

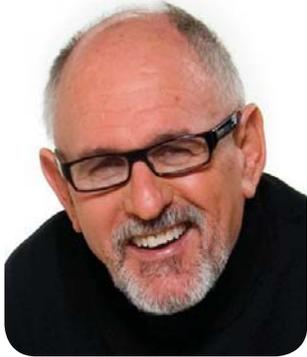


Wisconsin
Association
of
School
Business
Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 15, Number 4 - August 2011



Larry Johnson

While demonstrating a rapid ascent procedure for some VIP civilians off the coast of Hawaii, the nuclear

submarine USS Greenville collided with the Ehime Maru, a Japanese fishing vessel. The small boat sank, killing nine people.

A Navy inquiry found that one of the mistakes that lead to the incident was the failure of the fire control technician (FCT) to warn Greenville captain, Commander Scott Waddle, that the sonar display showed there was a ship in the area. According to later testimony, "The fire control technician should have heard Waddle's assessment of the situation and questioned it...he should clearly have forcibly told the captain and the officer of the deck."¹

Why didn't the FCT speak up? According to Navy Captain Conrad Donahue, who has commanded two nuclear submarines during his twenty-seven year career, "On this particular ship, and on a lot of ships in the Navy, the crew has so much trust in the skipper's abilities that they don't question him when they should. The FCT had a ship on the display but he saw the captain

The Kumbaya Syndrome

By Larry Johnson

Hear Larry Johnson at the WASBO Fall Conference - October 5-7, 2011

looking through the periscope. He probably assumed that if the skipper didn't see it...it wasn't there."²

How often does it happen in an organization that, for one reason or another, no one tells the boss what the boss needs to know and, as a result, the company blunders into a disaster? Perhaps an account manager spots serious flaws in a marketing strategy but, because she's new in the position, feels timid about speaking up. Maybe someone from the management team has a bad feeling about entering into a risky business deal, but says little to oppose it because everyone else is so gung-ho. Or perhaps the employees of a department voice no complaints about an unqualified, non-performing employee in a key position because they are reluctant to question their manager's hiring choice. "She's the boss," they reason, "she must know what she's doing." Even worse, they keep silent because they are afraid of retribution for appearing disloyal – and perhaps with good reason: If she has punished other bearers of bad news, why would anyone volunteer to be the next victim?

We call this reticence the "Kumbaya Syndrome." It was coined by an employee of a medium sized firm we



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WASBO Vision - To be the most influential Wisconsin organization for state and national school business management and leadership.

WASBO Mission - To provide professional development, to foster a network of support and to advocate for funding that ensures outstanding educational opportunities for all children in Wisconsin.

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Editor: Woody Wiedenhoef

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"Action and reaction, ebb and flow, trial and error, change - this is the rhythm of living. Out of our over-confidence, fear; out of our fear, clearer vision, fresh hope. And out of hope, progress."

Bruce Barton

President's Message Transitions

Collaborating for Success

By Wendy Brockert, Business Manager,
Lake Mills School District

This past year serving as President-Elect provided many experiences for which I am grateful. Now I am going through the transition to become your President. We are all going through transition at this time of year while trying to finish up the 2010-11 school year and getting ready for the 2011-12 school year.

The Leadership Team has spent time preparing for the 2011-12 WASBO year. We are examining all of the initiatives and programs our organization is in the midst of realizing. Chad Trowbridge mentioned a new program we looked at in June called EdVentures. Our Professional Improvement Committee is working to complete our mentorship program, and we are continuing to review our current certification programs and the possibility of starting new programs. At our August Board Meeting we will plan to prioritize and assign timelines to these many initiatives. Throughout this year I will update you on our progress with these initiatives. It is wonderful having so many resources for our members!

Another change was introduced at the May Business Meeting. We had our first reading to change the constitution to address board structure and officer positions. It is proposed to return the Past President position to the Board and make the Treasurer position a three year term. This constitution change would create two leadership tracks. One option is to run for Treasurer and serve a three year term. The second option is to run for President-Elect which will then proceed to President the second year and Past-President the third year. If the change is approved, our Treasurer will be elected once every three years. Each year beginning in 2013 we will begin electing a President-Elect. It is not easy to understand at first. The Board was given color coded



Wendy Brockert
WASBO President

charts to help us understand the proposed leadership tracks and the impact of the change in Board structure. At January's Business Meeting we will have the second reading of this constitution change. Please feel free to contact any board member if you have questions.

Please welcome Ken Mischler, Bob Avery and Rob Nelson as our new board members. Also, many thanks to Chad Trowbridge, Jeanne Stahl and Jeff Carew. They each did a great job contributing to WASBO while serving on the Board.

I hope each of you has a positive transition to the 2011-12 school year.

Wendy Brockert
wendy.brockert@lakemills.k12.wi.us





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Exec's Reflections

When Opportunity Knocks, Participate

By Woody Wiedenhoef, Executive Director, WASBO

"Even when opportunity knocks, a person still has to get up off his seat and open the door."

Woody Wiedenhoef
Anonymous Erin Green and Tom Wohlleber have attempted for some time to discuss with the State of Wisconsin the idea of developing a more effective model of purchasing goods and services for state and local units of government, especially school districts. They see this as a collaboration that will benefit school districts and other governmental units. This week, Erin and Tom met with two policy advisors from the Governor's office, along with CESA representatives and representatives with the DOA. WASBO members' participation helped make this a productive meeting. Tom and Erin, like other WASBO members, believe participation means we are obligated to make positive changes happen for the benefit of Wisconsin children.

This "get involved" spirit is just one of the many examples WASBO can point to with pride. Other recent examples of this spirit are quickly evident upon review of last week's WASBO activities.

The Fall Conference Committee met to put the finishing touches on the Fall Conference program.

The WASBO EdVentures Ad Hoc Committee evaluated three tools that may be helpful in generating discussion and decision making among citizens by relating factual materials to what they know about their school situations. The topics are "Financing our Future," "A New Day on Education Street" and "Transforming Rural Education." The focus will be on constituent participation

and communication with the intent to create an interest in taking community action.

The "Tom Wohlleber for ASBO Board" committee is making plans for his September, 2012 election to the ASBO Board. It is our belief that Tom will provide excellent and continuing leadership in helping ASBO serve its members.

The School Facilities Committee started organizing the February 2012 Facilities Management Conference, provided sessions for the Fall Conference, finalized sessions for the Midwest Facility Masters Conference and started to prepare for the January State Education Convention.

The Safety and Risk Management Committee made decisions pertaining to future Certified School Risk Manager courses and discussed providing "Taking Care of Business" newsletter articles and conference sessions.

The Midwest Facility Masters Conference Committee finalized their program for the November conference.

A p-Card User Group met to update their skills and learn new techniques using the Wisconsin p-Card and Skyward software.

WASBO, WCASS and the DPI developed sessions for the November 1-2, 2011 Federal Funding Conference.

The Spring Conference Committee started working on the May 2012 Spring Conference.

WASBO representation attended the first meeting of the State Accountability System Design Team.

The Professional Improvement Goal

Action Team updated their progress as they work to revise the Mentorship Program.

This week eight WASBO members submitted articles to be published in the **Taking Care of Business** newsletter.

On the Peer to Peer Communication Forum members posted questions on the following topics and members responded with answers and resources:

- ERRP Credit
- Time and Effort Reporting
- Indigent Students
- Background Checks
- Average FTE per sq.ft regarding custodial staffing levels for K-12 schools
- Purchasing from Government Supply Sources
- Accounts Payable Duties
- Insurance Consultants
- RFP for Bank
- Parent Transportation Contracts

Additionally, in the background, numerous committees were following through on their action plans.

All of this activity proudly demonstrates that School Business Officials serve each other to meet the educational needs of Wisconsin children. This activity results in staff development opportunities and resources for School Business Officials as you provide leadership in your schools. WASBO members wear the WASBO Mission and Vision on their shirtsleeves, openly and actively. Winston Churchill noted that "A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty." WASBO members are optimists.

When opportunity knocks, WASBO members participate.

The Kumbaya Syndrome

Continued from page 1

interviewed who told us that at his company, being seen as a team player is always more important than expressing the truth or voicing disagreement. His actual words were, "No matter how stupid or unethical a decision my team or my manager makes, we are all expected to embrace the stupidity, never argue, and start singing 'Kumbaya.'"

The cost of the "Kumbaya Syndrome" can be high as Commander Waddle discovered. Of course, no manager wants to be in his position. Here are some steps you can take to raise the odds it doesn't happen to you:

- **Clearly state and publish what you want.** If you want people to be candid and forthright, let them know it—and remind them often that such behavior is condoned and desired. Intel Corporation publicizes a set of company values and the expectations that support cultural honesty through the mission statement, the employee handbook, bulletin boards, and other appropriate venues. Employees even have a list of them printed on the back of their ID cards that they must wear at work.
- **Open your ears and aggressively listen to people.** If you want people to express their opinions, ask for them. Nothing will encourage openness and truth telling like a sincere interest in people's ideas and opinions. Commander Michael Abrashoff transformed the USS Benfold from one of the Navy's worst performing ships into one of its best. When he took command, there was poor crew performance, and the ship's turnover rate was one of the highest of any ship in the Navy. Abrashoff spent his first days wandering among the crew asking

them to tell him what they thought was wrong and to offer suggestions for fixing problems. After listening carefully, he assigned teams to develop and implement those suggestions for improvement.

According to Commander Abrashoff, he tackled the problem in this way because he really had no idea what to do, and he figured the only logical approach was to ask the crew for advice since they were closest to the problems. The simple act of listening not only gave him the answers he needed but also, he later realized, inadvertently stimulated the spectacular turnaround in morale and performance. "Once they knew I was truly interested in what they thought, the suggestions and ideas started rolling in and the morale started shooting up."³

- **Take people seriously even if you think they are crazy.** The key to encouraging people to speak up and open up is to listen to all opinions with the same sincere interest. When he took over as CEO at Avis Corporation, Robert Townsend, author of *Up The Organization*, set up "Breakfast with Bob" meetings so employees at any level could come in early, get a free breakfast, and tell him what they thought. Avis's extremely successful "We Try Harder" campaign can be traced to these discussions. Of course, people brainstormed numerous ideas, ranging from the ridiculous to the unworkable, before coming up with this winner. According to Townsend, once employees know you respect their opinions and aren't going to punish them for expressing themselves, they'll tell you what they think. What's more, he says,

"Once they know you respect them and truly take them seriously, you can tell them to go to hell if you want, and it will be OK."¹¹

- **Create an infrastructure to support open communication, candid expression of opinions, and constructive confrontation.** An old saying claims that "the farmer's shadow makes the best fertilizer," meaning plants attended to have an advantage over those neglected. Nothing happens in a vacuum, and the same goes for creating a culture of honesty. Part of Jack Welch's great legacy at General Electric was to establish Work Outs – officially sanctioned meetings between managers and employees where no-holds-barred discussions take place on everything from strategy to workplace politics. The US Army has put into practice After Action Reviews – meetings following military operations where subordinates can criticize their superior officers' decisions and suggest improvements without fear of retribution. The idea is to set rank and egos aside in order to improve performance.

Had Commander Waddle taken these steps with his crew, could the sinking of the Ehime Maru been avoided? We will never know. But it's fair to say that the odds would have improved. We think that makes them steps in the right direction for any manager looking to hear the unvarnished truth.

This article is an excerpt from *Absolute Honesty: Building A Corporate Culture That Values Straight Talk and Rewards Integrity* by Larry Johnson and Bob Phillips. Used with permission from AMACOM Books.

Notes

¹ CNN.com./U.S., March 9, 2001, Web posted at: 9:27 a.m. EST (1427)

² Josh Peters; University Wire 04-10-2001,

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Don't Miss These Opportunities!



Thriving in Tough Times: Building an Organizational Culture that Will Weather a Tough Economy

By Larry Johnson, CSP Thursday Keynote

All organizations are facing falling revenues, restricted budgets, reduced growth, and dimming prospects for the future. Like past fluctuations in the economy, this downturn will eventually pass. In the meantime, the challenge we all face is to apply the creativity required to figure out how to operate more efficiently, and demonstrate the willingness to persevere. Drawing on 22 years of consulting experience with some of the world's foremost corporations and governmental organizations, Larry will show us how we can make the most of these hard times. In this fast moving, upbeat presentation, Larry will show us how to:

- Face Reality
- Manage the Pain of Change
- Elevate Gripses To Goals
- Tell The Truth
- Reward Innovation
- Reach Out To Customers
- Persevere



Courage to Lead Leadership in a Non Bargaining World

Patricia E. Neudecker, Ph.D., Superintendent, Oconomowoc Area School District

Friday Keynote

Earn one graduate credit for \$220 when attending both days of the Fall Conference.



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Wednesday, October 5 - Autumn Ridge Golf Course Supporting WASBO's Student Scholarship Program

Concurrent Sessions

Leadership

- Absolute Honesty by Larry Johnson, CSP
- Managing New Initiatives in Learning
- Transformation Project
- Engaging Your Staff in a Non Union Environment
- Are You Ready to Communicate About School Funding? - A Round Table
- Writing PDP Goals for the Initial Educator

Best Practices

- Student Head Injuries/ Concussions: Is Your District Prepared?
- Improving Your Health and Well-Being

Facilities Manager Core Certification - Module 1

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

Human Resources in Changing Times

- Creating the Handbook without Collective Bargaining
- Creating the Handbook - A Round Table
- Union Relations without Collective Bargaining
- OPEB in a Post Bargaining World

- Selecting an Insurance Advisor
- Insurance Plan Design Options

Year of Success Program

- Fall at a Glance for New Business Managers & Bookkeepers
 - Cash Flow - Short-term Borrowing
 - Equalization Aid & Revenue Limit Review
 - Special Ed Accounting
 - Federal Grants
- Check WASBO.com for a complete list of sessions.

Register or learn more at
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PROFESSIONAL DEVELOPMENT TO USE TODAY AND PLAN FOR TOMORROW



Kit Dailey

Rah, Rah Schools

Rallying Support for Your District

By Debby Schuffletowski, Baird Public Finance and Kit Dailey, Eppstein Uhen



Debby Schuffletowski

Demand for Packer tickets spiked as soon as news broke that the NFL lockout was over, and everywhere you turn hype is building for the upcoming season. Meanwhile, school districts across the state remain mired in discussions over how they will

continue to support the educational needs of children going forward, and building momentum for voter support can seem impossible. Wouldn't it be nice to see such excitement spread beyond the walls of Lambeau Field?

Follow the Leader

Cheering for the Packers is fun, but the team also does a great job building momentum. That's a lesson that school districts can follow to build support of their own.

- **A good coach** – Without the right coach designing the right game plan, a football team is just a collection of players. In the same way, school districts need strong leadership, paired with dedicated staffs that are driven by a good strategic plan, to operate at their best. That leadership and planning helps to foster support and pride in a district's schools because they show the community that the district is headed in the right direction.
- **Training regimen** – District stakeholders are like players on your team; they need to know the plays before they can run them. Take advantage of teachable moments throughout the year to

educate the public about school finance variables. Districts are often accused of only reaching out to voters in times of need. "Practicing" with your constituents year round – letting them see positive outcomes from your district – will build rapport that can aid support for referenda or other issues when they do arise.

- **Media relations** – Players, coaches, reporters and other media pundits reflect on every game and every big play the Packers make. While schools will never receive such extensive coverage, successful districts maximize their interactions with residents through meetings, Q&A sessions, media interviews and more. They present their ideas simply, in ways the public can understand, and continually reinforce key messages.

Make it happen

- **Coaching** – Have a plan and surround yourself with knowledgeable coaches. If your district doesn't already use a budget forecasting tool, consider acquiring one. Here, you are provided the tools to quickly analyze key finance variables such as declining enrollment, changes in property valuations and shifts in your expenditure budgets. Our school finance formula is driven by enrollment. Anticipating the impact of declining enrollment can help you make decisions today that can put your district in a better position tomorrow. Information relating to your fund 38 (non-referendum) and 39 (referendum) debt will also be included in your model. Your financial advisor can assist you in analyzing your future

debt payments to find savings within your current debt, identify areas to address facility needs within your current structure, or restructure your current payments to assist with managing the peaks and valleys in your mill rate projections.

- **Training regimen** – Train throughout the season. Training isn't isolated to the beginning of the season; find opportunities to "train" your stakeholders throughout the year. Use your annual budget meeting as an opportunity to educate the public about the state funding formula for schools, including factors such as equalization aid and revenue limits. In addition, identify opportunities throughout the year to discuss the potential impact of current financial decisions on future budgets. Make sure you present your information in ways the public can understand. Provide this information in small, manageable pieces and provide talking points for your constituents to carry forward. For example, during a regular board meeting, take the opportunity to touch equalization aid, and, rather than refer to "expenditure reductions" or "tertiary aid," say, "If we remove the purchase of a bus this year, our spending will go down. This could cause our aid next year to decrease."
- **Media relations** – Be Proactive with your messages and be prepared to tell your own story. Most people in your district never set foot in one of your schools; those who do visit generally do so only rarely. For that reason, your district must be the one

Continued on page 14



John Forester
SAA Director of
Government Relations

Legislative Update

Education Policy Issues Remain Unresolved

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



With fiscal and collective bargaining issues dominating the state budget deliberations and resulting

recall elections, it is very easy to lose sight of unresolved education policy issues that will come back into focus when the legislature returns for its fall session on September 13th.

Open Enrollment

In one of the SAA's few victories from the budget session, the Joint Finance Committee did remove the Open Enrollment and Independent Charter School Expansion language from the budget bill. With this action, Senate Bill 2 became the vehicle for Open Enrollment policy change. You might recall that the bill, among other things, expanded the Open Enrollment application window to three months and also allowed unlimited, year-round Open Enrollment. In a victory for the SAA, the Assembly adopted an amendment that would close the door on unlimited Open Enrollment. The Senate, however, failed to concur in the Assembly amendment. The bill is effectively dead in the Assembly, but I anticipate the bill's proponents, especially virtual charter schools, will work hard to resurrect it. If Democrats take the Senate in the recall elections, the bill is dead.

Charter Schools

SAA members will recall that the SAA had enormous input into the rewriting of Senate Bill 22 (Independent Charter School Expansion). Because of the major improvements to the bill, the SAA

removed its formal opposition to SB22 as amended. SB22/AB51 has cleared the Senate and Assembly Education Committees and awaits floor action in each house. If Democrats take the Senate in the recall elections, the bill is dead.

Mandate Relief

The SAA's mandate relief bill, SB95/AB130 (transportation funding, contracting for special education services, common school fund flexibility, etc.), ran into an unexpected obstacle late in the budget session. The bill cleared the Senate Education Committee and awaits scheduling for floor action in that house. However, the bill failed in the Assembly Education Committee, much to the chagrin of Chairman Steve Kestell. We are hopeful that both houses will ultimately pass the Senate bill. However, if Democrats succeed in taking the Senate in the recall elections, the bill will not pass in its current form.

WiscNet

SAA members will recall that the Joint Finance Committee inserted a provision in the state budget bill that would eliminate WiscNet as a viable cooperative Internet service provider by forcing the UW to give up membership in WiscNet and prevent WiscNet from buying engineering services from UW-Madison. But the provision was rolled back in the final budget to delay that by two years.

Seventy-five percent of our public schools get Internet access via WiscNet. If schools are forced to use other Internet service providers most will pay 2-3 times more than what WiscNet charges them.

The SAA is meeting with all interested parties to identify a long-term solution that will continue to provide schools with high quality, cost-effective Internet service comparable to what they currently receive through WiscNet.

If you should have any questions, please contact me at 608-242-1370.

Have You Renewed Your 2011-12 WASBO Membership?

On-line WASBO Membership Renewal Process

If you need your WASBO username and password, or assistance with the renewal process, please contact our office at 608.249.8588 or by emailing saeger@wasbo.com. If you need to change your membership type from Student to District Professional or from District Professional to Retiree, please contact the WASBO office before you begin the renewal process.

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- 2) Click Renew/Upgrade Membership
- 3) Click the renew link on the left side of the screen (under your name)
- 4) Review your contact information for accuracy; if you wish to pay your ASBO International dues along with your WASBO dues be sure to click the appropriate box (or uncheck it if you do not want ASBO membership or already paid ASBO dues directly to ASBO International.)
- 5) Click renew, then click on either the pay now (to pay with a credit card) or bill me (to print an invoice) buttons.
- 6) If you chose the bill me option, please print your invoice. On your portal page scroll down to the bottom of the page to the Open Invoices and Recent Payments. Click the printer icon to the right of the dollar amount for your dues, then click Open. Your invoice will open in Microsoft Word so it can be printed for processing.



Are You Prepared to Lead Your District? Get What You Need at the WASBO Fall Conference

Whether you know it or not, you are a leader in your district. Do you have the tools you need to meet the challenges ahead? Have you invested in your professional and personal development? Have you thought about how you can do the best job possible for the students in your district under a new set of rules?

This year's Fall Conference theme is "Facing New Challenges and Forging a New Path." The planning committee spent a great deal of time thinking about topics that will address the changing landscape of labor relations, retirement and health plans. Additionally, they focused on your leadership skills as you guide your district through the transition. The committee centered on the tracks of Transitional Leadership, Human Resources, Facilities Manager Certification and the "Year of Success" track for new school business officials.

The conference will enjoy two keynote speakers. Larry Johnson will open the conference on Thursday morning with the session, **Thriving in Tough Times: Building an Organizational Culture that Will Weather a Tough Economy.** He is the co-author of **Absolute Honesty: Building a Corporate Culture That Values Straight Talk and Rewards Integrity.** For twenty years, Larry has helped organizations build more productive and profitable working cultures through the development of strong leaders and dedicated

employees. Larry speaks on creating high-performance organizational cultures through leadership, teamwork, customer service and straight talk. He will also provide the breakout session, **Absolute Honesty.**

Friday morning Dr. Patricia Neudecker, Superintendent for the Oconomowoc Area School District, will present **Courage to Lead - Leadership in a Non Bargaining World.** Large scale change is exhausting, but it also brings new opportunities. The unprecedented Wisconsin situation offers the chance to make changes for the benefit of our children that have never been possible before. Dr. Patricia Neudecker, president of the American Association of School Administrators, and one of our own Wisconsin superintendents, will address the group on ideas for making changes that are positive, far-reaching, and visionary.

Hear from experts from Lathrop & Clark, LLP, Quarles & Brady, LLP, Robert W. Baird & Co., Eppstein Uhen Architects, von Briesen & Roper, S.C., WASB, CESA 1 Institute and your school district colleagues on the following topics:

- Creating the Handbook
- Union Relations
- OPEB in a Post Bargaining World
- Selecting the Insurance Advisor
- Plan Design Options
- Improve Your Quality of Life by Improving Your Health & Well-Being
- Transformational Leadership
- Facilities Certification Module
- 1 Core Certification Sessions
 - Effective Hiring & Orientation Process, Custodial Staffing Levels, Product & Equipment Selection
- Student Head Injuries/Concussions

- Year of Success Track - Special Education Accounting, Federal Grants, Cash Flow & Short Term Borrowing, Equalization Aid & Revenue Limit, Fall at a Glance
- PDP Goal Writing
- Managing New Initiatives in Learning
- Communicating about School Funding

This conference follows a busy summer and students returning to school. Now it is time for you to invest in your own learning and professional development. The conference is an opportunity to network with your counterparts and learn how they are dealing with the challenges in their districts. Many of the benefits of conference attendance are found beyond the educational sessions when you find yourself talking to someone experiencing a similar situation to one you may be facing. Ideas are found at conferences to save money, work more effectively and often you leave with a refreshed outlook.

Join us at the WASBO Fall Conference on October 6-7th at The Osthoff Resort & Conference Center in Elkhart Lake.

If you are able to get away a day early, you can start networking at the WASBO Foundation Scholarship Golf Outing on October 5th. This outing helps support our student scholarship program where we provide scholarships to graduating seniors and a student in a school business management graduate program. We will be at the Autumn Ridge Golf Course in Valders. This is a beautiful course located about 20 miles north of Elkhart Lake. The outing is followed by a dinner and prizes.



ASBO Update

Wisconsin Report

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

Erin Green
Immediate Past
President
ASBO International

Setting the Stage

Every one of us is feeling the stress and anxiety of being in the position of helping to lead our school systems in what will likely be

seen as the "tipping point" in US education - the biggest change in how education is delivered in sixty years. Education is moving at the speed of light to revolutionize itself. This change is by necessity because of rapidly dwindling resources, a worldwide recession and the rapid "flattening" of the world into one global marketplace.

A Word About Unions

In Wisconsin, where public unions were invented, we are at ground zero of a massive remake of what unions will look like going forward. Wisconsin's history was built on the hard work and skill of many immigrants. Germans, Irish, Italians and Poles all came to Wisconsin with their skills in manufacturing, woodworking, metal work, cheese-making, brewing and agriculture. Unions served a needed purpose to protect workers from unscrupulous owners and provide processes to manage worker-employer relationships for the benefit of all. Educational unions protected teachers from being buffeted by political winds and raised the standard of living for educators, many of whom were single women, by negotiating high level benefits and living wages. We are quickly moving into a post-union world where the role of the union will be dramatically altered. Other states in the US will likely follow suit. School Business Officials will be at the fulcrum of these changes. This will require "way out of the box" thinking. Instead

of sitting across the bargaining table from union leaders, who try to protect the status quo, we can think creatively on questions such as:

1. What benefits does our school system need to provide to attract and retain the best employees?
2. With the latitude to make benefit changes, how can school districts lower costs of benefits or alter traditional salary schedules in order to shift resources into the classroom?
3. School Districts can now empower and reward our best and brightest.
4. How can school districts design a pay for performance system?

School administration now has the freedom to work with our top teachers, who may not be our union leaders, on these questions.

Governor Scott Walker chose an often mundane piece of legislation designed to balance the books mid-year, the Budget Repair Bill, to reorder the state's fiscal and political landscape, perhaps for a generation. Tucked into this legislation was language to curtail collective bargaining for most public employees. This bombshell fell hard on Wisconsin's capitol. It was followed with weeks of protests, the fleeing of Democratic legislators to Illinois to avoid a vote on the bill, a Supreme Court challenge and a highly volatile Supreme Court election. The conservative candidate won.

The Budget Repair Bill was upheld in June by the Supreme Court of Wisconsin and we are now into a brand new world. There are now recall elections being held all around the state on both sides of the aisle.

In this new world, the only bargainable item is essentially base pay, and that is limited to the Consumer Price Index. If the two sides disagree in bargaining, there is no arbitration. Impasse is declared and the pay rate increase is imposed by the employer. That's it. All other issues involving working conditions and fringe benefits are strictly a management right. This includes seniority, arbitration, pay structures, layoff procedures, and all other fringe benefits. The administration now has the authority to set all pay and benefits at market rates. School districts will develop Employee Handbooks that provide procedures for conducting business. This new freedom brings responsibility. Districts will have to learn how to manage and avoid lawsuits for discrimination. They cannot fall back on the "contract" to govern. This is a good time to be a labor law attorney.

Health Insurance

Districts are now free to change plans and make design changes, to more closely align with the market without receiving agreement from a union. Districts can assess their own budgetary needs and alter employee premium share amounts. The recent law states that districts with the state insurance plan shall have a premium share of 12.6%. Most school districts are not with the state plan, but many districts are charging employees the 12.6% to be in line with the state plan. This employee contribution is still far below what the average private sector employee pays (20-25%). Some districts are starting to offer high deductible plans. Health plan designs will gradually come in line with the marketplace. Some districts offer "Cash in Lieu Of" plans where employees

Continued on page 13



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receive a sum of money for not taking health insurance. (\$3000/\$6000 single/family per year is common) Districts may adjust this scale. Many contracts had the insurance company and policy coverage written into them. This lock has been broken and the marketplace can provide balance.

Retiree Benefits/Pension Reform

For decades Wisconsin public employees have enjoyed fully paid pension contributions by employers. In recent years employee unions have not been willing to negotiate reduced benefits without agreement to replace it with something else. With the new law, all public employees will pay half the contribution rate, currently 5.8% per year, into their pension funds. The district will fund the other 5.8%. This changed because of the downturn in the economy and the modified viewpoints of taxpayers. Wisconsin has a 99% funded WRS system, one of the best in the US. The retirement age is 57 (with 30 years of service) for full retirement. This may change in time to a higher age. Many employees cannot afford to retire at 57, given the cost of health care. In Illinois a new two tier system has been passed. Newly hired public employees will not be able to retire until age 67 because of the poor capitalization practices in the Illinois system.

Many districts have a locally negotiated retiree benefit on top of their pension. Many involve a set number of years of health insurance (5-8 years is common). These benefits have become financially unsustainable. Districts will now have the option to change these or eliminate them. Care must be taken to honor "property rights" and avoid litigation. Again, it is a good time to be a labor law attorney, as each district has different language to interpret. Many are in the process of evaluating what to

do. Most of these benefits are classified as OPEB, and must be actuarially accounted for. Many districts will scale back or eliminate these benefits.

Teacher Seniority Rights, Merit Pay, Performance Pay, Evaluation, Student Assessments

This will be the next shot over the bow by Governor Walker. Governor Walker and State Education Superintendent Tony Evers have formed the State Accountability Design Group, which will make recommendations pertaining to school assessments. Currently Wisconsin is studying other states experiences. We are closely following Florida's experience in grading schools and evaluating teachers. Evaluation and layoff provisions are now a management right. Governor Walker and Superintendent Evers are attempting to engage the teacher union in this effort, so far without success. The union is of course very wary given the newly enacted legislation. The union may feel they are put in a position of either agreeing or having to say no. At the individual district level, many of us are working with our best and brightest teacher leaders, and hope to work on an alternative to the salary grid with years and education determining pay. Greendale School District is going to propose a 1½% pay increase only if each teacher gives us 40 hours of professional development time. The Governor's office, the DPI and several educational organizations, including WASBO, are working with some of the best people in the country on teacher evaluation and student assessment. Again, the hope is that the unions get involved. The rocky start this Spring with our new Governor has polarized relations, but once the new reality settles in, there may be a sense of renewal, and hope for change that rewards high performing staff and dismisses poor performers.

Collective Bargaining/Labor Relations

With the new powers that districts have, many are not giving step, lane or general schedule pay increases, given the fact that State aid and revenue limits have greatly decreased for next year. Districts' revenue tax limits actually have decreased by almost 6% instead of the usual inflationary increase. Most districts are just trying to get their feet under them with new employee handbooks. Management can set terms of employment and work schedules. Districts are also walking gingerly, trying to maintain relationships with employees. Management wishes to forge positive relationships with employee leaders who may not be union leaders. Another component in the bill is that unions will have to collect their own dues. The unions will also have to recertify each year. Many local unions may cease to exist, given the costs employees will have to bear. Unions are now asking for automatic withdrawal for dues.

Conclusion

Wisconsin is in a time of great change with regard to labor relations and general operation of public entities and schools. Most of us in administration realize these changes had to happen. The previous arrangement was not sustainable. While the method used to affect change was brutal, there was really no way to sugar coat it. Doing it fast and hard may have been the best solution so we can all move forward. School administrators will have to lead in this new environment and transition.

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Rah, Rah Schools

Continued from page 8

to reach out. If you want the community to know of your district successes and needs, you have to tell them. Opening these lines of communication throughout the year builds trust, credibility and support.

One successful strategy is the "3+3 Rule": identify three key points you want your constituents to know; then, give each point three supporting facts that further explain the situation as well as the point of the message. For example, a key message might be that student enrollment in your district has dropped and that has caused you to lose revenue. Supporting points could be the steps you have taken to reduce your operating budget to meet your new budget. This gives reporters and the public accurate, specific insight into what your

district is doing. When talking to others, the stakeholders will also have small, consistent messages to communicate.

With the communication strategies above, you will be continually working to be at the top of your game, and, with ample preparation, you'll be ready for Game Day.

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The Kumbaya Syndrome

Continued from page 6

- reporting on the military inquiry into the sinking of the Ehime Maru.
- 3** Betsy Morris, "Lou Gerstner, the Holy Terror Who's Saving IBM," *Fortune*, April 14, 1997

Larry Johnson is a well-known business author, speaker and corporate culture expert. His latest book is ***Absolute Honesty: Building A Corporate Culture That Values Straight Talk and Reward Integrity***. Larry and his daughter, Gen-Expert Meagan Johnson can be reached at 800-836-6599 or <http://www.johnsontraininggroup.com>.

"Change is the law of life and those who look only to the past or present are certain to miss the future."

- John F. Kennedy

"The greatest danger in times of turbulence is not the turbulence; it is to act with yesterday's logic."

- Peter Drucker

Act 10 Presents Handbook and Policy Challenges and Opportunities for Public Employers

By Davis & Kuelthau, s.c.



Act 10 will fundamentally change the nature of the relationship between many public sector employees and employers upon expiration of collective bargaining agreements. Most of the terms and conditions of public employment will no longer be subject to a collective bargaining agreement (CBA). Instead, the relationship will be governed by policy and the employer's discretion, requiring the development and approval of new or expanded policies and procedures. This can include employee handbooks, expanded personnel policies, and other methods of defining the employment relationship.

Virtually all public employers will be affected by this fundamental shift from CBAs to policy-driven employment relationships. Even for those public employers who are non-union, and are already experienced with handbooks and policies, public awareness of the change in public employer-employee relationships represents an opportunity to examine current policies and procedures, and to make adjustments in accord with "best practices."

Not As Simple As It Seems

First and foremost, resist the temptation to take the "easy way out" through either a wholesale conversion of the CBA to a handbook or the adoption of an "off the shelf" handbook or personnel policy manual, which will almost certainly not reflect your district or municipality's particular employment practices and needs. There is no easy fix or safe shortcut. The cost of an "off the shelf" handbook or policy manual, in terms of both capital and human resources, does not end with such a purchase. At the very least, any such model provisions must be thoroughly evaluated, reviewed, and adapted to

ensure that they are both relevant and useful to the organization.

An exhaustive list of everything that should be included in your handbook and policies cannot be provided here. A good starting point certainly may be policies that are already in place. At a minimum, your handbook should include the basic information needed for employees and their supervisors to understand the basics of pay, benefits, communication and job responsibilities. Perhaps most critically, a handbook should be a framework or compilation of pertinent policies, but with many of the details left to the discretion of management; what may seem to be thorough in drafting policies or handbooks may -- in practice -- over-regulate a public employer, and inhibit or even cut against appropriate decisions that fit the circumstances presented.

Timing issues created by the expiration of current CBAs will be important in formulating policies and handbook. Many districts and municipalities have had CBAs in effect for decades. Your handbook or policies may need to address how previously accrued benefits such as sick leave, paid time off, post-retirement benefits, etc., are handled going forward. There may be important distinctions between employees based on the "vesting" requirements for some of those benefits.

Grievance Procedures a Special Concern

One specific product of Act 10 is the requirement that any public employer that does not have a civil service system in place on the effective date of the Act must establish a grievance system no later than the first day of the fourth month after the effective

date of the Act. In light of the Supreme Court's decision and the subsequent announcements of the Secretary of State, the presumed effective date of Act 10 is June 29, 2011. Thus, a grievance procedure should be enacted before the end of October 2011. To comply, a public employer may establish either a civil service system or a grievance procedure. Most will likely choose a grievance procedure. To comply with the Act, a grievance procedure must cover discipline, termination and safety issues and must include all of the following:

- A written document specifying the process a grievant and employer must follow;
- A hearing before an impartial hearing officer; and
- An appeal process in which the highest level of appeal is the governing body of the government unit, such as a Village Board, City Council or School Board.

Careful consideration must be given to all of these requirements, including how a grievance is defined and who should be involved in each stage of the process. For example, the procedure might allow for the governing body appeal to be conducted with or without a hearing.

Open Meeting Considerations

It should be noted that much of the general policy and benefit discussion of the public body will need to take place in open session as the bargaining and individual employee exceptions in the open meetings law might not apply in most instances.

For further information contact a Davis & Kuelthau attorney at 414.276.0200 or www.dkattorneys.com.



WASBO Custodial & Maintenance Conference July 13, 2011 Sun Prairie High School ~ Sun Prairie, Wisconsin



Sun Prairie had an opportunity to showcase their new high school which opened in the Fall of 2010 when they hosted the Custodial & Maintenance Conference. Attendees were treated to a Behind the Scenes Tour of this state of the art facility. They could choose from over twenty sessions on topics from Scissors Lift Safety to Pool Maintenance to Green Cleaning to Mitigating Sexual Harassment Liability to Asbestos Awareness. Attendees from twenty-nine districts spent time with the eighteen vendors learning about janitorial products, energy management, water treatment systems, retirement

planning, grounds care, athletic floors, door hardware and security, web based facility management and purchasing. Facility Manager Certification Module 1 Sessions were offered for those working to achieve their core certification. Gale Kreibich of Gunderson Lutheran kicked off the conference with a message on the Custodian's Role in Providing Customer Service. The Safety Room Challenge was competitive while educational as participating teams identified safety violations and learned how to correct them to provide a safe learning and work environment. The team from Kimberly upheld their title from last year as Dave Hoh, Ken Schultz, Dick Heiman, Joe Van Roy and Joe Harvey achieved the highest score. Congratulations also goes to Richard Stellan from the St. Francis School District for winning the Individual Title in the Safety Room Challenge. WASBO thanks our hosts - Tom Brooks and his staff at the Sun Prairie Area School District as well as Phil Frei for agreeing to host the conference.





Betty Zimdars
WASBO Director

Director's Corner

Walk Softly and Carry a Small Stick!

By Betty Zimdars, Assistant Superintendent of Business and Information Services,
Howard-Suamico School District

With the passage of Wisconsin Acts 10 and 32, we as school district administrators have opportunities to enhance the learning environment for our students and to forge a new relationship with our employees. We have been given large shoes and a powerful stick. The actions that we take within the next two years will define us as individuals and will define our school districts. We want to emerge on the other side of this new environment as responsible, caring, wise individuals that have guided and defined our school districts as a place that is focused on student learning and a great place to work for our employees. To accomplish this huge task we must walk softly and carry a very small stick.

School districts will be looking at employee benefits and management rights. Moving slowly and taking a balanced, measured approach will aid your district in this new environment. As we attract and retain employees we need to look at comparability between districts while remaining competitive. A collaborative approach would go a long way in gaining the respect of your employees and community. Setting up an employee benefit committee that looks at all benefits will reduce the stress being caused by Wisconsin Acts 10 and 32. The committee needs to

review benefits through the lenses of impact on student learning.

One area of concern to many districts is the amount of face-to-face time that students are receiving. One solution could be to increase the amount of time that teachers spend with students by lengthening the day or by increasing the number of contract days. A committee should look at the root cause of the problem to determine the additional instructional minutes that will be gained and how those minutes will be used. The big question remains; how do we know that lengthening the school day or increasing contract days will improve student learning? What measures are going to be used to determine instructional impact? What measures are going to be used to gauge employee satisfaction?

Another approach may be to look at the number of total instructional minutes that are available within the year and subtract the amount of time that is non-instructional (i.e. lunch, recess, assemblies, parent-teacher days, early release, etc) and then determine if instructional time can be increased by reducing non-instructional time. An employee-based committee could brainstorm and develop innovative solutions that would increase student learning and add value to the community. The buy-in from staff members would increase as it would be a collaborative

approach rather than a management right. Committee members would be the best advocates for the decision as they had a part in systemic change that is monitored and reported on a regular basis.

Meaningful change takes time and some individuals will still resist the change even after successful results have been shared. This is when the management approach must change for the success of the whole organization. It is then management's responsibility to ensure that all staff members have a successful transition to the new model. As management, if resistance continues you then have a duty and responsibility to help those individuals be successful in a new environment.

The bottom line is that change for change's sake never works. Change that is collaborative, measured and balanced will have the support of staff. Student learning will improve and staff members will be happier. Your district's reputation will improve and the community will receive a good value for this investment. As this new environment unfolds, take some time to vision what you want your school district to look like in three to five years then walk softly and carry a very small stick.

"Act as if what you do makes a difference. It does."
- William James

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Don Mrdjjenovich

Back Tracking

By Don Mrdjjenovich, Retired WASBO Executive Director

When you realize that you have been traveling in a questionable direction for a long time, you find yourself in a place where you didn't intend to be. It is not like you made a mad dash to get there. It's more like you kept moving along and not looking far enough ahead to anticipate where your trek might lead you. In my experience, that pretty much explains the current status of public employee relations in our state, as well as many others.

Public employee unions struck out on a path to the present about forty-seven years ago with the enactment of right to bargain law. Consider the fact that almost every proposal that has ever been put on the table by a union can be placed in one of the following three categories: 1. Less work, 2. More compensation, and 3. More control of the work environment. In fairness, that is what unions are supposed to do. I must also state that any non-union negotiations, including my own over the years, could also be placed into one of those categories. It is also true that most non-union school employees also benefited from the contracts negotiated by public employee unions.

Saying yes to union proposals for so many years has had a tremendous cumulative effect, resulting in an ever increasing limitation on the powers and authority of elected public officials. By law, School Boards are elected to act in the best interests of students. Unions are not created for that purpose. The constant and reliable flow of dues money to union coffers has provided them with unprecedented legal and legislative power never before seen in our history. Are they to be criticized for

their success? I think not. They were and are doing what unions are supposed to do. Elected Boards of Education and other public employers, who by law, can't close their businesses or cite negative balance sheets at the negotiations table, find it to be increasingly difficult to implement efficiencies or change from the status quo. Saying no was never easy, nor was facing the threat of strikes and binding arbitration. School Boards found themselves limited as never before in their ability to act in the best interests of the students they were elected and pledged to serve.

In an attempt to correct the perceived imbalance of authority and control that currently existed between elected officials and public employees, our governor and his majority in the legislature took a most aggressive and

divisive approach. While I would have chosen a more moderate approach, one cannot argue that the opportunity now exists to do some corrective back tracking. I'm not suggesting we go all the way back to the starting point, but some positive changes can now be made in the working relationship between public employees and their public employers. Hopefully, the welfare of students will prevail more often than they have in the past. I am equally hopeful that our School Boards will continue to respect and appreciate those teachers, administrators and support staff who have served our children in a caring and professional manner for so many years. None of us wants to again find ourselves in a place where we never intended to be.

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Soaring Rare Earth Prices

Could They Affect Your School?

By CESA 10

Prices for many products have been on the rise in recent years, and the cost of rare earth elements are no exception. Prices of rare earth elements used to manufacture electronic and consumer products have skyrocketed as China tightens control of mining, production, and exports. This may result in steep price increases for many high-tech consumer items.

The term “rare earth elements” refers to the 17 chemically-related elements located at the bottom of the periodic table, which includes the lanthanoids plus scandium and yttrium. Although most people may not be familiar with these elements, they are used extensively by auto makers, manufacturers of consumer electronics and green technology companies. Rare earth elements are used to produce several common products including energy-saving light bulbs, laptop computer screens, cell phones, rechargeable batteries, DVDs, plasma televisions, solar panels, hybrid cars and wind turbines.

In the last year, the cost of many of these elements has doubled or tripled. The reason for the surging prices is basic economics—global demand for rare earth elements is increasing dramatically while China has cut exports, causing prices to double and triple in recent months. If the Chinese government further reduces export quotas, it may push prices even higher.

For schools, the effect of these soaring prices will be most noticeable when it comes to purchasing light bulbs. The price of europium oxide, used for its phosphorescent properties found in plasma televisions and light bulbs, has risen to as much as \$3,400 a kilogram

compared to \$1,300 a year ago according to market research company Industrial Minerals.

As a result of price increases to europium oxide, some bulb prices have already increased from 10 to 100 percent. Unfortunately, the cost of four-foot fluorescent lamps commonly used in schools, offices, and other large buildings is experiencing the largest increases because they use more phosphors compared to other bulbs. In fact, phosphors make up about 30 percent of the material cost of lamps. According to an article in the Richmond Times-Dispatch, bulb manufacturer Osram Sylvania says the company will continue raising prices on a monthly basis until the global rare earth market stabilizes.

“Since additional bulb price increases may be on the horizon, it might be a good idea to order a larger supply of bulbs now to help minimize your future energy costs,” said Todd Wanous, Energy Manager at CESA 10.

China currently produces up to 97 percent of the world’s rare earth elements. However, China is not the only place where these elements can be found. In fact, the term “rare earth” is a misnomer since most of these elements exist in abundance across the globe. The issue is that these elements are usually found in combination with one another and separating them into a pure form is very costly. Due to low-cost labor and rather lax environmental standards, China gained a monopoly in the rare earth market more than a decade ago.

Because of the increased demand and



tightening restrictions on exports of the metals from China, the search for alternative sources in Australia, Brazil, Canada, South Africa, Greenland, and the

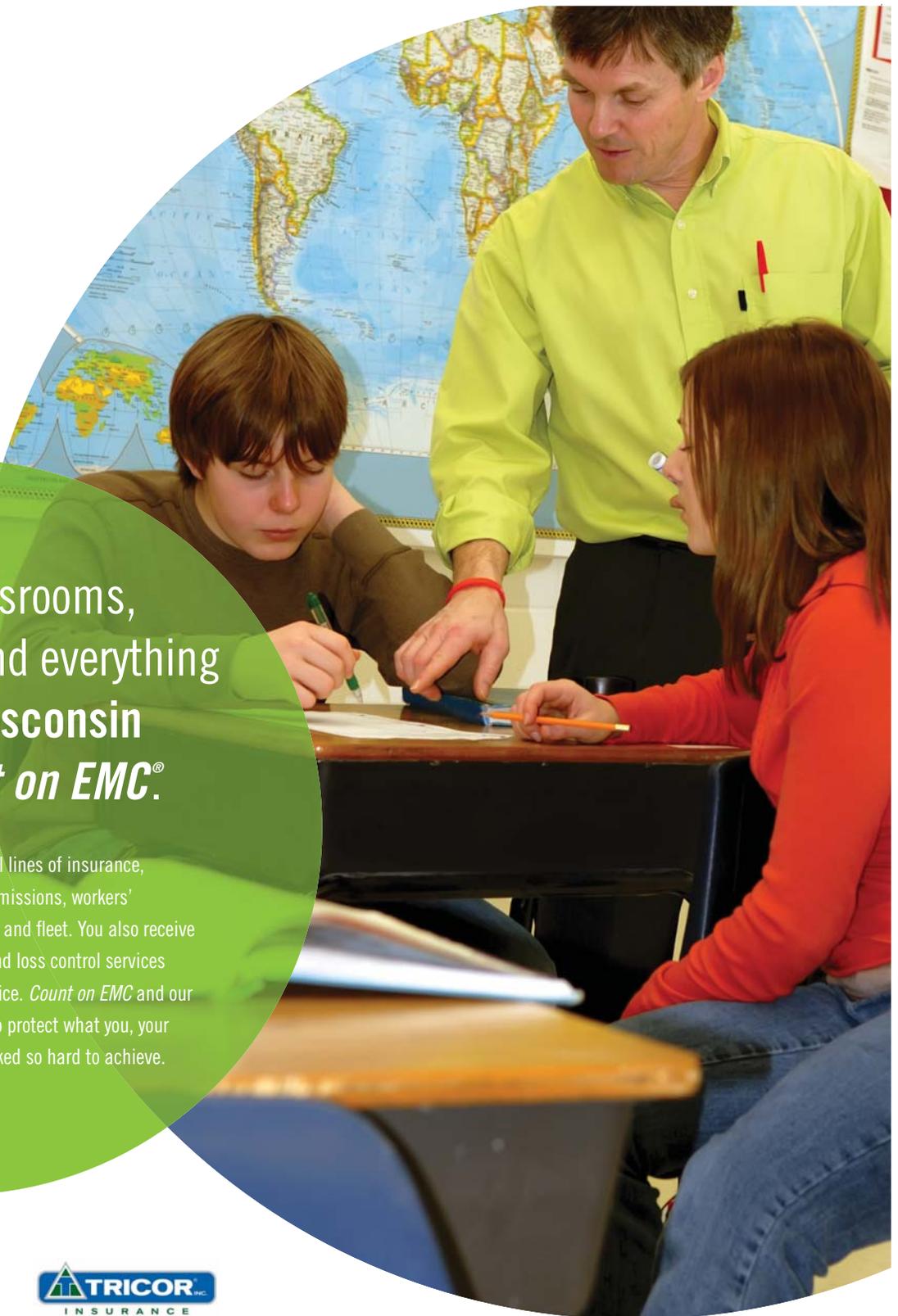
United States is becoming a priority. Mines in these countries were closed when China undercut world prices in the 1990s, and it will most likely take a few years to reopen the mines and ramp up production in these areas.

One U.S. mine, Mountain Pass Mine in California, which was the leading producer of rare earth metals from the 1960s to the 1990s, will resume full mining operations by the end of 2012. However, the U.S. Government Accountability office cautions that it may take up to 15 years before the U.S. is able to produce enough rare earth minerals to meet domestic demand.

If you have questions about the effects of rare earth price increases, contact Todd Wanous at 715-720-2143, or send email to twanous@cesa10.k12.wi.us. Wanous serves in the Facilities Management Department at CESA 10, which is located in Chippewa Falls. The Facilities Management Department provides energy management and environmental health and safety services to schools and government facilities throughout the state. In addition, this department administers the Focus on Energy Program for school and government customers in Wisconsin.

“There are no passengers on Spaceship Earth. We are all crew.”

- Marshall McLuhan, 1964



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Jeff Carew

Watching WASBO Evolve

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

On June 9, 2000 I attended my first WASBO board meeting as a board member. I was appointed by incoming President Gary Siegman and began what would be 11 years of service to the board. In that time I had the opportunity to participate and help guide WASBO in an incredible evolution. I saw significant membership growth, the development of a strategic plan, extraordinary professional development opportunities and significant changes in operations, staff and leadership. This evolution has created a structure that will provide a network of resources to support the membership through the great transition Wisconsin's public sector is experiencing. WASBO has long had a collegial spirit and that, combined with our strategic efforts both here and nationally, put all of us in a position to successfully negotiate this new landscape.

WASBO has evolved into a nimble professional development organization with a structure that can quickly align resources to address membership needs. It is an organization that has made a concerted effort to raise its status, both at the state level and nationally, and is well positioned to continue to have dramatic impact.

There are really three important components to this evolution that I noticed over my time on the board: growth in overall membership numbers; strategic planning, operations and leadership; and the status of the organization in Wisconsin's political hierarchy and the impact at ASBO on a national level.

From a membership numbers perspective, WASBO has taken the responsibility to serve more people and in many different disciplines. Service

Affiliates are an integral part of the organization; we serve on committees and consistently make presentations during conferences. WASBO has superintendents, human resources professionals, and technology leaders as members. WASBO also serves district accountants and bookkeepers. WASBO serves facility management leaders and it is this group that is truly an example of what WASBO is capable of. This committee, and the certification program, are great assets to public schools in Wisconsin and are also a WASBO effort that receives national attention.

Planning and operations is another evolutionary component elevating WASBO. First was the process of creating a vision and mission statement. That led to the development of a strategic plan and annual strategic planning process by the board. The vision and mission statements are evaluated periodically which provides specific objectives to align the strategic plan. Recently, in an effort to be more nimble, goal action teams were formed to address very specific objectives.

From an operations perspective the WASBO staff has grown to continue to deliver the service the membership requires. Conferences are continually evaluated to make sure they deliver the content members desire. New conferences have been added (Midwest Facility Masters), some have grown (Accounting, Facilities), some have been changed (Taking Care of Business has changed to be a joint effort with the Personnel professionals) but there is constant focus on content. The WASBO staff provides data to the board to ensure the evaluation process is as objective as possible.

WASBO national outreach is another area WASBO has evolved. We have

supported Roger Price on the ASBO board; Nick Alioto and Roger Dickson have made key contributions to ASBO's Accounting Committee. Dr. Bambi Statz had a major role in the development of the national school finance officer certification (SFO) and WASBO's most notable outreach was Erin Green's service to the ASBO board and her ascension to ASBO president last year. We have made a great impact on ASBO, and supporting Tom Wohlleber as he runs for the ASBO board will continue our national effort.

WASBO has accomplished a lot in the past 11 years and I am proud to be part of it. I do think all these efforts simply assembled a foundation for the challenges and opportunities that lie ahead. WASBO has a structure that can quickly provide support as districts develop employee handbooks. WASBO can provide leadership training as its members will be asked to lead their organizations through these changes. WASBO's diverse membership base, relationship with service affiliates, interaction with national sources and ability to quickly change content will serve its membership well as this new world currently has more questions than answers.

I would encourage you to thank those that have served the WASBO board. Collectively, they shared the foresight to construct an organization able to tackle any situation. The hours dedicated will benefit all. I would also encourage you to get involved. It is a great experience and one that I will miss very much. I want thank everyone, particularly the presidents I was fortunate to serve under – Gary Siegman, Sue Schnorr, Woody Wiedenhoef, Tom Owens, Mark Van Der Zee, Mike Garty, Gail Moesch, Tom Wohlleber, Diane Pertzborn, Keith Lucius and Chad Trowbridge.

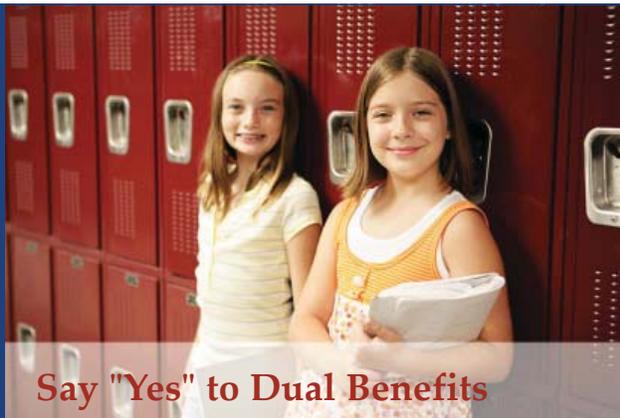
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With the increasing responsibilities and fewer staff, the help and expertise that I gain through ASBO membership is priceless.
Peter Willcoxon Sr., RSBA, White Bear Lake Area Schools (MN)



Association of School Business Officials International

www.asbointl.org

"Everybody has accepted by now that change is unavoidable. But that still implies that change is like death and taxes — it should be postponed as long as possible and no change would be vastly preferable. But in a period of upheaval, such as the one we are living in, change is the norm."

- Peter Drucker
Management Challenges for the 21st Century (1999)



Tom Wohlleber

Tom Wohlleber Runs for ASBO International Board of Directors in 2012 Election

WASBO has experienced six years of distinction with Erin Green serving first as Director on the ASBO International Board of Directors, then as Vice President, President and currently as Immediate Past President. Wisconsin has been well represented.

Even though Erin's term is coming to an end we have cause to be excited. Tom Wohlleber has decided to run for a Director seat on the ASBO International Board of Directors in the 2012 election. If elected, he would take office in January of 2013. Tom currently serves on the ASBO Risk Management Committee. He is also a recipient of the ASBO Eagle Award. Anyone who knows Tom knows that he is a very skilled leader who has passion for education, school business

management and making progress. We look forward to supporting him.

The WASBO Board of Directors took action at their June 15, 2011 Board meeting to support Tom as a candidate for the ASBO Board. The following is the resolution that was passed at that meeting.

Wisconsin ASBO Board of Directors Resolution Supporting Thomas Wohlleber For the Office of Director on the ASBO International Board of Directors

Whereas, Tom Wohlleber has distinguished himself as a professional School Business Official, Author, Instructor, Colleague, and Mentor to many, and

Whereas, he has given unselfishly of his time to serve in the leadership of WASBO as a Director, Treasurer, President-Elect and President, and

Whereas, he has chaired the Madison Area School Business Officials, WASBO Nominating Committee, WASBO Accounting Committee, WASBO Spring Conference Planning Committee and WASBO Technology Committee, served on the WASBO Professional Improvement Committee, WASBO Constitution Committee, WASBO Safety and Risk Management Committee and School Administrators Alliance Legislative Committee, and

Whereas, his commitment to the profession of school business management has included active participation in the affairs of ASBO International where he serves on the Risk Management Committee, has previously served on the ASBO Purchasing Research Committee, has attended ASBO Leadership Conferences, ASBO Annual Meetings and the Eagle Institute, and

Whereas, he has presented at state conferences, served as faculty for the University of Wisconsin-Whitewater School Business Management Graduate Program and the Edgewood College Educational Administration Graduate Program, has been active with the Wisconsin School Safety Coordinators Association, serving as their president, and the WASB Insurance Program Board of Trustees, and

Whereas, Tom is an advocate for innovation, cooperation, school district sustainability, risk management and cooperative purchasing initiatives, and

Whereas, he is actively involved in his community through his local Optimist Club, Middleton Good Neighbor Festival, Middleton Outreach Ministry, Youth Sports as a coach and referee, and as a leader in collaborative efforts with the City of Middleton and greater community toward environmentally friendly practices and sustainability, and

Whereas, he has received the WASBO School Business Official of the Year Award, WASBO Wallace E. Zastrow Award, several other state commendations, and the ASBO International Eagle Award.

Be it hereby resolved that the WASBO Board of Directors unanimously endorses and recommends Thomas Wohlleber, Assistant Superintendent of Business Services, Middleton-Cross Plains Area School District, to the ASBO International Nominating Committee for their consideration as a most worthy and deserving candidate for the Office of Director in the year 2012 election.



WASBO Custodial & Maintenance Conference

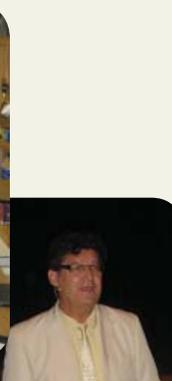
July 20, 2011

Central High School ~ La Crosse, Wisconsin



It was a "hot" Custodial & Maintenance Conference in La Crosse. While attendees enjoyed air conditioning inside La Crosse Central High School, they enjoyed a great selection of hot topic sessions from HVAC to Fire Safety to Gym Floors to Cost Cleaning Analysis to Microfiber to Retirement Planning. Building tours were popular and time spent with the fourteen

exhibiting companies was appreciated by attendees. For those working to achieve the Facility Manager Certification, Module 5 was offered with Norm Davis (Westby), Joel Konze (Sparta), John Daily (Holmen), Joe Ledvina (La Crosse) and Jason Showen (La Crosse) serving as presenters. Gale Kreibich of Gunderson Lutheran kicked off the conference with a message on the Custodian's Role in Providing Customer Service. The Safety Room Challenge was competitive while educational as participating teams identified safety violations and learned how to correct them to provide a safe learning and work environment. The winning team was from Fall Creek. Congratulation to Lucy Hennings, Tammy Jungerberg, Shirley Larson, Brian McCann and Troy Zakrzewski. Congratulations also goes to Laurie Pries of the Wabeno School District for winning the Individual Title in the Safety Room Challenge. Thanks goes to **Complete Control, Inc. - Siemens** for their sponsorship and support of the conference. We also thank our hosts - Joe Ledvina and his staff at the La Crosse School District.





Alyssa Moen

What Do You Know About Worker's Compensation and the Benefits of Return to Work?

By Alyssa Moen, TRICOR

Contributed by the WASBO Safety & Risk Management Committee

State Workers' Compensation systems are in place to help compensate employees for work-related accidents, which may involve rehabilitating injured employees, and/or minimizing personal accident losses. Workers' Compensation involves compensation for the injured person, rehabilitation (e.g., proper medical care, vocational rehabilitation and reasonable accommodations for the individual with a disability) and cost allocation among employers and industries according to losses.

In order to manage work comp claims, every school district should have a Return to Work (RTW) program. Return to Work Programs are recommended by just about anyone who understands the field of workers' compensation. As an employer, you hear repeatedly how a RTW program will substantially reduce your cost of workers' compensation – as much as 20% - 50%.

Employers will achieve cost savings from a RTW program by shortening the life of the claim resulting in a lower claim cost and a lower experience modification factor being used in each of the next three years when your next workers' comp premium is calculated. There are many more cost savings resulting from a transitional duty or early RTW program.

Benefits and Advantages from a RTW Program

- Lower claim handling cost by shortening the life of the claim, often preventing a medical only claim from becoming an indemnity claim (this can have a

major impact on your experience modification factor mentioned above).

- Lower medical case management cost as employees who return to work on modified duty have an overall faster recovery time than employees who are not offered transitional duty.
- A significant decrease in legal defense expenses, as few employees who are back at work contest their workers comp claims before the workers comp board or court.
- If the employee rejects the transitional duty job, the probability of success of a request before the workers' comp board to terminate benefits is much higher than when no job offer has been made.
- An increase in settlement leverage when a valid job offer has been made to an employee.
- An increase in employee morale which results in lower absenteeism.
- A reduction in the replacement labor costs (including the expense of locating, hiring and training additional staff to do the work of the injured employee).
- A decrease in overtime wages for other employees to do the work of the injured employee.
- The loss of productivity is minimized.
- Lower wage replacement cost – either salary continuation or indemnity benefits paid.
- Lower medical cost as the recovery time is shorter for employees who remain active after an injury.
- A lower frequency of lost time claims as the employees know

they are expected back at work as soon as their physician allows them to perform modified duties.

- Lower use of Family Medical Leave Act time.
- A reduction in American with Disabilities Act (ADA) claims.
- A shorter claim duration which decreases the amount of time management must devote to following the claim.

In order to have a successful RTW program, the school district must have management commitment, preparation, training, and communication. One significant component of the RTW program is to identify light duty work at your school district. An important first step is performing job analyses on the various positions in your organization. The actual demands and essential functions of each position must be identified. This can be used for developing individual modified assignments. The key is to find ways to make use of the worker's skills and knowledge rather than "make-work" assignments. Creativity in developing modified assignments enables the employee to be productive while meeting medical guidelines. Consider the following: part-time employment, temporary jobs, alternative tasks, job sharing, jobs in other departments, transitioning through different jobs, and job modification.

There are several examples of jobs employees could do at your school district for light duty and there are also many examples of jobs employees could perform off-site. Some examples at your district are: book organizing work, hazard communication program work (updating chemical inventory

Continued on page 28

list and matching all MSDS to the list), checking first aid kits, performing fire extinguisher checks, cleaning up school grounds, grade papers and being creative in finding work that fits within the injured worker's restrictions. Light duty jobs do not have to be performed on the premises or during the employee's regular shift. Light duty jobs off-site include: volunteering at shelters, volunteering in the community, and working in another building within the school district.

Frequently asked questions about return-to-work:

1. Does my injured worker require a treating physician's release to start transitional duty?

Yes. The job description for the transitional duty position can be provided to the physician for approval or the physician may supply a detailed listing of restrictions that the employer can review.

2. What if the injured worker is medically released and able to perform transitional duty work, but refuses to come back to work?

If duty is available that meets the

restrictions provided by the physician and the injured worker elects not to accept the job, the injured worker is not eligible for Temporary Total Disability benefits.

3. What if my injured worker is medically released for transitional duty, but the injury prevents him/her from driving a vehicle? Can I arrange for transportation?

Yes. This is a good practice to aid the injured worker to return to the job. But recognize that if a vehicle accident occurs to or from work and your employee is further injured, that may become part of the workers' compensation claim. Please use safe and reliable transportation if offering to transport the injured worker to your workplace.

4. What if my injured worker was earning a higher salary in their regular job than the transitional duty job pays?

(Example - skilled craftsman's salary vs. a mailroom clerk's salary) The injured worker would be entitled to Temporary Partial Disability benefits for the difference between the injured worker's average weekly wage and

the wage paid by the employer during modified duty.

5. What if my injured worker can only work a ½ day of transitional duty?

Temporary Partial Disability benefits would be provided.

6. Is it a good idea to promote the availability of transitional duty to all employees?

Yes. If your employees see that you take return-to-work seriously and offer meaningful and productive work to all injured workers, they will not feel like they have been singled out or made the exception. Detail your return-to-work program as part of your employee orientation training.

Make return-to-work a part of your district's culture.

For more information contact:

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WASBO, WCASS and DPI Wisconsin Federal Funding Conference

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With the increased focus on the necessity for transparency and accountability of federal funds, school districts find that they must increase their understanding of federal requirements to remain in compliance with program regulations. But the silver lining of fiscal monitoring is a deeper understanding of how federal funds may be used. With this knowledge, districts have the tools to rearrange existing revenue sources to close gaps and fund new initiatives. To provide school districts with the information they need not only to be in compliance, but also maximize their federal resources, WASBO, WCASS and DPI are hosting the Wisconsin Federal Funding Conference on November 1 and 2, 2011, in Wisconsin Dells.

All too often, conferences provide information that is of vital significance to school district staff...but the individuals attending realize that half of their work equation is missing. An individual who is an expert in their program area may go to a conference and hear a fiscal presentation, and then realize they need not only to understand the subject matter but be able to return to the district and report to the business office. To “get everyone in the same room” school districts should commit to send a team of individuals: a special education program coordinator, a Title I program coordinator and business office staff that works closely with special education and Title I funding. The purpose is to have program and business office staff attend sessions together.

Session topics will include:

- Overview of Federal Funding Requirements
- Wisconsin Uniform Financial Accounting Requirements
- Federal Time & Effort Reporting Requirements
- Overview of Title I Funding and IDEA Funding (allocation and per pupil amount determinations, obligation periods, allowable costs, supplement not supplant requirements, application and claim process)
- IDEA – Maintenance of Effort (MOE)
- IDEA – Coordinated Early Intervening Services (CEIS)
- IDEA – Equitable Services Requirement (Private School Set-Aside)
- IDEA – Title I Schoolwide Set-Aside Option
- Title I – Maintenance of Effort
- Title I – Schoolwide and Targeted Assistance Programs and Use of Funds
- Title I – Private School Participation
- Title I – Comparability
- Special Education Funding Sources (High Cost and Categorical Aid)
- Common Fiscal Issues with Title I and IDEA
- Utilizing Existing Resources to Fund Response to Intervention Systems, including PBIS



For those districts that are interested in learning the different ways to utilize existing resources to implement or expand a Response to Intervention system, there will be an optional hands-on practicum on the afternoon of Day 2. The practicum will keep districts in teams to work through “story problems” with the end goal of learning how to utilize the various funding sources and situations to maximize a district’s ability to fund RtI while learning how to avoid the pitfalls of federal funding non-compliance.

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Improve Your Quality of Life by Improving Your Health and Well-Being

By Dr. Thomas Van Gilder, Medical Director of Humana's Commercial Market in Wisconsin

Google the phrase "health and well-being," and you'll get about a half-billion search results. The two words are linked so often, it's easy to forget that each one holds a specific meaning—by definition and in our lives. Knowing the distinction between the two can help us improve not only our physical and emotional health, but also our overall quality of life.

In general, "health" refers to our physical state. "Well-being" is not as concretely or simply defined as health, in that it is more of a concept—and a personal feeling. It is inextricably tied to the state of our physical health, yet it encompasses much more. Well-being takes in aspects of our health that go beyond nutrition and exercise, such as our emotional health, including stress management and spiritual health.

Well-being also involves our sense of security, for ourselves and for our family. That includes our short- and long-term financial security, personal safety and even our environmental stewardship. A sense of belonging to our community, to our friends and to our family affects our well-being, too. And so does our sense of purpose in life.

The good news is we can make choices and take actions to achieve lifelong well-being.

Good Health is Key

The best place to start is with our health. Since social circumstances and behavior patterns make up more than half of the underlying drivers of health, making simple behavioral changes can lead to better health and well-being. It can also save millions of lives and billions of dollars in health care costs.

That's because, for over 50 years, an estimated 80 percent of the nation's health care budget has been consumed by five behavioral issues:

- 1) drinking;
- 2) smoking;
- 3) poor diet;
- 4) stress; and
- 5) inactivity

Making healthy choices in these five behaviors alone can improve how we look and feel physically.

To do that, we need to follow well-documented guidelines for proper diet and exercise. We can avoid things that are not good for our bodies, like smoking or drinking alcohol to excess. We also need to find ways to relieve and manage stress. In short, we can make choices and take actions that result in a healthier body—and mind.

Change is Difficult

It sure sounds simple, doesn't it? Make some changes in our behavior. Take better care of ourselves, and we'll be healthier. Yet, we also know that people don't change their behavior easily, even when they're experiencing serious health challenges.

Think about these disturbing statistics: About 90 percent of those who undergo coronary-artery bypass surgery don't change their lifestyle in the subsequent two years. And two-of-three American adults are overweight or obese, and yet 60 percent don't exercise.

As these statistics suggest, and as we all know from experience, making even simple changes often proves staggeringly difficult. So we're seeing more and more prevention and screening programs that assess health risks.

Innovative Wellness Programs Increasing

We're also witnessing an explosion in the number of health and wellness programs designed to get people moving and eating better, to manage their stress more effectively and to feel fit emotionally—and even spiritually.

Technology is also playing a greater role in keeping people healthy. Examples are initiatives aimed at finding new ways to help individuals stay healthy through the use of mobile technologies and other technology innovations.

One good example is the StaySmartStayHealthy.com initiative, which includes a series of videos that offer key health-related information—in a fun, easy-to-understand way.

Another technology-based pilot initiative is to explore the benefits of remote medical monitoring. Members with heart conditions will be able to step on a special scale in their homes. Then, in real-time, data such as weight, blood pressure and blood-glucose levels will go electronically to their primary care physician, who can act quickly on the information if necessary.

Because these types of initiatives have been so successful, individuals will continue to see an increasing number of innovative programs designed to improve their health and reduce health care costs.

Take Action to Improve Your Well-Being

We'll also continue to see more programs aimed at improving other aspects that contribute to our well-being. Plus, you can take actions on your own to improve your sense of security, belonging and purpose.

Continued on page 32

- **Security.** Sit down and figure out where your finances stand. Especially in today's world, if you don't take control of your finances, the stress that financial uncertainty causes can lead to devastating effects on health and well-being.
- **Belonging.** Start your own list of social activities you like and don't like. Write them down, and be creative in coming up with new ideas for socializing.
- **Purpose.** Consider your purpose here on earth. No matter what age you are, if you find yourself looking for meaning in life, you won't have to look far. A mirror is a good place to start.

write your thoughts down. Make a list of your talents and life goals. Then think about and connect with a source that can benefit from your talents and life's experiences—and get involved.

Once you begin to improve one aspect of your well-being, you'll surely want to start on another area. Add together a sense of security and belonging, along with better physical health, and you're well on your way to achieving well-being—and an overall higher quality of life.

Dr. Van Gilder is vice president and medical director for Humana's Commercial market in Wisconsin. He works to provide innovative solutions that will help Humana members achieve lifelong well-being.

That's right: Reflection holds the key. Reflect on your life's experiences and

On Thursday, October 6, William Snyder, from HumanaVitality, LLC, will

be presenting "Improving Your Health and Well-Being" at the WASBO Fall Conference. This presentation will help distinguish between "health" and "well-being," as well as show ways to improve your physical and emotional health to improve the quality of life. Learn how to proactively make choices and take action to achieve lifelong well-being. HumanaVitality™, Humana's new innovative comprehensive wellness and loyalty solution that integrates rewards with health, will be featured.



What to Do at Work Each Day:

Stuff That Makes You Stand Out!

By Mark Towers

In order to stand out, there are certain things that you need to embrace and do each day. These items will keep you pumped up, keep your colleagues wondering what you are up to, and, in turn, make for a much more vibrant team/organization. They are:

Take one hundred percent accountability and responsibility for your happiness and your life's situation. Don't finger point or complain. Bear in mind that most people don't care about your problems and some are glad you got 'em. Sir Winston Churchill said, "The price of greatness is responsibility." This insight is oh-so correct and will never go out of fashion.

Delight a customer (either an internal or external one) by noon each day.

The ability to "WOW" someone is something that cannot be taught. It can only be delivered. Recently, a seminar participant wrote a thank-you note to my wife for being supportive of me and thanked her for all she did to keep me going. This moved me and reminded me that I (and you) need to deliver a WOW by noon each day. I'm not talking about something grandiose. I am simply talking about a small WOW that is bound to make a big difference for somebody. Make it happen by noon. Then do it again as often as possible.

Everyone loves a positive result. Deliver at least one tangible one before you head home. When we were first married, I had a second job at McDonald's Hamburgers. I memorized their four corporate values of Quality, Service, Cleanliness and Value. The

manager of this McDonald's was a stickler for cleanliness. I made it my job to shine the outside doors to the large stainless steel cooler before leaving to go home. The other employees thought I was nuts, but I didn't care. I enjoyed supplying that result and I was forever grateful for having that part-time job that helped feed and clothe my family.

Seek to create good morale or buy into the efforts of the people who are attempting to better morale. Never speak negatively about the morale in your organization. As a wise supervisor in a manufacturing plant once told me, "People want to work at a place that is meaningful, challenging and fun. I am not sure that I can always supply meaning and challenge every day, but I know I can supply fun. Some days, I'll pass out candy or share something

Continued on page 33



Mark Towers

Get with the Program... Three Things You Gotta Do in Today's Crazy World!

By Mark Towers

"Life is states of integration and states of flux. Your life's imaginary pendulum will continually swing back and forth between these two states." I talk to lots of folks each week and most of them seem to be currently grappling with a state of flux/uncertainty. Getting with the program is a short phrase that implies the importance of taking greater control of your destiny. This short article will lay out three concepts to help you deal with today's crazy world.

Get with the program by branding yourself as You, Incorporated!

You have been blessed with only three tools in your personal tool kit... your talent, your motivation and your self-talk. Improve all three daily. As a talented human resources manager recently said to me, "I don't let my organization or anyone else define me. I avoid stagnation and I see myself as a dynamic company of one...running around doing terrific things for my colleagues and customers. If I don't deal with the realities of my outer world

with my energized and inspired inner world, then I will become marginalized and irrelevant."

This man's boss describes him as not only valuable to the organization... but essential. Branding and projecting yourself as You, Inc. is a must strategy for living in today's turbulence.

Get with the program by not letting change paralyze or intimidate you.

There may be value in order, but there is opportunity in chaos. And there's plenty of change and chaos these days. When a change comes your way, see it as an opportunity. Position yourself as a "human search engine." Embrace the challenge of any change with an abundance mentality.

The ability to adapt and innovate cannot be underestimated. Research has found that the brains of wild animals are 15 to 30 percent larger than those of their domesticated counterparts. Wild animals are better at adapting and the ability to adapt and innovate is of paramount importance in this topsy-turvy environment. So it is with you... be more courageous. Don't be afraid to innovate by exploring the fringes of the options that lie in front of you. Indeed, it's not about what you achieve in your time here on earth...it's about what you

overcome.

Get with the program by living in the now.

Lots of folks "catastrophize." They either spend too much time re-living the past (yesterday really did end last night) or conjecturing about the future (worry is negative goal-setting). Embrace each moment as if you had purposely chosen it. There can be no stress if you consciously embrace the moment and live in the present.

A close friend once told me, "Motivation may get you started, but habit keeps you going." I cogitated on that for a while and came to realize that living in the now is the most critical habit for remaining upbeat and optimistic. Think about your thinking patterns...make the time to dissect them. Don't believe everything you think. Come back to the now as often as possible; it is the key to enlightenment.

In conclusion, getting with the program is about branding yourself as You, Inc., not letting change overwhelm you and living in the now. I wrote this piece to supply you with a "faith lift." I hope you enjoyed reading it as much as I did writing it. Stay strong!

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What to Do at Work Each Day: Stuff That Makes You Stand Out!

Continued from page 32

funny that I found on the internet or even do a silly impersonation. Sometimes, the only arrow you have in your quiver is laughter. As the saying goes..."laughter don't leave home without it!" Now that's good advice.

Avoid "relational bullying." Don't gossip, lie, humiliate or exclude others. Sydney Harris once said, "The three hardest things to do in life are return

love for hate, include the excluded and admit you are wrong." Harris is urging us to live at a higher and more transcendent level. Please memorize this quotation. Although these three things are hard to do, it is my invitation and my request that you strive to weave them into your personal repertoire.

As a mentor once shared with me, "You cannot always be outstanding,

but you better stand out." I believe the five strategies above will serve a dual purpose...they will enable you to be both outstanding as well as stand out. Enjoy your work day and be exactly who you are...but with an even better set of skills!

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Ted Hayes

Parade Safety

By Ted Hayes, CSP, MSE, Senior Risk Manager, M3 Insurance Solutions, Inc.

Homecoming, athletic championships and community celebrations often mean a celebratory parade. Oftentimes, students, coaches, and other school personnel may ride on floats, fire trucks, or other types of equipment. Participants in these types of events must clearly understand their safety responsibilities to minimize the chance of accidents.

All participants riding on a float or any type of moving equipment must sign a release and waiver form. This form must clearly explain the activity to take place and the risks involved. No one should be allowed to participate if a signed release and waiver is not turned in to school administration.

An example of this type of release and waiver is as follows:

All participants riding on the float must sign and return this form to (_____). (_____) must have this paper signed and returned to the office by (date), in order to participate on the (float/fire truck, etc.).

Release and Waiver:

As lawful consideration for _____ (the parent/guardian), I, being the parent or legal guardian for the student, release (**school district**) and its employees, from any and all liability for any injury to the student caused by, or resulting from, the student's participation at the (activity) on the float, whether or not such injury or damage was caused by the negligence of (school district) or its employees, or any other cause. I further agree not to sue (school district) or its employees for any injuries resulting from the student's participation in the (activity), whether or not such injury or damage was caused by their negligence or any other cause.

I have carefully read this release and waiver provisions and understand its contents. I am aware that I am releasing certain legal rights that I otherwise may have as a condition of the student's participation in the (activity).

Parent/Guardian Signature: _____
Date: _____

This is only a template release and waiver form. Ensure that your school district's legal counsel approves of any release and waiver form before it is used.

Develop Parade Safety Rules and Regulations

At a minimum, parade participants must understand the following safety rules and regulations:

- **Don't allow the use of water guns, bubble machines, silly string, etc. to be dispensed from the parade participants.**
- **Closely monitor the dispensing of candy or any other items that may entice observers (especially small children) on to the parade route.**
- **Participants must not sit on vehicle hoods/trunks.**

- **Participants must not sit on vehicles/equipment that are not intended for that purpose – on top of the fire truck hoses for example.**
- **School administration should closely monitor parade activities and immediately correct any risk activity that may lead to an accident.** If it is felt that an entry or participant is posing a risk to anyone due to activities occurring on, or affiliated with the float/vehicle, they will be asked to immediately discontinue such activities.
- **School administration has the right to remove any float/vehicle/participant, at any time, based on their assessment relating to safety and security concerns, interference with the progress of the parade or any other reason that is deemed appropriate.**
- **Protective equipment, especially helmets, must be worn for activities such as rollerblading, biking and skateboarding.**
- **No alcohol is allowed on any float/vehicle at any time.**
- **It is recommended that all livestock participants wear protective helmets.**
- **No small children should ride on school sponsored floats.**
- **All drivers must possess a valid driver's license.** All moving floats/vehicles must allow drivers to maintain a 180-degree view of the route at all times.
- **Emergency exit accessibility must be available on all floats/vehicles.**



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- Helen Keller



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- All parade entries, detached or otherwise, should have direct communication with the driver.
- The blowing of horns, sirens and playing loud music should only be allowed on the parade route, and must be kept to a reasonable level while on the parade route. Acceptable noise levels will be determined by school administration and any requests to adjust sound levels must be enforced.
- Limit the height of all parade floats or activities.
- No smoking will be allowed on or near floats or motorized vehicles.
- All units carrying people must be equipped with adequate restraining devices (body harness, protective railings) capable of stopping anyone falling from the unit. Anyone riding on the unit must be properly braced and seated.
- No one riding on a float/vehicle shall extend their arms outside of the entry.
- In the case of an emergency with parade participants or spectators, parade participants must move to the right of the parade route to allow clear, unhindered access for emergency vehicles.

For more information:
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Countdown to SFO Certification

For many of us, the month of August marks a time of transition, the countdown to a new school year. But before the first bell rings, and the school halls flood with students, we hope you'll make time to get your SFO® Certification.

Make a Plan

Applications for SFO certification are accepted all year long and preparation is primarily through self-study.

Begin today and you could have your designation within weeks, here's how:

1. Review Program Requirements

There are three parts to the SFO certification. Review the program and eligibility requirements for each component.

2. Submit Your Application

Applications are submitted using the SFO Credential Management System, ASBO's secure, online resource. Simply create an account to start.

3. Schedule Your Certification Exam

Candidates take the exam at a computer-based testing center through the Pearson VUE network in the United States and parts of Canada with over

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SFO



Director's Corner

The Change Imperative

By Dave Van Spankeren, Executive Director of Business Services, CESA 6

Dave Van Spankeren
WASBO Director

"We are faced with a challenging task of managing a budget deficit, while simultaneously improving the quality of education."

"Current cost reduction efforts have focused on 'resource and service cuts' thus forcing the districts to 'do more with less.' "

"In this time of economic crisis when we are struggling to find ways to cut from our operating budgets, we need to find out what systems are working for purchasing, and which ones are not working."

Arne Duncan

We all live in the new reality created through "The Great Recession." I agree with Arne Duncan that we need to find new ways to operate to enable us to be more efficient and effective. I firmly believe that we are now living in the "new normal" and will be for some time.

In order to step up to the challenge, we need to look at what we do and how we can do it better. We have gone through the typical approach, which includes listing hundreds of items on flip charts, then deciding what we can either completely cut or reduce. This is an exercise that has been repeated by virtually every school district in the country. The exercise can create short-term cost savings, but is really not the systemic approach that is needed to ensure sustainable results.

In order to create sustainable and systemic results, districts can review areas including, process improvement, strategic sourcing and benchmarking.

For example:

- Identify alternative income streams by developing a framework for aggregating non-core spend categories and leveraging scale;
- Identify and prioritize targeted cost savings;

- Identify key process improvement areas to ensure savings sustainability and develop a framework for implementation;
- Create a benchmark report between Wisconsin school districts with sizing of improvement opportunities.
- Find cost savings by partnering at all levels of government in purchasing.

One approach creates value in the "non-core" area of education by reducing costs through Lean/Six Sigma and strategic sourcing techniques which are commonly used in the management consulting industry. Non-core spending includes areas like transportation, technology, facilities, food service, and supplies.

Examples of LEAN/Six Sigma success in school districts and educational service agencies across the country are outlined below.

Continued on page 39

Council Bluffs Community School District

Category	1 Year	3 Years	5 Years	Contracted Savings
Technology	\$80k			19%
Supplies	\$300k			28%
Transportation	\$637k	\$1,911k		21%
Printers & Copiers	\$131k	\$393k	\$655k	35%
Total	\$1,148k	\$2,304k	\$655k	\$2,946k

First year of savings of \$123.44 per student. Overall contracted savings of nearly \$3 million (\$317.77 per student).

Millard Public Schools: Key Benefits

#	Changes	Benefits	Annual Cost Savings
1	Centralize Purchasing Management • Institute formal vendor management • Create standard list of products for most common categories • Establish performance metrics	• Best value (right price at right quantity) • Obtain significant savings through aggressive sourcing • Audit of "non-approved" purchases	• 17.3% of \$15 million (\$2.6 million)
2	Roll-out procurement cards district wide for small transactions	• Lower transaction costs	• 4,000-6,000 transactions can be converted to procurement cards • Reduce transaction cost from by \$25-40 per transaction
3	Rationalize warehouse inventory to support high velocity items	• Fewer items to manage in warehouse	• Reduce inventory obsolescence by \$27,000 • Reduce warehouse space by 31% to provide pallet locations for food commodities program
4	Create a best-in-class purchasing process by piloting changes in one key category	• Provide a model for other district spend categories	• Reduced transaction cost for ~1,000 Purchase Orders (office products example)

Systemic changes through process improvement creates annual savings of \$2,777,000 (\$115 per student) and a structure to continually improve efficiency and effectiveness

These districts utilized a diagnostic assessment which follows LEAN/Six Sigma practices to determine areas for process improvement. LEAN evolved in the post WWII environment in Japan and was refined by Toyota. A simplified definition of LEAN says that everything is a process and that once a standardized process is put into place, improvements can be made to that process. LEAN strives to eliminate waste or non-value added steps in an effort to continually improve the process and the result of the process. Essentially, LEAN is centered on preserving value with less work. Six Sigma was developed in American manufacturing (Motorola

is credited as the originator) and is focused on eliminating defects and variability, striving for no more than 3.4 defects per million.

School districts should also look at identifying critical areas of fragmentation through a comprehensive spend analysis. A review of your annual vendor payments and the number of purchase orders issued by vendor is the first step.

Benchmarking uses information available through the Department of Education's Common Core Data and DPI shows variation in spend on a cost-

per-student basis vs. peer districts.

Of particular interest to Dr. Vicki Barber, El Dorado County (CA) Office of Education Superintendent, was a benchmark study to peer county offices of education showing spending performance across key expense categories. "The results of the peer benchmark study pointed out areas for us to focus on to improve both process improvement and cost. I was amazed at the variation between county offices and will use this information to share our best practices and learn more about the best practices used by peers."

In this "new normal" we must all be looking for systemic ways to improve value while becoming more effective and efficient. It is hard times for all areas of government. Now is the time to investigate partnerships between our schools and city, town, village, county, technical schools and state governments.

Whether you partner with a systems consultant to help you identify and implement systemic change or go it alone, I challenge all of you to identify, implement, and share your best practices in the area of non-core spending improvement and inter-government partnering.

Who would have thought two years ago that we would now be referring to that fiscal environment as "the good old days"?

**Comparison of Cost/Student in Peer COE's
Across Selected Expense Categories**

Expense Category	Lowest Cost among peers (\$m)	County Office of Education with Lowest Cost	El Dorado County Cost	Variation from Lowest Cost
Support Services	\$770	El Dorado COE	\$770	Best in Class
Administration	\$1,161	Napa COE	\$1,354	\$193/student
Operations/Maintenance	\$736	Butte COE	\$918	\$182/student
Food Services	\$201	Marin COE	\$235	\$34/student
Transportation	\$209	Napa COE	\$388	\$179/student

El Dorado is best-in-class in Support Services; has opportunity to save a portion of \$17 million across the remaining categories based on understanding the differences between current dollar per student versus lowest among peers.

"Efficiency is doing things right; effectiveness is doing the right things."
- Peter F. Drucker



Welcome New Members

District Professional Members

- **Laura Anschutz**, Bookkeeper, Gibraltar
- **Beth Babik**, Custodial Supervisor, Pulaski Community Schools
- **Kevin Bahr**, Director of Facilities, Pulaski Community Schools
- **Michael Brendel**, Director of Business Services, Viroqua Area School District
- **Robert Crawley**, Custodian, Muskego Norway
- **Paula Deden**, 2nd Shift Supervisor, Wilmot Union High School
- **Jim Engebretson**, Administrative Assistant, Crandon
- **Andrew Feuling**, Business Manager, Salem School District
- **Karen Hug**, Finance Manager, West Bend
- **Jill Krahn**, Assistant Bookkeeper, Wautoma Area
- **Elise Krohn**, Human Resources Specialists, Merrill Area Public Schools
- **James Kuchta**, District Administrator, De Soto Area School District
- **Michael Nowak**, Custodian, Muskego Norway
- **Judy Pieper**, Bookkeeper, School District of Lomira
- **Joseph Sanfelippo**, Superintendent, Fall Creek School District
- **Tina Schmitz**, Director of Finance, Kenosha Unified School District
- **Jamie Scofield**, Director Building & Grounds, Grafton

Service Affiliate Members

- **Jack Cantwell**, Territory Sales Manager, Horace Mann
- **Ken Engstrom**, Classroom Audio Consultant, Lightspeed Technologies, Inc.
- **Ron Garrison**, Honeywell Energy Services Group
- **Kim Howard**, President, Teachers On Call
- **Brad Lazar**, Certified Financial Planner, AXA Advisors, LLC
- **Mark Rundle**, Regional Director, Integrys Energy Services, Inc.
- **Hollie Schouweiler**, Software Support Representative, Marcia Brenner Associates
- **Steven Sendele**, Sales Professional, Ho-Chunk Distribution Center
- **Daniel Westlund**, Hillyard

On the Move

- **John Stellmacher** from Waupan to Hartford Jt. 1
- **Kathy Stoltz** from Weston to Richland
- **Doreen Treuden** from Deerfield to Evansville
- **Brian Walters** from Westfield to Waupan

Retirements

- **Clarence Roethle** from Hartford UHS

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New Members

- **Jeffrey A. Dellutri**, Nicolet Union HSD, Glendale, WI
- **Brian Krey**, River Valley SD, Spring Green, WI



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

Book Review

“How Successful People Think”

Dr. John C. Maxwell, Authors

Review by Orvin R. Clark, EdD, RSBA

Dr. Maxwell is an internationally recognized leadership expert, speaker and author who has sold over twelve million books. His organizations have trained more than one million leaders worldwide. Dr. Maxwell is founder of Injoy Stewardship Services and EQUIP, organizations dedicated to helping people maximize their personal and leadership potential. Maxwell has written over 40 books on leadership including ***Becoming a Person of Influence, The Success Journey, 17 Essential Qualities of a Team Player, Talent is Never Enough, Failing Forward, The Difference Maker, Your Road Map for Success*** and ***The 360 Degree Leader***. Three of his books: ***The 21 Irrefutable Laws of Leadership, Developing the Leaders Around You*** and ***The 21 Indispensable Qualities of a Leader*** have each sold over one million copies each.

How Successful People Think is 127 pages in length and provides a combination of intelligence and inspiration. The book is divided into eleven chapters based upon each type of thinking. The skills are the raw materials of thinking that can be learned. Dr. Maxwell stated “I’ve studied successful people for forty years, and though the diversity you find among them is astounding, I’ve found that they are all alike in one way: how they think! That is one thing that separates successful people from unsuccessful ones. And here is the good news. How

successful people think can be learned. If you change your thinking, you can change your life!” He explains why you should change your thinking and how to become a better thinker. The eleven kinds of thinking are:

- Big Picture Thinking
- Focused Thinking
- Creative Thinking
- Realistic Thinking
- Strategic Thinking
- Possibility Thinking
- Reflective Thinking
- Popular Thinking
- Shared Thinking
- Unselfish Thinking
- Bottom-Line Thinking

As you read the chapters dedicated to each kind of thinking, you will discover that they do not try to tell you what to think; they attempt to teach you how to think. Dr. Maxwell said he found a kind of formula that can help you stretch your thoughts. It says “The Right Thought plus the Right People in the Right Environment at the Right Time for the Right Reason = the Right Result.” Some tips to become a different type of thinker:

- **Big-Picture Thinkers** learn continually, listen intentionally, look expansively, and live completely. Big-Picture thinkers see the vision before their people do; size up situations, taking into account many variables; sketch a picture of where the team is going; show how the future connects with the past to make the journey more meaningful; and seize the moment when the timing is right. Big-picture thinkers

are comfortable with ambiguity, learn from every experience, gain insight from a variety of people and give themselves permission to expand their world. Keep learning, keep growing and keep looking at the big picture! If you desire to be a good thinker, that is what you need to do.

- **Focused Thinking** harnesses energy toward a desired goal, gives ideas time to develop, brings clarity to the target and take you to the next level. Here are five suggestions to help with the process: (1) remove distractions, (2) make time for focus thinking, (3) keep items of focus before you, (4) set goals, and (5) question your progress. Philosopher Bertrand Russell once asserted, “To be able to concentrate for a considerable time is essential to difficult achievement.” Focus thinking removes distractions and mental clutter so that you can concentrate on the issue and think with clarity.
- **Creative Thinking** isn’t necessarily original thinking but a composite of other thoughts discovered along the way. Consider some characteristics that creative thinkers have in common. Creative thinkers value ideas, explore options, embrace ambiguity, celebrate the offbeat, and connect the unconnected. Discover the enjoyment of creative thought by removing creative killers (negative thinking), asking the right questions, developing a

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Jeff Dickert
Administrator, CESA 7
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creative environment, spending time with other creative people, and going outside of the lines, i.e., get out of the box. Vince Lombardi stated "The joy is in creating, not maintaining."

- **Realistic Thinking** is the difference between what we wish for and what is. Realistic thinking minimizes downside risk if we plan for the worst-case scenario, gives you a target and game plan, is a catalyst for change, gives you credibility and provides a foundation to build on.
- **Strategic Thinking** can make a positive impact on any area of life. Here are a few of the reasons you should adopt it as one of your thinking tools: simplifies the difficult, prompts you to ask the right questions, prompts customization, prepares you today for an uncertain tomorrow, reduces the margin of error, and gives you influence with others.
- **Possibility Thinking** increases your possibilities, draws opportunities and people to you, allows you to dream big dreams, makes it possible to rise above average, gives you energy, and keeps you from giving up. People who embrace possibility thinking are capable of accomplishing tasks that seem impossible because they believe in solutions.
- **Reflective Thinking** is a process to reflect on successes and mistakes, discover what should be repeated and determine what should change. By mentally visiting past situations, you can think with greater understanding. Reflective thinking gives you a true perspective, emotional

integrity, increases confidence in decision-making and clarifies the big picture.

- **Popular Thinking** sometimes means not thinking, offers false hope, slow to embrace change, and only brings average results. If you value popularity over good thinking, then you will severely limit your potential to learn the other types of thinking.
- **Shared Thinking** is faster than solo thinking, more innovative, more mature, returns greater value and is the only way to great thinking. Good thinkers, especially those who are also good leaders, understand the power of shared thinking. They know that when they value the thoughts and ideas of others, they receive the compounding results of shared thinking and accomplish more than they ever could on their own.
- **Unselfish Thinking** can often deliver a return greater than any other kind of thinking. Take a look at some of the benefits; brings personal fulfillment, adds value to others, encourages other virtues, increases quality of life, makes you part of something greater than yourself and creates a legacy. Dr. Maxwell says "Here is how relationships often play out:
 - I win, you lose---I win only once.
 - You win, I lose---You win only once.
 - We both win---We win many times.
 - We both lose---Good-bye, partnership!"
- **Bottom-Line Thinking** means different things for different

purposes; i.e., business, family, church, or school. Dollars are not always the primary measure of success. Every activity has a bottom line. Bottom line thinking provides great clarity, helps you assess every situation, helps you make the best decisions, generates high morale and ensures your future.

"People become really quite remarkable when they start thinking that they can do things. When they believe in themselves they have the first secret of success." ---Norman Vincent Peale. So while you read this book begin applying the "thinking" principles and remember development starts with self!

"Life is 10% of what happens to me and 90% of how I react to it."

- John Maxwell

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WASBO Remembers Kenneth W. Johnston 1983-84 Past President

Kenneth Wesley Johnston, beloved husband, father and friend, peacefully passed on June 28, 2011. Ken was born on September 20, 1931 in Oshkosh, the son of Henry and Ada. Five siblings make up their family; William (Lois) of Chandler TX, Miriam, Peg, Louise-all deceased- and Pat (Roy) Biebel of Oshkosh.

On June 22, 1957, Ken and his college sweetheart Carol Ann Bauer were married. They are blessed with two daughters, Julie (Gary) Wendt of Middleton and Barbara (Jim) Winiiecki of Wales. Five grandchildren, Matthew, Stephen and Katherine Winiiecki and Lisa and Daniel Wendt complete their loving family.

A lifelong educator, Ken received his BS degree from UW-Oshkosh and his MS and PhD from UW-Madison. He taught in Watertown before Carol and he moved to Racine and then Appleton. There he taught at Wilson Junior High School, served as Principal there, and subsequently went into central administration with the Appleton Area School District for the remainder of his career.

Of special pride was the fact he served his country in three branches of the military: the Army and Navy and Marine Corps.

Ken was very actively involved in community service including the presidency of such organizations as the Y's Men Service Club, the board of the YMCA, WASBO, AEA and Outagamie Red Cross among others. His earlier years saw long service in the boy scouts while his later years were an active part of the Rotary Club of Appleton. Singing groups such as church choirs and barber shop groups filled times of joy. Even better were the old songs and camp ditties we sang with family in the car. Tennis, sailing, playing bridge, and travel with Carol in the U.S. and Europe were a special part of his life. Most of all, Ken, his family and friends loved their cottage on Stratton Lake in Waupaca.

Ken loved and cherished his wife of 54 years. "Everyone should have such a wonderful wife and family to share. Could life be better and more full?"

Ken was dearly loved by his family and respected by all who knew him. In lieu of flowers a memorial has been established in Ken's name to provide an educational scholarship through the Appleton Rotary Foundation. A "Celebration of Ken's Life" was held on July 17, 2011.

"People do not care how much you know until they know how much you care."
- John Maxwell



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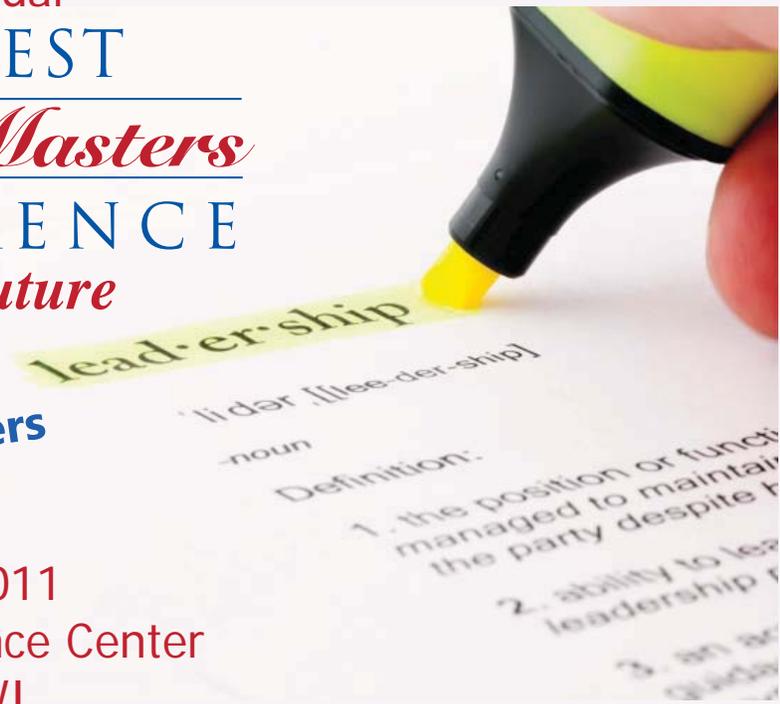


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With these concerns in mind, WASBO is pleased to present The Year of Success Program - a five-conference

package designed to offer new business managers, bookkeepers, and even district administrators with the timely knowledge they need to succeed in a typical school business office year. Specially designed tracks at each of these five conferences cover time-sensitive topics, and allow you to focus on understanding the most immediate and upcoming challenges. Learn from experienced peers, service providers and instructors from the Wisconsin Department of Public Instruction while you plot a course for your Year of Success.

The WASBO Year of Success Program also offers a substantial savings - approximately 25% - over individual conference registrations. WASBO Member pricing for The Year of Success Program is \$926.25. The Non-Member price is \$986.25 and includes one year of trial WASBO membership if you have not previously been a WASBO member. Simply choose the appropriate Year of Success option during the registration process for the New School Administrators & Support Staff Conference to take advantage of this program. Time is running out so apply now.

New School Administrators & Support Staff Conference
August 10-11, 2011 Stevens Point
www.wasbo.com/newadmin

WASBO Fall Conference
October 5-7, 2011 Elkhart Lake
www.wasbo.com/fall

New School Administrators & Support Staff Academy
November 29, 2011 Madison

Accounting Seminar
March 21-22, 2012 Wisconsin Dells

Spring Conference
May 22-25, 2012 Wisconsin Dells



Contribute to Taking Care of Business

WASBO Members throughout the state are implementing fresh ideas and creative plans. Putting into action processes and procedures that address the many law changes does not have to be done alone. Please share your ideas with your colleagues by submitting an article to **Taking Care of Business**. Give others the opportunity to benefit from your experiences. Do not let your modesty or fear of writing get in the way of sharing with your colleagues. The WASBO office will help you through the process. Submit your article or ideas for an article to Woody Wiedenhoefft at wwiedenhoefft@wasbo.com.

Congratulations to ASBO Bridges to the Future Recipient Mike Koltes

Mike received one of 20 scholarships awarded for 2011. He will receive \$2,000 to attend ASBO International's Annual Meeting and Exhibits in September. To be eligible for the scholarship you must be a school business official for five years or less and be a member of ASBO International. Watch for application materials for the 2012 Bridges to the Future Scholarship. The deadline to apply is typically June 1.

"People do not seem to realize that their opinion of the world is also a confession of character."

- Ralph Waldo Emerson



**Wisconsin Association of School
Business Officials**
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Upcoming Events - www.wasbo.com

Professional Development

September 16-19, 2011

[ASBO Intl. Annual Meeting & Exhibits](#)
Seattle, WA (Viterbo Credit Offered)

October 5, 2011

[WASBO Fnd. Scholarship Golf Outing](#)
Autumn Ridge Golf Course, Valders

October 6-7, 2011

[WASBO Fall Conference](#)
The Osthoff, Elkhart Lake (Viterbo Credit)

November 1-2, 2011

[WASBO/WCASS/DPI](#)
[Wisconsin Federal Funding Conference](#)
Kalahari Conference Center, Wisconsin Dells
(Viterbo Credit)

November 10-11, 2011

[Midwest Facility Masters Conference](#)
Kalahari Conference Center, Wisconsin Dells
(Viterbo Credit)

November 29, 2011

[WASBO New School Administrators
Academy](#)
Radisson Hotel, Madison

November 30-December 1, 2011

[WASBO/WASPA School Personnel
Academy](#)
Radisson Hotel, Madison (Viterbo Credit)

January 18-20, 2012

[WASB/WASDA/WASBO State Education
Convention](#)
Frontier Airlines Center, Milwaukee (Viterbo
Credit)

February 16-18, 2012

[ASBO Executive Leadership Forum](#)
Disney Contemporary Resort, Lake Buena
Vista, FL

February 28-29, 2012

[Facilities Management Conference](#)
Kalahari Conference Center, Wisconsin Dells
(Viterbo Credit)

February 29, 2012

[WASBO Transportation & Bus Safety
Workshop](#)
Kalahari Conference Center, Wisconsin Dells
(Viterbo Credit w/ Facilities Conference)

March 21-22, 2012

[WASBO Accounting Seminar](#)
Chula Vista Conference Center, Wisconsin
Dells (Viterbo Credit)

May 22-25, 2012

[WASBO Spring Conference & Exhibits](#)
Kalahari Conference Center, Wisconsin Dells
(Viterbo Credit)

Committee Meetings

School Facilities Committee

October 11, 2011, 9:30 am, WASBO Office, Madison

Midwest Facility Masters Committee

September 2, 2011, October 14, 2011 - WASBO
Office, Madison

Safety & Risk Management Committee

October 11, 2011, 12:00 pm, WASBO Office,
Madison

Spring Conference Planning Committee

September 30, 2011, 10 am-2 pm, Wisconsin Dells

Fall Conference Planning Committee

September 8, 2011, 10:00 am, Conference Call

Transportation Committee

August 26, 2011, 10:00 am, WASBO Office, Madison

Business Meetings

January 19, 2012 - Milwaukee, State Education
Convention

May 24, 2012 - Wisconsin Dells, Spring Conference

Board of Directors Meetings

August 17, 2011	Madison
October 19, 2011	Nekoosa
December 14, 2011	Eau Claire
February 8, 2012	Oshkosh
April 19, 2012	Manitowoc
June 13, 2012	Madison

Regionals

Check www.WASBO.com for more information.

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

Sept. 16, 2011 (CESA 7), Dec. 9, 2011 (Seymour),
Feb. 10, 2012 (DePere)

Madison Area - Meetings start at 9:00 a.m. TBD

Northeast - Meetings start at 11:00 a.m.

Sept. 16, 2011 (CESA 7), Nov. 18, 2011 (Appleton
area), Feb. 10, 2012 (DePere), April 13, 2012 (Fond
du Lac), May 11, 2012 (Manitowoc)

Northwest - Meetings start at 10:00 a.m. at

Lehman's Supper Club in Rice Lake.

Sept. 7, 2011, Oct. 5, 2011, Nov. 2, 2011, Dec. 7,
2011, Feb. 1, 2012, March 7, 2012, April 4, 2012,
May 2, 2012

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

Aug. 19, 2011 (Mequon), Sept. 16, 2011 (Oak
Creek), Nov. 11, 2011 (Grafton), Dec. 9, 2011
(Whitnall), Jan. 13, 2012 (New Berlin), Feb. 10, 2012
(Kettle Moraine), April 13, 2012 (Hamilton)

Southwest - Meetings start at 12:30 pm. at CESA #3

Oct. 12, 2011 Nov. 16, 2011 (tent.), Feb. 15, 2012
(tent.), April 18, 2012

West Central - Meetings are from 10 am - 1 pm at

the Sparta Area SD Administration & Education Center
Sept. 1, 2011, Oct. 6, 2011, Nov. 3, 2011, Dec. 1,
2011, Jan. 5, 2012, Feb. 2, 2012, March 1, 2012,
April 5, 2012, May 3, 2012, June 7, 2012

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

August 19, 2011 Antigo

