



Wisconsin
Association
of
School
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Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 15, Number 1 - February 2011

WASBO Recognizes Debra Pelegrin as 2011 School Business Official and Janice DeMeuse as 2011 Shining Star



L to R - Woody Wiedenhoeft, Chad Trowbridge, Tony Evers and Debra Pelegrin

Debra Pelegrin is the business manager for the Little Chute School District which is geographically the smallest district in the state. Debra was nominated by the Northeast and Bay Area Regionals and her nomination was endorsed by her district administrator, David Botz.

Mr. Botz focused on Debra's leadership in the district and

community. Her successes include the passage of a 2007 building referendum and a referendum to exceed the revenue limit by \$200,000 for 5 years. Debra is a professional who has earned respect and trust in the district, serving on the Technology Task Force and on the Negotiations team. She saved the district \$45,000 annually by working with non-union employees to orchestrate a different health plan.

Debra developed a strong relationship with village government and continually works to find ways to collaborate. Her skills and strength have enabled the Little Chute School District to offer quality instruction for all students and be attractive to students from outside the district, as evidenced by positive open enrollment numbers.

Mr. Botz concluded his recommendation by noting that, "while there are business managers who are proficient and dedicated public school business managers, there are others who are outstanding because of their commitment to education and students. Debra Pelegrin is one of the outstanding business managers." We congratulate Debra as the 2011 School Business Official of the Year.

The Shining Star Award is meant to honor a WASBO member who is a leader that gives his or her time and expertise to benefit the profession of school business management. Janice De Meuse of the Luxemburg Casco School District is just that person.

Janice was nominated by her peers from the Northeast and Bay Area Regionals. They pointed to her leadership as the regional representative for the Bay Area Regional. She is respected as both a formal and informal mentor by her colleagues who is always willing to share her knowledge.

Janice chaired the WASBO Member Resources Goal Action Team which instituted the Electronic Resource Center and most recently launched the Peer to Peer Communication Forum. She served as director and is currently treasurer on the Board of Directors. Janice also contributed



L to R - Mike Roshar and Julie Ebert of Quarles & Brady, LLP, Janice De Meuse and Chad Trowbridge.

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Editor: Woody Wiedenhoef

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President's Message

Troubling Times

Working Together for the Children of Tomorrow

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



Chad Trowbridge
WASBO President

At the Joint Convention in January I had the honor, serving as WASBO President, to introduce Governor Scott Walker and Sir Ken Robinson.

It was no surprise that faced with a troubling economy, high unemployment numbers, and a state deficit, that Governor Walker did not have a positive address for the group concerning education. Although his message was quite vague, it was clear to me that the state has a large structural deficit problem, and education is a big part of it.

I heard many different ideas circulating at the convention. Some were about per pupil increases to the revenue cap at varying levels, and from some, the perspective of a decrease. Cost controls, bargaining law changes, QEO at some level, forced changes to benefits, and retirement were subjects I am sure you also heard.

Regardless, John Forester is telling us to buckle in. It will be the toughest biennial budget process in history. Get your local legislators in your buildings, show them all the good things you have going on and share with them what your challenges are. We need to advocate for Wisconsin School Children and prepare for change.

Sir Ken Robinson is a well known advocate for fostering creativity and innovation in our schools. He was a professor of Education at the University of Warwick in England where he is now Professor Emeritus. His newest book, "The Element: How Finding Your Passion Changes Everything," explores how people, when "in their element," doing something they love, are insulated against unpredictable changes, which leads to a more flexible and productive society.

Due to some unforeseen

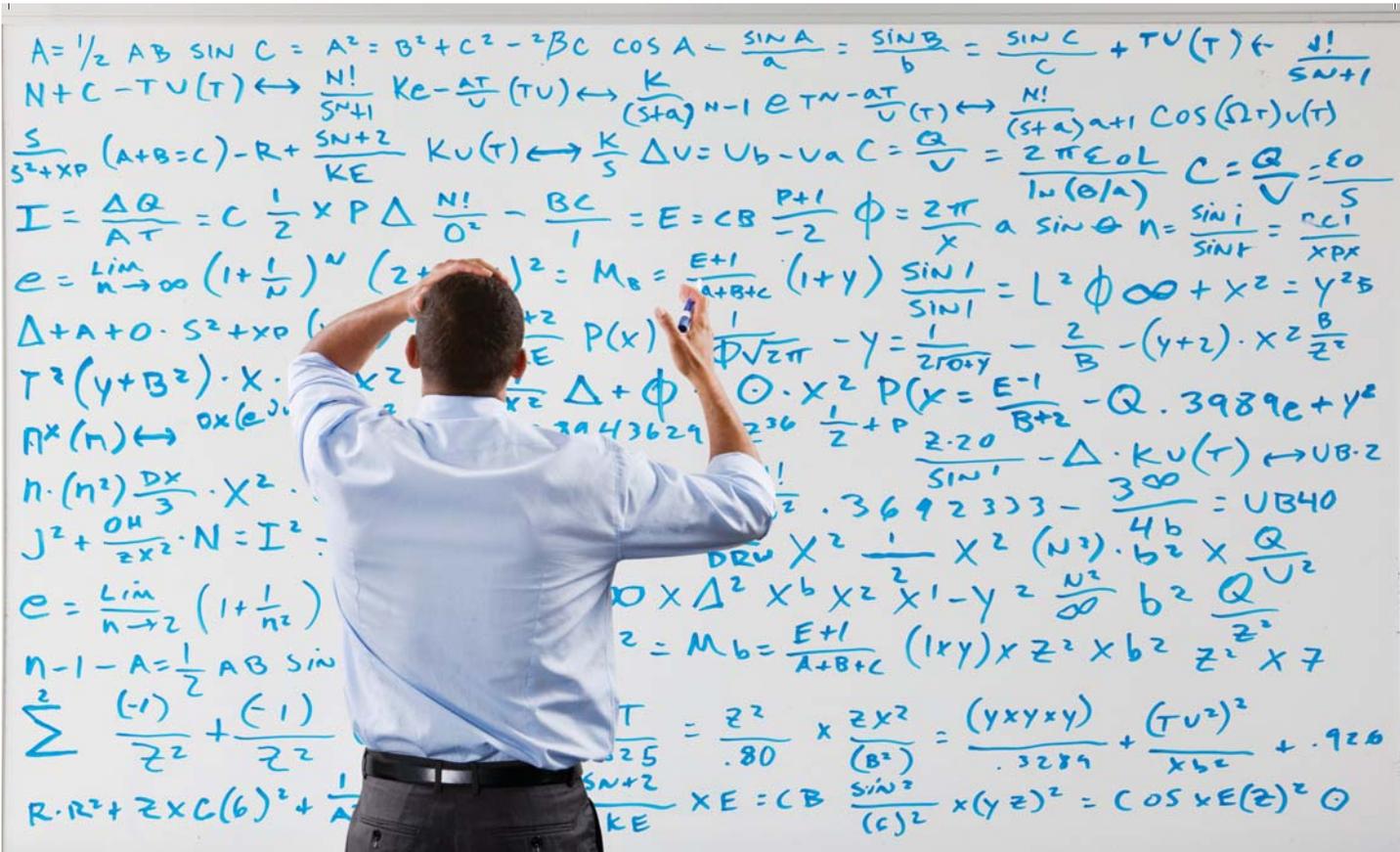
circumstances that didn't allow him to travel and be with us in person, he delivered this message via webcast. I would have to say that even though he was not there in person, the audience was captivated and very interested in his message.

I also had the honor to congratulate Debra Pelegrin from Little Chute as the School Business Official of the Year, and Janice DeMeuse from Luxemburg-Casco as the recipient of the Shining Star award. We are fortunate to have such deserving, yet incredibly humble, people in WASBO.

At the December Board meeting, the Board developed some direction for continuing to explore the idea of changing our Board Structure. Through feedback from the regionals, there is support for doing things differently. For example: a person may desire to be part of the WASBO leadership team, but does not necessarily want to be the President of WASBO. The Board is going to look at options and election cycles at the February meeting. We will consider creating a 3-year Treasurer position, which will hold a place on the leadership team, but not be in the track for the WASBO Presidency. Either a Vice President position, or a past president position would need to be created in order to make this work. It has been a very good discussion, and the goal has been more involvement and keeping quality leadership in WASBO. There will be more to follow.

As we continue through these troubling times, remember that it is your leadership and expertise that will help your districts get through not only the short term, but work on long term solutions to education. As hard as it may be, this is where our value is at an all time high.





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Exec's Reflections

Living with Predictions - Living with Change

Woody Wiedenhoeff
WASBO
Executive Director

Two years ago, I made some predictions in my Executive Reflections. It is time to assess those predictions and redirect thoughts and actions accordingly.

The condensed version of those predictions is as follows.

1. Considering the State deficit, schools will be fortunate to escape without real reductions.
2. Revenue Limit increases will be at risk.
3. The QEO will be rescinded.
4. Federal Economic Stimulus will relieve local and state shortfalls.
5. These are short two-year solutions, hoping the economy turns around enough to balance needs and revenue in future years.
6. Proactive long-range planning discussions between parties with varying interests are in short supply. Position taking is in long supply.

Where do we go from here for the next two years? After some reflection, I offer up the following predictions.

1. Considering the State deficit, schools will make real reductions, especially in the area of employee rescissions, employee compensation or both.
2. The Revenue Limits and State Aid will decrease, not increase. This could mean reductions by as much as \$300 per pupil.

3. The QEO as we knew it will stay rescinded. Instead of school management having less flexibility as predicted by some, school management will have additional flexibility at the bargaining table. Very wise decision-making will be needed in using this flexibility.
4. There will be no more Federal Economic Stimulus. The funding cliff is here.
5. There will be state money available for expanding and providing charter schools, virtual charters parental choice and voucher programs.
6. The Executive Director of the Wisconsin Realtors Association makes my next point. He observed that we cannot just "cut" our way out of this situation. Continuous reductions in resources, in and of themselves, do not provide for growth in our mission.
7. Proposed solutions are still short term in nature. We still need the economy to turn around and this takes a long-term outlook.
8. Ideological position taking will stay in long supply. Collaboration and cooperation is still in short supply.

What does all this mean for WASBO members? It means we will be part of the long-term solutions. WASBO members are pro-actively optimistic and believe we will continue helping our children grow into productive adults. Larry Dalton made the point to us a year ago. "...student learning is the artwork. We (WASBO members) provide the picture frame and the matting. Without us, the art doesn't have a way to hang on the wall."

Meet the Candidates

This issue of Taking Care of Business features our candidates for the WASBO Board of Directors. Candidates have written about their background and their interest in becoming a Director on the WASBO Board. As our membership grows, it has become more difficult for us to know each other on a personal basis. You will find our candidates lead not only interesting professional lives, but they also have wide and varied backgrounds. In the past, the WASBO web page has posted the candidates' resumes for membership review. This will continue. In March, resumes of the candidates will be posted. Enjoy what you learn about your fellow members. Our membership is humble and modest in talking about themselves, so this writing task was difficult for the candidates. Their dedication to the WASBO tradition of sharing and caring is unquestioned. They all offer both professional and personal attributes that will help grow the strength of our organization. We are fortunate to be surrounded by colleagues of such caliber. When you see the candidates at one of the upcoming conferences, thank them for being willing to serve the WASBO organization. On behalf of WASBO, thank you to all the candidates for your willingness to volunteer your time and energy to move our organization forward!

"If you want to lift yourself up, lift up someone else."
- Booker T. Washington

Continued from page 1

as a member of the Accounting Committee, working to rewrite the WASB **Budget Cycle** Book. For several years, Janice has been a facilitator at the School Finance Puzzle Workshop.

At the ASBO level, Janice served on the Election Committee for Erin Green, has received the Certificate of Excellence in Financial Reporting from ASBO and is a member of the Human Resources Committee.

As her district administrator, Patrick Saunders, said, "Janice is an outstanding person of character and integrity." We would like to thank and congratulate Janice De Meuse, our 2011 Shining Star.



WASBO Launches New Web Site



The new year brings fresh beginnings and for WASBO it brought a new web site. If you have not had a chance to check it out, you will still find it at www.wasbo.com. Our goal was to create a site that was more user friendly, easier to navigate and provided more value for our members. Some improvements include the Members Central area on the home page that will quickly take you to the tools you need most. Home page content includes Upcoming Events and Spotlight sections to let you know what is most current. A tab was added for our Service Affiliate members to help them find resources that are specifically for them. We also added a banner box to the home page to recognize the support of our Service Affiliate members. As you check it out, let us know what you think and how we can continue to improve.

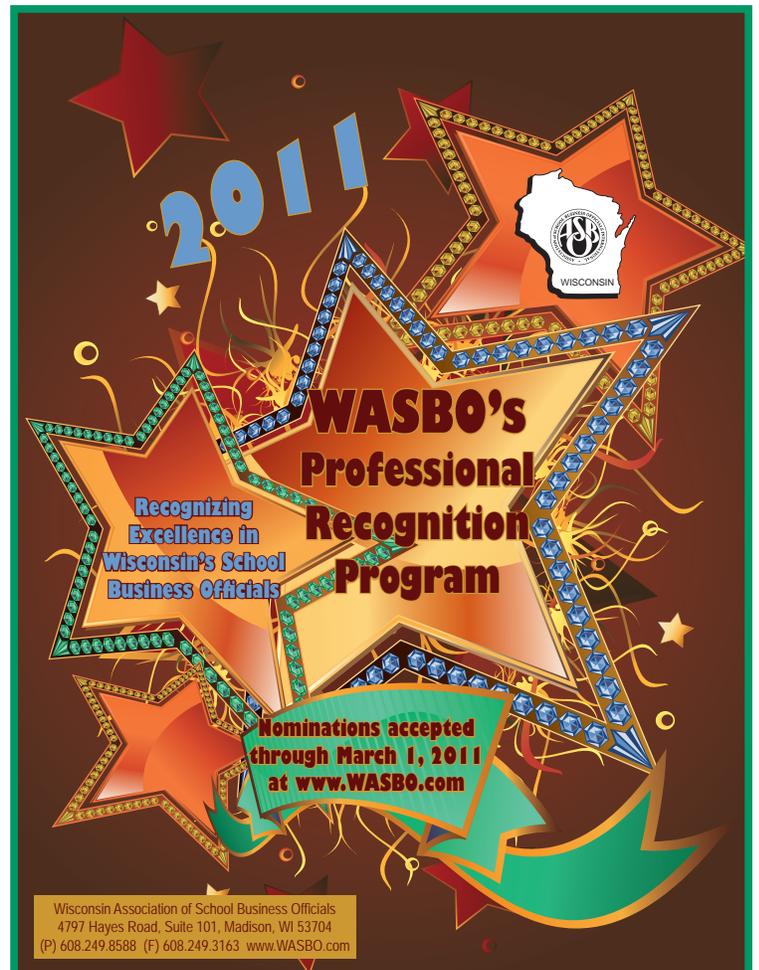



Say "Yes" to Dual Benefits

When you renew with your affiliate ASBO, check the box for ASBO International Membership. With one payment, you can participate in both organizations—doubling the tools, resources, and colleagues you can call on to help you in your everyday responsibilities. Together, we can effectively manage resources to give every child the power of education.

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

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*Erin Green
Immediate Past
President
ASBO International*

ASBO Update

How Would "SFO" Look Behind Your Name?

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



ASBO's recognition of the importance of the School Business Official to the school leadership team is evidenced by the creation of the new School Finance Officer (SFO) credential. ASBO is working toward universal acceptance and recognition of this new credential which is the "CPA" for our profession.

As a newly accredited SFO, I cannot divulge the specifics of the exam, but I can tell you that most practicing school business managers in Wisconsin will have no trouble passing it. You are some of the most qualified school business managers in the country and world thanks to our strong licensure program which requires a Masters Degree in School Business. The content tested includes things you know from your day-to-day work. ASBO and their affiliates will be working to develop classes to prepare candidates for the exam. ASBO offered a "refresher" class at the last annual conference. I sat in and found many useful ideas and samples of work.

So Why Go For the SFO?

1. Value of improved skills and credentials in this economy
2. Portable credential that will be recognized throughout the US and Canada
3. Enhanced credibility with staff and community
4. Pride in your profession demonstrated by the SFO recognition
5. Quality in the school business management profession
6. Enhanced career opportunities
7. Challenges us to seek continued improvement

The creation of the SFO credential has been a 30 year goal of ASBO International. Many thanks go to Ron Everett, the former Executive Director of Illinois ASBO. He began this endeavor by working with ASBO and the Professional Development Committee on the "Standards for the Profession" document. This document laid the groundwork for the Certification Commission, headed by Pam Weber from ASBO and chaired by Bambi Statz from Wisconsin, to develop a rigorous exam, using input from practicing school business officials. These school business officials dedicated considerable time and expertise over the past two years.

The SFO is granted to highly qualified individuals who fulfill multiple requirements, including demonstrating eligibility through work and education, passing a comprehensive two-part exam that tests competency in accounting and school business management topics and adhering to the ASBO Certification Code of Conduct.

"School business officials are the chief fiscal officers for school districts and hold an influential position in the community," says John Musso, CAE, RSBA, Executive Director of ASBO. "By earning the SFO, professionals validate their specialized knowledge and demonstrate a commitment to high standards and ethical practice in school business management."

School business officials who have earned the SFO Certification commit to continuing professional development, renewing annually and recertification every three years.

Congratulations to Wisconsin's 2011 Certified Administrators of School Finance and Operations (SFO)

Jason Austin, Holmen
 Mary Blaha, Sheboygan Falls
 Eileen Coss, Kenosha
 Janice De Meuse, Luxemburg Casco
 Erin Green, Greendale

Denise Howe, Friess Lake
 Julie Kelly, St. Francis
 Erica Pickett, Stoughton
 Judy Rogers
 Robert Thom, Campbellsport



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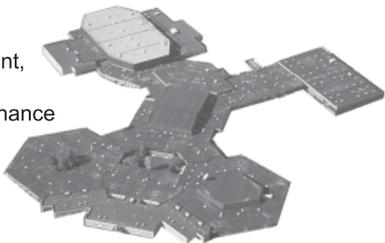
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*John Forester
SAA Director of
Government Relations*

Legislative Update Walker Emphasizes Reform and Flexibility in State of State Message

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



Legislature on February 1st, declaring, "we have an economic and fiscal crisis in this state that demands our immediate attention."

Noting a potential \$3 billion deficit for the 2011-13 biennium and a more than \$200 million shortfall for the rest of this fiscal year, Walker acknowledged that the budget and budget repair bills that he will introduce in the coming weeks will focus on making the tough decisions now to correct our budget imbalances and lay the foundation for future economic growth.

One area of emphasis was the need to address public employee benefits. "Currently, most state employees pay next to nothing from their salaries toward their pension, while the state's taxpayers pay more than \$190 million each year on state employees' behalf. "Similarly, most state workers only pay about 6% of their premium costs for their health care plan."

"Asking public employees to make a pension payment of just over 5%... and a premium payment of 12%... would save the state more than \$30 million over three months. Most workers outside of government would love a deal like that – particularly if it means saving jobs," Walker said.

Walker repeatedly returned to the themes of using the budget as an opportunity to right-size government,

reform entitlement programs and to provide operational flexibility to local governments.

The SAA is currently working with lawmakers to rebalance the labor-management relationship and to provide other means of operational flexibility for local school districts. The SAA Legislative Committee has adopted a Labor Relations Reform Package, the core of which appears below:

- Align school employee total compensation increases with the annual statewide per pupil adjustments under revenue caps, equal to a five-year rolling average of personal income growth multiplied by the amount of the low revenue ceiling. Districts avoid arbitration if alignment is achieved.
- Prescribe cast-forward costing for all employers and include lane movements for teachers. There is no requirement to maintain fringe benefits to have a "QEO".
- Make health insurance a permissive subject of bargaining.
- Restore the "greatest weight" factor of revenue controls and "greater weight" factor of local economic conditions in the statutory criteria used by arbitrators.
- Prohibit an arbitrator from considering an employer's fund balance as a reflection of the employer's ability to pay or to fund the union's offer.

- Prohibit the payment of lane, step and benefit cost increases during contract hiatus to create an incentive to settle.
- Change the following mandatory subjects of bargaining to permissive subjects: preparation time, subcontracting, assignment of duties during the work day, class size, employee evaluations, reductions in force or work hours, the impact of the use of instructional technology, and the calendar of student contact days and employee work days.
- Establish in statute specified misconduct that, if engaged in, would be grounds for discharge without the application of just cause.
- Define "probationary status" for teachers in statute. Probationary teachers must have a minimum of three consecutive years of demonstrated effectiveness to gain non-probationary status.
- Non-probationary teachers who are found to be ineffective in two consecutive annual evaluations (or two within any four year period) shall have their contract non-renewed or be returned to probationary status.
- Educator effectiveness shall take precedence over seniority when making layoffs.
- Repeal the state Family and Medical Leave Act and simply align with the federal law.

Continued on page 15



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Meet WASBO's Candidates for Treasurer

Tom Helgestad Building & Grounds Director Wisconsin Rapids Schools



I'd like to introduce myself to those of you who don't know me. My name is Tom Helgestad, and I'm the Building and Grounds Director for Wisconsin Rapids Schools. I'm married to Marilyn and we have 2 grown boys who live in the Milwaukee area. We have 2 cats, Reggie and Crouton, and a yellow lab named Nala.

I have been active in WASBO since 1989, when I became the Building and Grounds Director. Until then, I had worked in the district as a maintenance supervisor for 6 years.

I have seen many changes in WASBO over the years and have been a part of some of the growth on the facilities side. I was Co-chair of the School Facilities Committee for many years with Bob Kraus of Mukwonago when the custodial summer conferences were developed. At that time, I handled all of the mailing and registrations out of my office as WASBO had limited staff and resources. We would just mail them the profits (\$18,000-20,000/year) at the end of the conference. Again, when the facility manager's conference and certification programs were developed, I worked on those committees.

I have had the privilege of serving on the Board of Directors twice, once from 1994-1996 and then again from 2006-2009. I was appointed both times, first by Mr. Bob Borch and then by Ms. Gail Moesch. I ran for treasurer once before

in 1996 against Al Gosda and lost. It should have been that way seeing he was my junior high math teacher and football coach.

I was awarded the 2010 Facilities Manager of the Year Award last spring.

I have met many wonderful people through WASBO. My career and school district have benefited through the knowledge and experiences gained by being a member of this organization.

Another reason I put my name on the ballot was that I believe it's good for every organization or electorate to have a choice when it comes to voting for positions of leadership.

Lynn Knight Business Manager School District of Nekoosa



My name is Lynn Knight and I am the Business Manager for the School District of Nekoosa. I have a Masters Degree in School Business Management and I am licensed in the state of Wisconsin as a School Business Manager. In my prior life, I was the Finance Manager for the Stevens Point Area Public School District and before that, a school district auditor. I am currently studying for the CPA exam and hope to take the first test in May. I honestly feel that I have been going to school my whole entire life!

On a personal note, I have been married for 29 years and have two sons, one daughter-in-law, and no grandchildren. I'm hoping that changes very soon! My oldest is in the Navy, stationed in San Diego, CA. My youngest has also served in the Navy and is now attending UW-Stevens Point majoring in chemistry.

I currently serve on WASBO's Transportation Committee, Professional

Improvement Committee, and the Accounting Committee. All three committees have important tasks at hand. The Transportation Committee is busy deciphering and communicating the new regulations. The Professional Improvement Committee is working on the mentoring program and hopes to have an updated version ready to roll out soon. The Accounting Committee has just finished a three year project by re-writing **The Budget Cycle** book. This was a team effort with WASBO and WASB working diligently to produce a quality product.

I have been a WASBO Board member since 2009. Under the direction of prior and current WASBO presidents, Diane Pertzborn, Keith Lucius, and Chad Trowbridge, I hope to maintain the vision of WASBO by continuing the quest of WASBO being the most influential organization on significant Wisconsin school business management issues. More than ever, school finance issues need the voice of experts. WASBO members are that voice and we must continue to deliver our message on the road paved by our past and current leaders of WASBO.

I thoroughly enjoy being a school business manager, and I couldn't be prouder of our WASBO organization. WASBO has been there for me since I started my career in school finance. The relationships that are formed and the knowledge that is shared are immeasurable. If it wasn't for the WASBO membership, I would not be where I am today. I would be honored to serve WASBO as your treasurer.

There are serious challenges facing school districts today and WASBO must continue to be part of the solution. As your treasurer, I am ready to meet these challenges head on without ever losing sight of our true focus; educating children.



Meet WASBO's Candidates for Director

Bob Avery
School
Finance Team
WI Department
of Public
Instruction



Hello, my name is Bob Avery and I am presenting myself for your consideration as a candidate for the WASBO Board of Directors. I am writing you today to explain who I am and why I am running for the board. At the time of this writing, I am the Director of Business Services and Operations for the School District of Somerset in the NW regional, but I will soon be leaving Somerset to join the School Finance Team at the State Department of Public Instruction. Before Somerset, I served the Stoughton, Sun Prairie and Wisconsin Heights school districts in the Madison area in various capacities.

I have been a member of WASBO since 2000 and have worked in managerial positions in public education since 1997, when I was hired by the Stoughton Area School District as coordinator for its in-house transportation department. While in Stoughton, my supervisor encouraged me to explore expanding my role in schools by returning to grad school and pursuing a degree in school business management. In 2002, I took his advice and enrolled at Whitewater. At the same time, an opening in the business office in Sun Prairie became available and I was hired as the Business Services Manager. This, to me, was a great opportunity to get hands on experience in the office while also pursuing the academic aspect of my professional education. Prior to

this, my degrees were in the liberal arts and my experience was managing operations, so the chance to work in the accounting, budgeting, and purchasing functions was invaluable.

In 2005, I was hired as the business manager in Wisconsin Heights. It was time to "sail my own boat." Being the business manager in a district with an enrollment that was rapidly declining (average of 5%) and having two failed referendums was challenging, frustrating, invigorating, and enlightening. I got to work with a lot of great people and gained experience that would be hard to duplicate. For the past two-and-a-half years, I have worked in a district that is in many ways at the other end of the spectrum. Somerset has been blessed with growing enrollments and our biggest concern is space, not cuts.

In February this year, I will begin working at DPI as a school finance consultant. I was uncertain if my new position with the state would allow me to run for the Board or not, so I consulted with both our executive director, Woody Wiedenhoef, and with my new boss, Jerry Landmark. Both agreed that this would be allowable and Jerry remarked that if I were elected it would help further solidify the great working relationship that the Department has with the Association. So, while I will no longer be a traditional school business official, I will continue to be a member of WASBO and eligible to serve in a leadership capacity. With the support of my new employer, I therefore offer my services to the Association.

My experience, then, is varied and widespread, which, I believe, will make me a better Board member, if elected.

I am happily married to Carol, an accountant by training, who is the

executive director of a non-profit organization that serves adults with disabilities in the Madison area, and have three wonderful children. Carol has been, and continues to be, incredibly supportive of my professional life, including when I started at Whitewater when our youngest was only nine months old, as well as for the 2½ years I worked 250 miles from home. Whitney is a graduate of Minnesota and runs her own children's drama school; Ryan is a junior at Concordia-WI (Mequon) and double-majoring in elementary education and special education; and Olivia is in 4th grade exploring her interests in dance, music, theater, and horses. When I am not in the office, my time is dedicated to my family. I do try to carve out some time for myself to ride my bike, read, and keep up on current events, the Badgers and the Packers. As part of my bicycling experience, I work to raise money for the Lance Armstrong Foundation (the LIVESTRONG folks) and ride across Iowa in July as part of an event called RAGBRAI.

I am running for the Board because I believe in the WASBO Mission "to provide professional growth opportunities for its members, provide a network of support for its members, to work for adequate funding, and to advocate for educational opportunities for children in the State of Wisconsin." There are two specific ways that I feel I can support that mission – through service and by giving back.

I believe that an organization is only as strong as its membership (and WASBO is an incredibly strong organization!) and that committing to an organization also means serving the organization. In the past I have been on the Transportation Committee (and chaired it for a while) and on the Fall

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Meet WASBO's Candidates for Director

*Continued
from page 12*

Conference Planning committee. I also am a member of the "School Finance Puzzle" planning committee and was one of the presenters this January at the Joint Convention. Through these efforts, I have worked to support professional growth opportunities for the membership. Now, I'd like to continue this work as a member of the Board, providing my perspective and effort as WASBO moves into the second decade of the 21st Century. There are many challenges ahead in the field of school business management in the coming years and I promise to work hard to serve WASBO and promote the WASBO Mission.

Secondly, I have benefitted greatly from the expertise, experience, insights, and wisdom of many colleagues and mentors in this field, the WASBO "network of support." (Special thanks to Doug Linse, Jim Harlan, Phil Frei, Tom Wohlleber, Diane Pertzborn, Bambi Statz, Steve Summers, and Woody Wiedenhoef for all your support and guidance over the years!) I have received from others and believe now I can start giving back, being a source of support for my colleagues. This, I believe, is vital to WASBO, to give back to colleagues, other members, and to incoming professionals. It is why I (and many of you) agreed to take on interns. It is why I am running for the Board. There are many challenges ahead to school business officials in the coming years and I promise to work hard to serve WASBOnians.

Working as a member of the Board, I would support efforts by our organization and through the SAA to work for adequate school funding and to advocate for public education and the children we serve here in Wisconsin.

To that end I support the efforts of State Superintendent Evers and his Fair Funding for Our Future Proposal, and as a Board member would advocate these positions in Madison as called upon.

Now you know a little more about me and why I am throwing my hat into the ring this year for the WASBO Board. I hope that you consider me as one of your next Board members when you vote this spring. I know that there are many extremely well qualified candidates and know that we will be well served regardless of who is elected. Thank you for your time and consideration.

Erik Kass
Assistant
Superintendent
for Business
Services
Madison
Metropolitan
School District



My name is Erik Kass, and I am a candidate for the WASBO Board of Directors. I am currently in my third year as the Assistant Superintendent for Business Services for the Madison Metropolitan School District (MMSD). MMSD is currently the second largest school district in the State of Wisconsin, serving a little over 25,000 students. Each day in a district like Madison brings something new, but that is what keeps me interested in working in school business management.

Prior to arriving in Madison in July of 2008, I worked for 4 ½ years for the School District of Waukesha. I served for three years as the Comptroller for the District, and then 1 ½ years as the Director of Business Services. It was in

the role of Comptroller that I was able to work under the supervision of Robert Buchholtz and find my own way through the profession. He allowed me to take part in many different projects and take ownership over many different pieces of the business office, which I was able to grow at my own pace. Without the experiences and supervision I received in Waukesha, I couldn't venture a guess as to where I would be today.

The way I found myself in school business management is one more of chance than actual planning. I spent most of my childhood growing up in a small suburb of Milwaukee (Brown Deer), until my family moved to Cedarburg, WI in 1992. From there, I attended the University of Wisconsin – Oshkosh where I received an undergraduate degree in Finance in 2001. While attending UW-Oshkosh, I played soccer for four years and was lucky enough to make a final four in Division III my 4th year of eligibility. After graduation in 2001, I unfortunately moved back home as the job market was difficult at the time. I landed an entry-level sales job for a company owned by a good friend's brother, but never really appreciated the world of sales. Fortunately for me, in 2002 I was attending a birthday get together where a gentleman by the name of Gary Swalve (Business Manager at Maple Dale-Indian Hill School District at the time) was also in attendance. His son Brandon was one of my great high school friends, and it was at this party that Gary first talked to me about the opportunities in School Business Management. It was right after that I called Bambi Statz at UW-Whitewater and spoke with her about the program. Soon after, I was enrolled in the School Business Management program in the fall of 2002.

Continued on page 14



Meet WASBO's Candidates for Director

*Continued
from page 13*

My involvement in WASBO really didn't begin to take shape until I moved to the Madison Metropolitan School District. I had always attended conferences, but never thought about getting involved and giving back to the organization. I think that all changed when I was in a session about mentorship and what PI-34 means to our profession when an epiphany of sorts happened. I thought to myself there is probably something I can offer back to the WASBO organization. After that presentation, I became involved with co-chairing the Professional Improvement sub-committee on mentorship. For me, it was about a passion for giving the tools to new Business Managers that I was lucky to have, only because of my boss at the time. I have also taken on the mentorship role for a new individual to our profession in a larger district over the past year.

Each of us understands that education will be facing continued scrutiny and sometimes seemingly insurmountable challenges in the years to come. I believe that never losing sight of our connection to achievement in the classroom as business officials or buildings and grounds employees will go a long way in overcoming these challenges together. I hope you consider supporting my candidacy for the WASBO Board this spring.

"It is better to lead from behind and to put others in front, especially when you celebrate victory when nice things occur. You take the front line when there is danger. Then people will appreciate your leadership."

- Nelson Mandela

**Ken
Mischler
Director of
Business
Services
Manitowoc
Public
School District**



Hi, I am Ken Mischler and I am running for the WASBO Board. I am currently the Director of Business Services for the Manitowoc Public School District. This is my 19th year at Manitowoc and previously I worked ten years as a Certified Public Accountant (CPA) and four years as the Comptroller for the Oshkosh Area School District.

My life changed when I moved from working at a public accounting firm to working at a public school district (Oshkosh Area School District). Here is where I met the most influential school business official of my career. His name is Larry Krebs. You may know him best as the long serving Business Manager in the Neenah School District. He was my mentor before there was such a program. He taught me a lot about the operations of a public school. This was hard for me to understand coming from the private sector. He also taught me that the best way to learn is through other colleagues. I believe the Valley WASBO (now NEWASBO), was the first group of business officials to establish regional meetings. We continue to meet about once every other month.

I was born and raised in Kaukauna. I come from a large family with 14 brothers and sisters. I got teased all the time about growing up in a big family. Did you eat or sleep in shifts? Were you Catholic? Were you raised on a farm? Were there any twins? What was laundry like? I have to say I have no regrets being raised in a large family.

Most of the family members meet once a month with our own Mischler Family Investment Club.

My wife, Cindy, is a junior high school English teacher. We have three children. Kelly graduated from UW-Whitewater two years ago in Marketing and works in St. Louis for Milwaukee Tool. Kelly won the WASBO Met Life scholarship in 2006. Adam is at UW-Madison and is planning to graduate next year in Chemical Engineering and Chemistry. Katelynn has just become a teenager and loves dance, volleyball and Poms. I am very proud of all of them.

I have been a member of WASBO for over 20 years and the WICPA for just under 30 years. I have been the chairperson for the WASBO Accounting committee for eight years and have been a member of the committee for 15-20 years. The WASBO Accounting Committee's main purpose is to put together the Accounting Conference to meets the needs of both business managers and district bookkeepers. In addition, the committee has been responsible for the new **Budget Cycle** handbook. The handbook has been almost three years in the making. It was a big undertaking, but it was completed with the help of a number of hard working fellow business officials.

I am running for director because I believe I can serve the organization as both a committee chairperson and a director. I bring considerable experience and knowledge to the WASBO organization. There are more challenges and demands on school districts now than at any time in the years I have been a school business official. In the position of WASBO director, I am certain that I can contribute to the WASBO organization and help fellow

Continued on page 15



Meet WASBO's Candidates for Director

*Continued
from page 14*

Brian Walters
**Business
Manager
Westfield
School
District**



business officials in these challenging times. I want to be part of the WASBO success and experience.

I have been involved in the mentor program and have been a mentor to several future business managers. It is rewarding to watch individuals grow into remarkable business managers. They start with a core background and grow into the person that you know they can be.

I have been a presenter at numerous workshops for WASBO and other organizations. I consider myself an expert in Microsoft Excel and I enjoy sharing with others the ways Excel has saved me many hours of calculation and analysis.

When people ask what I do for a living I always say I am an accountant/business manager. I can add the perspective of my CPA background to the three-year WASBO director position. There is an old joke about accountants. "If an accountant's wife cannot sleep, what should she ask her spouse? Could you tell me about your work?" Well I have not talked my wife to sleep yet. I think my job as a business official can be exciting, fun and challenging. I am very task oriented and will work very hard be the best WASBO Director I can be.

"Learn to lead in a nourishing manner.

Learn to lead without being possessive.

Learn to be helpful without taking the credit.

Learn to lead without coercion."

- Lao Tzu, philosopher

I would like to take this opportunity to express my interest in running for WASBO Director.

I have been involved with education since the day I graduated from UW-Whitewater with a BSE in Business Education. My first job was as a business education teacher at Preble High School and Lombardi Middle School in Green Bay. I immediately went back to school to obtain my master's degree. While beginning my teaching career and coaching baseball I enrolled in UW-Whitewater's School Business Management program. Just prior to finishing my program I was hired by the School District of Westfield as its Business Manager and have been working there ever since. This past year I was promoted to Assistant Superintendent & Business Manager. In this position I am either directly involved in or directly supervise all financial aspects of the school district. I also oversee the food service, buildings and grounds, and transportation departments. In addition, I contribute to all curricular and personnel decisions and long-range planning.

I am running for WASBO Director to add an additional perspective and lend my vision to further develop WASBO as an influential organization. I realize many in the profession of school business management do not come from the teaching field and I feel I can add something in that manner also. I am a Trustee for the Village of Westfield which gives me an operations perspective from the vantage point of a

board member. I appreciate and care for everyone I work for or with which helps me build effective relationships. The kids within the school all know who I am and talk with me on a frequent basis. These characteristics aid me every day in what I do in this profession. Finally, I am active in professional development and am a lifelong learner who is constantly looking for ways to improve the way schools do business.

I appreciate the opportunity to run for WASBO Director. Thank you for your time and consideration.

"Though government has an important role to play in meeting the many challenges that remain before us, we are coming to understand that no organization, including government, will fully succeed without the active participation of each of us.

Volunteers are vital to enabling this country to live up to the true promise of its heritage."

- President Bill Clinton

Legislative Update

Continued from page 9

- Change the threshold below which the state prevailing wage would not apply for school public works projects from the current \$25,000 to \$250,000.

If you should have any questions regarding the SAA's work on these issues, please call me at (608) 242-1370. Thanks for reading and, as always, thank you for your efforts on behalf of Wisconsin school children.



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The Road to the EPA's Award of Excellence

By Erin Green and Brian Koffarnus

On January 13, 2011, the Greendale School District was awarded the Indoor Air Quality (IAQ) Tools for Schools National Excellence Award by U.S. EPA at the 11th annual IAQ Tools for Schools National Symposium in Washington DC. The award was accepted by Brian Koffarnus, Greendale Building and Grounds Director along with District Superintendent Dr. William Hughes, and Maintenance Specialists Steve Coombs and Joe Braam.

The National Excellence Award is one of EPA's highest IAQ awards presented annually to U.S. school districts with exemplary IAQ programs and demonstrated commitment to IAQ management and children's health. Greendale was one of only five school districts from across the U.S. selected to receive the Excellence Award at this year's Symposium and is one of only three districts in the state of Wisconsin to have achieved this honor.

ASBO International, through its IAQ Resident Practitioner and the IEQ (Indoor Environmental Quality) Advisory Group, has been a committed partner with Greendale on its road to national prominence and environmental excellence. By providing scholarships to the Tools for Schools Symposium, on-site environmental assessments, consultative services, staff training and technical resources, ASBO International has been a key resource in the Tools for Schools Program effort and will soon begin work on promoting Greendale's best practices to school districts nationally.

Background

In 2001 when Erin Green became the School Business Manager at the Greendale School District, it was immediately clear that overall

maintenance had been neglected years, with leaky roofs, old inoperable windows, old malfunctioning HVAC systems, broken fans, and inefficient heating plants district-wide. There had not been a commitment to maintaining the facilities in the prior 30 years, and it showed. Deteriorating building envelopes, evidence of mold and inadequate ventilation led to numerous staff complaints of discomfort and various health-related concerns.

After taking a year to assess the situation and review the issues, the Greendale Safety Committee was established in 2002, made up of administrators, the district nurse, maintenance staff, workers' compensation coordinator and the director of building and grounds. This committee was established to create and maintain an active interest in safety and health through broad scope safety and loss control programs that included the participation of staff and students in initiating and maintaining and improving safe practices for the Greendale School District.

The Safety Committee focused its efforts on a runaway worker compensation record, which was costing the district much in the way of inflated premiums due to high accident rates. Within a year, the MOD factor for Worker Compensation injuries had been brought down from 25% over the industry average (rate for accidents in the industry) to 20% below the average.

The Safety Committee looked for low hanging fruit to enhance the learning



L-R: Dr. William Hughes, Greendale Superintendent; Steve Coombs, Maintenance Foreman; Brian Koffarnus, Director of Buildings and Grounds; Joe Braam, Maintenance Staff Member; Kathy Prosser, Environmental Program Facilitator, IEQ Advisory Group ASBO International

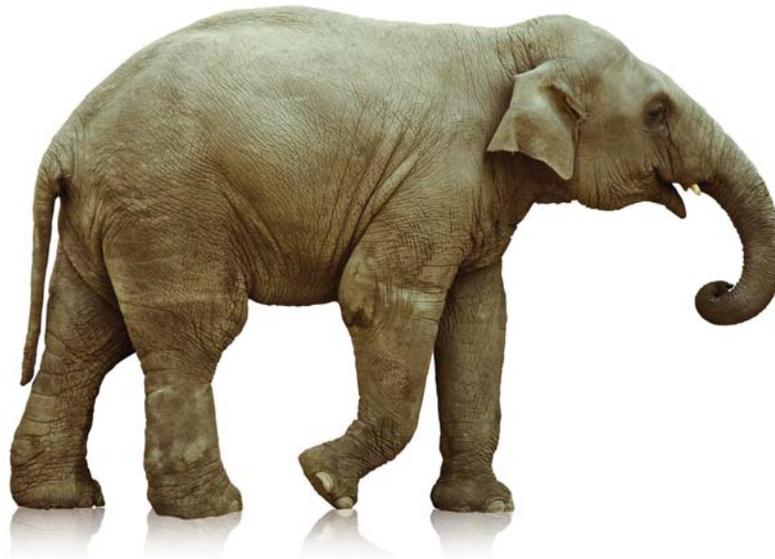
The district applied for and obtained a Focus on Energy grant in 2004 to upgrade all light fixtures to T-8s, install occupancy sensors in each room, and install acoustical ceilings in every room in all five schools. These enhancements paved the way to further enhancements of the learning environment, which included implementation of U.S. EPA's IAQ Tools for Schools program and efforts to improve the indoor learning environment.

In 2007, the Greendale School District sought approval from voters to borrow \$14 million to renovate the high school. This bond passed allowing for a complete renovation of the existing building, including a \$5 million dollar replacement and upgrade of the existing HVAC system. Digital controls were installed enabling centralized control of all classroom environments and improved thermal comfort of the indoor environment.

Ms. Green's affiliation with ASBO International, who had received a grant from the EPA to educate members on IAQ and the Tools for Schools Kit, proved to be the key resource in the successful implementation of the Tools

Continued on page 19

Controlling Health Care Costs IS OUR COMMON INTEREST



Addressing the elephant in the room.

While progress to improve access to health care has been made in the past year, the issue of high, unsustainable costs continues to loom large—like the proverbial elephant in the room. For 64 years, WPS Health Insurance has provided competitively priced, high-quality health coverage to businesses, individuals, and school districts throughout Wisconsin. To do that, we work hard every day to help curb health care costs—from driving the use of appropriate, evidence-based care, to encouraging healthy choices, to providing a wide range of coverage options to employers and their employees. As Wisconsin's leading not-for-profit insurer, this is our focus and mission. Because controlling health care costs is our common interest.

Controlling Health Care Costs: 6 Things You Can Do Now — a free white paper from WPS is available at www.wpsic.com/control. To learn more about WPS and our subsidiary, Arise Health Plan, or to get a quote, contact your local agent, or call 608-223-5970 and reference "schools."



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for Schools Program. To launch the effort, a team of staff members applied for and received scholarships through ASBO International's IAQ Resident Practitioner and the IEQ Advisory Group to attend EPA's IAQ Tools for Schools National Symposium in Washington DC. Several staff members attended the Symposium between 2006 and 2010, with scholarship funding by ASBO International. These individuals included maintenance staff members, the business official, an assistant principal, the director of building and grounds, a guidance counselor and a science teacher.

During the 2008-2009 school year, the stars aligned and the timing was right to take IAQ implementation to the next level. The link between IAQ and student performance was shared, reduced workers compensation claims and increased cost savings earned the Superintendent's buy-in. His support provided the energy needed to move forward and put together an IAQ team to implement a district-wide plan. While staff had been hearing the message of the Greendale School District's commitment to safety, health and high performance, they would soon become active participants in the district's IAQ program. Until then, much of the communication about IAQ had been provided via written policies and email notifications.

The IEQ Advisory Group of ASBO International, comprised of John Gayetsky and Kathy Prosser, made a visit to the district in October 2008 to conduct building environmental walkthroughs and meet with staff members to assist with the implementation of a district-wide environmental management program. At this time Greendale School District made the decision to focus not only on IAQ, but to broaden their goals to include a plan that

encompassed multiple environmental concerns. The IEQ Team was formed and IEQ Coordinator, Brian Koffarnus, was named in the spring of 2009. The team consisting of administrators, teachers, district nurse, maintenance and custodial staff, meets quarterly to discuss IEQ concerns, strategies for environmental improvement and to identify district IEQ management needs.

As the community began to make a push for the district to implement green practices, the IEQ team became known as the Green Team for IEQ in the 2009-2010 school year. The addition of community members and students to the team was made to further involve the community in our efforts, and bring in additional expertise. This expanded team has become known as the Greener Dale Team, to demonstrate our commitment to the school's mission, more closely align with the goals of the IEQ management program, and, ultimately, achieve a higher level of student/staff performance, occupant health, financial stability, facility operations effectiveness, sustainability, and social responsibility.

The written goals of the program have included:

- 1) Decluttering of all spaces, offices and classrooms, to allow for adequate cleaning, leading to better health outcomes for all students and staff.

Outcome: This has occurred in most spaces, and is supported by administrative directives

- 2) Proper storage of all classroom and office items to promote a safe, clean environment.

Outcome: Administrators have supported this effort, and environments are much cleaner

and more orderly and healthy.

- 3) Staff education on HVAC system operation, so that vents are not blocked, fresh air is adequate, and health is improved.

Outcome: Staff has been trained by the Buildings and Grounds Director in staff meetings. Written reminders come out annually to alert staff to pay attention to this.

- 4) Implementation of a cyclical maintenance program that is preventive in nature.

Outcome: The program is ongoing. Facilities and equipment are maintained preventively.

- 5) Staff adherence to operational priorities to maintain low allergy incidence, such as no air fresheners, nothing hanging from ceilings, reduce use of paper on walls, no plants or animals, no stuffed furniture or items that cannot be cleaned properly (fuzzy items).

Outcome: Staff are reminded annually in writing about the directives and administrators enforce. The culture has changed in two years, and a better environment ensued.

District-wide Decluttering Story

Clutter had become a problem in the district. Teachers tend to hang onto to many older curricular items.

The school district hired an architect to look in the classrooms, offices and storage closets of each building to assess the use of space and identify the need for constructing additional storage cabinets. Greendale hired a professional organizer in 2009 to work with the staff one-on-one to help them throw away unnecessary items, and organize their spaces and classrooms.

Continued on page 21



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Contact Richard Waelti @ 262-377-8306 or email: rwaelti@wi.rr.com

A staff clean out day was held to focus on the problem and the solutions. Before and after pictures were taken.

End-of-Year Staff/Administration Walk Through

Principals of every school now implement a procedure drawn up by IEQ team. This was first implemented in spring 2009. Principals performed a mandatory inspection of each classroom as part of the teacher check-out procedure with the checklist created by the Team to ensure that rooms were de-cluttered and ready for summer cleaning. This alleviated stress by giving teachers permission to get rid of old materials. This was implemented again in 2010. The second time around program went more smoothly since there was less clutter to contend with.

Results: Spaces were organized, de-cluttered, healthy and inviting. It was clear that the learning environments had improved dramatically. A return visit by ASBO's IEQ Advisory Group in September 2010 demonstrated to them (and to us) that we had made substantial improvements in managing our learning environments. Learning areas were clean, orderly, well organized, and healthy. Achievement continues to improve, demonstrated by the various measures of student performance, some of which are referenced in this document. Ms. Green was interviewed in June 2009 by **Managing School Business**, a national professional magazine that reaches thousands of school administrators nationwide. The resulting article was titled, "Enlist Professional Organizer to Conquer Clutter."

Curricular Buy In

Kids Getting Involved: Kerry Owens-Bur, principal at College Park Elementary, has 5th grade students apply to be the cleaning representative

to help pick up and straighten classrooms at the end of day. Tasks include stacking chairs, picking things up and making rooms easier to clean. College Park Elementary staff spent days over the summer removing clutter and moving furniture for better cleaning, improved learning and improved teacher satisfaction.

Involving Special Education: Brian Koffarnus, Buildings & Grounds Director, worked with special education students to teach them cleaning skills. The success of this program launched the creation of another endeavor, the Student Assistance Program. Greendale School District worked with residents and the courts to provide an opportunity for high school students to perform their community service projects on school grounds.

Turf Story

Synthetic football turf was installed in 2008 which reduced chemical usage, mower use and the need for watering. This \$700,000 project was funded by a combination of fund raising and school district funding. The usable season of the field has been extended, rain is no longer an issue and maintenance of the field has been dramatically reduced.

Energy Story

The Energy Star challenge was added to the district web site and became a partner in 2007. The District took the Governor's Challenge to reduce energy use by 10% and we more than complied, saving \$120,000 over two years in energy costs.

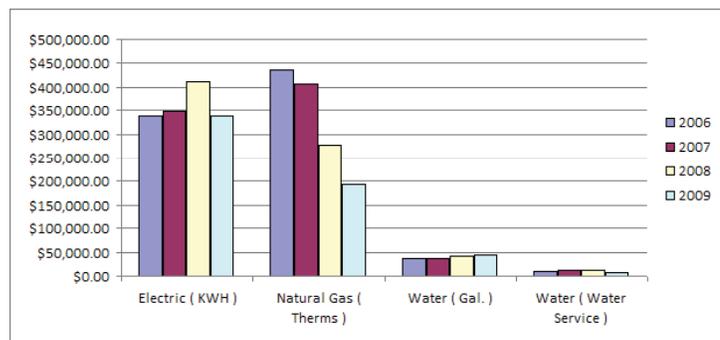
The results of the energy reduction program are depicted in the graph below. It details the financial savings among all district facilities. District staff is on board with energy reduction policies and efforts. The energy saved is dramatic.

Achievement Story

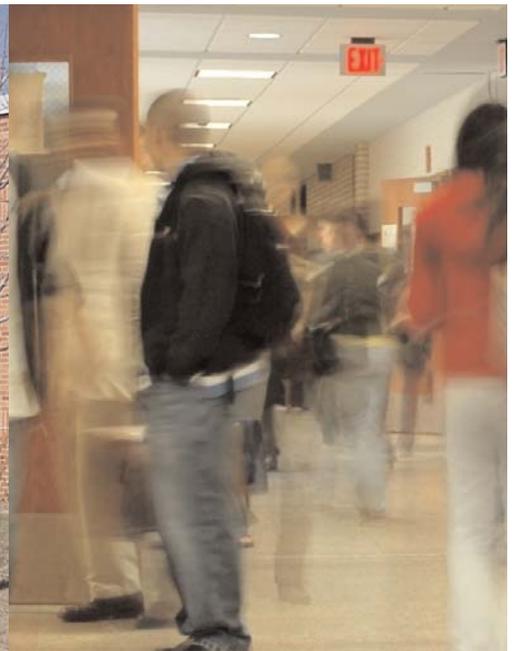
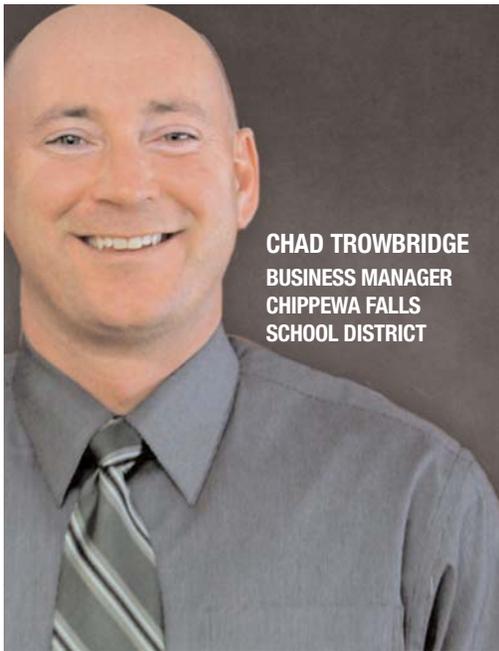
Greendale School District firmly believes that focusing attention on the learning environment has bolstered achievement district wide.

Contact ASBO International's practitioners, John Gayetsky and Kathy Prosser to obtain information on the support and knowledge available. kp1@wideopenwest.com (Kathy).

Sum of Total Cost	Year				
Utility Type	2006	2007	2008	2009	Grand Total
Electric (KWH)	\$337,341.01	\$347,060.81	\$410,888.59	\$338,922.79	\$1,434,213.20
Natural Gas (Therms)	\$435,512.63	\$406,532.52	\$276,212.40	\$193,112.51	\$1,311,370.06
Water (Gal.)	\$36,021.95	\$36,615.07	\$42,151.07	\$43,179.31	\$157,967.40
Water (Water Service)	\$10,117.80	\$11,497.50	\$11,957.40	\$8,429.85	\$42,002.55
Grand Total	\$818,993.39	\$801,705.90	\$741,209.46	\$583,644.46	\$2,945,553.21



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Team Approach to Bargaining: Can Your District Be More Effective?

Over 100 business managers, district administrators HR Directors, and Board Members attended this two-day conference in December to learn more about effective bargaining strategies. They heard from several attorneys who specialize in labor law, school districts and various professional associations about team building tools and techniques available to them. They had an opportunity to network about bargaining issues they are facing and were offered some strategies to use. We thank **PMA Financial Network** and **WISC** for their support of this conference.



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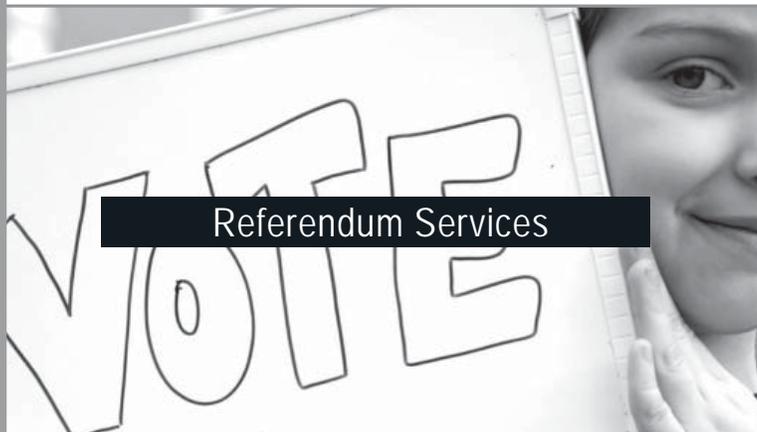
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P-Card Fraud Protection = Protecting the Assets and Integrity of the School District

By Bryan Barger, BMO/Harris Bank

One of the main reasons that board members and administration are reluctant to authorize the use of p-Cards is the fear of those cards being misused, lost or stolen. Because of the public funds that are involved, these are legitimate issues. This article provides a brief summary of the protection provided by the WASBO p-Card program. Whatever program you are using should include these safeguards.

Fraud, Misuse and Disputed Items with Purchasing Cards: A Summary

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.

First, 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 is 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 since if the card were to be misused then we might not be able to determine the source of the fraud. These cards are what BMO might refer to as a Department Card or Ghost Card. 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

p o l i c y unless it is determined that the " f r a u d " 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. It is important to note that all disputes 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 the protections provided under the BMO MasterCard program. If you are participating in the p-Card program and have additional questions as a program administrator, please do not hesitate to contact Client Services at 888-267-7834 for more information. If you are not a participating school district and would like more information about this important service contact Wisconsin ASBO at 608-249-8588.

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WASBO at the 90th State Education Convention



WASBO supports student music at the convention with funds raised at our Spring Conference.



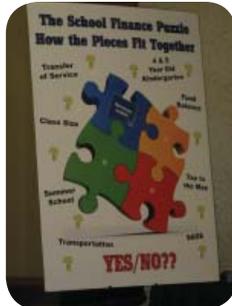
The Spring Conference Planning Committee met led by co-chairs Sue Schnorr & John Sackett.



Nineteen WASBO members presented and facilitated the Finance Puzzle pre conference session on Tuesday for 95 school board members and administrators.



Janice De Meuse was honored as WASBO's 2011 Shining Star. This award is sponsored by **Quarles & Brady, LLP.**



Business Official of the Year Debra Pelegrin with President Chad Trowbridge and award sponsors Kevin Mullen and Jim Miller of **Hutchinson, Shockey, Erley & Co.**



WASBO Executive Director, Woody Wiedenhoef was honored by the Wisconsin K-8/UHS Coalition in recognition of his support and achievements in working with education and the Coalition.





Yong Zhao, Presidential Chair of Global Education and Online Learning at the University of Oregon kicked off the convention.



State Superintendent Tony Evers advocated for Fair Funding for Our Future.



Jeannette Walls, author, "The Glass Castle" and "Half Broke Horses" spoke on Thursday.



WASBO Accounting Committee Chair, Ken Mischler, introduced *The Budget Cycle*. Members of the Accounting Committee worked with WASB to rewrite this publication.



Newly elected Governor Scott Walker addressed convention attendees.



WASBO President Chad Trowbridge presided over Friday's general session, introducing Governor Walker.



Sir Ken Robinson, internationally recognized leader in the development of creativity, innovation, education and human resources, addressed the convention through the use of technology.



Jodi Traas, co-chair of the Safety & Risk Management Committee introduced the new Certified School Risk Manager Program at the Business Meeting.



Wisconsin
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School
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Officials



WASBO Transportation & Bus Safety Workshop

March 16, 2011
Kalahari Resort & Conference Center
Wisconsin Dells, WI



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www.WASBO.com

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Would You Like to be a "Mock" School Board Member?

We are looking for interested School Business Managers to join our "mock school boards" and listen to budget presentations from the School Business Management and Educational Leadership students who are taking School Finance & Accounting this semester at UW-Whitewater. These are students who are seeking school business management or administrative licensure.

Each student prepares a school budget and gives an abridged presentation to a "mock school board" as their final project for this class. We have always been blessed with plenty of volunteers who come and serve as board members so that every student can participate in this valuable experience and receive immediate feedback. I am hoping that we will be able to offer the same opportunity to each student this spring.

Presentations are scheduled for Saturday, April 16 at 9:00 am and will likely take most of the morning. We will be meeting on the UW-Whitewater campus. This is an enjoyable session and it is great to see sharp professionals present their budgets. If you can volunteer that morning, contact Debi Towns at 262-472-6947 or townsd@uww.edu.

Debra Towns, Coordinator,
School Business Management Program, UW - Whitewater



Wisconsin
Association of
School
Business
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Register at
www.WASBO.com

13th Annual WASBO Facilities Management Conference

March 15-16, 2011
Kalahari Resort & Conference Center
Wisconsin Dells, WI

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WASBO Facilities Manager Core Certification

Developed by the WASBO School Facilities Committee
in cooperation with the Wisconsin Department of Public Instruction

Purpose of Program

To develop a knowledge base for Building and Grounds/Facilities leaders to provide safe and healthful educational facilities in the State of Wisconsin.

Certification

The WASBO Facilities Manager Certification Program is offered by the Wisconsin Association of School Business Officials and is recognized by the Wisconsin Department of Public Instruction. Certification is the preferred end; however, individuals may take selected courses in the curriculum without obtaining certification. Any level of participation will add to one's experience and knowledge base. Those completing the Facilities Manager Core Certification program requirements are recognized at the WASBO Spring Conference.

Application

A person must apply through WASBO to enter the program. The applicant must be a WASBO member in good standing and maintain WASBO membership throughout the course of the program. The cost of program application is a one-time fee of \$65.

Program Oversight

The certification program is managed by the WASBO School Facilities Committee with support from the WASBO Executive Director and staff and the WASBO Safety & Risk Management Committee. The Facilities Committee identifies topics and speakers, reviews the course materials, and provides feedback to the speakers.

Required Hours for Certification

To obtain core certification, an applicant must complete 32 hours of the WASBO Facilities Manager Core Certification curriculum.

Frequency of Course Offerings

Each year courses are offered at the WASBO Facilities Management Conference, Spring Conference, Fall Conference and Midwest Facility Masters Conference. A complete module is offered at each of these conferences. Additional sessions are offered at the Custodial & Maintenance Conference. In a typical year WASBO offers approximately 15 to 20 hours of courses, or 3-4 Modules, allowing a participant to complete the certification in as little as two years.

Required Curriculum

The Core curriculum is divided into seven modules and one introductory course. Each session in each module is required to achieve certification.

Introduction to Facilities Management (online session) - 1 Hour

Core Module 1 (4 Hours)

Custodial Operations

- Effective Hiring and Orientation Process
- Custodial Staffing Levels
- Custodial Supervision & Evaluation
- Product & Equipment Selection

Core Module 2 (6 Hours)

Systems: HVAC and Electrical

- Understanding Your Utility Bill: Part 1
- Understanding Your Utility Bill: Part 2
- Understanding HVAC: Part 1
- Understanding HVAC: Part 2
- Electrical Systems: Part 1 - Lighting & Lighting Controls
- Electrical Systems: Part 2 - Electronic Systems

Core Module 3 (5 Hours)

Environmental Health & Safety

- 20 Areas of Safety Concern & Responsibilities
- Indoor Air Quality: Part 1

- Integrated Pest Management: Part 1 - Bugs
- Asbestos: Part 1
- Life Safety & Building Codes

Core Module 4 (4 Hours)

Maintenance & Operations

- Exterior Building Envelope Maintenance
- Roof Maintenance
- Effective Preventative Maintenance Program
- Building Automation Management Systems

Core Module 5 (4 Hours)

Facility Planning and Budgeting

- Long Range Capital Projects Planning
- Comprehensive Facility Planning
- Budgeting for School Facilities Departments
- Budget Tracking Tools for Operating Budgets and Capital Projects

Core Module 6 (3 Hours)

Union Management and Interaction with the Public

- Union Negotiation Tools
- Addressing Grievances & Legal Issues
- Interaction with the Public: How to Sell Your Program

Core Module 7 (5 Hours)

Emergency Management, School Safety & Security

- Emergency Planning
- Security Assessment: Part 1- Site Survey
- Security Assessment: Part 2 - Technology
- After Hour Emergencies: How to Plan
- Continuity Planning and Disaster Recovery



WASBO Facilities Manager Continuing Education Program

Introduced by the WASBO School Facilities Committee
January 1, 2011

Purpose of Program

To continually add to a knowledge base for Building and Grounds/Facilities leaders to provide safe and healthful educational facilities in the State of Wisconsin.

Continuing Education

A Certified WASBO Facilities Manager is required to attend 12 hours of training over each three-year period following initial core certification. The WASBO Facilities Committee stresses the value of ongoing education to stay current and relevant in the ever changing field of school facilities management.

Application

Upon achievement of the WASBO Facilities Manager Core Certification, participants are enrolled in the Facilities Manager Continuing Education Program. There is no enrollment fee. To maintain certification, one must be a WASBO member in good standing.

Program Oversight

Oversight of the Continuing Education Program is the same as the Core Certification Program.

Required Hours for Continuing Education

To stay current in the Facilities Manager Continuing Education Program, a participant must complete 12 hours of the WASBO Facilities Manager Continuing Education curriculum within a three year time period.

Frequency and Content of Course Offerings

Each year courses are offered at the WASBO Facilities Management Conference and Midwest Facility Masters Conference. Sessions may also be offered at the Spring and Fall Conferences. Courses could cover topics from the ten continuing education modules or emerging subjects.

Past offerings have included:

Continuing Education (CE) Curriculum

CE Module 1

Custodial Operations

- Modern Technology and its Custodial Applications

CE Module 2

Systems: HVAC and Electrical

- Building Systems Integration: Hardware versus Software
- LED Lighting
- Myths and Truths About Performance Contracting

CE Module 3

Environmental Health & Safety

- Asthma and Asthma Triggers
- Asbestos - Part 2
- IEQ Regulations
- IEQ Legislation
- Cold Plasma Technology
- Pandemic Planning

CE Module 4

Maintenance & Operations

- Computerized Maintenance Management Systems
- Athletic Field Logos
- Roofing Warranties
- Expectations for Flooring Materials Performance
- Site Maintenance Program
- The True Cost of Deferred Maintenance

CE Module 5

Facility Planning and Budgeting

- Understanding and Communicating Facilities Studies
- How to Fund Athletic Facilities without Using Tax Dollars

CE Module 6

Union Management and Interaction with the Public

- Recovering from the Referenda that Failed
- Community Use and Cost Recovery

CE Module 7

Emergency Management, School Safety & Security

- The Show Must Go On Safely
- Safety Committees
- School Fire Code
- What Do You Know About Electrical Hazards
- Review of ADA and Related Requirements
- Swimming Pool Safety

CE Module 8

Facilities Design & Construction Series

- Facilities Design and Construction Pre Referendum
- School Construction Methods and Hiring Contractors
- Federal Stimulus Package and School Infrastructure Update
- New School Construction Sessions:
 - Needs Assessment
 - Conceptual Design
 - Financial Evaluation
 - Referendum Campaign
 - Project Team and Construction Delivery Methods
 - Contracts and Other Legal Issues
 - Design Process
 - Developing Design Standards
 - The Construction Bid Process
 - The Construction Process
 - Best Practices in New School Design and Construction
 - Legal Side of Construction Management



**WASBO Facilities Manager
Continuing Education Program
Continuing Education (CE)
Curriculum continued**

**CE Module 9 - Energy Conservation &
Green Schools**

- District Energy Committees
- Green Schools: LEED® and Sustainability
- Focus on Energy Programs, Services and Grants
- Green Cleaning
- Ground Source GEO Thermal: Design & Energy Savings
- Green & Healthy Schools
- Wind PV: Is it for Your District?
- Working with Teachers to Reduce Energy Costs
- Wisconsin's Green K12 Future
- Solar Hot Water Applications for Schools

**CE Module 10 - Designing and
Maintaining Exterior Envelopes**

- Roofing
- Exterior Walls
- Moisture

**WASBO School Facilities
Committee Co-chairs**

Jim Beckmann, Director of
Operations, Glendale
River Hills School District/
Maple Dale-Indian Hill School
District

Dale Zabel, Director of Facility
Services, Kettle Moraine
School District

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School District Benefits

- Knowledge of current and changing legislation and regulations
- Savings through efficiencies of operation, energy use and effective labor management
- Improved safety for students, staff and community
- Savings through fewer claims
- A healthy and safe learning environment
- Increase in public confidence
- Effective facility planning and budgeting

Personal Professional Benefits

- Increase in knowledge which leads to increased confidence in your abilities
- Recognition in your district and by your peers
- Knowledge gained from a network of school facility managers and industry professionals
- Familiarity with current topics, trends and legislation affecting school facilities management
- Improved employment options
- Enhanced leadership skills

Who Should Participate

The Facilities Manager Core Certification and Facilities Manager Continuing Education Programs benefit facilities directors, business managers, district administrators, maintenance supervisors or anyone who has director or supervisory responsibility for the operations of school facilities.

To Enroll

An online application for the Core Certification Program can be found at www.WASBO.com. The cost of the application is a one-time fee of \$65. Individuals who have completed the Core Certification Program are automatically enrolled in the Continuing Education Program. Participants in both the Facilities Manager Core Certification Program and the Facilities Manager Continuing Education Program must be WASBO Members in good standing.

To Receive Credit

At each course, a sign in sheet is circulated during the session. To receive credit for your attendance, find or add your name to the list. Your signature will verify your attendance. This is our only record of your attendance and must be recorded during session attendance to receive credit.

For More Certification Information

Jeanne Deimund
deimund@wasbo.com
608.249.8588
Or visit www.WASBO.com

To Participate on the WASBO School Facilities Committee

If you would like to share your time and expertise with your colleagues, consider joining the WASBO School Facilities Committee. Contact the WASBO office at 608.249.8588 to learn more.

Revised January 13, 2011



Jill Collins
WASBO Director

Director's Corner The Challenge of Change

By Jill Collins, Director of Business Services, School District of Black River Falls

We all know that change is not easy and that it is typically a slow process in education.

Changing the way we think about educating kids is a challenge, but it is one that we as administrators, teachers and community members need to tackle together for continuous improvement. Our School District is doing just that through a book study as a piece of our strategic planning process. The book, "Beyond School Improvement," is not only being studied by our administrative team, but we are doing so in conjunction with teacher, student and community leaders and it is being led by its main author, Bob Davidovich.

As business managers of school districts, we don't often immerse ourselves with curricular elements as much as we probably should. It is all too easy to bury ourselves with the day-to-day challenges of the fiscal, auxiliary services or human resources duties of our jobs. We, without hesitation, follow the policies and procedures that we've created for the district without thinking about the central reason why they were created or why we work so hard to follow them: of course the central reason is all about educating kids. Although we are early in the process at our district, it has already opened my eyes to a new way of thinking about the future of education in Wisconsin and how we as business officials need to be an integral part of the strategic planning for any change in how we educate kids.

Preparing students for the future is not an easy job; after all, we are preparing students for jobs that do not even exist today. It is our job as business officials to understand this phenomenon and

to be a part of the solution with the current resources we have. Studying the past trends and future predictions is imperative to this process.

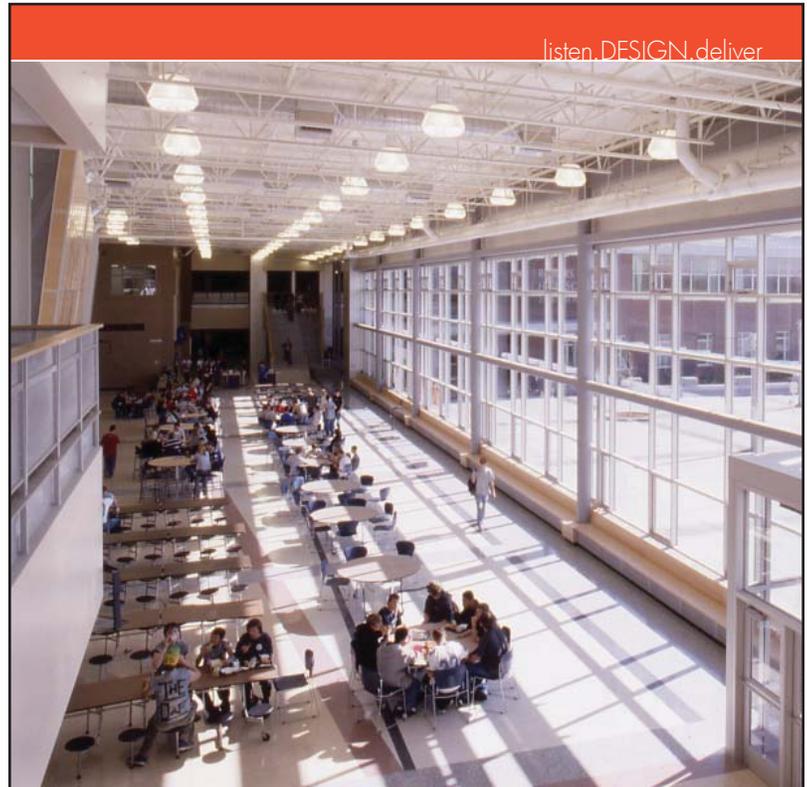
We have used charter schools as a way to "research" project-based learning, but have yet to really scratch the surface in implementing such an idea in most Wisconsin public school systems. Community partnerships need to continue to be uncovered as we look for ways to help relieve the burden of fiscal restraints and provide alternative ways to educate kids. We also need to continuously have an open mind as other opportunities present themselves.

Mr. Davidovich recently spent a lot of time helping our strategic planning committee understand the difference between improvement and innovation.

In my simplest understanding of the difference, improvement could be equated to incremental increases in test scores, whereas innovation is restructuring the process of how we educate our kids and propel them forward to meet the demands of the future. The challenge will be: how do we do both?

My challenge to you is to remember our central purpose and to think about how you can better understand your district's curricular goals and processes. Then, think about how you too can positively influence and assist in the improvement and innovation of student learning for the future.

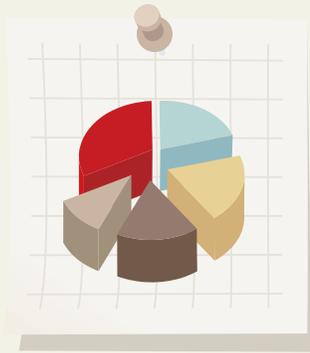
"Beyond School Improvement: The Journey to Innovative Leadership," by Robert Davidovich, Pauli Nikolay, Bonnie Laugerman and Carol Commodore, copyright 2010.



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WASBO Certified School Risk Manager Program

The Certified School Risk Manager Program

CSRSM is a cohesive, unified education and designation program that builds risk management knowledge as it builds trust within the school system. Participants will attain an in-depth knowledge of the risk management process and terminology based on the philosophy and theory of school risk management. They will also learn how to better protect their schools against unplanned losses and to effectively maintain budget integrity in tough economic times by gaining proficiency in:

- Risk Identification
- Risk Analysis
- Risk Control
- Risk Financing
- Risk Administration

The CSRSM faculty consists of practicing school risk management professionals. Participants will become more efficient, knowledgeable, and better able to affect the total cost of risk impacting the budget of the school system. The CSRSM Program was developed to further the professional development of the risk management team - giving participants a competitive edge.

Who Should Attend

Those employed by school districts as risk managers, employee benefits or safety coordinators, administrative, or other positions that oversee the risk management function, will benefit significantly by earning this designation. Insurance agency, brokerage, and company personnel who work with school risk managers are also encouraged to attend. Networking with other risk managers is encouraged throughout the CSRSM Program.

What to Expect

CSRSM courses are intensive, concentrated learning experiences that can be applied to the workplace immediately. Participants will receive personal, expert instruction for the real-world issues of managing risks. Each one-day course is available through classroom or online instruction, and includes an optional multiple-choice examination. (Examination is required for those pursuing certification.)

**For the WASBO
CSRSM course
schedule, go to
www.WASBO.com.**

Benefits of the CSRSM Designation:

- Affects the total cost of risk, impacting the school districts budget.
- Increases skills in identifying potential sources of loss within school operations.
- Meets the dramatically increasing demand for basic risk management knowledge in and beyond the school environment.
- Especially designed to meet the needs of school risk managers, school business officials, employee benefits and safety coordinators, and those in administrative positions that oversee the risk management function in schools.
- Improves ability to forecast loss amounts and maintain adequate reserves.
- Demonstrates professional competence through attainment of the CSRSM designation.
- Earns trust and credibility within the school system
- Provides opportunity to network with other school business officials about risk management

The Five Courses of Study:

Fundamentals of Risk Management

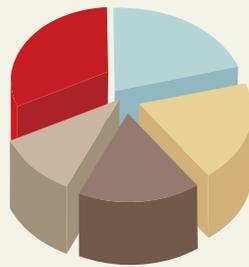
This course provides an in-depth look at the overall risk management process, delves into the identification step of the process, and examines the function of the school risk manager.

- Risk Management Function and Process
- School Risk Manager
- Identifying School Risks: Logical Classifications
- Identifying School Risks: Methods
- Gathering Loss Data

Handling School Risks

This course studies the development of a safety and health plan, loss control fundamentals, risk control and mitigation of exposures, and managing school claims. A post-accident loss control reduction technique is included.

- Introduction to and Fundamentals of Controlling Risk
- Safety and Health Program for School Districts
- School District Exposures
- Managing School Claims



Funding School Risks

The purpose of this course is to examine various loss funding techniques, including guaranteed cost programs, deductibles and retention programs, pools, and transferring risk through contracts.

- Introduction to Funding School Risks
- Foundations for Funding
- Options for Funding School Risks
- Reserving for School District Risks
- Finance Issues for the School Risk Manager

Measuring School Risks

This course includes the mechanics of developing, forecasting, and trending losses to be used in determining insurance program retentions and deductibles.

- Introduction and Qualitative Analysis for School Risks
- Qualitative Risk Assessment and Loss Run Analysis
- Quantitative Analysis: Tools and Forecasting
- The Risk Analysis Process

The first two courses, Fundamentals of Risk Management and Handling School Risks, are being offered March 1 & 2 in Madison. These courses are at capacity, but please contact the WASBO office if you are interested in future dates for these courses. The Safety & Risk Management Committee will be scheduling dates for upcoming training soon!

Administering School Risks

This course covers how a school risk manager implements and monitors the school risk management program, the risk management team, information technology, allocating costs, ethics in school risk management, and requests for proposals.

- Introduction to Administering School Risks
- The School Risk Management Team
- Communicating with the Risk Management Team
- Implementing the Risk Management Program
- Monitoring the Risk Management Program

CSRM: helping school risk managers create success

Why CSRSM

- Protect students and faculty by managing the school district safety program.
- Learn how to better protect the district against unplanned and unforeseen losses.
- Learn how to stay within budget and maintain budget integrity.
- Lower the cost of risk and become proactive in managing risks.
- Learn how to save taxpayer dollars.
- Better understand the Workers' Compensation program.
- Learn how to better protect district assets.
- Assure compliance with laws and regulations.

Who Should Participate

The Certified School Risk Manager Program will benefit :

- Risk Managers
- Employee Benefits Coordinators
- Safety Coordinators
- Business Managers
- Workers' Compensation Coordinator
- Human Resource Manager
- School Nurse
- Insurance Agencies
- Insurance Representatives who work with schools

WASBO Safety & Risk Management Committee Recommendation to the Board of Directors

We recommend that WASBO promote and provide members with the opportunity to obtain the beneficial Certified School Risk Manager (CSRSM) designation. This program is designed to better protect our schools against unplanned losses and to effectively maintain budget integrity by gaining proficiency, while emphasizing practice over theory. This five course risk management study will enable our students to receive education safely and at less risk and cost to the district.

For More Information Contact:

Wisconsin Association of School Business Officials
4797 Hayes Road, Suite 101, Madison, WI 53704
608.249.8588 www.WASBO.com

To Become Certified

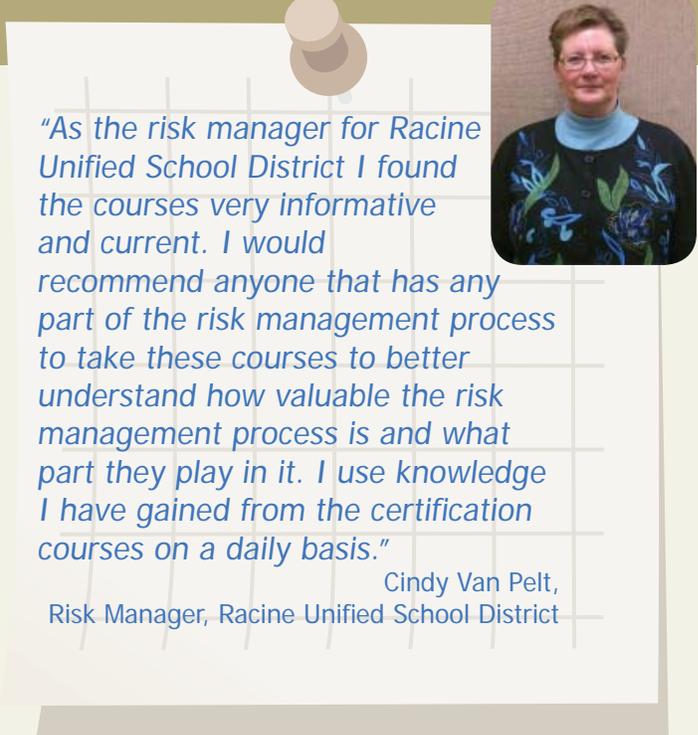
To become certified as a CSRSM one must complete all five courses of study and pass an examination after each course. All five courses will be offered by WASBO over a one year time period. For designation through The National Alliance, one must successfully complete the five CSRSM examinations within three calendar years following the year in which the participant successfully completed his or her first examination. Course fees include all course outlines and reference materials.

Annual Update Requirements

The National Alliance annual update requirements for CSRSMs may be met by attending a Workers Compensation Certificate course, Employee Benefits Certificate course, CISR course, William T. Hold Seminar, Dynamics of Service course or CSRSM course. Dues to The National Alliance may be required to meet annual update requirements.

Earn Graduate Credit

WASBO has applied for graduate credit through Viterbo University. Pending course approval by Viterbo University, we anticipate offering 3 graduate credits for completing all five courses. There may be options to earn one credit for attendance at two days. Fees for graduate credit will apply.



"As the risk manager for Racine Unified School District I found the courses very informative and current. I would recommend anyone that has any part of the risk management process to take these courses to better understand how valuable the risk management process is and what part they play in it. I use knowledge I have gained from the certification courses on a daily basis."

Cindy Van Pelt,
Risk Manager, Racine Unified School District



Revised January 14, 2011

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

Book Review

“The Samurai Leader”

Bill Diffendeffeffer, Author

Review by Orvin R. Clark, EdD, RSBA

Mr. Diffendeffeffer was a Vice President of IBM and Continental Airlines and CEO of SystemOne.

SystemOne Corporation was a global provider of computer reservation and travel management systems and a subsidiary of Continental Airlines. When Bill Diffendeffeffer started at SytemOne, it was in Chapter 11 bankruptcy and had just been valued at \$5-60 million in a formal bankruptcy court proceeding. It had major financial problems, and its turnaround was dramatic following a series of transactions which Bill Diffendeffeffer orchestrated. Continental received over \$600 million for it.

The Samurai Leader is 262 pages in length and divided into 10 chapters. At first the benefits of following the Samurai Code are counter-intuitive. The message and the lessons seem much too simple to be relevant in the highly complex business environment today's managers live in. It is in this simplicity that its Zen underpinnings are most obvious. Most samurai were Zen Buddhists. It gave the samurai an intellectual, moral and spiritual foundation to support the “tautness of spirit” that made samurai unique.

Like Zen, the Code of the Samurai focuses on the wholeness of being. Both the code and the eightfold Path share an awareness of the fundamental interdependence of actions and thoughts. The Eightfold Path is the rough equivalent to Christianity's Ten Commandments.

The Eightfold Path:

- **Right Understanding**
Understanding the Four Noble Truths, the realness of Karma, and the unity of things
- **Right Thinking**
Thinking positively and avoiding the base, cruel, and immoral thoughts
- **Right Speech**
Not lying, not gossiping, not talking too much, speaking wisely, with kindness
- **Right Action**
Acting morally
- **Right Livelihood**
Avoiding work that supports immorality, hurting people, or victimizing others. and do work that helps others
- **Right Effort**
Being your best self, emphasizing positive qualities, exercising self-control
- **Right Mindfulness**
Being fully aware of what is occurring inside and outside of oneself, using one's mind fully without barriers
- **Right Concentration**
Fully concentrating on what one is doing, free of distressing thoughts, immersing oneself in the actions of the moment

It is a holistic system built on mutually supportive root elements. Each element taken alone is simple, but the whole is powerful and can conquer the complex. So do not casually disregard twenty-five hundred years of intellectual development.

The Samurai Code consists of the following characteristics:

- Honor
- Courage

- Rectitude
- Loyalty
- Compassion
- Honesty
- Politeness
- Self-Control

The Samurai Leader is a series of stories illustrating each of the Samurai characteristics. The major problem is that it takes a lot of different traits and abilities to be a good manager, let alone an excellent one. Here is why it is worth being a Samurai Leader:

- A bolder and more confident approach to work
- A clear stance on morally ambiguous issues
- Greater self-control
- More respect from your peers
- More respect from your workplace bosses
- More respect from the people who work for you
- A greater sense of connectedness
- You will be happier!

Actually, it gets even better than that, but the above list all by itself is hard to believe. Yet those are the benefits of committing one's action to the right value system. When you know the Code, you know what action to take. Life is about doing the right thing and knowing when to do it. Here is how the Code of the Samurai all comes together.

The Code of the Samurai Leaders:

- **Act Honorably**
Honor isn't negotiable. It is an overarching requirement
- **Act with Courage and a Warrior's Spirit**
When you know what needs to be done, do it
- **Act with Rectitude**
Do the right thing

Continued on page 40



Welcome New Members

Regular Members

- **Lee Benish**, Operations Manager, Kohler Public Schools
- **Gerald Bodway**, School Board Member, Osseo-Fairchild School District
- **Linda Connely**, Controller, CESA 03
- **Marleen Dobrinsky**, Transportation Supervisor, Weyauwega-Fremont
- **Colleen Eggers**, Administrative Assistant, Lancaster Community Schools
- **James Greene**, Custodian, Zisassivan Headstart
- **Shannon Grindell**, Accounting Manager, Unity School District
- **Julie Grotophorst**, Director of Human Resources, Greendale
- **Bill Hughes**, Superintendent, Greendale
- **Kathy Leidig**, Occupational Health Nurse, Green Bay
- **Steve Mortimer**, Head Custodian, Wonewoc
- **Steve Rammer**, Transportation Services Manager, Middleton-Cross Plains Area
- **Wayne Teuscher**, Safety/Operations Coordinator, Edgerton School District
- **Jared Tobin**, Maintenance, Edgerton School District
- **Carri Traczyk**, School Board Member, Chetek-Weyerhaeuser Area School District
- **Jeffery Wendorf**, Transportation Director, Kickapoo Area School District

Service Affiliate Members

- **Jeff Anderson**, Regional Sales Manager, H & B Specialized Products
- **Scott Gurholt**, Marketing Director, Riley Construction Co
- **Paul Hedlund**, Regional Manager, Johnson Insurance Services, LLC
- **Scott Johnson**, Account Executive, Baycom Inc
- **Mark Kerrigan**, Director of Sales and Marketing, Applied Planning Technologies, Inc
- **Tom Kunst**, Vice President Key Account Sales, UnitedHealthcare
- **Kathryn Otto**, Field Operations Director, WEA Trust
- **Kelly Pederson**, Marketing Coordinator, Technology Resource Advisors, Inc.
- **Laura Peterson**, Corporate Marketing, Universal Restoration Services
- **Sandy Weber**, Account Executive, MDC Wallcoverings
- **Tracy Williams-Prince**, Marketing Director, Keller, Inc.

Student Members

- **Peggy Corning**

ASBO 10 Year Anniversary in February 2011

- **Jack Amadio**, School District of Superior
- **Warren R. Flitcroft**, RSBA, Lake Geneva Schools
- **Janelle L. Marotz, CPA**, Eau Claire Area School District

Book Review

Continued from page 39

- **Be Loyal**
Without loyalty, there is no trust
- **Be Compassionate**
To be a leader one must care for others
- **Appreciate the Arts**
Art is a doorway to understanding and appreciating life
- **Be Honest**
Without honesty, there is no credibility
- **Be Polite**
It shows respect and makes getting along with everyone much easier
- **Act Under Self-control**
To manage others one must manage oneself

The lives and teachings of the Samurai warriors from the twelfth century to the end of the eighteenth century offer a unique and powerful model from which today's managers have much to learn. The Code provides a foundation for a way of life and doing business that leads managers to achieving greater levels of success than previously imagined. Gordon Bethune, Chairman and CEO, Continental Airlines said "**The Samurai Leader** is a brilliant guide for succeeding in today's very complex business environment. Its unique vision offers help on winning the battles a manager faces in business but also a way of being that will empower an ethical, creative and productive career. Having managers learn to do the right thing and lead others with that same integrity, and courage results in a samurai company that people want to do business with."

The stories are not only entertaining but educational. Many components of the Samurai Code have evolved into parts of the Boy and Girl Scouts Codes, Hippocratic Oath, service organization pledges and military formal and informal codes. Read **The Samurai Leader**, study the Code, practice the Code and live the life of a Samurai.

On the Move

- **Michelle Winger** from Minocqua to Lac du Flambeau #1
- **Brian Krey** from student to River Valley
- **Carl Hayek** from River Valley to Waupaca
- **Harley Hellerud** from Waupaca to Retired
- **Joe Marquardt** from Clinton to New London
- **Karen Kucharz Robbe** from DPI to Clinton
- **Bob Avery** from Somerset to DPI
- **Jerry Zamzow** from Bremner Food Group to Tomorrow River
- **Dawn Meier** from Alma to Barron



After the Ball

By Don Mrdjenovich, Retired WASBO Executive Director

Fortunately for you readers, I won't be able to sing you this song. I am sure it

goals represent how Sadie must have appeared at the ball where, if you'll excuse my bad manners, she put more than her best foot forward.

Governor Walker has stated that his primary goal is to create jobs. To do that, Wisconsin must attract new businesses and industries and retain those we have. Two key ingredients in that attraction are a quality system of public education and a productive work force. Tax breaks and incentives alone won't get the job done.

out dates all of us, including the retirees. Bear with me, I'm going someplace with this.

*After the ball was over,
Sadie took out her glass eye,
She put her false teeth in a tumbler,
And pulled out a bottle of rye.*

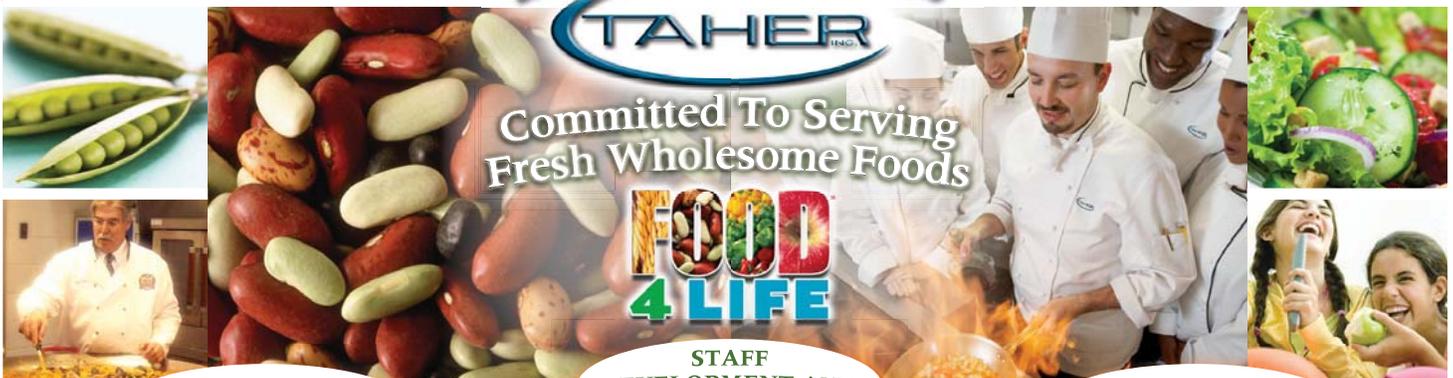
*She stood her false leg in the corner,
Hung her false hair on the wall,
All that was left went to slumber,
After the ball.*

Obviously, Sadie in slumber no longer resembles the Sadie who attended the ball. With a new Congress seated, and a new Governor and Republican legislature in Madison, I am taking careful notes as their promises and

As in every new legislative session, we are given reason for hope and cause for concern. In the history of Wisconsin, we have only experienced significant improvements in the funding and distribution of state aid to our schools when we have had a surplus in the state coffers. We are now operating with a deficit. On the other hand, State Superintendent Evers, with the input and support of WASBO and other professional education associations and unions, has put forth a bold plan to bring an increased measure of fairness and adequacy to our state's support of public education. Implementing it will be a daunting task in light of the current state of the treasury.

Every state has programs in place to provide tax incentives. Every state does not have what Wisconsin currently has to offer, the quality of its schools and the work ethic of its people. We can only hope that our new Governor and legislature realize how important it is to maintain the Wisconsin promise, a quality education for every child regardless of where they may reside. If they lose sight of that promise, I will be as disappointed as the guy who took Sadie home after the ball.

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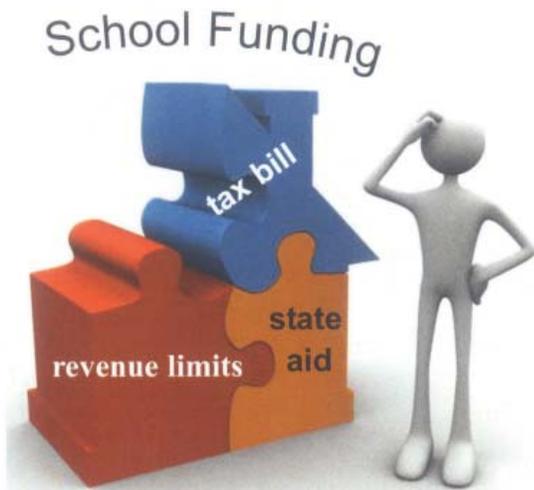
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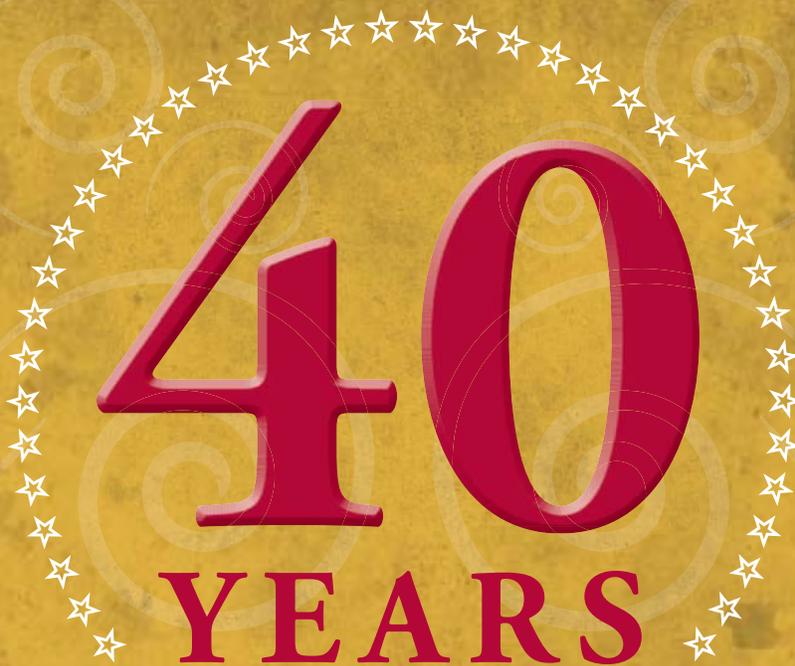


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How to Educate Effectively

By Mark Towers

These principles are most important in regard to being a successful educator:

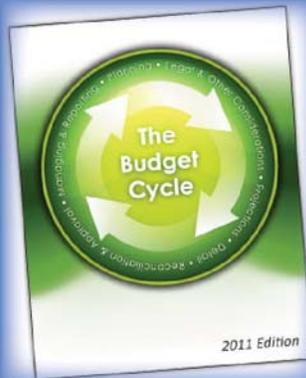
1. Avoid acting like the expert (even if you are one) and avoid lecturing the entire time. Create an “oasis” every now and then where sharing amongst everyone can occur. As the research shows, an individual can pay attention to something for approximately eight minutes! Respect and honor your students by storytelling, summarizing and/or involving them in the process.
2. Every person is tuned into his/her two favorite radio stations—WIIFM (What’s In It For Me) and MMFI-AM (Make Me Feel Important About Me). Make certain that you address the key benefits of the education in order to keep them motivated during your session. Also, honor and respect the work they do—make them feel valued, respected and important.
3. Students like to be able to describe what they have learned to someone else. Use acronyms, “bulleted” lists and/or easy-to-remember concepts. For instance: Let’s say that you are preparing to teach a course on how to accept criticism. You could use the acronym of **QTIP**. This would remind them to **Quit Taking It Personally** and they could use this concept to teach what they have learned to someone else.
4. Be extremely well prepared and competent so your students can have lots of confidence in you. Your students want you to succeed. As a student shared with me in regard to an instructor that she admires: “This lady is so well versed that she can be spontaneous, too. I love her sessions because she is truly a professional and she always makes the information enjoyable.”
5. Keep your material fresh. Every educator has some “tried and true” material and that is fine. However, you cannot afford to get stale. Continually adapt new techniques and nuances into your teaching efforts so you stay excited. The ability to manage change with unchanging values is oh-so important today. It is what distinguishes terrific educators from mediocre ones.
6. Don’t just say it—convey it with a story. Stories are what people recall and use as “a hook” back to the content of the course. Periodically tell a story that is short, positive and has a moral. Everyone’s neural pathways are hard wired to hear and internalize the oldest and most powerful teaching vehicle of all—the first-person story. Hone your stories and know that your ability to tell them is truly a difference maker in the lives of your students.
7. William Butler Yeats said, “Education is not the filling of a bucket. It is the lighting of a fire.” You must be excited about your subject and your situation. Notch up your enthusiasm level another twenty percent. There are only three kinds of teachers. The kind you forgive, the kind you forget and the kind you remember. Be memorable by being passionate!

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“The supreme quality for leadership is unquestionably integrity. Without it, no real success is possible, no matter whether it is on a section gang, a football field, in an army, or in an office.”

- Dwight D. Eisenhower

The Budget Cycle



The budgeting process, from strategic planning to preparation, presentation, administration and evaluation of a budget, is the focus of this handbook. A good primer on the basics for new board members and administrators and a handy reference manual for every school district bookshelf.

The WASBO Accounting Committee worked diligently with the WASB staff and the Wisconsin DPI to rewrite this handbook. Special acknowledgement should be given to Ken Mischler, Janice DeMeuse, Rebecca Hansen, Lynn Knight, Janelle Marotz, Joan Meyer, Patty Sprang, Gretchen Thomes, Mark Van Der Zee, and Betty Zimdars.

You may order your copy for \$30 at the www.wasb.org or www.wasbo.com.



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Stay Connected

WASBO Professional Recognition Program Nominations Due

March 1, 2010 – WASBO has many deserving candidates for award nominations. Recognize them by making a nomination for one of the following WASBO awards.

- 2011 Wallace E. Zastrow Award – Sponsored by WISC
- 2011 New School Business Official of the Year – Sponsored by Johnson Controls
- 2011 Facilities Manager of the Year – Sponsored by Johnson Controls
- 2011 Business Services Award – Sponsored by Robert W. Baird & Co.
- 2011 Friend of WASBO
- 2012 School Business Official of the Year – Sponsored by Hutchinson, Shockey, Erley & Co.
- 2012 Shining Star Award – Sponsored by Quarles & Brady, LLP

Criteria and the online nomination process can be found at www.WASBO.com. We encourage each WASBO Regional to submit a nomination.

Professional Development & Networking Opportunities

– WASBO committees have put together timely programs to provide you with information you can use today and help you plan for tomorrow. Please take the time to thank the members of these committees for their planning efforts. See upcoming conference dates on the back of this newsletter or at www.wasbo.com.

WASBO Facilities Committee

– WASBO members were appointed to the task force required by Act 96 (Indoor Environmental Quality Task Force). Their work will be finished during this school year, which will provide models that could be used by all school districts addressing environmental concerns.

WASBO Accounting Committee – The Accounting Committee and WASB have finished the “Budget Cycle” book. This resource is available at WASBO web site for \$30. The Accounting Committee is congratulated for their professional service in providing this resource to our school boards and administrators.

WASBO Professional Improvement Committee

– The re-writing of the curriculum for training mentors, addressing the PI 34 process for new business officials and providing for an improved induction program will be finished during this school year. WASBO will then provide training for mentors and proteges. Stay tuned for information on the training process over the next several months. This service will be extremely helpful for our newer business officials that are coming into the profession.

WASBO Safety and Risk Management Committee

– The WASBO Board and WASBO Safety and Risk Management Committee acted to provide a new certification program: The Certified School Risk Manager (CSRM) program using the curriculum of The National Alliance for Insurance Education & Research.

This certification consists of five full days of training in the areas of:

1. Fundamentals of Risk Management
2. Measuring School Risks
3. Handling School Risks
4. Funding School Risks
5. Administering School Risks

Each day of training concludes with an exam. Upon successful completion of the five days of training and each exam, participants will earn the CSRM designation. We also believe there will be WASBO members and school employees who choose to attend training days that are of particular

interest to them without earning the designation.



We will offer Viterbo credit for attendance at this training. We have scheduled the first two training days for Fundamentals of Risk Management and Measuring School Risks for March 1 & 2 in the WASBO office. While these training days are full, we will be scheduling future training dates. Stay tuned.

Get Involved – WASBO gets things done through the work of our committees and membership. Please consider enhancing your own profession development by joining a WASBO committee. Email Erin Lynette at erin@wasbo.com to start participating on a committee.

Scholarships – We are again pleased to offer four high school student scholarships for any Wisconsin graduating senior thanks to our scholarship fundraisers and the following sponsors: MetLife Resources, EMC Insurance Companies, SchoolDude.com, Stalker Flooring, National Insurance Services and Miron Construction. The application deadline is March 1, 2011. These scholarships require applicants to interview their superintendent, business manager or bookkeeper regarding the effects of revenue limits on their district. We appreciate the time you offer students to assist them in their scholarship application.

We also provide the Dr. Bambi Statz Academic Scholarship to a WASBO member enrolled in a school business management masters program provided by Ehlers. For our members who are participating on ASBO committees we offer Professional Development Grants to assist in covering travel expenses to attend meetings.



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Upcoming Events - www.wasbo.com

Professional Development

March 1-2, 2011

**Fundamentals of Risk Management FUN
Handling School Risk**

Wisconsin School Leadership Center, Madison
(Viterbo Credit Offered - pending approval)

March 15-16, 2011

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

March 16, 2011

**WASBO Transportation & Bus Safety
Workshop**

Kalahari Resort & Conference Center, WI Dells
(Viterbo Credit Offered)

March 23-24, 2011

WASBO Accounting Seminar

Chula Vista Resort & Conference Center, WI
Dells
(Viterbo Credit Offered)

May 24-27, 2011

**WASBO Foundation Spring Conference,
Exhibits & Scholarship Fundraiser**
La Crosse (Viterbo Credit Offered)

July 13, 2011

**WASBO Custodial & Maintenance
Conference**

Sun Prairie High School, Sun Prairie

July 20, 2011

**WASBO Custodial & Maintenance
Conference**

Central High School, La Crosse

Regionals

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

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

February 11, 2011	DePere
May 13, 2011	Shawano

Bay Area Buildings & Grounds

March 31, 2011

Madison Area

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

March 4, 2011	Stoughton
April 1, 2011	Lodi

Northeast

Meetings start at 11:00 a.m.

February 11, 2011	DePere (9:00 a.m.)
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.

March 2, 2011
April 6, 2011
May 4, 2011

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

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.

February 16, 2011
April 20, 2011

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

March 3, 2011
April 7, 2011
May 5, 2011
June 2, 2011

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

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.)

April 12, 2011, August 2, 2011

Safety & Risk Management Committee
(Meetings held at the WASBO Office, Madison at 12:00
p.m.)

April 12, 2011, August 2, 2011

Board of Directors Meetings

February 16, 2011	Oshkosh - CESA 6
April 6, 2011	Madison - WASBO
June 15, 2011	Nekoosa SD

Business Meetings

May 26, 2011 - La Crosse, Spring Conference

"Leadership and learning are
indispensable to each other."

- John F. Kennedy



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