



Wisconsin
Association
of
School
Business
Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 15, Number 5 - October 2011



Register at
www.wasbo.com/schoolpersonnel

Every school district in Wisconsin has been affected by recent legislative changes through Act 10 and Act 32. The school district employee-employer culture is being transformed. Many districts are well into implementation, while others still have contracts in place and will be making changes in the coming months. What are the long term impacts of this transformation and how will your immediate decisions impact the culture of your district for years to come?

WASBO and the Wisconsin Association of School Personnel Administrators (WASPA) are partnering to offer a comprehensive two-day conference on this topic. Labor law attorneys from several firms will be on hand to share their legal expertise as you break new ground. Eleven school districts from across the state will share what they have learned so far in the process.

The conference will start with Shana Lewis, Davis & Kuelthau, s.c. and Bob Butler, WASB, discussing the

The Changing Landscape of Public Education Employee and Employer Relations

potential implications for school district officials as a result of drafting, adopting and enforcing employee handbook provisions and personnel policies in a post Act 10/Act 32 environment.

Districts will have more flexibility in the use of electronic evaluations and evaluation software. In addition, we will learn about pay-for-performance issues and revised salary schedules and what some districts are doing in these areas. Bob Simandl, Simandl & Prentice, s.c. will look at the legal concerns being addressed by districts in dealing with merit pay.

The new Budget Adjustment Repair Bill had a sweeping impact on the nature of the relationship between school districts and their employees. In the absence of unions, how can districts get feedback from employees without crossing the line into bargaining which is prohibited by Act 10? In this session, Andy Phillips and Dan Borowski, Phillips & Borowski, s.c., will give advice on how to collaborate with employees without violating the law. School districts will share various approaches they are using to gather input from their employees for new initiatives, policies, benefits, working conditions, compensation, evaluations, handbooks, and more.

The rules for dealing with employees have changed significantly. Jon Anderson, Godfrey & Kahn, s.c. will explore how to communicate effectively with staff when some will be non-union, some will remain union represented and some have never been union represented.

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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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"Autumn arrives in early morning, but spring at the close of a winter day."

Elizabeth Bowen



President's Message

A Word From Your President

Collaborating for Success

By Wendy Brockert, Business Manager,
Lake Mills School District

We had our first WASBO Board Meeting for 2011-12 on August 17th. At the meeting the Board reviewed 14 open initiatives for WASBO to try to accomplish over the next several years. In reviewing the initiatives, the Board had their first opportunity to review your responses to the August survey of its District Professional, Student and Retired Members. Please see Jill Collins' article on page 39 about the survey.

The Board can not accomplish all of the initiatives in one year, nor accomplish them alone. At the meeting, the directors created a timeline for each item and decided who would be responsible for each task. The initiatives we are discussing are as follows and are not listed by priority:

- Payroll and/or Human Resources Certification
- Expanding the CSRM Certification Program
- Updating the Handbook for Evaluation & Improvement of Business Support Staff Functions, Glossary of School Finance Terms, What Does the Business Office Do Brochure and the Budget Cycle Book
- Statewide Negotiations Steering Committee
- EdVentures Program
- Completion of the updated Mentorship Program
- Electing Tom Wohlleber to the ASBO Board in 2012
- Updating our Policies and Procedures Handbooks
- Providing support to members who wish to receive ASBO's SFO
- Collaborative Purchasing Program
- State Accountability Design Team

You can find all of the items in a spreadsheet which includes the timeline at the WASBO website. This information is a link on the



Wendy Brockert
WASBO President

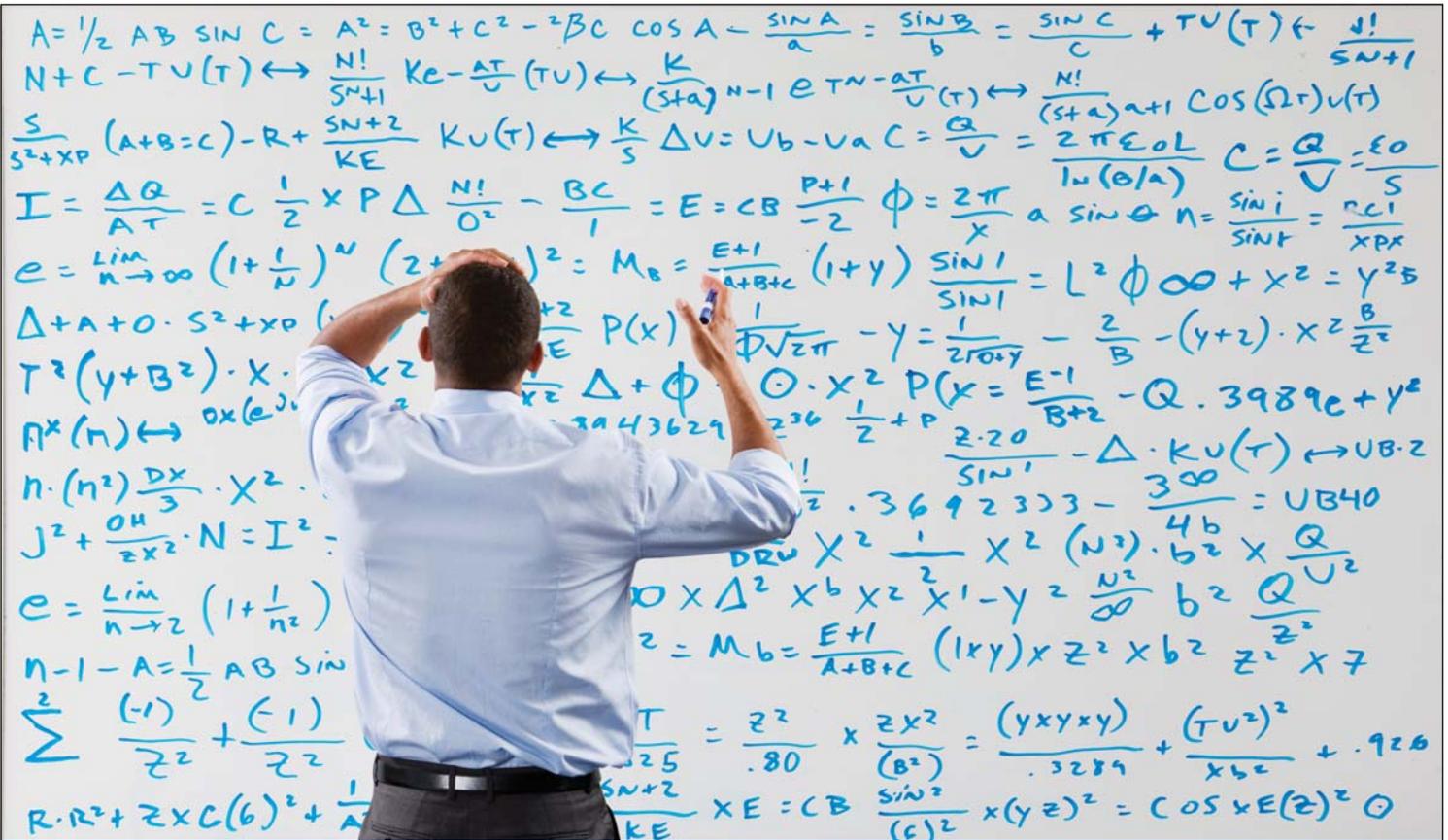
August Board Meeting Agenda.

The Board also meets in October, December, February, April and June. Each of these items will be discussed at least once at one of the Board meetings. As we began reviewing the survey results, we added some items to our list based on your feedback. The Board wants to provide programs and help in ways to make each of its members successful in their jobs. The Board will also be looking for feedback at its regional meetings on the initiatives. Thank you for your support and please do not hesitate to ask questions and provide input to any of our directors.

Wendy Brockert

wendy.brockert@lakemills.k12.wi.us





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Exec's Reflections

Demonstrating Commitment to Continuous Improvement

By Woody Wiedenhoef, Executive Director, WASBO

Woody Wiedenhoef

With the implementation of PI-34, WASBO developed a Mentorship Program. The

process for matching trained mentors with protégés. The committee feels that the enhancements will contribute to the professional development of both mentors and protégés.

program has a robust curriculum that provides training for mentors. Protégés (mentees) were matched with the trained mentors. This program has been in place since 2004 and the feedback received on its effectiveness has been very positive.

The Professional Improvement Committee will make their final program revisions by winter. The completed program will include a communication plan that will be rolled out in the spring of 2012. Training mentors on how to be good "coaches" will be part of the new curriculum. In addition, the new program will include a process for training mentors on PI-34 and providing for additional trained Professional Development Plan Reviewers. We will have a more effective mentor and protégé matching process, which will be accomplished at the regional level.

WASBO members have supported each other for over six decades. That support is what, in my opinion, makes WASBO the strongest of the professional organizations out there! In keeping with the tradition of the WASBO support network, our new members will be able to learn from their experienced colleagues and our experienced colleagues' continuous improvement will be challenged through the fresh ideas introduced by WASBO's newest members - a certain win-win situation.

In 2009, the WASBO Board decided that this program should be re-evaluated given WASBO's commitment to continuous improvement. The Professional Improvement Committee was assigned to this new WASBO Action Goal.

Stay tuned for the unveiling of WASBO's improved Mentorship Program. The Professional Improvement Committee has done a fabulous job of taking a great program and making it even better - well done!

Currently, the Professional Improvement Committee is finalizing their work. There are improvements in the curriculum that address both the changing compliance expectations, as well as the finalized PI-34 standards. The program will be more systemic for both protégés and mentors. There is a more effective

The committee feels that this will provide better matches according to size of district, location, and experience. There will be training for protégés on Professional Development Plans and writing effective goal statements.



SEEKING BOARD OF DIRECTOR CANDIDATES

The WASBO Nominating Committee is seeking candidates for two elected Director positions on the WASBO Board of Directors. The names of the candidates are required to be presented to the membership at the WASBO Business Meeting as part of the January State Education Convention. Any active WASBO member who desires to have their name placed on the ballot should contact a member of the Nominating Committee before December 31, 2011.

Sincerely,
WASBO Nominating Committee Co-Chairs
Mary Ellen Van Valin Tom Wohlleber
vanvalinm@milton.k12.wi.us tomw@mcpasd.k12.wi.us

Nominating Committee Members - Mike Garty (Retired) and Bob Avery, DPI (Board Liaison)

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WASBO Foundation Fall Conference & Scholarship Golf Outing October 5-7, 2011 - Elkhart Lake, Wisconsin



The WASBO Foundation Fall Conference brought 200 attendees together for two days of learning and networking while the Scholarship Golf Outing had 95 golfers and 13 volunteers contribute to the success of our student scholarship program. Both conference attendees and golfers enjoyed picture perfect weather in northeastern Wisconsin. The conference program focused on the changing times in Wisconsin public education. Keynote speaker Larry Johnson discussed how some organizations thrive in challenging times because they are able to adapt, change and think ahead. In his breakout session he shared the importance of "Absolute Honesty."

Lunch on Thursday provided an opportunity to recognize Erin Green's commitment and work on the ASBO International Board of Directors. Chuck Linderman, 2011 ASBO International President, attended the conference and presented Erin with a plaque on behalf of ASBO International. WASBO President Wendy Brockert honored Erin with a \$1,000 student scholarship that she may present to a student in the Greendale School District.

Friday we were joined by Patricia Neudecker, Superintendent at the Oconomowoc Area School District. Pat helped put into perspective the role public schools have had to grow into as
Continued on page 47





*John Forester
SAA Director of
Government Relations*

Legislative Update

What is the SAA? How Does it Work?

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



The School Administrators Alliance (SAA) is a statewide organization established to provide four associations of public school administrators with government relations services and a unified political voice. The SAA is an alliance of:

- Association of Wisconsin School Administrators (AWSA)
- Wisconsin Association of School Business Officials (WASBO)
- Wisconsin Association of School District Administrators (WASDA)
- Wisconsin Council of Administrators of Special Services (WCASS)

As the combined government relations arm of these four associations, the SAA represents the interests of Wisconsin school children and Wisconsin public schools before the State Legislature, the Office of the Governor and the state agencies. The SAA supports legislation that improves Wisconsin public schools and the quality of education for Wisconsin school children. The SAA actively participates with other groups in addressing issues of mutual concern.

The SAA was founded in 1991 when the Wisconsin Association of School District Administrators (WASDA) and the Association of Wisconsin School Administrators (AWSA) joined their advocacy efforts. With the addition of the Wisconsin Association of School Business Officials (WASBO) in 1992 and the Wisconsin Council of Administrators of Special Services (WCASS) in 1994,

the SAA has grown to represent more than 3,000 members – virtually every licensed school administrator in the state of Wisconsin. This diverse membership provides a broad perspective and a deep understanding of educational issues.

Each of the four SAA member associations appoints six primary and as many as six alternate members to represent the association on the SAA Legislative Committee, the primary policy-making body for the SAA. It is up to each association to decide how those members are appointed and the length of time they may serve as representatives of their association. The SAA chair, who serves a two-year term as presiding officer, is recommended by the steering committee and confirmed by each association's board of directors. The position of the chair rotates among the four associations. The executive directors of each association and the SAA director of government relations serve as ex officio members.

The Legislative Committee creates the SAA's formal legislative policy positions and monitors SAA government relations efforts and political activities. Central to this mission is the creation of the SAA's written biennial legislative agenda for ultimate approval by the association boards of directors.

The Executive Committee consists of the executive director of each association and the Director of Government Relations. The Executive Committee manages the day-to-day operations of the SAA, meets on a regular basis to allocate SAA resources, develops and executes political strategy and determines how to best keep the

membership informed of pressing political issues. It is the Executive Committee's responsibility to interpret and follow through on the direction set by the legislative committee.

The executive directors and Director of Government Relations have the authority to make decisions and take legislative positions independent of, but consistent with, the direction established by the SAA Legislative Committee.

In addition to the Legislative and Executive Committees, the SAA also receives valuable input from project teams. SAA Project Teams are organized on an as-needed basis to provide additional depth and clarity to a specific area of the SAA agenda. Teams consist of SAA members appointed from the four associations. Project teams dissolve once the project is completed. However, one project team, the School Finance Team, now operates on a permanent basis to provide ongoing expertise on school finance issues.

I hope you find this information useful in understanding the operation of the SAA. If you have any questions please contact SAA Director of Government Relations John Forester at (608) 242-1370 or john.forester@wsaa.org. Thanks for listening and, as always, thank you for your efforts on behalf of Wisconsin school children. For up-to-date reports on legislative activities, please visit the SAA's website at www.wsaa.org.

Why Your “Investment in Influence” Is So Important

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

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

What is SAA PAC?

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

What is SAADirect?

SAADirect is the SAA's conduit. A conduit is an organization that receives money from individuals, deposits it in a financial institution, and then transfers contributions to a candidate or campaign committee at the request of the original contributor. Conduits can be thought of as “political savings accounts” held

by individuals but administered by the association. **SAADirect** has the same purpose as that of **SAA PAC**.

How Do Conduit and PAC Contributions Differ?

Conduit contributions differ from political action committee (PAC) contributions in that they are considered by the Elections Board to be individual contributions and reported that way on candidates' campaign finance reports. Therefore, they are not subject to the same limitations as PAC contributions. However, the check to the candidate or committee is made out in the aggregate and the association gets “credit” along with the individual contributors in the transmittal letter that accompanies the check. A good example would be a \$500 check to candidate A from the association's conduit that is comprised of 10 individual contributions of \$50 each. Each contributor would be listed in the transmittal letter and candidates would report them as \$50 individual contributions on their finance reports.

A key element of the conduit is that each participant retains the absolute right to decide when and where their contributions are distributed.

The SAA, the administering body of our conduit, will follow political events and make suggestions as to where contributions would be most beneficial, but the ultimate decision rests solely with each conduit participant.

Why Does the SAA Need a PAC and a Conduit?

Conduits are such an important complement to PACs because many of the candidates that we wish to support for reelection reach their PAC limit very early in an election cycle. Therefore, the only way that we can hope to strengthen our relationship with these “PAC'd out” candidates is via individual

or conduit contributions. Unfortunately, the SAA receives no “credit” for individual contributions sent directly to the candidate.

How are SAA PAC and SAADirect Funds Distributed?

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

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

Should I Participate in SAA PAC or SAADirect?

PACs and conduits each have their distinct advantages, so you should participate in both programs if possible. Many restrictions that apply to PACs do not apply to conduits. The SAA intends

Continued on page 10



ASBO Bridges to the Future Scholarship Experience

By Mike Koltes, Grants/Accounting Specialist, De Forest Area School District

It was an honor to attend the 2011 Annual ASBO Meeting held in Seattle, Washington as a Bridges to the Future Scholarship recipient. MetLife sponsors the scholarship that is specifically geared for school business officials that have less than 5 years of experience in the field. With the scholarship, I was able to attend the meeting without a major financial burden on my district. The experience was like none other I have ever had. The networking opportunities and professional development were excellent. I would highly recommend this opportunity for new school business managers.

As a Bridges Scholarship recipient, I had an itinerary specifically for me. On the first day of the conference, I got to meet the other scholarship

winners and had a discussion session on issues that specifically concern new business managers. On the second day of the conference I was invited to sit in with an ASBO committee. This created networking opportunities with more experienced business managers and provided a chance to see ASBO work being accomplished at its most fundamental level. The remaining days were spent attending general sessions and discussion sessions. The content was very informative and timely given the current state of our economy.

There were a few other highlights of the trip that I would like to share as well. The first is John Medina, one of the keynote speakers. He is a brain researcher at Washington University and specializes in brain development and function. His overall message was that stress kills brain cells and affects learning. He challenged us to think about the way



that we educate our students, knowing that a stressful home life and/or school day often leads to decreased brain function. John challenged us to think about how we can create a safe and comfortable environment where students can learn.

My experience as a Bridges to the Future Scholarship recipient was excellent. Seattle was a great city to host the ASBO Annual Meeting. It's home to the Space Needle, Puget Sound, Pike's Market and the first ever Starbucks. Seattle's culture is very welcoming and diverse. Thanks to ASBO International, MetLife and WASBO for all your support.

Why Your "Investment in Influence" Is So Important

Continued from page 8

to use both programs to maximize SAA political influence. If you wish to "direct" where your contribution goes, and you don't mind being listed as a contributor on that candidate's campaign finance report, you may wish to support **SAADirect**. If you wish to remain more anonymous in your support of the candidates the SAA chooses to support, you may prefer **SAA PAC**.

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

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

Are Political Contributions Tax Deductible?

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

How Do I Contribute?

To open an **SAADirect** account, or to

"Every accomplishment starts with the decision to try."

- Author unknown





ASBO Annual Meeting & Expo

September 16-19, 2011
Seattle, Washington



WASBO joined with nine state affiliates to host a reception at the Experience Music Project. Tom Wohlleber, our 2012 candidate for the ASBO Board of Directors, greeted hundreds of guests. We thank **Simandl & Prentice, S.C.** and **National Insurance Services** for their sponsorship at this event.



Wisconsin has more SFO's than any other state or province.



WASBO at the Joint Affiliate Reception at Experience Music Project. We thank **PMA Financial Network** for providing our conference shirts.



Betty Zimdars presented on the success of using the LEAN Process in the Howard-Suamico School District.



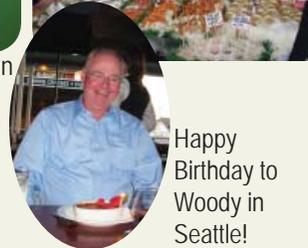
Better keep our day jobs.



Guess who?



Nearly 40 Wisconsin attendees enjoyed dinner together at The Crab Pot.



Happy Birthday to Woody in Seattle!



Yes, this was really taken in Seattle.



Pictorial representation of keynote John Medina's message on Transformational Change.



ASBO International Future Conference Sites



2012 Executive Leadership Forum
February 16-18, 2012
Disney's Contemporary Resort
Lake Buena Vista, Florida

2013 Annual Meeting & Expo
October 25-28, 2013
Hynes Convention Center
Boston, Massachusetts

2012 Annual Meeting & Expo
October 12-15, 2012
Phoenix Convention Center
Phoenix, Arizona

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WERC Issues Revised Union Election Rules

By William G. Bracken, Labor Relations Coordinator, Davis & Kuelthau, s.c.

William G. Bracken

The new collective bargaining law established new standards that unions must satisfy in representation elections to retain their status as the exclusive bargaining representative for employees in a bargaining unit.

On September 15, 2011 the Wisconsin Employment Relations Commission (WERC) published final administrative rules regarding union elections required under 2011 Wisconsin Acts 10 and 32 after receiving Governor Walker's approval. These rules do not apply to public safety or transit employees.

The chart below will help you determine when a union election will take place. If a union misses the filing deadline, it will be decertified. If a union is decertified, it will no longer be able to represent the employees for at least one year.

"Extension" Of Contract Narrowly Defined

While many employers thought that they "extended" their existing contracts before the Acts 10 and 32 became effective, the definition of "extension" adopted by the WERC does not include almost any employer that entered into an additional one or two year agreement.

An "extension" of a collective bargaining agreement is defined as including all of the following:

- (a) An overall agreement specifying wages, hours and conditions of employment.
- (b) Without a definite expiration date.
- (c) Subject to termination by either of the parties upon notification or advance notification to the other.

It is unlikely that many municipalities or school districts will meet this definition.

Rounds 4 and 5

For those public employers with existing contracts that were agreed upon before June 29, 2011 and are in effect on the filing deadline dates (September 30/ January 30), the timing of the union election will be:

	Applicable Bargaining Unit	Last Date of Union Petition	Date of Election
A.	Municipal Employees	January 30 in the same year following expiration of the contract	February/ March April
B.	School District Employees	September 30 in the same year following expiration of the contract	October/ November

By law, the elections for school districts must take place "on or before December 1" and for municipalities "on or before May 1." The WERC's timetable above ensures that the petition will be filed and the election conducted in plenty of time before the statutory deadline. The rules also provide that, upon the agreement of both parties, the WERC will conduct an election earlier.

For example, in a school district with a contract that was agreed upon before June 29, 2011, with an effective date from July 1, 2009 to June 30, 2012, the union would have to file a petition by September 30, 2012 to continue to represent the employees. The election would take place in October/November 2012.

There is the potential for delay in a contract that expired on December 31, 2010. In that instance, the union would have to wait until January 30, 2012 to file an election petition. However, in most cases, the petition for election must be filed soon after the contract

Election	Applicable Bargaining Unit	Last Date of Union Petition	Date of Election
Round 1	State and municipal general employees with "extension" agreements in place as of 7/1/11	September 22, 2011	October 2011
Round 2	School districts with no contract in effect as of 9/30/11, or, if contract is in effect, said contract was agreed upon after 6/28/11	September 30, 2011	October/ November 2011
Round 3	Municipal general employee units with no contract in effect as of 1/30/12, or, if a contract is in effect, said contract was agreed upon after 6/28/11	January 30, 2012	February/ March April 2012

Continued on page 16

FICA

Alternative Retirement Plan



FICA Alternative Retirement Plan Saves Employers Money!

Why pay FICA taxes for part-time, seasonal or temporary employees (PST) if you don't have to? Qualified employers can save the matching 6.2% of Social Security on PST wages with use of a FICA Alternative Retirement Plan. The plan is an authorized alternative to Social Security under Internal Revenue Code Section 3121.

A qualified employer can establish a FICA Alternative Retirement Plan that enables the employee to contribute a pre-tax 7.5% of gross wages to a FICA Alternative Retirement Plan. The employee's take home pay does not change in any noticeable way.

Plan Advantages for Employers

- Save the 6.2% of the matching Social Security portion of total PST payroll
- Easy implementation
- Limited on-going payroll administration
- Web site access for payroll data transfers
- Annual employer statements
- Plan support

Plan Advantages for Employees

With the FICA Alternative Retirement Plan, employees gain more control of when and how they can use their money. Unlike Social Security, with The FICA Alternative Retirement Plan, the employee contributions and interest are available upon:

- Termination of employment
- In the event of death or disability
- At normal retirement age

Contributions to The FICA Alternative Retirement Plan are deposited into a group annuity contract which provides guaranteed interest and guarantee of principal.

Potential Employer Savings

Annual PST Payroll	Employer Savings
\$ 50,000	\$ 3,100
\$ 100,000	\$ 6,200
\$ 250,000	\$ 15,500
\$ 750,000	\$ 46,500
\$ 1,000,000	\$ 62,000
\$ 1,500,000	\$ 93,000
\$ 5,000,000	\$ 310,000

Here is how 6.2% equals 7.5% pre-tax:

	Social Security	FICA Alternative
Gross monthly wage	\$1000.00	\$1000.00
Less 7.5% pre-tax contribution	-0-	\$(75.00)
Taxable Income	\$1000.00	\$925.00
Less 15% Fed inc. taxes	\$(150.00)	\$(138.75)
Less 5% State inc. taxes	\$(50.00)	\$(46.25)
Less 6.2% FICA withholding	\$(62.00)	-0-
Less 1.45% Medicare	\$(14.50)	\$(13.41)
Net paycheck to you:	\$723.50	\$726.59

* Above calculations are based upon general assumptions. Actual calculations for your circumstance can and will be different based upon personal financial circumstances.

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A Silver Lining in a Year of Major Change in Wisconsin

By Bruce Nelson, President, Precision Retirement Group, Inc.

For the past several months, Wisconsin's state government has been in the middle of some major legislative changes, which have received a great deal of attention and media coverage around the nation. Despite the political sparring, there have been some positive financial changes that now impact local parks and recreation departments.

In the last several months, several organizations have worked to establish new legislation that increases the Wisconsin Retirement System (WRS) eligibility. This legislation was initiated by Steve Thompson, Wisconsin Parks & Recreation Association (WPRA) executive director; Woody Wiedenhoeff, Wisconsin Association of School Business Officials (WASBO) executive director; John Forester, Wisconsin School Administrators Alliance (WSAA); and Bruce Nelson, president of Precision Retirement Group, Inc. (PRG).

The significance of this legislation has now increased WRS eligibility from 600 hours for part-time, seasonal and temporary employees (PST) to 1,200 hours. This change greatly benefits governmental entities, because the employer now has a greater threshold for WRS eligibility, thus saving the employer money. As most park and recreation members know, they usually have the highest concentration of PST employees, followed by school districts. This legislation became effective July 2011 for all **new hires**.

In addition to this new legislation, qualified employers can implement a federally authorized alternative plan for all non-WRS-eligible or PST employees. The significance of this plan is that it now allows governmental entities the option of opting out of Social Security for non-WRS employees and creating an alternative plan, which contributes

7.5 percent to a pre-tax account while saving the matching 6.2 percent for the governmental entity.

Here is how The Plan works:

Rather than reducing the employees' wages on an after-tax basis by the required 6.2 percent FICA tax on each paycheck, the employer establishes the FICA Alternative Retirement Plan account. A 7.5 percent pretax contribution is deducted from the PST employees' wages and is contributed to their personal account. Upon termination or retirement, the account is distributed to the employee.

"This plan has saved our school district and our department valuable savings over the last several years," replies Deb Stolz, director, Shorewood Recreation and Community Services.

For more information, contact Bruce Nelson, President, Precision Retirement Group, Inc. at (800) 369-9461 or bnelson@prginfo.net.

The Changing Landscape of Public Education Employee and Employer Relations

Continued from page 1

The second day of the conference will bring reports from the Educator Effectiveness (Jon Bales, District Administrator for the DeForest Area School District) and Accountability Design (Steve Kestell, Chairman of Assembly Education Committee) Teams. Learn who is involved and what expected outcomes may come from their work.

The next session will focus on how to effectively discipline the full range of school district employees since the passage of Act 10. It will address the procedures for a proper investigation, including the very real representational rights unions still have even under Act 10, including Weingarten rights. Strategies to anticipate the various legal challenges from employees in a post-

Act 10 world, including discrimination theories, retaliation claims, First Amendment rights, and rights under individual teacher contracts will also be covered. The program will look at dealing with both specific acts of misconduct, poor quality of performance and the potential impact of both these events on the non-renewal process for teachers.

The conference will conclude with a session that looks at bidding health insurance and fringe benefits. Today's economic climate is forcing school districts to think more strategically about the benefits they are offering. Changes to plan designs may no longer be enough and districts are looking for a process to help establish long-term goals for their benefit programs.

Topics to be covered as part of the RFP process include: defining the scope, understanding who the decision makers are, establishing timelines, communication strategies and processes along with considerations surrounding plan design, consumerism, health care reform and funding mechanisms.

This conference is a perfect opportunity for human resource directors, business managers, district administrators, board members and school district employees in supervisory roles to learn from experienced labor law attorneys and your school district colleagues as we change the landscape of public education employee and employer relations. Join us November 30 - December 1 at the Madison Radisson Hotel & Conference Center.

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WEA TSA Trust 403(b) help is not to be construed as legal advice. TSA program securities offered through WEA Investment Services, Inc., member FINRA.

WERC Issues Revised Union Election Rules

Continued from page 13
expires.

If the union does not file a timely petition, the union will be decertified.

It appears that some unions may decide to forego the filing of the election petition. In fact, the state teachers' union (WEAC), said it is up to each local union to decide whether it is in their interests to become certified. The difficulty in prevailing in an election and having to collect dues may outweigh the benefits of being able to bargain over only total base wages, capped by the consumer price index. Some unions have publicly stated that they believe they will be more successful obtaining higher wage increases and preserving existing benefits by relying on informal discussions with elected officials.

The rules specify the procedure that both parties must follow in the election process:

- (1) Union files election petition with the WERC including filing fees ranging from \$200 to \$2000 per election based on the number of employees.
- (2) Within ten days of the petition, the employer must provide an electronic list of employees, the last four digits of the employee's social security number and other information.
- (3) The WERC or its agent will conduct an election and certify the results. The voter eligibility date will always be one during the payroll period when the election petition is filed. Elections may be conducted three ways: on-site balloting, mail balloting and telephonic balloting.
- (4) The union must receive support from 51% of the total eligible voters in the bargaining unit to retain certification as the bargaining representative.
- (5) If the union is decertified, no union may represent the same employee group until after one year.

In an interesting twist, an election for a union trying to represent employees in a decertified unit after a one year moratorium, is governed by a far more attainable standard, whereby the election outcome is determined by a majority of those who actually vote in the election -- not the higher standard of 51% of all employees in the unit.

The rules regarding the certification of union elections is now available on the WERC's website: www.werc.wi.gov

For more information, please contact William Bracken at wbracken@dkattorneys.com or your Davis & Kuelthau attorney.



Scot Ecker
WASBO Director

Director's Corner

Edventures

By Scot Ecker, Director of Business Services, Muskego-Norway School District

Over the last two years, several WASBO members have experienced Edventures in

Learning at the 2010 & 2011 ASBO International conferences. Edventures (<http://www.edventuresinlearning.com>) specializes in aligning stakeholders with their corporation's strategic initiatives. Known as Edventure Maps, the process utilizes customized dialogue and full-size (3'x5') visual "maps" to support an organization's financial literacy, change management and understand organizational learning needs. This is accomplished by fostering dialogue and change in organizations through a unique, small-group interactive process. Education clients include Houston Independent School District, Tennessee Department of Education, Toledo School District and Battelle for Kids.

Some of our members recognized great potential for creating a similar tool for Wisconsin that could potentially be used jointly by WASBO, WASDA, WASB, WSPRA, DPI and other educational leadership groups. On June 15th, representatives from each of these groups joined together to experience the process first-hand. The initial reaction of those that participated was positive.

A cross-section of individuals have met several more times with the purpose of continuing to explore and investigate the viability of using the Edventures map product as a beneficial educational tool, particularly as it relates to school finance, in Wisconsin.

So far, our committee continues to

think that there could be value in having a tool like this for use in Wisconsin. We have also concluded that before we could move forward with developing a product that would be useful in Wisconsin, several key matters need to be resolved. Our focus over the next several meetings will be on resolving these items:

1. Identify the purpose(s) of our tool.
2. Identify learning targets for those that would use the tool.
3. Develop a process to customize the graphics and scenarios to match Wisconsin's unique challenges.
4. Identify a funding method to produce the maps and make them available to interested users.

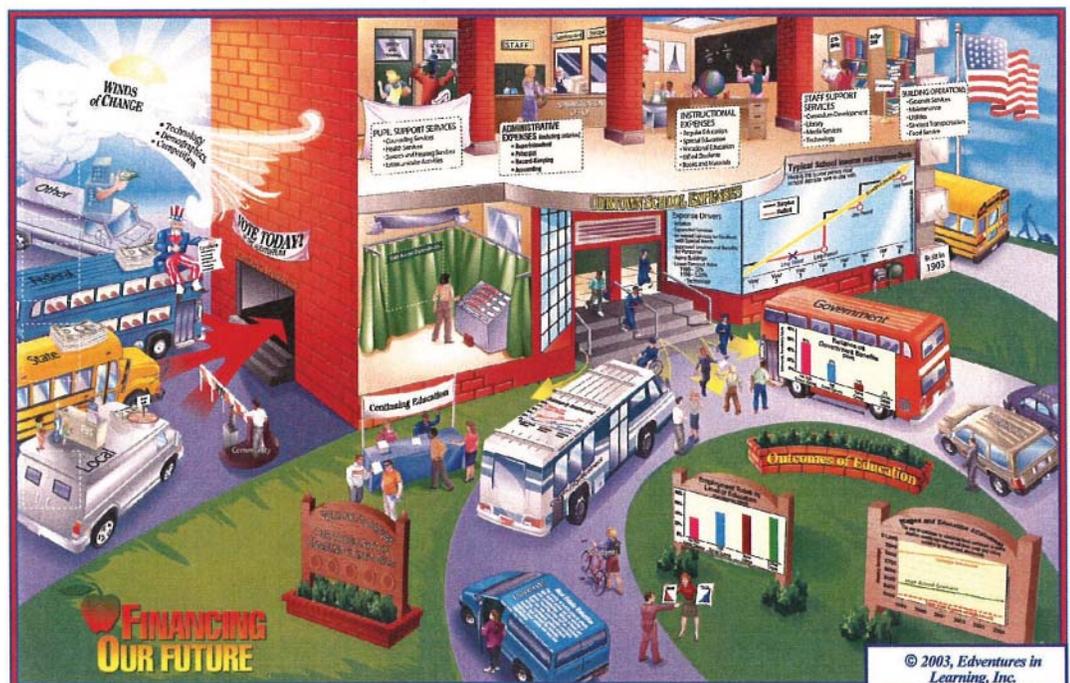
Here is an example of a sample map (from another state) as well as a few details about the process itself.

The process would work as follows:

1. Create cross functional groups of 6-10 participants with a trained facilitator.
2. Facilitators coach participants to enable self-learning as opposed to direct instruction.
3. Participants understand complex issues through graphic illustrations and interactive activities.
4. Open-ended questions allow participants to offer comments, opinions & insights.
5. The interactive activities and graphics provide specific and factual education and societal information.
6. Interactive learning activities and simulations help participants enhance understanding and recognition about different educational scenarios.

Stay tuned to WASBO and your regionals for further updates on this process.

Example Map (if we move forward this would be customized for Wisconsin)



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Don Mrdjenovich

Peeling an Onion

By Don Mrdjenovich, Retired WASBO Executive Director

It was several years ago that I first saw then Green Bay District Administrator, Tom Joynt's model of an onion which he used to prioritize his options in delivering educational services. Assuming a discrete amount of financial resources, the inner layer was comprised of all of those services and curriculum offerings required by state and federal law. The next layer contained the basic elements required to operate a school district, but not specified in the statutes. Subsequent layers became more discretionary but were deemed as essential. Each layer, radiating out from the required core, carried a price tag. The exercise ended when the available financial resources were depleted.

Most school districts have had to conduct similar exercises to get the current school year up and running. This year was probably the most challenging that school officials have ever faced. It may also prove to be the most revealing, in that it became apparent that the demand on severely limited financial resources didn't always match up well with the perceived needs of the school district. The allocation of resources required by statutes, rules and regulations were often seen as being out of place in the core when compared to some of the educational services which had to be placed in the outer layers of the onion skin.

Pulling collective bargaining agreements, which are legally binding, out of the core of the model, allowed most districts to reallocate scarce financial resources to other areas of

school district operations. However, numerous other statutes, rules and regulations, when viewed in the light of stringent budgetary requirements, continue to get first draw on the district's treasury, even though they do not stack up as well as other district needs and priorities. It begs the attention of the state and federal legislatures. Simply put, "If you have found it necessary to significantly reduce the financial resources available to our school districts, then please remove a proportional amount of the requirements you have placed on us. We would like more freedom to allocate our scarce financial resources to best meet the needs of our students." We hear so much about reforming public education, perhaps that would be a good place to start. Our legislators need to have this brought to their attention now.

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State and Local Government Ratings are Not Directly Constrained by that of the U.S. Sovereign

Reprinted with permission from Standard & Poor's Global Credit Portal® Ratings Direct®, August 8, 2011

Despite Standard & Poor's Ratings Services' downgrade of the U.S. sovereign debt rating to AA+/Negative/A-1+, we may still assign a 'AAA' rating to some state and local governments.

We do not directly link our ratings on U.S. state and local governments to that of the U.S. sovereign debt rating for reasons outlined in our criteria. However, we recognize generally that U.S. state and local governments' economic performance is frequently similar to the nation and they share responsibility for some spending items with the federal government. Yet individual state and local governments' funding interdependencies with the federal government vary considerably. A minority of state and local obligors rated by Standard & Poor's have achieved the highest long-term rating of 'AAA'. We expect that many of these obligors, particularly those with relatively low levels of funding interdependencies with the federal government or those that, in our view, are likely to manage declines in federal funding without weakening their credit profile, should be able to retain ratings above the U.S. sovereign rating if we would otherwise assign ratings above the U.S. sovereign rating based on our view of other rating factors. However, in light of the potential for common economic and credit environments between the U.S. and state and local governments, we expect that in most instances in which state and local governments have ratings above that of the U.S., the differential will be limited to one notch.

Overview

- It is possible for state and local governments to have higher ratings than the U.S. sovereign

rating, most likely by no more than one notch.

- We derive our credit ratings by evaluating a borrower's individual credit factors based on our credit rating criteria.
- A factor in rating a state or local government above the U.S. is whether it is insulated from negative federal intervention in fiscal management.

Our credit rating criteria allows for a higher rating on a state or local government than on the sovereign if, in our view, the state or local government demonstrates the following characteristics:

- The ability to maintain stronger credit characteristics than the sovereign in a stress scenario,
- An institutional framework that is predictable and that is likely to limit the risk of negative sovereign intervention, and
- The projected ability to mitigate negative sovereign intervention by a high degree of financial flexibility and independent treasury management.

Pursuant to our criteria, the fiscal autonomy, political independence, and generally strong credit cultures of U.S. state and local governments can support ratings above that of the U.S. sovereign.

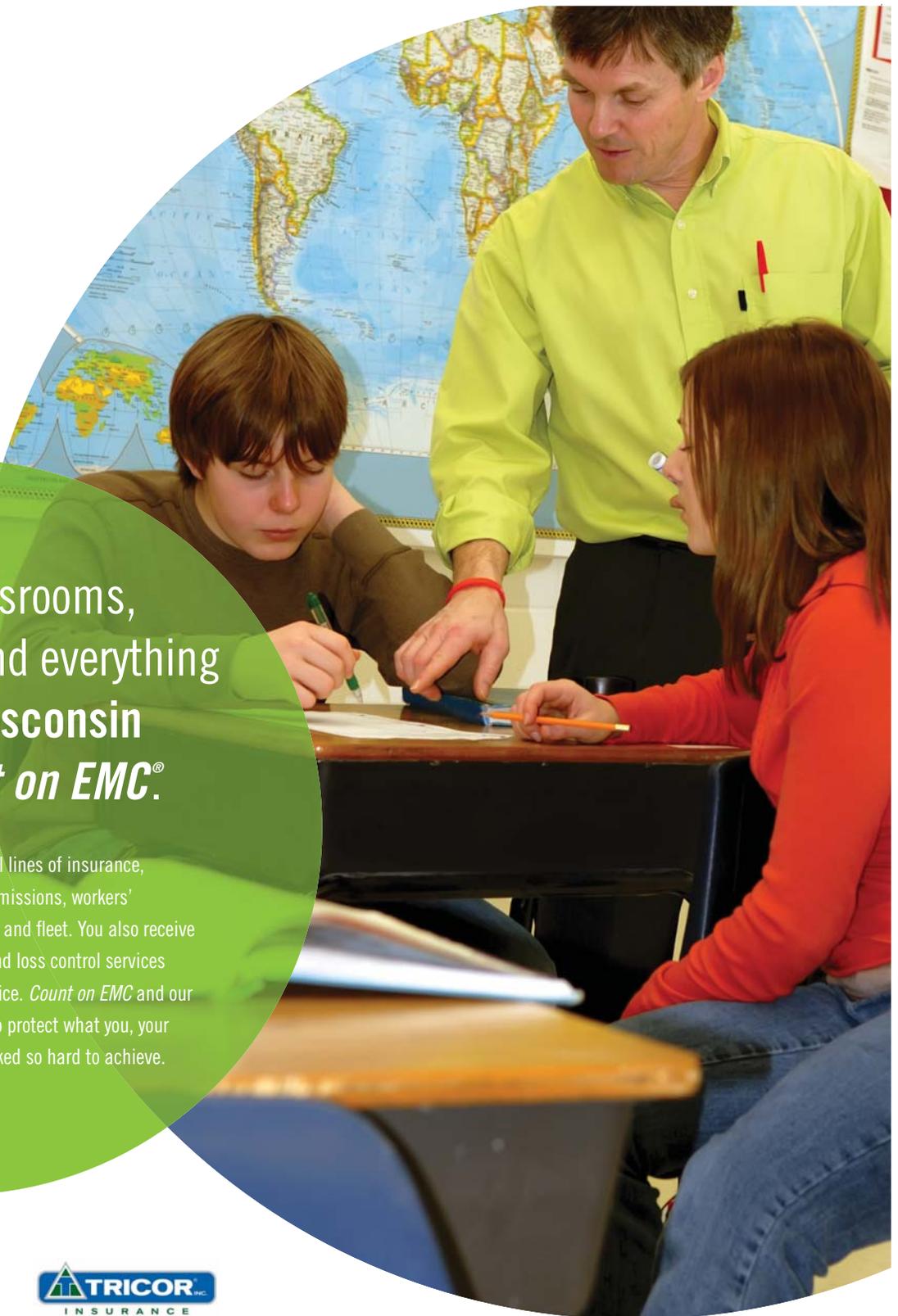
Ability to Maintain Stronger Credit Characteristics than the Sovereign in a Stress Scenario

A central feature of our U.S. public finance criteria is the independence of individual state and local governments from the federal government. In part, this is based on our view of the Tenth Amendment to the U.S.

Constitution, which provides that rights not expressly given to the federal government remain with the states. Although our ratings reflect the role of the federal government in state and local finances and economies, we believe that this decentralized governmental structure in the U.S. suggests that we also analyze state and local government credit quality independent of the federal impact.

When viewing credits on a standalone basis, we expect that some state and local governments in the U.S. are capable of maintaining relatively consistent credit quality even through a period of stress at the sovereign level. Compared with many of their peers on a global basis, U.S. state and local governments function with a high level of revenue independence. Specifically, most state revenues (including almost all discretionary revenue) are derived within the states themselves, i.e., they do not come from the federal government. Revenues are even less linked to the federal government at the local level (although some state-shared revenues originate with the federal government). In addition, historically we have found that state and local governments generally have distinct credit cultures backed by well-established frameworks that provide for enforcement of important public finance laws. We view this to be important in the U.S. public finance setting because we predominantly assign issue ratings as opposed to issuer credit ratings. Debt issues in the U.S. municipal market tend to be backed by dedicated taxes, revenues, or fees and include specific protections that are legally enforceable in the U.S. context.

Given the depth and magnitude of
Continued on page 23



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the U.S. economy, state and local governments operate within a wide range of disparate economic bases throughout the country. We have found that some state or local economies regularly perform differently from that of the U.S. as a whole. Our criteria describe how we analyze the attributes of state and local economies and incorporate our analysis into our ratings. Beyond analyzing economies in isolation, however, we have observed that some state or local governments have more favorable balances between resources and responsibilities (i.e., they may be less leveraged) than the federal government. We believe that certain state and local governments have historically shown a greater commitment to fiscal discipline or a more resilient local economy, which may be reflected in ratings higher than that of the U.S. government. In a minority of cases (3.9% of U.S. public finance ratings), state and local governments currently demonstrate what we consider to be particularly strong credit characteristics consistent with our highest rating and, thus, are rated 'AAA'. Because we have assigned these ratings based on our view of individual rating factors pursuant to our criteria, we believe these ratings are appropriate notwithstanding the downgrade of the U.S. sovereign debt rating.

A Predictable Institution Framework, Financial Flexibility, and Independent Treasury Management

In our view, the institutional framework for U.S. public finance is among the most stable and predictable in the world. We believe this is primarily a result of the constitutional separation of power between the central and sub-national levels of government that is intended to restrain intervention in state and local government administration.

U.S. state and local governments

enjoy considerable financial autonomy from federal intervention. State—and in many cases local - governments have authority to establish and maintain laws pertaining to tax rates and collections, as well as the ability to add new taxes and other forms of revenue generation. In practice, receipt of federal funding typically requires a state or local government to satisfy various mandates, such as providing certain levels of service. And yet, participation in some of the programs for which federal funding is provided is voluntary. This includes Medicaid, the largest federal-state jointly financed social service.

In addition, U.S. state and local governments' treasury management is independent from the U.S. federal government. Although we consider stress scenarios in which federal disbursements could be delayed or reduced, thereby inflicting cash flow disruptions, state and local government obligors with 'AAA' ratings have, in our view, strong access to liquidity, likely allowing them to bridge such episodes.

Criteria Support Possibility Of 'AAA' State And Local Government Ratings

Participation in the U.S. economy and legal system provides a platform in which state and local governmental obligors can generally manage their finances and debt portfolios with considerable independence and without material risk of negative sovereign intervention. In light of this independence, our ratings largely reflect our view of local economic characteristics or state-level laws that may impede or strengthen state and local credit quality to varying degrees. Credit implications from these factors are detailed in our relevant criteria documents.

Related Criteria And Research

- Special Report: U.S. Sovereign

Downgrade's Global Effects, Aug. 8, 2011

- Where U.S. Public Finance Ratings Could Head In The Wake Of The Federal Fiscal Crisis, July 21, 2011
- U.S. State Ratings And Outlooks: Current List
- USPF Criteria: State Ratings Methodology, Jan. 3, 2011
- Methodology: Rating A Regional Or Local Government Higher Than Its Sovereign, Sept. 9, 2009
- USPF Criteria: GO Debt, Oct. 12, 2006

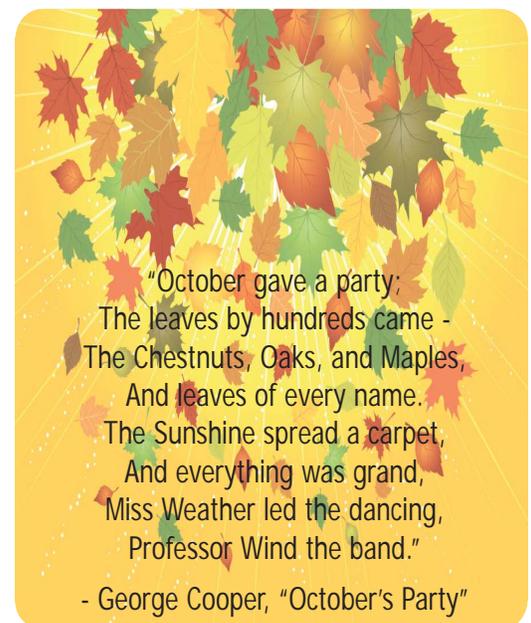
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SFO



Bret Linton

Six Ways to Reduce Pension Costs and Combat Volatility

By Bret Linton, Milliman

Reprinted with permission from *Insight, Milliman*, September 26, 2011

In the best of times, sponsors of defined benefit (DB) plans enjoy what is essentially a free ride in terms of funding their pension plans. That was the case from 1982 through 1999 when strong stock market returns made it virtually cost-free to provide retirement benefits. With the volatility of the economy in the last decade, pension plans again require funding and have experienced similar volatility. DB plan sponsors are asking what their options are to stabilize pension costs and expenses.

Demise of DB Plans is Exaggerated

As a result, many organizations have considered alternatives to providing retirement benefits through a defined benefit pension plan. It is believed that many plan sponsors have frozen their DB plans and switched to defined contribution (DC) plans as their primary retirement benefits. Significantly, this trend is not as widespread as popularly believed. Among Fortune 1000 companies, there were 417 active DB plans and 190 frozen ones in 2009. In 2010, those numbers changed only slightly—to 378 active plans and 208 frozen ones. Most of the decrease in defined benefit pension plans has come from small plan sponsors whose economies of scale are not as significant (e.g., small doctor offices or sole proprietor plans).

In addition, the trend toward freezing DB plans is much less prevalent in the public sector than it is in private industry. In the private sector, 22% of participants are in frozen plans, compared with only 9% in government employer programs. And even within the private sector,

only 11% of union workers participate in frozen plans, compared with 28% of non-union workers.

Alternatives to Pension Freeze

Significantly, the DB market has evolved in the past few years to create new DB strategies and modify existing ones in ways that make them compelling alternatives for many organizations. For example, Bureau of Labor Statistics data shows that after freezing existing DB plans, 11% of private companies turn around and create a new DB plan. This isn't as mysterious as it sounds. In most cases, these are new cash balance plans, which grew in number from just over 1,000 nationwide in 2001, to nearly 5,000 by 2007. In the remainder of this paper, we will focus on the rationale for cash balance plans—as well as five other strategies that employers are considering if they currently offer DB plans. The six strategies are:

1. Liability-driven investing
2. Funding relief
3. Modifications to current DB plan
4. DC conversion
5. Cash balance plan
6. Cash balance plan plus DC

We will examine each approach in terms of out-of-pocket costs to the plan sponsor and the expected volatility of those costs. At the end of this survey, we'll offer some general guidelines on how employers can tackle the decision of which strategy or strategies to incorporate in their programs.

Liability-driven Investing

Liability-driven investing (LDI) represents a shift of strategic focus for sponsors of DB plans who had previously depended on the equity portions of their portfolios to drive the

funding of their pension plans. LDI strategies do not focus on total asset return. Instead, they seek to generate a return at or above the market-based growth of the liabilities, thus controlling the volatility of pension expense.

Although LDI represents a major change on the policy level, it is actually relatively simple to implement. At opportune times, the plan sponsor changes the asset allocation to reduce exposure to the volatile assets in the portfolio, investing instead in assets that act like the liabilities. Typically these are corporate bonds with a duration that matches that of the index used to value the liabilities.

Switching to LDI has minimal impact on participants, and requires the same amount of the plan sponsor's time as any change of managers would entail. LDI will significantly reduce the volatility of funding the plan. But the cost may be high, assuming there is an opportunity cost from foregone equity returns. (In down markets, LDI represents a cost savings as well.)

Funding Relief

On June 24, 2010, Congress passed the Preservation of Access to Care for Medicare Beneficiaries and Pension Relief Act. This legislation was in response to the financial crisis, designed to give plan sponsors some extra breathing room to fund their pension obligations. Plans that choose to adopt this strategy are allowed extra time to amortize big losses they were exposed to during any two plan years between 2008 and 2011. Relief is still available for the 2011 plan year.

Currently, the Pension Protection Act requires that any gain or loss be

Continued on page 26

amortized over seven years. Under the provisions of the Pension Relief Act passed last year, plans have two options to extend the amortization period. They can choose a nine-year schedule, where the first two years are interest-only; both interest and principle must be accounted for in Years 3 through 9. The second option allows a 15-year amortization period without triggering the benefit restrictions that normally apply.

Plans that employ either of these funding relief strategies would be subject to a matching contributions requirement for any employee's compensation in excess of \$1 million; the same rule applies to any extraordinary dividends or redemptions. The benefit of these strategies is the potential to reduce costs. By spreading the plan's cash requirements over more years, there is potentially more time for market returns to make up for recently experienced losses. However, in terms of volatility, the pension plan's position would probably remain the same.

Modifications to Current DB Plan

Every employer has its own particular philosophy about benefits. The traditional defined benefit plan provides a great incentive to attract and retain long-term employees. In today's environment, many employers choose to retain the traditional DB plan, but modify the plan design to control costs. One option is to reduce the existing benefit formula. For example, instead of providing 1.5% of final average pay, the sponsor could reduce its obligation to 1%—applied either to all employees or to future hires only. Alternatively, the sponsor could adopt a different, less costly funding formula such as a career average benefit formula or similar types of formulas.

Other options include the reduction of

ancillary benefits, such as disability benefits or early retirement subsidies. Such reductions are clearly takeaways relative to the status quo. Nonetheless they would still allow the plan sponsor to provide a larger benefit to employees when they retire and a richer benefit than a DC plan—at a lower cost than a typical DC plan.

DC Conversion

Freezing the DB plan and replacing it with a DC plan is the first option that many employers think about when looking to reduce pension expense and volatility. Of course, the cost of the DC plan will vary depending on plan design. The employer can elect to contribute a flat percentage of pay—with or without a match for participant contributions. Or the employer contribution can be tiered, based on age, service, or points, which is a combination of age and service.

In a DC conversion, the volatility of contributions will clearly decrease, as all of the market risk is transferred to participants. The employer experiences a small amount of volatility related to fluctuations in payroll and the number and amount of employee contributions that need to be matched each year.

However, the cost savings may be ephemeral, at least over the short term. Even a frozen DB plan must be funded in order to pay for benefits for employees who are still owed a pension at retirement.

While a DC plan can reduce the cost to the plan sponsor, the cost savings comes at the expense of the employees. A much reduced retirement benefit is usually provided when plan sponsors switch to a DC plan. A point also worth noting is that providing a similar level of retirement benefit through a DC plan actually costs the plan sponsor more money, which is mostly due to the loss of economies of scale and the loss of

positive investment experience.

Cash balance plans

Cash balance plans are often referred to as "hybrid plans" because they provide participants with the feel of a DC plan even though they are, in fact, DB plans. The plan sponsor remains responsible for investing assets and paying a benefit upon retirement. But the formula is based on a set contribution rate for current employees, plus a fixed rate of return, which is always positive—no matter what the market returns.

The cash balance plan can be a good deal for employees, who get a guaranteed rate of return without having to shoulder as much market risk. Their statements read more like a savings passbook than an investment account, which means the benefit is easy to understand and appreciate. Cash balance plans also benefit employers, who can choose exactly how much risk they want to take. They can decide to employ an LDI strategy that matches the promised benefit with an investment of similar duration—typically corporate bonds. Or they can choose a more aggressive investment strategy that seeks returns in excess of the rate of return promised to employees.

To take an example, in a DC plan all of a promised 6% annual contribution would come from the organization's operating account. With a cash balance plan, sponsors could enjoy a discount of 1% or more derived from the plan's investment program exceeding the guaranteed rate of return. Most plan sponsors promise a conservative rate of return in cash balance plans. However, volatility is less than in a DC plan, because no investment returns are guaranteed. Figure 1 illustrates the cost comparison of a defined contribution plan with a cash balance pension plan.

Continued on page 27

Cash Balance Plan, Cost Comparison

The following chart compares the cost of a defined contribution plan to a similar cash balance benefit for an employee age 25.

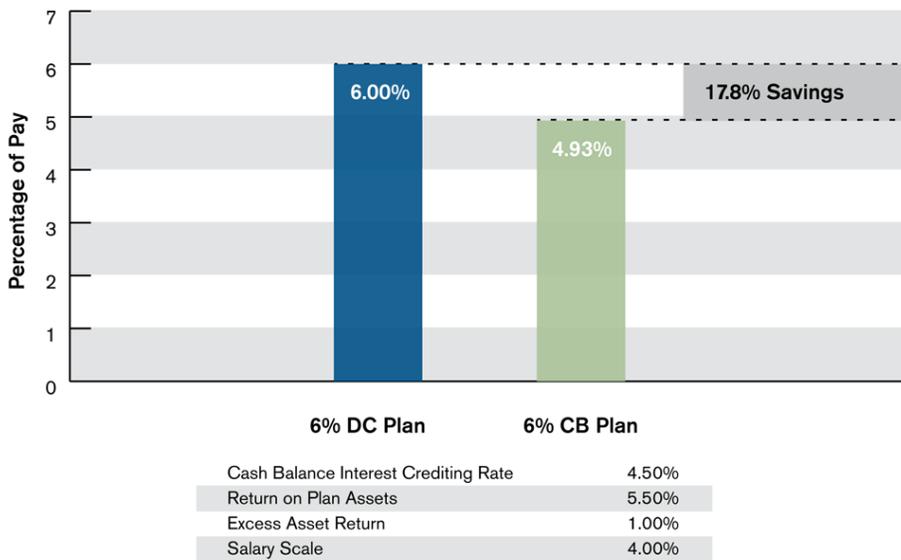


Figure 1

Given the assumptions listed, providing a 6% cash balance plan would cost the plan sponsor less than 5% of payroll. The 6% defined contribution plan would cost the plan sponsor 6% of payroll. This is a 17.8% savings to the plan sponsor over the working career of an employee hired at age 25.

Cash Balance Plan Plus DC

The last option explored here is a cash balance plan supplemented by a DC plan. We can look at this as an alternative for an employer that was thinking about instituting a DC plan with an 8% annual contribution. Instead, the organization could contribute 4% of salary to a cash balance plan, plus 4% to a defined contribution plan. The advantage to employees is significant enhancement of retirement security through diversification.

As with the pure cash balance approach, the employee still receives a guaranteed return from the DB component of the program. This corresponds to the fixed income allocation in a diversified approach. The amount committed to the DC plan can then be invested more

aggressively, including a significant percentage of equities with their higher expected return.

In many respects, this option represents the best of both worlds. Employees get a well-structured investment program that is easily understood, provides employees with the opportunity to have control over their investments, and is portable. Similarly, employers have the opportunity to satisfy employees' interest in earning high returns, yet still have the ability to pay for part of the benefit out of investment returns. Not surprisingly, the cost and volatility of this option lands right between those of the pure DC and cash balance options.

Strategies, Volatility, and Cost

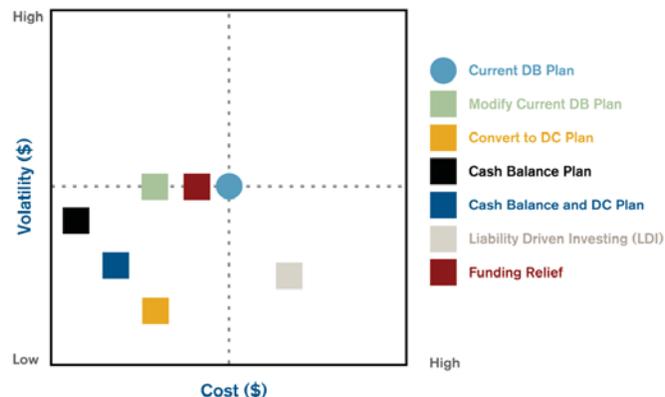


Figure 2

Choosing the Right Option

Two of the main concerns for plan sponsors are the potential volatility and cost of their defined benefit pension plans. Figure 2 illustrates how each of the six options detailed above may affect the volatility and cost of the pension plan. The actual extent of the cost savings or reduction in volatility will depend on the level of the changes made and the specifics of each plan. Which of these options is right for a particular organization's retirement program? The decision-making process is best begun by systematically posing a series of questions. It also helps to have appropriate tools to collect the data—and expert guidance in evaluating it. Typical questions include:

- What are the key objectives for each group of employees covered by the retirement programs?
- How do the objectives for the benefits policy align with overall corporate objectives?
- What is the desired level of funding?
- What level of volatility is acceptable?
- How much flexibility is needed to make plan changes?
- Is a change in employee behavior sought as a result of plan changes? If so, how are responses to be measured?
- How will the plan work under different economic conditions,

in terms of both investment performance and employee response?

Decision tools

Of course, the strategic questions about plan objectives can be answered by a policy review conducted by members of the

Continued on page 28

Six Ways to Reduce Pension Costs and Combat Volatility

Continued from page 27

retirement committee. The remaining topics require some degree of data collection and analysis. These don't necessarily have to be complex. In many cases, questionnaires and surveys are helpful in quickly spotlighting key priorities.

Further insight can be gained by graphing survey results in a scatter diagram, similar to the one reproduced above. Instead of labeling the axes "cost" and "volatility," we could use "employee reaction" and "competitiveness," to get a better understanding of how effective each strategy would be in achieving growth and retention goals.

Another effective tool shows each participant on a plot with age as one axis and the DC contribution percentage needed to replace the existing DB benefit on the other. Other tools generate information such as the demographic impact of the plan changes, the effectiveness of different options in terms of employees' income replacement ratios,¹ cost projections, and Monte Carlo simulations of the probable outcomes of asset liability management (ALM) strategies.

approach. Logically, a more thorough vetting process makes it more likely that the new solution will stand up over the long term, so the retirement committee will not find itself readdressing the same issues—and investing in big changes—every three to four years.

Controlling pension expense and volatility is a complex problem, so it's important to identify a program that will adapt to market conditions and remain aligned with corporate objectives.

When the economy eventually turns around, the new program needs to be attractive to employees and competitive as a retention tool for key personnel. That way, whether it's the best of times or the worst of times, the organization can retain its focus on its core business.

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Conference offered by
WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION
WCASS

To Freeze or Not to Freeze

There's no doubt that the past decade has been a difficult one for sponsors of traditional DB plans. Regardless of the market environment, it is simply prudent for plan sponsors to review the alternatives to see if a new approach would better serve the retirement needs of beneficiaries. However, prudent decision-making requires a thorough evaluation of trade-offs. Recent trends to terminate or freeze DB plans and replace them with a "3% DC solution" appear to be motivated solely by cost concerns.

Examining a full range of options based on objective criteria is a more thoughtful

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December 1, 2011**
Madison Radisson Hotel
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Register at
www.wasbo.com/schoolpersonnel

Who Should Attend?

Human Resource Directors,
District Administrators,
School Business Managers,
School Board Members, and
School District Employees in Supervisory Role

PROFESSIONAL DEVELOPMENT TO USE TODAY AND PLAN FOR TOMORROW

Wednesday, November 30

- 8:30-10:00 Implementing Employee Handbooks and Personnel Policies in a Post Act 10/Act 32 Environment
- 10:15-12:30 Merit Pay, Teacher Evaluation & Assessments
- 1:15-2:45 The Changing Labor Landscape - The Rules Have Changed, So What Now?
- 3:00-4:00 Post Act 10 Communication with Employees - Being Effective within the Bounds of the Law
- 4:00-4:30 Life Goes On - Inside the Capitol After Act 10
- 4:30-5:30 Networking Reception

Featured Speakers

- Accountability Design Team Reps
- Jon Anderson, Godfrey & Kahn, s.c.
- Dan Borowski & Andrew Phillips, Phillips, Borowski, s.c.
- Mardi Burns & Al Jaeger, Associated Financial Group
- Robert Butler, WASB
- John Forester, SAA
- Jim Korom, von Briesen & Roper, s.c.
- Shana R. Lewis, Davis & Kuelthau, s.c.
- Bob Simandl, Simandl & Prentice, s.c.

Featured School Districts

- Cedarburg
- Elkhorn
- Hartford Jt #1
- Hartland/Lakeside
- Howard-Suamico
- La Crosse
- Middleton-Cross Plains
- Pewaukee
- Stevens Point
- Verona
- West Allis-West Milwaukee

Thursday, December 1

- 8:00-10:30 Reports from the Educator Effectiveness Accountability Design Teams
- 10:45-11:45 Employee Discipline in the Post Act 10 Era: Upgrading the Quality of Your Workforce
- 12:45-2:45 Navigating Through the Request for Bids with Health Insurance and Fringe Benefits
- 2:45-3:00 Conference Wrap Up

Register or learn more at
www.WASBO.com/schoolpersonnel

Discounts available for multiple registrants from a district.

WASBO/WASPA Member Full Conference \$295
WASBO/WASPA Member One Day \$165

Non Member Full Conference \$440
Non Member One Day \$245

Non Member Registrations include a free introductory year of WASBO Membership if you have never been a WASBO Member! (Annual Membership Rate is \$190)

Sponsorship Opportunities Available



One graduate credit will be offered through Viterbo University for attendance at both days. \$220 Register at conference.

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Living Trusts101

Reprinted with permission from Grobe & Associates, LLP Newsletter, October 12, 2011

A trust, like a corporation, is an entity that exists only on paper but is legally capable of owning property. However, a live person called the trustee must be in charge of the property. Further, you can actually be the trustee of your own living trust, keeping full control over all property legally owned by the trust.

Note: Property held in trust is actually "owned" by the trustees of the trust, subject to the rights of the beneficiaries. The trust itself does not actually own anything.

There are many kinds of trusts. A living trust (also called an inter vivos trust) is simply a trust you create while you're alive, rather than one that is created upon your death under the terms of your will.

All living trusts are designed to avoid probate. Some also help you save on estate taxes, while others let you set up long-term property management.

Do I Need a Living Trust?

Property you transfer into a living trust before your death does not go through probate. The successor trustee, the person you appointed to handle the trust after your death, simply transfers ownership to the beneficiaries you named in the trust.

In many cases, the whole process takes only a few weeks and there are no attorney or court fees to pay. When the property has all been transferred to the beneficiaries, the living trust ceases to exist.

Is it Expensive to Create a Living Trust?

The cost of creating a living trust depends on what you want to achieve. The more complicated a living trust is, the more expensive it will be. Also important to note is that while the fees

associated with creating a living trust are paid up front a living trust actually saves you money and time by avoiding probate court.

Is a Trust Document Ever Made Public, Like a Will?

A will becomes a matter of public record when it is submitted to a probate court, as do all the other documents associated with probate - inventories of the deceased person's assets and debts, for example. The terms of a living trust, however, need not be made public.

Does a Trust Protect Property from Creditors?

Holding assets in a revocable trust does not shelter those assets from creditors. A creditor who wins a lawsuit against you can go after the trust property just as if you still owned it in your own name.

After your death, however, property in a living trust can be quickly and quietly distributed to the beneficiaries (unlike property that must go through probate). That complicates matters for creditors; by the time they find out about your death, your property may already be dispersed, and the creditors have no way of knowing exactly what you owned (except for real estate, which is always a matter of public record). It may not be worth the creditor's time and effort to try to track down the property and demand that the new owners use it to pay your debts.

On the other hand, probate can offer a kind of protection from creditors. During probate, known creditors must be notified of the death and given a chance to file claims. If they miss the deadline to file, they are out of luck forever.

Do I Need a Trust if I'm Young and Healthy?

Probably not. At this stage in your life, your main estate planning goals are probably making sure that in the unlikely event of your premature death, your property is distributed how you want it to be and, if you have young children, that they are cared for. You don't need a trust to accomplish those ends; writing a will, and perhaps buying some life insurance is sufficient.

Can a Living Trust Save Taxes?

A simple probate-avoidance living trust has no effect on either income or estate taxes. More complicated living trusts, however, can greatly reduce your federal estate tax bill if you expect your estate to owe estate tax at your death.

If you're wondering whether you need a living trust give us a call and we'll help you figure out the answer.

For more information contact Grobe & Associates, LLP, 608.662.8200 or info@grobecpa.com

"When witches go riding,
and black cats are seen,
the moon laughs and whispers,
'tis near Halloween."

- Author Unknown





Wisconsin
Association of
School
Business
Officials

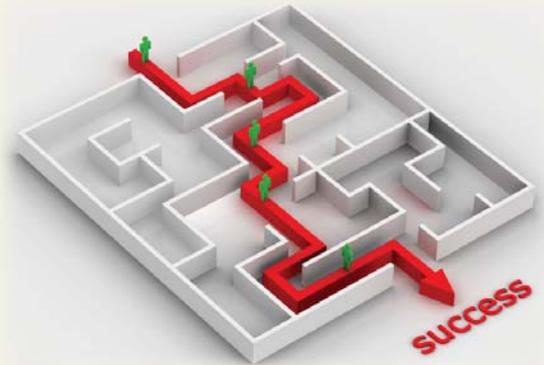


Register at www.WASBO.com/winter

School Business Management Winter at a Glance

A Year of Success Program

November 29, 2011
Radisson Hotel - Madison, WI



Who Should Attend?

Business Managers, Bookkeepers and District Administrators will find this valuable. You will benefit if you are responsible for school district finances and reporting. Teams are encouraged to attend.

The Year of Success Program

The Year of Success Program is an ideal introduction to the business office for new business managers, bookkeepers and district administrators. It will "bring it all together" and give you the support you need when you are new to school business management functions. You may find this day of training even more beneficial if you attend with your district administrator or bookkeeper. Even if you are not new to school business management, you may find these courses helpful in preparation for the months ahead.

The Winter at a Glance Seminar will focus on business office responsibilities most critical for the winter months. Make sure you are on track to meet reporting deadlines, complete reports accurately and build your budget for 2012-13.

Complete information at www.WASBO.com/winter

Member - \$165
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For more information on **Sponsorship Opportunities** contact the WASBO office at 608.249.8588 or go to www.WASBO.com/winter

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November 29		
7:45-8:25	Registration - Continental Breakfast	
8:25	Welcome	
8:30-9:30	Winter at a Glance - SFS Website Review of important DPI School Finance Team website links, upcoming reporting deadlines, and critical activities for the winter.	Debra Brown, Assistant Director, DPI School Financial Services
9:40-10:40	Membership Review of membership counting, projections and audits.	Robert Avery, School Finance Consultant DPI School Financial Services
10:50-11:50	Revenue Limits & Equalization Aid Review As you work on building your next budget, a review of these important calculations and worksheets is a must.	Erin Fath, School Finance Consultant, DPI School Financial Services
11:50-12:30	Lunch (included)	
12:30-1:30	Budget Building If you have not already started, now is the time to begin developing next year's budget!	Susan Schnorr, Director of Business Services, Fond du Lac School District
1:40-2:40	Categorical Aids Common School Fund, Transportation, Bilingual/Bicultural, SAGE... The state provides support to schools for many specific programs and services.	DPI School Financial Services Team
2:50-3:50	Fees What can you charge fees for and what is prohibited? Understand the limitations on your fee schedule before you look to change it.	Bradley Adams, School Finance Consultant, DPI School Financial Services

PROFESSIONAL DEVELOPMENT TO USE TODAY AND PLAN FOR TOMORROW

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Mark Towers

Finding Joy in Productivity

By Mark Towers

Peter Drucker, the magnificent management guru, once said, "There's profit in productivity." It's hard to argue with

that statement. Consider the notion: There's also contentment and a superb sense of well-being in being productive. Thank goodness for the inner motivation that human beings (like you) have to strive, achieve worthwhile endeavors, and make meaningful contributions to their current situation.

Could you imagine living in a world where people simply wanted to embrace the status quo? It would be a miserable existence for all of us! The power of productivity is a truly wonderful blessing. Embrace it, enjoy it, and continue to experience it.

Here are some tips for **finding joy in productivity**:

1. **Anticipate - be early.** As the wise sage once said, "If you're not early, you're late." Take pride in getting up early, being places early, and learning what you can. In life, you are truly "on before you're on." Being ahead of the game takes planning and commitment.

This planning, commitment, and anticipation pay huge dividends. The biographies of many great people (including Mahatma Gandhi, Mother Theresa, and Harry Truman) reveal that they were early risers. They got up. They got going. They learned. They applied what they learned, and they made a remarkably positive difference. Take note and model yourself after the great

anticipators.

2. **Take action.** The joy of productivity comes when you don't necessarily think yourself into a new way of acting - but rather act yourself into a new way of thinking!

Finding joy in productivity means moving yourself to the next level via gumption. It means executing and following through. It means getting past loneliness, weariness, and self-pity and moving on to significance. The words "Push Onward" never grow old. These words are the rallying cry of all the heroes and heroines from your past and your present. Never forget these words.

3. **Find joy in accomplishing little tasks.** It is true that:
 - a. God is in the details!
 - b. Little things make big differences.
 - c. Termites (with their little bites) do more damage every year than do the gargantuan tremors of earthquakes in America!

Think about it. Everyone can handle the big tasks - the big priorities. It's the small tasks (the little nuances) that make the big difference. Finding these tasks and executing them flawlessly brings joy (and often rewards).

4. **Measure what you can.** What industry measures progress more closely than any other industry? The answer is sports - football, baseball, gymnastics, and so on. People become enamored, excited, and engulfed with sporting activities because of measurement!

Find meaningful measurements -

the ones that motivate you. Strive to reach these benchmarks. If you do not reach them, that is okay. By shooting for the stars, you may reach the moon. This is better than having no benchmarks at all. As a good boss once told me, "It's more important to be goal-guided than goal-governed."

5. **Curse your comfort zone.** Don't stay stuck - try something else.

Productivity=Innovation. The power of innovation is often dismissed as something that is simply "touchy/feely stuff." Nothing could be further from the truth. Productivity comes when people experiment, explore, and extrapolate. Be a bit crazy. Find a new twist on old ways. Do not feel you have to hit a "creative home run" and always invent something new. Strive to upgrade the old - it always brings fresh, new energy.

6. **Caution - cool your jets! Don't become a productivity robot.** There's more to life than simply achieving and striving for productivity. Set aside time to rejuvenate yourself and enjoy time. Time is not money. It is honey - drink it in! None of us wants a tombstone that reads, "He/she got everything done on his/her to-do list."

7. **Be imbued with an attitude of gratitude.** You have some special talents that enable you to excel in your particular arena. Be thankful for the talents you have.

Moreover, embody this thankfulness by teaching others who can benefit from your energy.

Continued on page 35



We're there for you, so you can be there for our children

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2012 WASBO Foundation Spring Conference & Exhibits

Call for Presentations

Deadline - November 15, 2011
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Conference Details

Date May 22-25, 2012
Location Kalahari Resort & Conference Center - Wisconsin Dells, WI
Theme Honoring education with a look at the past and a glimpse into the future of Wisconsin's public education.

Conference Tracks

- New School Administrator
- Human Resource/Insurance/OPEB/Handbook
- Facilities and Safety - Core Facilities Manager Certification and Continuing Education Certification Sessions
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- Best Practices in School Business Management

Audience Wisconsin K-12 public education school business managers, facility directors, transportation directors, district administrators and other school business management support staff.

Session Details

Session Length 60 minutes
Handouts Due electronically by May 1, 2012 for inclusion on conference website and handout flash drive
AV All sessions rooms will be equipped with a screen and projector. Speakers are asked to bring their own laptops.

Selection Criteria May Include but is not Limited to:

- Pertinence to school business management
- Informational and educational (No sales presentations)
- New or innovative
- Correlation to conference theme
- How WASBO members will benefit from presentation
- How session fits into conference track

Submissions Should Include:

- Session title
- Session description suitable to print in promotional materials
- Any supporting materials
- Speaker name, contact information and biography

Finding Joy in Productivity *Continued from page 33*

People who live very long lives (90-100 years of age) advise us all to consistently do three things: (a) reflect more often; (b) take more risks; and (c) leave behind

some things that will live beyond your life span. This last concept is extremely important. Give others the gift of your "special spark of productivity."

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Speak Out Seminars, LLC
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E-mail: mark@speakoutseminars.com



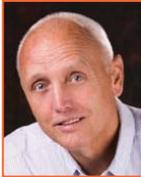
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November 3-4, 2011

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Keynote Speakers



Thursday, November 3rd

ENERGIZE FOR SUCCESS

Carl Olson
Educator, Author and "Energizer Olson" Presenter

Friday, November 4th

AUDIENCE PARTICIPATION

Deb Gurke, Ph.D.,
Director of Board Relations, Wisconsin Association of School Boards



Other Topics to Include: Keep the Camera Rolling: The Power of Video • Maximizing Your Cast of Characters: Raising Morale in the Middle of a Storm • A Peek Behind the Scenes... • Legislative Advocacy • Deploying Google Apps • Positive & Professional Communication Ideas • Knowing Your Audience • Hot Topic - Are You a Silent Movie? Learning How to Read Body Language • Writing Your Script: Developing a Communications Plan • Break a Leg! Communicating Negative News Positively



11801 W. Silver Spring Dr., Ste. 200, Milwaukee, WI 53225, Phone: 414-271-9456, www.wspra.org

Register TODAY at www.wspra.org. Registration Deadline is October 31st.



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- Henry David Thoreau



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Creating New Possibilities

Convention 2012



January 18-20, 2012
Frontier Airlines Center - Milwaukee, Wisconsin

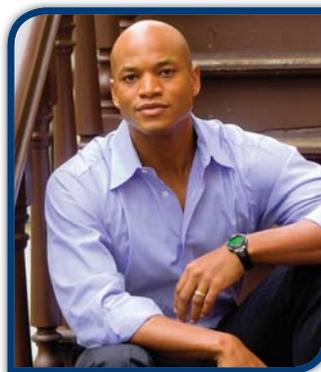
Registration opens Nov. 1!

Keynote Speakers



Will Richardson

Author, blogger and former educator, Will Richardson is an outspoken advocate for diverse new learning opportunities that the Web, social online learning networks and other technologies now offer to combine students' passions with education.



Wes Moore

In addition to being an Army combat veteran, White House fellow, and up and coming businessman, Wes Moore is perhaps best-known for his book *The Other Wes Moore*, which examines the consequences of personal responsibility and the important connection between public education and community.



Alison Levine

Famed adventurer Alison Levine has climbed mountain peaks on every continent, spent two decades working on Wall Street, and currently serves as an adjunct professor at West Point. She delivers a powerful message about taking responsible risks and dealing with changing environments.

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Network with colleagues
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Jill Collins

Director's Corner

Here's What You Said...

By Jill M. Collins, Business Manager, School District of Black River Falls

The WASBO Board of Directors thanks you for your time and appreciates the feedback that you have given us on a multitude of topics and initiatives via the District Professional/Student/Retiree Membership Survey. The Leadership Team has taken some time to review the survey results and the full board will be analyzing and discussing the results at our next Board meeting. In the words of our WASBO president, Wendy Brockert, "Our hope is that in reviewing the survey it will help us understand what we are doing well and what items we need to address to meet the needs of our members."

As you can guess, a main function of WASBO is to provide professional development opportunities for its members. The survey has reaffirmed that most members appreciate the professional development opportunities through conferences, networking opportunities and the reduced member rates for conferences. According to the survey results, over 98% of the respondents have attended a professional development opportunity. Most attendees are focused on the program content when deciding whether or not to attend a conference. Location is somewhat important as well, with Wisconsin Dells being the preferred location. It's also interesting to note the items that members least valued such as professional development coupons, Viterbo University credit options and professional recognition awards (WASBO Awards). These are areas that the WASBO Board will discuss further.

Participation in WASBO is not limited to just professional development

opportunities. About 30% of the responding members have been involved on committees, have volunteered to moderate sessions at conferences, and have participated in scholarship fundraising events. The main reason given by the few members that do not participate in WASBO activities was time commitments.

At one time or another you have received an email regarding a question a member has about a certain topic through the Peer to Peer Communication Forum. Of the 262 survey respondents, over 2/3 indicated they have posted a question, answered a question or posted a document, with the most popular response being "I have searched for something." This newest WASBO tool is serving members well.

Certifications for facility management or risk management have been popular with the membership with the survey reflecting that about half of the members have participated in these WASBO certification programs. An ad hoc committee of the WASBO Board is researching the idea of offering a payroll/human resources certification in addition to the above programs. According to the survey results, this idea is popular with the membership with over 2/3 of respondents indicating that they or someone in their office would be interested in pursuing the certification.

Members indicated a great amount of interest in investigating live webinars as a professional development alternative. The WASBO newsletter will continue to be available in hard copy because more members prefer this to reading it online.

So, as you read this article, know that WASBO is working hard to meet the needs of its members. If you have not attended a conference, complete the registration form to do so. If you have not joined a committee, challenge yourself to get involved. If you did not get a chance to participate in the survey, please be sure to contact a WASBO Board member with your questions or concerns. WASBO has much to offer its members and we appreciate your feedback so that we can work to serve you even better.

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Orvin R. Clark, EdD, RSBA

Book Review

“Thinking for a Change”

Dr. John C. Maxwell, Author

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

Thinking for a Change was written by John C. Maxwell.

Maxwell is the author of New York Times bestsellers: **The 21 Irrefutable Laws of Leadership: Developing the Leader within You** and **Running with the Giants**. The author has written over thirty books on motivation and leadership. He is widely regarded as America’s expert on leadership. He is the founder of the INJOY Group, an organization dedicated to helping people maximize their leadership potential.

Thinking for a Change is 257 pages in length, divided into two parts and full of short stories, examples and quotations. Part one provides the foundation for changing your thinking, the value of good thinking, the impact of changed thinking and mastering the process of intentional thinking. Part two discusses the eleven thinking skills every successful person needs:

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

Why are some people successful and others not? You will hear many answers. Consider some of the popular ones:

- Successful people get better

- opportunities.
- People who do not succeed have bad backgrounds.
- Education makes all the difference.
- Failure results from bad breaks.
- Some people are smart; others are not.
- Lazy people do not succeed.

Here is the difference: *Successful people think differently than unsuccessful people.*

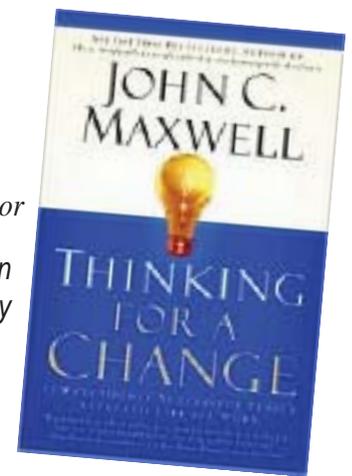
What type of thinking do you believe will increase your odds for success?

- Small Thinking or Big-Picture Thinking?
- Scattered Thinking or Focused Thinking?
- Restrictive Thinking or Creative Thinking?
- Fantasy Thinking or Realistic Thinking?
- Random Thinking or Strategic Thinking?
- Limited Thinking or Possibility Thinking?
- Impulsive Thinking or Reflective Thinking?
- Popular Thinking or Innovative Thinking?
- Solo Thinking or Shared Thinking?
- Selfish Thinking or Unselfish Thinking?
- Wishful Thinking or Bottom-Line Thinking?

Each chapter or skill ends with a THINKING QUESTION:

Chapter 1 - “Understand the Value of Good Thinking” – *Do I believe that good*

thinking can change my life?



Chapter 2 - “Realize the Impact of Changed Thinking” – *Is my desire for success and to improve my life strong enough to prompt me to change my thinking?*

Chapter 3 - “Master the Process of Intentional Thinking” – *Am I willing to pay the price to cultivate the habit of giving birth to nurturing and developing great thoughts every day?*

Skill 1 - “Acquire the Wisdom of Big-Picture Thinking” – *Am I thinking beyond myself and my world so that I process ideas with a holistic perspective?*

Skill 2 - “Unleash the Potential of Focused Thinking” – *Am I dedicated to removing distractions and mental clutter so that I can concentrate with clarity on the real issue?*

Skill 3 - “Discover the Joy of Creative Thinking” – *Am I working to break out of my “box” of limitations so that I explore ideas and options to experience creative breakthroughs?*

Skill 4 - “Recognize the Importance of Realistic Thinking” – *Am I building a solid mental foundation on facts so that I can think with certainty?*

Skill 5 - “Release the Power of Strategic Thinking” – *Am I implementing strategic plans that give me direction for today and increase my potential for tomorrow?*

Continued on page 41
Taking Care of Business

Now There's a Choice!

Introducing...WERMC

The Wisconsin Educators Risk Management Cooperative, a 66.0301 created by districts in 2011 to collaboratively purchase commercial insurance and implement risk management Best Practices

- Cooperatives have a proven track record of reducing injuries, litigation, and insurance costs
- Risk management consulting and co-op oversight by WERMC's independent consultant
- Risk management resources of a national insurance broker
- Competitive, yet sustainable, Workers Compensation dividends
- Broad liability coverage and excellent service platform



Erin Green
WERMC President
erin.green@greendale.k12.wi.us



Kathy Johnson
WERMC Independent Consultant
kjohnson@rmstrategies.net



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

SHARE YOUR EXPERTISE!

Best Practice Documents in All School Business Management Areas can be submitted at any time!
To submit a document email it to lynett@wasbo.com with ERC Document as the Subject.

SEARCH RESOURCES!

Nearly 2,000 documents are available such as sample RFP's, Budget Documents, Job Descriptions, Policies, Practices, Spreadsheet and more! Check out the new and enhanced search capabilities.

Book Review

Continued from page 40

Skill 6 - "Feel the Energy of Possibility Thinking" – *Am I unleashing the enthusiasm of possibility thinking to find solutions for even seemingly impossible situations?*

Skill 7 - "Embrace the Lessons of Reflective Thinking" – *Am I regularly revisiting the past to gain a true perspective and thinking with understanding?*

Skill 8 - "Question the Acceptance of Popular Thinking" – *Am I consciously rejecting the limitations of common*

thinking in order to accomplish uncommon results?

Skill 9 - "Encourage the Participation of Shared Thinking" – *Am I consistently including the heads of others to think "over my head" and achieve compounding results?*

Skill 10 - "Experience the Satisfaction of Unselfish Thinking" – *Am I continually considering others and their journey in order to think with maximum collaboration?*

Skill 11 - "Enjoy the Return of Bottom-Line Thinking" – *Am I staying focused on the bottom line so that I can gain the maximum return and reap the full potential of my thinking?*

Take a moment to evaluate yourself in each area of thinking. I trust your thinking has improved. However, the reality is that nobody can expect to master every kind of thinking. Read **Thinking for a Change** to find out how you may change your thinking and may change your life.

WI School Insurance Savings Plan has saved WI schools over 1.5 MILLION so far!



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Jeff Dickert
Administrator, CESA 7
jdickert@cesa7.k12.wi.us



www.wischoolinsurance.com



Welcome New Members

August-September 2011

District Professional Members

- **Sherry Baker**, District Administrator, Turtle Lake
- **Loren Daane**, Facilities Coordinator, Appleton Area School District
- **John Eyerly**, Superintendent, Westfield
- **John Finnemore**, Director Building Services, Madison Metropolitan
- **Robert Hofer**, Purchasing Agent, Kenosha Unified School District
- **Lisa Hohn**, Bookkeeper, Menominee Indian School District
- **Victoria Holt**, Business Services, Neenah School District
- **Daniel Kopf**, Buildings and Grounds, Chilton School District
- **Paul Locks**, Facility Manager, Elmbrook
- **Dana Neumann**, Bookkeeper, Weston School District
- **Bruce Russell**, Principal, Oconto Falls
- **Lisa Stahl**, Cooperative Purchasing Director, CESA #2
- **Christiane Standle**, Director of Human Resources, Menomonee Falls
- **Matt Stratton**, District Administrator, Dover #1
- **Andrew Thorson**, Facilities Engineer, Neenah School District
- **Kathleen Williams**, Superintendent, Wausau

Service Affiliate Members

- **John Albanese**, Sr. Sales Executive, Siemens, Inc.
- **Ben Klawitter**, Filtration Systems
- **John Kluber**, Managing Partner, Kluber Architects and Engineers
- **Paul Lessila**, Account Executive, R & R Insurance Services
- **Chad Montalbano**, Territory Account Manager, Stanley Security Solutions
- **Stephanie Riesch-Knapp**, Account Executive, R & R Insurance Services
- **Joel Sterk**, Senior Group Health Benefits Specialist, SIA Insurance Services
- **Teresa Wadzinski**, Project Architect, Eppstein Uhen Architects

Student Member

- **Brady Pittz**, Graduate Assistant, UW-Whitewater

On the Move

- **Jerry Dudzik** from both Hartford Joint #1 and Hartford UHS to full-time for Hartford UHS
- **Jim Krol** from Honeywell to Trane
- **Jonathan Mitchell** from student to Deerfield
- **Brian Williams** from Appleton to Peshtigo

Retirements

- **Pat Hickey** from Gibraltar
- **Tim Hogan** from Racine
- **Dennis Riley** from Marshall
- **Barbara Weade** from Adams-Friendship

ASBO Intl. New Members August 2011

- **Jason Austin**, Holmen SD, Holmen, WI
- **Julie Grothorst**, Greendale SD, Greendale, WI
- **Jeff Smrecek**, Deerfield Community SD, Deerfield, WI

ASBO Intl. Membership Milestones

- **Karen A. Dvornik**, Cedarburg SD, Cedarburg, WI (5 years)
- **Scot Ecker**, Muskego-Norway SD, Muskego, WI (10 years)
- **Philip M. Frei**, Sun Prairie Area SD, Sun Prairie, WI (20 years)

Keep us Posted!

Retiring?

Contact us before you leave so we can update your member type to retired and get your contact information.

We want to keep in touch!

Changing Districts?

Be sure to update your profile at www.wasbo.com so you don't miss any communications.

Give us a call if you need help.

Renew Your 2011-12 Membership

- Continue receiving "Taking Care of Business"
- Stay on top of daily education news with "Wisconsin Education News"
- Save money on conference registrations
- Have access to your colleagues through the Peer to Peer Communication Forum
- Be the first to receive information on upcoming professional development that will get you through the ever changing world of school business management
- Stay on top of what is happening in State government through the School Administrators Alliance.

Renew your membership online or call us at 608.249.8588.



Find Local School Business Jobs

- [Get FREE Access to School Business Jobs](#)
- [Apply for Jobs Online](#)
- [Post Your Resume Anonymously](#)
- [Create Customized Job Agents](#)
- [Set Up Your Personal Profile](#)

Recruit Qualified Candidates

- [Gain Access to Qualified Candidates](#)
- [Recruit Professional School Business Officials Directly](#)
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Amid these challenging economic times, the WEA Trust remains a strong and stable organization based in Wisconsin. We are dedicated to providing solutions and competitive pricing for school districts.

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3 myths

About WEA Trust:

Myth # 1: WEA Trust only offers one health plan with little flexibility.

Fact: WEA Trust has always offered different health and prescription drug plans, each with a different cost structure. For example, health deductibles can range from \$100 to \$10,000.

Myth # 2: School district premium dollars are being given to the union.

Fact: WEA Trust is an independent, not-for-profit company based in Wisconsin and registered with the Office of the Commissioner of Insurance. It is illegal for the insurance company to funnel money to the union.

Myth # 3: WEA Trust is not price competitive in the marketplace.

Fact: WEA Trust's average rate increase this year is 3%, and rate increases have been below state and national averages for the last four years.



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WASBO Remembers John Brozovich 1985-86 Past President

John Brozovich, 83 of Sun City Center Florida died July 28, 2011. John was born in West Allis, Wisconsin to Steve and Margaret Brozovich. He served in the Navy between high school and college. John taught and coached and ended his career as the Business Administrator for the Sheboygan Public Schools. He served on many committees at the state and national level. He was active in the Knights of Columbus, Elks and Wisconsin Association of School Business Officials.

He is survived by his wife of 57 years, Dolores and two sons John (Katie) Milwaukee and Timothy; two grandchildren, Ashley and Kyle Dallas and many family members and friends. John cherished his family and friends, he enjoyed games, golf and cards. He was preceded in death by a sister, Margaret a brother, Edward and a son, Robert.

A celebration of John's life was held August 11, 2011. Donations may be made in John's name to St. Jude Children's Research Hospital, PO Box 50, Memphis, TN 38101.



WASBO Remembers Wayne F. Devery Retired Business Administrator, Menomonie School District



Wayne F. Devery, 72, of Eau Claire, Wisconsin, passed away Thursday, Oct. 6, 2011, after a four-year, courageous battle with melanoma cancer, at home under the care of Mayo Clinic Hospice, with his loving family by his side.

Wayne was born in Rochester, March 8, 1939, to Harry and Pearl (Atkinson) Devery. He was united in marriage to Nancy Ferguson on Aug. 20, 1960, at Grace Lutheran Church in Eau Claire. Wayne joined the United States Army Reserve Program in 1959 and served through 1965. During that period he served two years as a Military Policeman in Ft. Gordon, Ga., and the remaining time with the HQ CO, of the 397th Engineer Battalion in Eau Claire.

He was accepted into the Grand Lodge of Free and Accepted Masons of Wisconsin and rose to Master Mason in Sanctuary Lodge No. 347 in Eau Claire. He then went on to join the fun group of Masons by being admitted to the Nobles of the Mystic Shrine. He enjoyed the Shriner's very much and served many years before resigning from the fraternity.

Wayne earned his BA degree from University of Wisconsin, Eau Claire, in business administration, and masters and specialist degrees from the University of Wisconsin Stout, in Menomonie, Wis. After graduation, Wayne was purchasing agent at Uniroyal in Eau Claire for a few years, then he and his family moved to Menomonie, where he served as business administrator for the Menomonie Public Schools for 30 years.

He also belonged to many organizations over the years, serving on the board for the American Lutheran Nursing Homes and Condo boards in Florida and serving in organizations such as Lions Club.

Upon retirement, Wayne and his wife enjoyed many summers at their lake home entertaining their children and grandchildren. The winters were spent at their home in Sarasota, Fla. Wayne enjoyed travel, golf, camping, and spending time with family and friends. He will always be remembered for his quick wit, sense of humor and playing the stump fiddle. He inspired everyone with his positive outlook on life. His courage inspired many.

He is survived by his wife Nancy; three children, Mark (Rita) Devery, Menomonie, Wis., Pamela (Steve) Kruchten, Eagan, and Susan (Richard) Deal, Plymouth; eight grandchildren, Melissa and Ryan Devery, Nicole, Allison and Joseph Kruchten, and Rachael, Taylor and Michael Deal; sister, Aleeta (Robert) Brekke, Rosemount; sister-in-law, Miriam Devery, Minnesota; brother-in-law, Richard (Deanne) Ferguson, Texas; and many nieces and nephews. He was preceded in death by his parents, brothers Charles and Glenn Devery, and sisters, Martha Seleman and Carna Bernard.

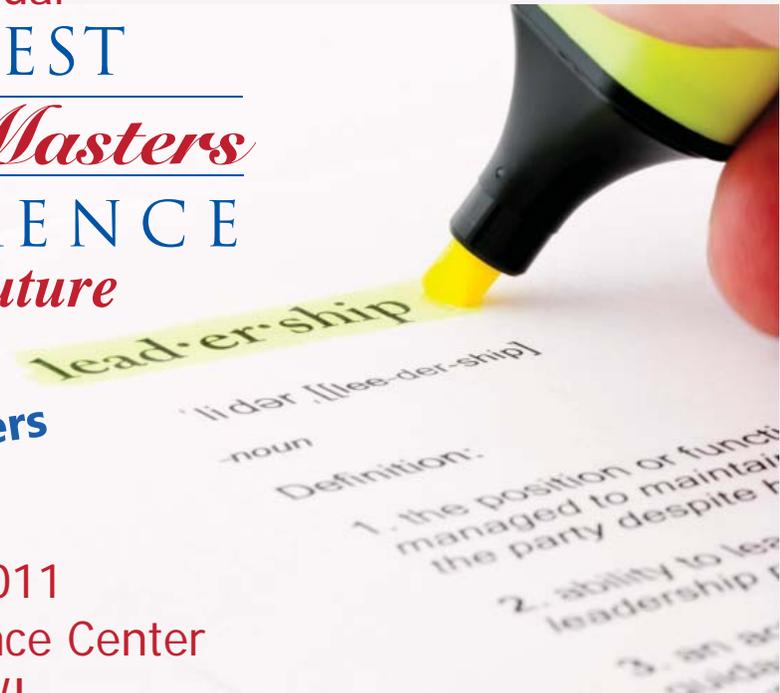
Memorials may be given to Mayo Clinic Hospice, P.O. Box 2060, Eau Claire, WI 54701 or to the charity of your choice. To send the family on-line condolences, please visit www.fullerspeckienhulke.com.



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November 10-11, 2011
Kalahari Resort & Conference Center
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Now, more than ever, you are being called upon to be a leader in your school district. Attend this conference to enhance your leadership skills with Knowledge and Networking.

General Sessions:

- **"No One Warned Me About This"**
Mark Metzger, a business lawyer and litigator who focuses in the areas of information technology law and school law, will look at past, present and future approaches to education and the surprising tools we'll need to help tomorrow's students.



- **Friday Idea Exchange: A Common Sense Approach to Facilities**

Learn from Industry Experts About:

- Sustainability & Green in the Education Environment
- Finance & Budgeting for School Facilities
- Environmental Health & Safety
- Safety, Security & Risk Management
- Operations
- Leadership
- Facility Planning - How it Impacts Instruction
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Stay Connected



If You Haven't Renewed Your

2011-12 WASBO Membership by October 31, 2011 This Will Be Your Last Issue of Taking Care of Business

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

Save Money on WASBO Seminars with Professional Development Coupons

Save up to 25% off the standard one-day seminar rate of \$165 by pre-ordering coupons. For more information or to order go to www.WASBO.com/coupons

Service Affiliate Member Survey Coming Soon

We want to know about the value of your WASBO Service Affiliate Membership. When this survey comes to your email, please take time to complete it so we can work together to provide the resources and value you need.

Collaborative Purchasing Survey

Thank you to those who completed this survey. Your responses have been reviewed by the Collaborative Purchasing Task Force in the hopes of developing processes that save money and create efficiencies. WASBO has turned this information over to the Governor's office. The Governor's Office, DOA, CESA Network and WASBO will work together by leveraging local and state government purchasing. Look for results of the survey to be emailed to you.

Certified School Risk Manager (CSRM)

Courses Now Available Online

If you have not been able to complete the five courses in person, this is another option for you. Fundamentals of Risk Management, Handling School Risks, Measuring School Risks, Funding School Risks and Administering School Risks are all available as online courses.

Write for Taking Care of Business

WASBO Members throughout the state are implementing fresh ideas and creative plans. 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 Wiedenhoef at wwiedenhoef@wasbo.com.

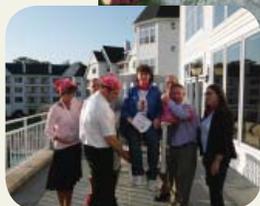


WASBO Foundation Fall Conference & Scholarship Golf Outing October 5-7, 2011 - Elkhart Lake, WI



Continued from page 7

more needs and mandates are being met by schools. She also talked about the valuable resource we have in our employees as we work to meet the requirements and goals of our educational system. Sessions covered employee handbooks, OPEB, insurance plan design, new initiatives in learning, transformational leadership, communicating with the public about school finance, writing PDP goals, improving your health and Module 1 of the Facilities Manager Core Certification Program. This year's Team Building Activity called on creativity and the ability to work together as teams scoured The Osthoff property for answers to their clues and the chance to take a memorable picture. The Green Team achieved the most points and each won a gift certificate to Shutterfly.





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

Professional Development

- October 26, 2011 (Viterbo Credit)
[CSR: Administering School Risks](#)
Wisconsin School Leadership Center, Madison
- November 1-2, 2011 (Viterbo Credit)
[WASBO/WCASS/DPI](#)
[Wisconsin Federal Funding Conference](#)
Kalahari Conference Center, Wisconsin Dells
- November 10-11, 2011 (Viterbo Credit)
[Midwest Facility Masters Conference](#)
Kalahari Conference Center, Wisconsin Dells
- November 29, 2011
[School Business Management - Winter at a Glance](#)
Radisson Hotel, Madison
- November 30-December 1, 2011 (Viterbo Credit)
[WASBO/WASPA School Personnel Academy - Changing Landscape of Public Education Employee and Employer Relations](#)
Radisson Hotel, Madison
- January 18-20, 2012 (Viterbo Credit)
[WASB/WASDA/WASBO State Education Convention](#)
Frontier Airlines Center, Milwaukee
- February 16-18, 2012
[ASBO Executive Leadership Forum](#)
Disney Contemporary Resort, Lake Buena Vista, FL
- February 28-29, 2012 (Viterbo Credit)
[Facilities Management Conference](#)
Kalahari Conference Center, Wisconsin Dells

- February 29, 2012 (Viterbo Credit w/ Facilities Conference)
[WASBO Transportation & Bus Safety Workshop](#)
Kalahari Conference Center, Wisconsin Dells
- March 21-22, 2012 (Viterbo Credit)
[WASBO Accounting Conference](#)
Chula Vista Conference Center, Wisconsin Dells
- May 22-25, 2012 (Viterbo Credit)
[WASBO Spring Conference & Exhibits](#)
Kalahari Conference Center, Wisconsin Dells

Committee Meetings

- [School Facilities Committee](#)
January 11, 2012, 9:30 am, WASBO Office, Madison
April 17, 2012, 9:30 am, WASBO Office, Madison
August 7, 2012, 9:30 am, WASBO Office, Madison
- [Safety & Risk Management Committee](#)
January 11, 2012, 12:00 pm, WASBO Office, Madison
- [Spring Conference Planning Committee](#)
January, 2012, Milwaukee - State Education Convention
- [Transportation Committee](#)
October 21, 2011, 10:00 a.m.-12:00 p.m., WASBO Office, Madison
- [Business Meetings](#)
January 19, 2012 - Milwaukee, State Education Convention
May 24, 2012 - Wisconsin Dells, Spring Conference

Board of Directors Meetings

- | | |
|-------------------|------------|
| 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.
Dec. 9, 2011 (Seymour), Feb. 10, 2012 (DePere)
- [Madison Area](#) - Meetings start at 9:00 a.m.
Nov. 4, 2011 (Marshall), Dec. 2, 2011 (Monona Grove), Feb. 3, 2012 (Sun Prairie), March 2, 2012 (Stoughton), April 13, 2012 (Lodi)
- [Northeast](#) - Meetings start at 11:00 a.m.
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.

NEW DATE Nov. 9, 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.

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
Nov. 16, 2011, Feb. 15, 2012, April 18, 2012

[West Central](#) - Meetings are from 10 am - 1 pm at the Sparta Area SD Administration & Education Center
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.

Nov. 4, 2011 (Mosinee), Dec. 9, 2011 (D.C. Everest), March 9, 2012 (Auburndale), April 13, 2012 (Merrill), June 15, 2012 (Rhineland), August 17, 2012 (Antigo)

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