us, badly needed in these times when trust in government is low and the need for communication is high. ASBO recently started the ASBO Research and Education Fund (AREF). The fund champions the behind-the-scenes work of school business professionals by sponsoring and advancing education and research initiatives to help them better serve students. Coming this year is a new ASBO blog to help us share best practices.

I hope this is enough to convince you to give ASBO membership a try. It is a valuable addition to the great services you obtain from WASBO

and your regionals. There simply is no replacement, digital or otherwise, for ASBO's top-notch professional development. It is where you can develop your own network of support amongst colleagues from around the country and world. ASBO has changed in the past 10 years. It is not unusual to find colleagues from Great Britain, Australia and even South Africa at our events.

Education is undergoing tremendous change. I don't need to tell you that! We are moving away from the model of the 1950's where 30 students sat compliantly listening to lectures, preparing to work in Fortune 500 company cubicles. Instead, we need to embrace an education that is personally relevant to each student, delivered in a learning style that works for them, framed in a global way. Jobs of today require cultural competence, the ability to work across countries and cultures, the ability to be creative and innovative, and to be able to apply knowledge and solve real world problems.

It is clear that our communities and school districts are looking to us to help guide them through this transformative period. It will fall to us to have real conversations with unions, as the wages and benefits provided to education staff are unsustainable in many regions. It is time to start meaningful collaboration with the business sector who demonstrates their support with taxes paid and rely on our graduating students to grow their business. We need a well-educated workforce in order to propel our economy into the future. It is time to align our curricula with the skills needed in the real world. Jobs will continue to shift to the countries that can perform them adequately at

Continued on page 20



Celebrate History ASBO International Turns 100

September 24-27, 2010 - Disney's Coronado Springs Resort, Lake Buena Vista, Florida

Celebrate 100 years of ASBO International! Join us in recognizing WASBO's excellence and contributions to ASBO International as Erin Green presides as President at this conference. Also, come honor Tom Wohlleber's selection as a Distinguished

Professional Award Recipient as a part of the ASBO Eagle Award Program. The selection for the International Eagle Award Recipient will be made in August. Presentation of the awards will be made at the Annual Meeting in September. We are cheering for Tom to be selected from these finalists for the top award!

The 2010 Annual Meeting will launch school business management into the next 100 years. ASBO has stood the test of time. For a century, school business officials just like you have relied on ASBO International. Come together with your colleagues to discover creative solutions to keep cuts away from the classroom, save jobs, and inspire changes.

www.asbointl.org/Centennial

Annual Meeting Keynotes

Bring Disney Magic Back to Your District

Saturday, September 25

Experience the renowned Disney Institute, professional development that has inspired generations of leaders. You'll discover proven, creative business philosophies to steer your district through the economic challenges as you learn about Walt Disney himself, an innovative pioneer and entrepreneur. Your school district

has more in common with Disney than you ever imagined.

Slap Some Innovation Into Your Business Office

Monday, September 27

It's time for a "Slap," Stan Slap. This corporate strategist is revolutionizing the business world. And now he wants to help you make a difference. Slap will bust the myth that you can't succeed in these economic times and challenge you to bring the mojo back to your team. Tough times call for tougher teams. Let's leave the excuses to the other guys. Buckle up: we're going off road!

Pre- and Post Annual Meeting Workshops

Like spreadsheets? You'll love ASBO's workshops. Get the inside scoop on

how other states are "racing to the top," discover how to unlock your award-winning budget, and find out whether GASB 54 will require special revenue and capital projects funds be reported in the general fund. Sign up now for your Annual Meeting workshop. Space is limited.

Centennial Gala

Sunday, September 26

You only turn 100 once. To celebrate ASBO International's 100th anniversary join your WASBO friends to support Erin and Tom at this event. You will have an opportunity to order your ticket for this event directly through WASBO for \$30. **DO NOT ORDER YOUR TICKET THROUGH ASBO.** Registration information will be coming soon on the WASBO web site and through email in early July. If your company is interested in supporting WASBO at the ASBO Annual Meeting please contact the WASBO office for more information.

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Erin Green
President
ASBO International

Containing Health Care Costs

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

At the top of all of our lists of costs we'd like to contain are health care costs. Our budgets are being scrutinized and the portion devoted to health care is

great. We cannot arbitrarily control these benefits as they are negotiated with unions.

With health care costs rising at an unsustainable level, what can we do?

In my region of Wisconsin, we have some of the highest health care costs in the country. Greendale School District (GSD) pays \$21,000/year for family coverage.

Recently, I updated our school board with my annual "state of health care" report. Here are some of the takeaways:

A review of six years of data gathered from Health Risk Assessments show our district's health risks migration is going in the right direction. Our population has fewer health risks than the WEA Trust general population.

- Over the past six years, our LOW RISK population has increased from 72.8% to 81.5% and our HIGH RISK population has decreased from 7.4% to 4.9%.
- The University of Michigan has done ground breaking research finding that health costs correlate with health risks. In other words, the more risks you have, the higher your health costs are.
- The 2009-2010 top health risks among all staff, as measured by a recent screening of our employees in order of priority are:
 - Body fat

- Weight
- LDL cholesterol
- Depression
- Hypertension

Most of these risks are lifestyle related, and can be mitigated with exercise, better diets, and treatment.

- The University of Michigan's wellness guru, Dr. Eddington makes the point that it's not only health costs that are at risk, it is also productivity, absenteeism and "presenteeism" (people present but not productive). In addition, "below the tip of the iceberg" are other costs such as Worker Compensation costs, sub replacement costs, poor productivity and sick leave usage that are impacted by poor health.
- GSD has designed the staff wellness and health promotion program to drive maximum participation (204 staff members out of 220 possible) signed on in 2009-2010. For a 3% reduction in premium share, worth about \$600/year, staff commit to taking an on-site health screening, reviewing their results individually with a health coach, agreeing to not smoke, agreeing to take all age and gender recommended health screening tests, and agreeing to exercise regularly.
- The Nurse Practitioner (NP) program, implemented last year, has been well received by staff. The NP offers services such as diagnosis and treatment of minor illnesses, monitoring of chronic illnesses to prevent hospitalizations, monitoring and coaching of personal wellness programs, and writing of scripts.

The program is open to GSD staff and their dependents, and students with the NP which is on-site Mondays and Thursdays. A total of eight hours a week are generally available to staff for these services. Not only are office visit costs saved, the cost of time lost, sick leave, and subs are saved by having the service on-site. This program is made possible through a contract with a local health care provider as a result of our collaboration on various wellness projects. The program is expected to cost approximately \$15,000 this year. With 224 visits to date this school year, the cost per visit is approximately \$37. This compares to an average office call of \$100 in this area. This is an easy and convenient way to bring primary health care to those who need it.

What about mental health needs of staff?

- The National Survey on Drug Use and Health found 5.1% of all adults in the US reported they had an unmet need for mental health care.
- The Center for Mental Health Services estimates that two-thirds of children and adolescents who need mental health services do not receive them.
- There is a significant opportunity for employers in the area of medical-behavioral treatment integration. Patients with serious medical conditions likely will have a mental health condition as well. Opportunities to reduce costs and improve outcomes exist by providing integrated treatment.
- GSD is addressing this need to the extent possible today by

Continued on page 24

Containing Health Care Costs

Continued from page 23

use of the EAP program, use of behavioral health counseling through the health plans, and by offering educational sessions on-site for staff.

- It is likely that up to 10% of education staff nationwide have mental health issues that are treatable.

To view a summary of our health promotion program follow this link:

http://www.greendale.k12.wi.us/Health_Manual/Health_Program_Brochure.pdf

Most districts have similar major risk factors. In the US, these trend around excess weight, lack of physical activity, and poor diet. High stress levels are also a common problem for school staff. Most people know they have these problems, and know what to do, but lack the focus and motivation to change. This is where work site wellness programs come in.

Best practice in health care cost containment today recommends these:

- Introduce an element of "consumer driven" health care, by using health savings accounts and reimbursement accounts so that staff pay attention to the costs incurred and get "skin in the game."
- Incent staff to get off your health insurance program.
- Negotiate directly with care providers or join buying pools. Check out new pharmacy cooperatives to lower drug costs.
- Make work site wellness convenient with incentives to participate. A great program that no one uses is useless.
- Provide steerage by plan elements, such as high co-pays for emergency room visits, lower co-pays for generic drugs, and

higher deductibles for expensive health plans.

- Provide care management to those with chronic conditions.
- Work with the unions to find solutions to the unsustainable situation health care presents.

Recently, Rob Sweetgall, a national speaker who talks frequently to school staffs and students, challenged our district to find ten minutes at the start of each day to get our students moving. The benefits, besides better health, could be improved learning and reduced behavior problems. If all schools adopted this idea, could we start making a dent in improving health of staff and students?

For some great examples of districts making a difference with regard to health care costs, check out Schaumburg School District 54 in Illinois under the direction of ASBO member CFO Mohsin Dada, the Washoe School District in Nevada, and the Polk County School District in Florida.

Dada has tweaked the plan design to drive lower costs by taking advantage of physician discounts, negotiating with hospitals, introducing a wellness program, providing care management for chronic diseases, implementing a three tiered system, and negotiating premium rate increases to be shared with employees.

Promoting health in the workplace can positively affect the bottom line for companies and the waistline for employees, according to Brigham Young University researchers. Their study, published in the journal "Preventive Medicine," examined the health claims costs and absenteeism of 6,246 employees and retirees from the Washoe County School District over a period of six years. The results reveal that employees who participate in

workplace health promotion programs miss fewer workdays than those who do not participate. The reduction in absenteeism translates into a cost savings of nearly \$16 for each dollar spent on the program – a savings of \$3 million. "This is just another reason companies should offer and encourage participation in wellness programs," said Steven Aldana, director of the research team and professor of exercise science at Brigham Young University. "The findings are important because, although investment in health promotion is not large, it has a large pay-back for organizations," said Nico Pronk, vice president of the HealthPartners Center for Health Promotion in Minneapolis. "Perhaps more importantly, it shows that such programs are able to keep people more functional and on-the-job. Although this is certainly important from an employer's perspective, the ultimate winner is the individual who enjoys better health on a daily basis."

The Polk County Public Schools are one of nine school districts selected to receive a national 2009 School Employee Wellness Award from the Washington, D.C.-based Directors of Health Promotion and Education (DHPE) <http://www.dhpe.org/about.asp>. DHPE is a membership organization for health promotion and health education professionals within U.S. health agencies. The DHPE awards program recognizes school districts implementing wellness programs that promote employee health, improve workforce productivity and reduce the costs associated with employee absenteeism due to health care.

The Polk Public Schools began a school employee wellness program in 2001. The school district is the largest employer in Polk County with more than 12,000 employees. The employee wellness program focuses on four health

Continued on page 25



Director's Corner

Get Involved in WASBO

By Chad Trowbridge, Business Manager, Chippewa Falls Area Unified School District

Chad Trowbridge
WASBO
President Elect

A number of people approached me at the Spring Conference and asked, "How can I get more involved in WASBO?" These people varied in years of experience, background, and positions.

WASBO is a great organization because of its members. Those members serve in various capacities, but a great deal of work gets done in WASBO committees. Some of the committees plan major events like conferences, while other committees are focused on a specific area of development or are project based.

The WASBO Board is committed to providing clear purpose and direction to its committees. The Board will accomplish this by creating committee job descriptions that will contain committee responsibilities and strategies.

There are many advantages to this structure, and there is hope that WASBO members who are looking to become more involved can look at the committee job descriptions and know what exactly it is that they are committing to. It will also help to understand what the committee's purpose is, so that individual talents and interest areas can be best matched up with need.

You can find a list of committee chairs, board liaisons, committee job descriptions, and sign up forms at the following link on the WASBO website: www.wasbo.com. Committee responsibilities and strategies will be revised and updated by the various committees in the upcoming months.

I would encourage you to take a look the committees and get involved. Serving on a committee is what got me more involved with WASBO and eventually pursuing a position on the Board.

Containing Health Care Costs

Continued from page 24

areas identified by employee health risks and interests: physical activity, healthy eating, stress management, and weight management.

The school district's wellness activities include fitness classes, a wellness web site, personal counseling, an annual health fair, cooking instruction and demonstrations and incentive-laden health challenges and contests. Community partners for the various initiatives include local and state health departments, hospitals, cancer centers, Blue Cross Blue Shield, pharmaceutical companies, the American Red Cross, the American Lung Association, and other partners.

Health outcomes from the wellness program include a 15 percent increase in diabetes identification among employees and 78 percent decrease in medical costs associated with diabetes. Overall total medical costs have decreased by 46 percent.

It remains to be seen how the recent "health care for all" legislation will play out. Rather than health care reform, alone, the case could be made that the US needs "lifestyle reform". Until that happens, we could be fighting a losing battle.

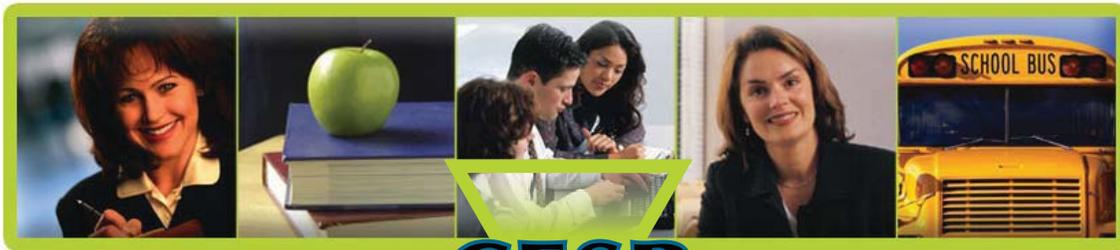


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Architecture Engineering Planning Interiors

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CESP

Council of Educational Support Professionals

2010 Summer Conference

Attitude, Relationships, and Humor: Powerful Forces in Our Lives

August 6, 2010 - Sheraton Madison Hotel

Co-sponsored by WASBO and AWSA

Could your school administrative assistants, business office staff and paraprofessionals use a day of professional development? This one day conference will assist them as they interact with students, staff and parents throughout the school year. This year's conference theme is **Attitude, Relationships, and Humor: Powerful Forces in Our Lives.**

We all know the effect that one negative person can have on an entire group. How do you work with such a person and remain positive? What is the personal force that you bring to your work environment? Do you use your attitude to positively affect your relationships with others? Do you find humor in your job that helps lighten your load? Come hear from Roger Fish about how you can create a positive and fun work environment through your relationships, attitude and the use of humor. Learning opportunities include: Current Drug Trends, Technology Tools & Trends, Retirement Savings: The Keys to Success, and Networking with Peers and Sharing of Ideas and Best Practices.

Cost is \$112 each or \$92 when you bring a friend.

Register at: <http://www.awsa.org/associations/10159/files/CESP-home.html>

Contact the AWSA office for more information, 608.241.0300.

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Orvin R. Clark, EdD, RSBA
Educational Leadership
Department Chair
University of Wisconsin-
Superior

Book Review

They Shoot Managers Don't They?

Managing Yourself and Leading Others in a Changing World

Terry L. Paulson, PhD, Author

Review by Orvin R. Clark, EdD, RSBA

Managing Yourself and Leading Others in a Changing World was written by Terry L. Paulson, PhD. Dr. Terry Paulson is a licensed psychologist, management specialist and author of popular books such as, **Paulson on Change, Making Humor Work, 50 Tips for Speaking Like a Pro**, and **Can I Have the Keys to the Car?** He has hosted ECI's business television series entitled, "Quality from the Human Side" and is a distinguished faculty member of the Institute for Management Studies. He presents people-oriented techniques any manager can use to improve and maintain morale and create an empowered team of employees. He uses quotations from famous people, humor, cartoons, practical strategies and focused examples to promote change and results.

They Shoot Managers Don't They? is 154 pages in length and is an interesting read, rated 4 stars by reviewers. The book has a startling title but is based on a series of short stories which are lessons on self development and leadership. The phrase "They Shoot Managers Don't They?" is an attention getter, but the book really focuses on leadership. Each chapter has a theme and at the end of the chapter there is a list of key ideas called **Keepers**.

In the Introduction Dr. Paulson relates a story; "Not long ago I was flying to Los Angeles, where I was scheduled to speak at a conference. I was at

They Shoot Managers Don't They?; subtitled "Managing

Kennedy Airport in New York, standing in line to check my bags, and the guy in front of me was giving the baggage checker a difficult time. He was being terribly and obnoxiously abusive. I didn't say anything--the man was not only upset, he was big. After he moved away from the curb, I expressed my sympathy to the checker for the verbal bullying he had taken.

"Do people talk that way to you often?" I asked him.

"Oh, yeah. You get used to it around here."

"Don't worry, bud" he drawled, as he slapped the tags on my suitcases. "After all, the customer's always right."

I'm a psychologist, I had a pretty good idea he didn't really mean that.

"Well, I don't think he was right in this case," I said.

"Don't worry," the checker repeated with quiet confidence, swinging my bags on the conveyor belt behind him. "I've already gotten even."

"What do you mean?" I said, my eyes opening wide in growing concern.

"He's on his way to Chicago," the man said, "but his bags are going to Japan."

This incident contains a valuable lesson so eloquently taught. Unless you have the ability to manage conflict successfully, your actions or inactions can allow it to escalate into guerilla warfare. Some people don't get mad, they just get even.

Keepers

- Being abusive gets your bags sent to Japan.
- Manage change and conflict or it will manage you.

Chapter One – *Beating the Myth of the Prefect Manager*

Keepers

- Avoid the three Ps: Perfection, Procrastination, Paralysis.
- Trade "Plan-plan-plan-fail" for "Try it, test it, fix it, try it again, adjust it until it works."

Chapter Two – *Beating the Myth of Winners and Losers*

Keepers

- You miss one hundred percent of the shots you never take.
- Winners win and lose more frequently than losers because they stay in the game.
- Position, perform, and persist to maximize results.
- Limit your "down time"; bounce back quickly from setbacks.

Chapter Three – *Excellence Is an Inside Job: Manage Yourself So You Can Lead Others*

Keepers

- Catch yourself being effective.
- Treat yourself the way you treat others that you care about.
- Balance goal setting with self-support.
- Be specific and future-focused in your self-criticism.

Chapter Four – *Care Enough to Confront: Being Tough as nails and Supportive*

Keepers

- Care enough to confront.
- Document to inform, not to

Continued on page 28

Book Review - They Shoot Managers Don't They?

Continued from page 27

punish.

- Be tough as nails and supportive.
- Be consistent: be a vending machine, not a slot machine.

Chapter Five – Avoiding Avoidance: Be a Problem Solver Not a Problem Evader

Keepers

- Set a time limit; then confront.
- Make appointments for confronting your difficult people.
- Make problem solving a priority.
- Keep problem solving focused on the future.
- Visualize a positive outcome to your problem solving efforts.

Chapter Six – Building Bridges vs. Burning Them: the subtle Art of Influence

Keepers

- Build bridges, not walls.
- Relationships are like deposit systems: put something in before you try to take something out.
- Scan for ways to build sincere positive contacts.
- Trust comes from a history of balanced interaction.
- You don't have to be liked, but make yourself hard to be perceived as an enemy.
- Move beyond biases and you'll find that people are people.

Chapter Seven – No Surprises: Using Future Focused Feedback

Keepers

- Use feedback for course corrections in a changing world.
- Keep criticism specific and future focused.
- Catch people being effective.
- Keep positive feedback self-initiated, specific, separate, and sincere.
- Listen before suggesting solutions.
- Think change, not conviction.
- Performance evaluations should

not be a surprise but a reflection of ongoing feedback.

Chapter Eight – Keeping Your Big Mouth Shut: Cultivating the Listening Edge

Keepers

- Don't silence resistance, use it to make better decisions.
- Listen to, understand, and assist others; promote win/win problem solving.
- Avoid mindreading; listen to what people are saying, not to what you expect them to say.
- In problem solving, use your ears and eyes more than your mouth.
- Absorb, explore, and redirect any verbal attack.
- To disarm anger, acknowledge the problem and your desire to listen.
- Use active listening, ask for specifics, take notes, and move on to future focused problem solving.
- Check important messages; repeat what was said to assure that it has been received.
- Be a good facilitator: use open questions, paraphrases, animation, door openers, and the positive pause.
- Encourage others to come to you early with disagreements or problems.

Chapter Nine – Conflict Up the Organization: Managing Your Boss

Keepers

- Do your part to keep information flowing, keep your boss informed.
- Build on common ground and search for ways to show support.
- Make your boss look good; learn to serve as well as to shine.
- Know when to give up; your next boss may work with you instead of against you.

Chapter Ten – Building Empowered

Teams that meet the Challenge of Change

Keepers

- Work your vision and values.
- Walk your talk and earn the trust of your team every day.
- Provide timely, focused information early.
- Use friendly controls that let your team follow the score that counts.
- Define your boundaries before you empower.
- Use initiative, priority shifts, and the Four X's rule to keep your team working smart.
- Mine your team's pockets of enthusiasm and innovation.
- Work at making a living and a life by having tickets every day.

Chapter Eleven – Making this book Worth Buying: The Challenge of Self-Change

Keepers

- Focus your change efforts.
- Take change one step at a time to build on successes.
- Make commitments to build support.
- Use reminders to keep change on course.
- Catch yourself changing.
- Use self reward to support changes, not setbacks.
- Skill retention is largely self management.

The reasons for buying and reading *They Shoot Managers Don't They?* are stated above and would be an excellent addition to your professional book shelf.



For Complete
Session Information
and to Register
www.WASBO.com



Find your way at the
**WASBO New School Administrators
& Business Support Staff Workshop**

August 11-12, 2010
Holiday Inn Hotel & Convention Center
Stevens Point, Wisconsin

Take this opportunity to meet and learn from school finance experts. The DPI School Finance Team, Education Association Leaders and Public Finance vendors will all share their knowledge so you can better serve your school district and do the best job possible of providing resources to children.

The WASBO New School Administrators & Business Support Staff Workshop features two days of sessions on August 11-12, full of the nuts and bolts information you need to understand and succeed in the school business arena. Topics covered include:

- The Fiscal Year at a Glance
- Fund 27 Special Education
- Accounting Transactions
- Revenue Limits
- Equalization Aid & Levy Credits
- The Importance of Networking
- Do's and Don'ts of Under-levying Your Revenue Limit
- The Importance of Long-Range Financial Planning
- Building Trust with School Boards and the Community

If you are licensed under PI34, consider joining us August 10 for a pre-conference session, Writing Professional Development (PDP) Goals for the Initial Educator. You will learn about the licensing process, tools for managing the process and how to address the requirements. Cost is \$60. You need not attend the New Administrators Workshop to participate in the pre-conference.

2010 WASBO Fall Conference

Reaching Out and Making Connections



October 20-22, 2010
The Osthoff Resort & Conference Center
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Fraud, Misuse and Disputed Items with Purchasing Cards: A Summary

By Bryan D. Barger, Vice President, Senior Relationship Manager, North American Public Sector BMO/Harris Spend and Payment Solutions

Often times, there is confusion between what is fraudulent and what is misuse in the purchasing card world. Under both situations, BMO has suggestions to keep each p-card participant's liability to the absolute minimum.

Firstly, under the BMO purchasing card program, there is ZERO liability for cardholders (and the organization) due to fraudulent use from a lost or stolen card. Fraud is best defined by unauthorized activity that conducted outside of your organization. When a card is lost or stolen, it is suggested that the program administrator immediately report this information to BMO's Client Services group to make sure that the card is cancelled immediately. BMO may request additional documentation in writing from the participating p-card program member to help distinguish between authorized and fraudulent charges.

Employee misuse, on the other hand, results from charges that occur from within the organization for what MasterCard terms "waivable" charges. Waivable charges include all transactions charged to the BMO card that did not benefit the organization directly or indirectly. In all our years of purchase card operation, loss due to cardholder misuse has been almost non-existent. Nonetheless, BMO offers MasterCoverage (at no charge) as an additional benefit which provides coverage in the event of card misuse by employees. Under this program, an organization (with 5 or more cards) is covered for any "waivable charges" up to \$100,000 per employee, and up to a maximum limit of \$25,000 per cardholder for organizations that have 2-4 cards.

Please note that MasterCoverage excludes card accounts that do NOT have an individual's name associated with it—what BMO might refer to as a Department Card (and Ghost Cards fall into this category as well)—since if the card were to be misused, then we might not be able to determine the source of the fraud. That is why we always suggest that every card be directed to an individual, if at all possible. Under the BMO program, there is no additional cost per card or "spend per card" thresholds. However, please be assured fraud resulting from LOST or STOLEN Department Cards ARE covered under the zero liability policy unless it is determined that the "fraud" may not really be external—and that the "fraud" is really an attempt to disguise employee misuse.

Disputed charges result when an organization has a disagreement (non-receipt, incomplete order, etc.) with the merchant over the goods or services to be received from the merchant or supplier. It is first suggested to contact the merchant directly to try and resolve any issues—but it may become necessary to report a dispute directly to the bank. Please reference your BMO Member Account Agreement, Schedule 1, Page 3 for more information relating to the full process of disputing a charge. It is important to note that all disputed charges MUST be made within 100 days (of the charge posting date (NOT the statement date) in order to make sure that the dispute procedure can be followed. (MasterCard could amend this, so I would suggest disputing all items as quickly as possible when realized.)

Hopefully this information helps to explain some of protections provided under the BMO MasterCard program.

If you have additional questions as a program administrator, please do not hesitate to contact Client Services at 888-267-7834 for more information.

WASBO PCard Program Members Receive \$146,229 in Rebates

Rebate checks for 2009-10 were mailed at the end of June to forty-eight school districts totaling \$146,229. Wisconsin PCard school districts had purchasing volume of \$14.7 million. The WASBO purchasing card program is part of a program started by Illinois ASBO. Currently the program includes Alaska, Iowa, Illinois, Indiana, Minnesota, Montana, New Hampshire, Oregon, Vermont, Washington and Wisconsin. This joint effort allows the program to generate total purchasing volume of over \$122 million and rebates ranging from 1.05% to 1.21%, depending on the payment schedule selected by the district. There are no program fees and every district, no matter how large or small, receives the same rebate. Any district applying for this program will be served. Each state retains an administrative fee to support the operation of the program.

P-Card User Group Training Thursday, August 12, 2010 Holiday Inn Stevens Point

Take this opportunity to talk to other districts to see how you can maximize your use of the program to save time and money. Look for Details Online Training and information on the Skyward interface to help you streamline your program administration process. If there are topics you would like to see covered or have suggestions for improvements to the program, please send an email to hafeman@wasbo.com. You can register to attend this training day at www.WASBO.com.



THE WISCONSIN ASSOCIATION OF SCHOOL BUSINESS OFFICIALS FOUNDATION

63RD ANNUAL SPRING CONFERENCE & EXHIBITS

MAY 25-28, 2010

KALAHARI RESORT & CONFERENCE CENTER - WISCONSIN DELLS, WISCONSIN

Planting Seeds of Knowledge to Create a Greener Future for Wisconsin's Schools.

This was the theme of this year's Spring Conference. Seeds of knowledge were planted in the thirty-three concurrent sessions, in the keynote session, "Green Your School" by eco-preneur, Kim Carlson,

and in the exhibit hall where 134 exhibitors shared information on the products and services available to assist your district in being more "green" or saving some "green."

In addition to the variety of formal learning opportunities, there were many opportunities to learn by networking with colleagues while doing our part to be more socially responsible.

On Tuesday, we recognized our past and present leadership at the President's Recognition Dinner. Everyone had an opportunity to reconnect at the Opening Mixer sponsored by PMA Financial Group and WISC. Wednesday, 212 golfers came out to raise money for

student scholarships. Wednesday evening we continued networking at the WASBO Auction and Game Night with a reception sponsored by Robert W. Baird & Co. and McKinstry. We raised \$6,924 at the auction to support WASBO's members who give their time and expertise to represent us on ASBO International Committees and on the Board of Directors.

Thursday we kicked off the day with our keynote, Kim Carlson, provided by WEA Trust. Kim taught us that there are many shades of green and we can all do something to make our planet more sustainable. At lunch we recognized our scholarship recipients (pages 10-11) and bid on bird houses painted by the Spring Conference Planning Committee. The \$392 in proceeds benefited the Aging & Disability Resource Center of Sauk County. We also sold 47 bluebird houses which were handcrafted by Boy Scouts as part of TJ Sinicke's Eagle Scout project to help bring bluebirds back to Wisconsin.

Friday began with our Business Meeting and recognition of our award winners. (pages 7, 9, and 15). We also congratulated our

Continued on page 35



PLANTING SEEDS OF KNOWLEDGE
TO CREATE A GREENER FUTURE FOR
WISCONSIN'S SCHOOLS






"WE DO NOT INHERIT THE EARTH FROM OUR ANCESTORS;
WE BORROW IT FROM OUR CHILDREN."
— CHIEF SEATTLE





WE WOULD LIKE TO THANK OUR SPONSORS FOR HELPING US
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TO CREATE A GREENER FUTURE FOR WISCONSIN'S SCHOOLS



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Director's Corner

Service Affiliates - PLEASE READ

By Jeff Carew, Director - Wisconsin Office, PMA Financial Network, Inc.

Don't miss this or any opportunity.

I received a phone call just days after the Spring Conference

*Jeff Carew
WASBO Director
and Service Affiliate
Committee Chair*

from an unhappy WASBO Service Affiliate complaining of a lack of traffic at the booth. I asked several questions to better understand his experience and made a couple of suggestions on how to improve in the future. As I reflected on this conversation, I thought about the conference, I thought about the economy, and I thought about WASBO's relationship with its service affiliates and began to realize just how good we have it – as long as we take advantage of it.

Over the past year and a half, the firm I represent has expanded our marketing to include other government entities. This means new organizations, more conferences, more booth time and new conversations. At many of these conferences the booth hours are very long and the traffic is less than great. Some of these organizations do not invite the vendors to participate in the sessions, to join them for the meals, and

Spring Conference

Continued from page 32

some make you feel like a vendor from the moment you enter to moment you leave. These new experiences have really enabled me to put my WASBO relationship in perspective.

I can confidently say that the level of access we enjoy as a WASBO service affiliate is unrivaled anywhere else and actually makes us better at our job. I learned early on that nothing is sold on the exhibit floor and rarely do relations blossom -- but they can, and do, start. Exhibit areas are a necessary part of our existence, but WASBO has always been at the forefront of making that simply a part of our time, talent and financial contribution.

Service Affiliates are a large part of the golf outings which provides us hours of access to potential clients. We are invited to all the networking events, meals and social events. It is at these events where relationships elevate from the mundane booth speak of "nice to meet you what district are you with" to an in depth discussion. You may be able to learn about a specific challenges being faced, and arrive at collaborative solutions involving your product or service. In WASBO's efforts to be inclusive, they have created an

environment that fosters the value added partnership.

So when I attend these new events, access to opportunities are not on the agenda and I realize how spoiled we are by WASBO. However, to ensure we get the most out of the investment in the conference, we put in the extra effort to find these opportunities.

Which brings me back to that unhappy service affiliate's phone call. I was very disheartened as I watched many of the service affiliates pack up their wares and head out of the Kalahari immediately after the exhibit floor closed. A buffet lunch followed which may have been the moment to sit next to a WASBO member, learn about a specific challenge being faced, identify a potential solution and set up a meeting. The lunch was paid for and the program included one of the highlights on the WASBO calendar: presentation of scholarships. It doesn't get much easier than that.

I would encourage all service affiliates to take advantage of every opportunity. This level of access to the membership in a professional organization is uncommon and you will quickly realize its value and will work to search it out.

2010 Facilities Management Certification Program graduates (page 19). The DeForest Middle School Show Choir and Jazz Ensemble got things started with some toe tapping music.

Recognizing the importance of the arts in education, we annually raise funds to support student music at the State Education Convention in January. This year we sold leaves and grew our WASBO tree. We provide \$400 to each of the three groups selected to perform at the convention.

This year's conference also walked the talk when it came to making greener choices. We provided each attendee with a reusable water bottle instead of providing bottled water. Handouts were offered online and on flashdrives. The program was printed on recycled paper made with 100% post consumer waste. We even used a more eco-friendly font, Century Gothic, which uses 30% less ink than a typical arial font. Name badges were printed on recycled stock and name badge holders were made from plants, not plastic. We planned networking opportunities on site

to reduce the need to travel and therefore reducing emissions. Any decorations for the conference were recyclable or reusable. Sponsor recognition was done electronically on the large general session screens and in the exhibit hall reusable flags were displayed to recognize our supporters.

We hope you were able to find ways to be more green and sustainable both personally and in your school district so together we can create a greener future for Wisconsin's schools and our children.

2010 WASBO Custodial & Maintenance Summer Conference

Wausau East High School

June 23, 2010

Custodial and Maintenance staff from twenty districts attended the Custodial & Maintenance Conference at Wausau East High School. Dennis Wald, Director of Physical Plant for the Wausau School District and his staff hosted a conference



filled with information on a variety of topics and provided tours of the six year old high school. Attendees started the day with a session on School Safety and Security by security expert, Ted Hayes of M3 Insurance Solutions for Business. They could choose to attend breakout sessions on Plumbing Maintenance, Athletic Field Maintenance, Green Cleaning, Green Building, Custodial Equipment Maintenance or Sexual Harassment, to name a few. Time was available to visit with exhibitors to learn about new products or how to use equipment. Finally, the day was not complete unless they took the Safety Room Challenge provided by Joe Bellomo (Waunakee), Jeff Lund (Parkview) and their teams. The group from Superior took home the honors as the winning team. The winners

included Yvonne Grenier, Dale Lundgren, Chris Wenzel, Steve Stupak and Andy Vengrin. Congratulations!



2010 WASBO Custodial & Maintenance Summer Conference



July 14, 2010

Nature Hill Intermediate School
Oconomowoc, WI



**Register at
www.WASBO.com**



**If you missed the Wausau Conference,
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*Building Monitoring Systems &
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Sexual Harassment Training*

Presented by the
WASBO School Facilities Committee and WASBO Safety Committee
Hosted by the Oconomowoc Area School District

Wisconsin Association of School Business Officials Foundation
4797 Hayes Road, Suite 101, Madison, WI 53704 ~ Phone (608) 249-8588 ~ Fax (608) 249-3163 ~ www.WASBO.com ~ wasbo@wasbo.com



Paul Rodenbeck Remembered

Long time WASBO member, Paul W. Rodenbeck, 64 of Marshfield died on May 10, 2010 as a result of a heart attack. Paul served the Marshfield School District as the Director of Buildings and Grounds for the past fifteen years.

Paul was born to William and Pearl Rodenbeck on January 1, 1946 just outside of Detroit, MI. He grew up in Avoca, MI, a small farming community. He started school at Country School, a 1-room schoolhouse in Avoca. He graduated from Yale Public High School having enjoyed Drama and Band (and a good bit of mischief).

Paul married Midge Pingel on August 26, 1967. They had five children: Ingrid, Naomi, William, Andrew, and Hans. Paul and Midge were blessed with 10 grandchildren. Paul was a natural in his role as Grandpa and delighted in any time he was able to spend with them. Any of Paul's rough edges softened at the sight of his grandkids and they always put the twinkle in his eyes. It is natural. Everyone that knows Paul knows that he was always a "big kid" at heart.

Paul's faith was expressed passionately through music of all kinds. He enjoyed singing in his church and had a great love for the pipe organ. For as many pipe organs that Paul has played on, from the collapsible field organ in a small mission church in Louisville, Kentucky, to the majestic organ in St. Paul's Church in Saginaw, there is one in particular that stands out. Together with his brother, Tim, he constructed by hand in his home in Marshfield, a 6-rank pipe organ out of organ pieces collected over the years. Paul's organ style matched his personality; strong, passionate and often... Loud!

He showed that same passion in his work. Paul, the quintessential handyman, showed his industrious nature in his career. He had great pride in his community and he put his heart and ambitions into serving the Marshfield School District. He believed in serving his community and used his talents to support the training and education of the children of Marshfield and the surrounding areas.

Paul was a member of the Wisconsin Association of School Business Officials, Association of School Business Officials International, Wisconsin Rural Water Association, and Wisconsin School Safety Coordinators Association.



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Welcome New Members

- **Wendell Boyer**, Director of Buildings and Grounds, Milton
- **John Heck**, Energy Advisor, CESA #10
- **Brad Rodgers**, CESA #7
- **Renee Wininger**, Outreach Specialist, CESA #10
- **Tom Conlin**, Public Finance Relationship Manager, PNC Bank
- **Mike David**, Account Executive, Johnson Controls, Inc.
- **Scott Levin**, Vice President/General Manager, NCompass Technologies
- **Willie Liddicoat**, North American Mechanical, Inc.
- **Harv Linse**, Account Executive, Johnson Insurance
- **Matt Mekemson**, VP of Commercial Insurance, Johnson Insurance
- **Donald Savaiano**, President, The IJN Group

ASBO 10 Year Anniversary in May/June 2010

- **Patricia Hickey**, Gibraltar Area School District
- **Gary Swalve**, Maple Dale Indian Hill School District



Featured in ASBO Accents Online E-Newsletter June 24, 2010

ASBO Member Spotlight:

Thomas R. Owens, Ph.D., RSBO

Not only has Thomas (Tom) R. Owens, assistant superintendent of business/personnel services of D.C. Everest Area School District in Weston, Wisconsin, had a successful 32-year career in school business, he has had an equally long and prosperous military career. And he has found many parallels between the two seemingly very different fields during the past three decades.

Tom earned his B.A. at the University of Wisconsin-Whitewater, where he helped launch the ROTC program, serving as its first cadet association

president. Upon graduation, he was commissioned into the Army and served in both the Wisconsin Army National Guard and the U.S. Army Reserves. Tom simultaneously taught history, civics, and comparative governments at the junior high, middle school, and high school levels for seven years. Along the way, a colleague talked to him about a school business program in which he was enrolled.

"I recognized parallels between school business and what I was doing in the Reserves—leadership, working with people, procurement, and more," Tom says. He subsequently enrolled in the program himself, earning a master's degree in school business management (and later a Ph.D. in educational administration), and joined D.C. Everest as supervisor of administrative services in 1978. He has been with the district ever since.

Tom has relied on his various experiences to help shape his decisions over the years. From 1986 to 2008, he dealt with expanding enrollment in D.C. Everest Schools, which has since leveled off to around 5,700 students. He used a decision-making process acquired during his doctoral program to deal with overcrowded schools. Having taught seventh through ninth graders, Tom saw the value of having grades six and seven in one middle school building. He created a middle school, pulling the seventh graders out of the junior high school and putting them with sixth graders from all the elementary schools, leaving grades eight and nine in the junior high school and grades 10-12 in the high school. "It has worked extremely well," Tom says, adding that initial concerns of too many transitions were unfounded and that there were fewer problems than expected.

"I think those who end up in this profession dedicate their lives to the education of children," Tom says. "We have pressures from every direction, and our job is to make the difficult possible. In my job I help about 5,000 students each year. The kids in the classroom don't know me, but I know I'm helping."

Read more about Tom in the July/August issue of ASBO International's School Business Affairs!

OPEB Fatigue?

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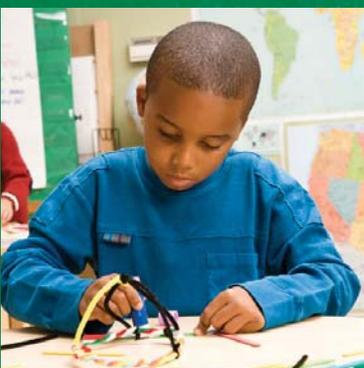
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John Forester
SAA Director of
Government Relations

Legislative Update

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



State Tax Revenues on Target

The Wisconsin Department of Revenue (DOR) reported that the state's general fund tax collections for April 2010, met forecasts. Individual income tax collections in April were up 14.7 percent from the previous year. Sales tax collections increased 4.9 percent over the same period, and corporate tax collections are up nearly 25 percent. Overall, total revenue collections are down about 1 percent, or about \$91 million, year-to-date compared to the 2009 fiscal year.

Legislative Fiscal Bureau director Bob Lang says the April tax collections are an encouraging sign that projected budget numbers will be on target at the end of this fiscal year on June 30 and a budget repair bill won't be needed.

In related news, the Department of Workforce Development reported that Wisconsin employers added 16,400 jobs in April, the largest one-month increase in more than 14 years, bringing the total jobs added this year to 32,000. The state's unemployment rate dropped to 8.5 percent in April from 8.8 percent in March.

Governor Signs SAGE Flexibility Bill

On Wednesday May 12, 2010, Governor Doyle signed Assembly Bill 808 (SAGE Flexibility) into law as Act 301. Act 301 allows existing SAGE schools to satisfy the class size requirement by reducing the student-teacher ration to 18:1, and combining two classes with two teachers would be limited to a total

class size of no more than 30 students (30:2 student-teacher ratio). Act 301 also, in the 2010-11 school year, opens the program to schools not currently in the SAGE program if a number of eligibility criteria are satisfied. Finally, under the Act, DPI may not waive SAGE requirements in any SAGE contract entered into or renewed after the effective date of the bill. Simply put, Act 301 is designed to help save the SAGE program in many Wisconsin school districts.

The SAA was instrumental in forging the compromise and securing passage of this legislation. The SAA is grateful for the efforts of the bill's primary author, Representative Kristen Dexter (D-Eau Claire), all of the members of the Rural Democratic Caucus and for the support of Representative Sondy Pope-Roberts and Senator John Lehman, the respective chairs of the Assembly and Senate Committees on Education.

School Transportation, Declining Enrollment Bills Fail

As you know, the SAA worked for months with rural Democrats on a package of bills (including the SAGE Flexibility legislation noted above) that would benefit schools throughout Wisconsin. Unfortunately, in the waning days of the legislative session, bills relating to school transportation aid, transportation of private school students and declining enrollment relief failed to clear all the necessary hurdles for passage in both houses. We believe these are good bills and we are committed to advancing them in the 2011-13 legislative session. Summaries of these bills follow.

School Transportation Aid

Under current law, the Department of Public Instruction (DPI) must prorate state aid payments to school districts for transportation costs if the amount appropriated is insufficient to cover all eligible costs. Under AB 807/SB 596, beginning in the 2010-11 fiscal year, if there is a balance in the appropriation after all claims have been paid, DPI must distribute the balance to school districts on a prorated basis.

Transportation of Private School Students

A provision adopted in the 2009-11 budget provides that in the Milwaukee Public Schools (MPS), if two or more pupils reside in the same household and attend the same private school, the contract may, at the discretion of the school board, provide for a total annual payment for all of the pupils instead of for each of the pupils. AB 809/SB 595 extends this "one trip, one payment" provision to all school districts.

This bill also moves the current date by which private schools must notify public schools of the number of children needing transportation each year from May 15th (current law) to July 1.

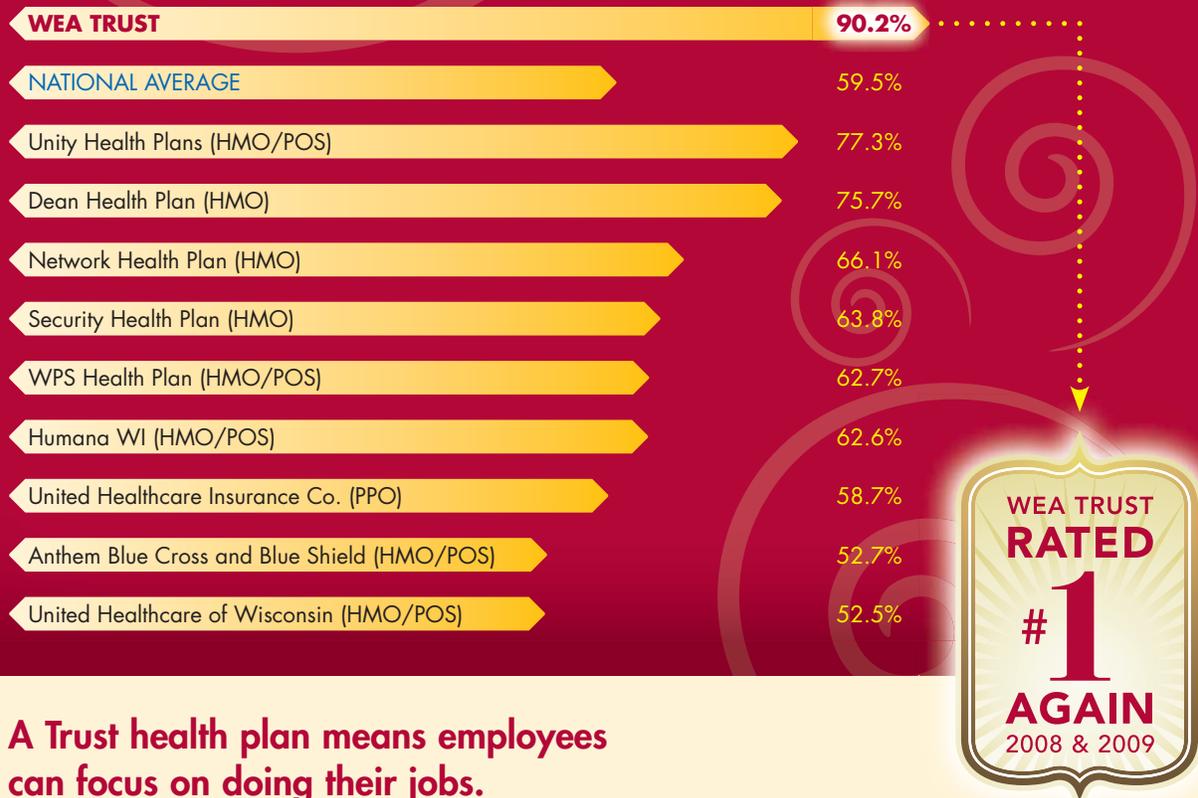
Declining Enrollment Relief

Under current law, in the first year of a school district's enrollment decline, the district's revenue limit is increased by 100 percent of the allowable revenues that the decline would have generated. AB 840/SB 603 extends the declining enrollment revenue adjustment to two years. In the second year, the district receives a revenue adjustment equal to 50 percent of the first year adjustment.

First rate

The WEA Trust earned the No. 1 health plan rating in Wisconsin in the Consumer Assessment of Healthcare Providers and Systems (CAHPS®) survey. It's the second straight year the Trust earned the state's top score. Health plan members were asked to rate their plan on a 10-point scale and more than 90% rated their plan an 8 or higher.

CAHPS HEALTH PLAN RATING (PERCENTAGE RATING THEIR PLAN 8 OR HIGHER ON 10-POINT SCALE)



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ASBO's 100th Anniversary International Annual Meeting & Exhibits

ASBO is officially 100 years old and Wisconsin's Erin Green will be presiding as President. Come and support Erin at this great educational conference being held at Disney's Coronado Springs, Lake Buena Vista, FL on September 24-27. Watch for special information for attendees (Service Affiliates and Regular Members) coming out in July.

Mark Your Calendars for Future Seminars, Workshops and Conferences

See the back cover of this issue for dates or go to www.WASBO.com. Registration is open for the WASBO New School Administrators and Business support Staff Workshop. Your participation in these professional development opportunities is an important investment for you and your district. Professional development is sometimes characterized as a travel expense when actually it is an investment for the future. Networking and gaining proficiency in our ever-changing world will pay dividends.

New Opportunities

Initial Educator Training on the PDP Process, Plan and Goal Writing – The WASBO Professional Improvement Committee is providing training for new school business officials who are certified as Initial Educators. This training is in Stevens Point at the Holiday Inn on August 10, 1:00 p.m. -4:30 p.m., as a preconference session to the WASBO New School Administrator and Business Support Staff Workshop being held at the same location on August 11 and 12. Register at www.WASBO.com.

PDP Reviewer Training – The WASBO Professional Improvement Committee is providing a second training opportunity for WASBO members who want to serve as PDP reviewers for newly licensed school business officials. In addition, this training is an excellent tool for members who have had past mentorship training. It will help our trained mentors to understand the certification challenges faced by new school business officials. This training is in Stevens Point at the Holiday Inn on August 11. Details for this training are posted at www.WASBO.com.

WASBO Purchasing Card User Group Training - Join your fellow WASBO P-Card users on August 12 in Stevens Point at the Holiday Inn to learn about how Details Online and the interface with Skyward can make the

P-Card program more efficient and easier to administer. If you are not presently using a P-Card for purchasing, join your colleagues who are. You will be able to see how over 50 districts are using a P-Card to their advantage and gaining rebates of over \$146,000. Look for details with your rebate check.

Congratulations to Our New Retirees

Dianne Meyer (Milton), Tom Owens (DC Everest), Betty Mujwid (Flambeau), Jean Kienzle (Elmbrook) and Bill Zeininger (Waupun).

Where Are They Now?

Mary Ellen Van Valin (Monona Grove to Milton), John Stellmacher (Barron to Waupun), John Stoskopf (Stevens Point to DC Everest), Scott Altmann (Oshkosh to Lakeland Union High School District), Debby Schufletowski (Fall Creek to Robert W. Baird full-time).

Fund Balance – It is that time of year to be thinking about closing the books. Please be careful to record the fund balance as reserved and/or designated on the Annual Report when appropriate. There are a number of districts that record their fund balance as unreserved/undesignated. In the new post QEO world, arbitrators may see that as "extra" money. It would be likely the union would at least make that argument. Please check that the fund balance is recorded correctly.

Interim Assignments – School Business Officials are taking new positions during these upcoming summer months, leaving a void in the districts they are leaving. Many of these districts are in need of assistance for interim school business officials until their opening is filled. If you would like to be considered, please send a one-page resume and other pertinent details to the WASBO office. Some retired members have already done so, but more are needed.

Developing New Resources – The WASBO Resource and Technology Goal Action Team will be implementing the new "K12QA Discussion Forum" (Oasys) the fall of the 2010-11 school year. It is a new on-line method for sharing information

with individuals or groups and storing the conversations and materials in an on-line library system. Watch for upcoming details on how to use the communication tool with your WASBO colleagues.

Renew Your WASBO Membership for July 1, 2010-June 30, 2011 at www.WASBO.com

To continue receiving the benefits of your WASBO membership, please take a few minutes to renew at www.WASBO.com. If you need assistance, give us a call at 608-249-8588. Your membership saves you money on seminar and conference registrations. WASBO keeps you informed through the daily **Wisconsin Education News** email and your subscription to **Taking Care of Business**. Access resources such as the Electronic Resource Center and the K12QA Discussion Forum that is coming this Fall. When you are the only one in your district that does your job, you need to stay connected to your colleagues across the state who are faced with the same challenges. The small investment in your membership will come back to your district.



Where can you find sample RFP's, Budget Documents, Job Descriptions, Policies, Practices, Spreadsheets and more?

Electronic Resource Center (ERC)
Found at www.WASBO.com

SHARE YOUR EXPERTISE and EVERYONE BENEFITS!

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To submit a document email it to lynnett@wasbo.com with ERC Document as the Subject.



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WASBO Calendar

Professional Development
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July 14, 2010

WASBO Custodial & Maintenance Conference

Nature Hill Intermediate School, Oconomowoc

August 6, 2010

CESP Summer Conference (AWSA & WASBO)

Sheraton, Madison

August 11-12, 2010

WASBO New School Administrators & Business Support Staff Workshop

Preconference - Writing PDP Goals for the Initial Educator (August 10)

Holiday Inn, Stevens Point
(Viterbo Credit Offered)

August 11, 2010

DPI PDP Reviewer Training

Holiday Inn, Stevens Point

August 12, 2010

WASBO PCard User Group Training

Holiday Inn, Stevens Point

September 24-27, 2010

ASBO International's 96th Annual Meeting and Exhibits

Disney's Coronado Springs, Lake Buena Vista, FL
(Viterbo Credit Offered)

October 20, 2010

WASBO Foundation Scholarship Fund Raiser

Elkhart Lake

October 21-22, 2010

WASBO Fall Conference

Osthoff Resort & Conference Center, Elkhart Lake
(Viterbo Credit Offered)

November 11-12, 2010

Midwest Facility Masters Conference

Glacier Canyon Lodge at the Wilderness, WI Dells
(Viterbo Credit Offered)

December 1-2, 2010

WASBO/WASPA School Personnel Academy & Taking

Care of Business Seminar

Radisson, Madison
(Viterbo Credit Offered)

Regionals

Each Regional Representative, meeting locations & directions are available at www.WASBO.com if predetermined.

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

| | |
|--------------------|-------------|
| September 10, 2010 | CESA 7 |
| December 10, 2010 | Ashwaubenon |
| February 11, 2011 | DePere |
| May 13, 2011 | Shawano |

Madison Area

Meetings will be held the first Friday of the month and begin at 9:00 a.m.

| | |
|------------------|--------------|
| October 1, 2010 | DeForest |
| November 5, 2010 | Marshall |
| December 3, 2010 | Monona Grove |
| February 4, 2011 | Sun Prairie |
| March 4, 2011 | Stoughton |
| April 1, 2011 | Lodi |

Northeast

Meetings start at 11:00 a.m.

| | |
|--------------------|-------------|
| September 10, 2010 | CESA 7 |
| November 19, 2010 | Appleton |
| February 11, 2011 | DePere |
| April 8, 2011 | Fond du Lac |
| May 13, 2011 | Manitowoc |

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.

September 1, 2010, October 6, 2010, November 3, 2010, December 1, 2010, February 2, 2011, March 2, 2011, April 6, 2011, May 4, 2011

Southeast

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

| | |
|-------------------|-----------------|
| November 12, 2010 | Elmbrook |
| December 10, 2010 | Whitnall |
| February 11, 2011 | St Francis |
| April 8, 2011 | Hamilton-Sussex |

Southwest

Meetings will be held at the CESA #3 office in Fennimore at 12:30 p.m.

October 13, 2010, November 17, 2010, February 16, 2011, April 20, 2011



Go to www.WASBO.com and click on "Calendar" for updated meeting information, to register or get directions.

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

September 2, 2010, October 7, 2010, November 4, 2010, December 2, 2010, January 6, 2011, February 3, 2011, March 3, 2011, April 7, 2011, May 5, 2011, June 2, 2011

WI Valley

Coffee at 9:00, Meeting at 9:30.

| | |
|-------------------|------------------|
| August 20, 2010 | Antigo |
| October 8, 2010 | Wausau |
| November 12, 2010 | Stevens Point |
| December 10, 2010 | Merrill |
| February 18, 2011 | D.C. Everest |
| March 11, 2011 | Mosinee |
| April 8, 2011 | Wisconsin Rapids |
| August 19, 2011 | Antigo |

Committee Meetings

School Facilities Committee (Meetings held at the WASBO Office, Madison at 9:30 a.m.)

August 3, 2010
October 12, 2010

Midwest Facility Masters Conference

Planning Committee

July 20, 2010, 10:00 am, WASBO Office

Safety Committee

November 3, 2010, 1:30 pm, WASBO Office

Board of Directors Meetings

| | |
|-------------------|-------------------|
| September 8, 2010 | Chippewa Falls SD |
| November 17, 2010 | Madison - WASBO |
| December 15, 2010 | Milwaukee - PMA |
| February 16, 2011 | Madison - WASBO |
| April 6, 2011 | Madison - WASBO |
| June 15, 2011 | Nekoosa SD |

Business Meetings

January 20, 2011 - Milwaukee, State Education Convention

May 26, 2011 - La Crosse, Spring Conference



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