



Wisconsin
Association
of
School
Business
Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 17, Number 1 - February 2013

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Keith Lucius

WASBO Honors Keith Lucius 2013 School Business Official of the Year

Keith Lucius, Assistant Superintendent of the Ashwaubenon School District, was recognized at the 2013 Joint State Education Convention as the 2013 WASBO School Business Official of the Year in acknowledgement of his service, time, expertise, and leadership in WASBO.

Lucius was nominated by WASBO's Bay Area and Northwest Regional Groups and his superintendent, Brian Hanes. His regional colleagues had

this to say about Lucius: "Keith is dedicated to his profession and leads with a genuine passion for doing what is best for his district, community, and of course the children who benefit from his expertise." Lucius also received praise from his Ashwaubenon colleagues, Superintendent Brian H. Hanes, high school Principal Mark J. Sheedy, Director of Instruction Jill Kieslich-Rhude, and former Director of Facilities Michael Beno; Ashwaubenon School Board President Mark W. Williams; and Pastor Terry Martell of Oakbrook Church in DePere. Some of Lucius's many

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Kent Ellickson

WASBO Honors Kent Ellickson 2013 Shining Star

Kent Ellickson, Director of Business Services for the Sparta Area School District, was recognized at the 2013 Joint State Education Convention as WASBO's 2013 Shining Star in acknowledgement of his service, time, expertise, and leadership in WASBO. He has been a member of WASBO since 2001.

Ellickson was nominated by his WASBO colleagues in recognition of his leadership in developing the School Finance Puzzle, an annual workshop for Wisconsin school board members. The nomination notes that his "professionalism and personality combine to create a style of leadership that keeps this committee on task and meeting deadlines, which isn't easy to do. Under Kent's leadership, the facilitators, speakers and others involved keep returning and reworking the session in order to remain both timely

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

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

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Editor: Woody Wiedenhoef

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President's Message

A Word From Your President

Preparing Today for Tomorrow's Challenges

By Janice DeMeuse, Business Manager,
Luxemburg-Casco School District



Janice DeMeuse
WASBO President

Welcome to winter in Wisconsin. The Board held its latest meeting in Black River Falls on February 6th and the local news indicated the area was tying a record for consecutive days of snowfall—and it continued to fall. I think it is time to head out for somewhere warm.

The WASBO Board spent some time at this meeting discussing initiatives that are at various stages of development:

- We discussed a draft of a survey that you will receive soon regarding payroll/HR certification. WASBO members have been looking for this type of certification and we are seeking your input to help us structure and design a program that will reflect your needs.
- Another survey will be sent to you regarding SFO preparation. Since ASBO will offer a discount on the test to individuals from states that offer a formal program to help them get ready for the exam, WASBO would like to help individuals who are seeking this certification to be prepared. A group in the Madison area has requested WASBO assistance and would serve as a pilot group.
- Woody has been meeting with representatives of Forecast5 to come to a partnership agreement to make the Forecast5 products available to WASBO members. That agreement has been finalized.
- Schools that have purchased Investing in Wisconsin Public Schools now have the ability to share this tool with other districts through an arrangement negotiated with EdVentures in Learning. Borrowing schools must have purchased at least one package. This arrangement will allow schools to host sessions for larger groups without having to purchase several sets.

The Leadership Team attended ASBO's Executive Leadership Forum in New Orleans on February 14 – 16. We spent the first day working on strategic planning with facilitator Bud Crouch and leadership teams from other states. The remainder of the conference was devoted to larger group work exploring the Ritz-Carlton principles of leadership and Covey's *The Speed of Trust*. After the intensity of these sessions, we were able to spend a few hours enjoying the warmth, although cool for New Orleans, and culture of New Orleans.

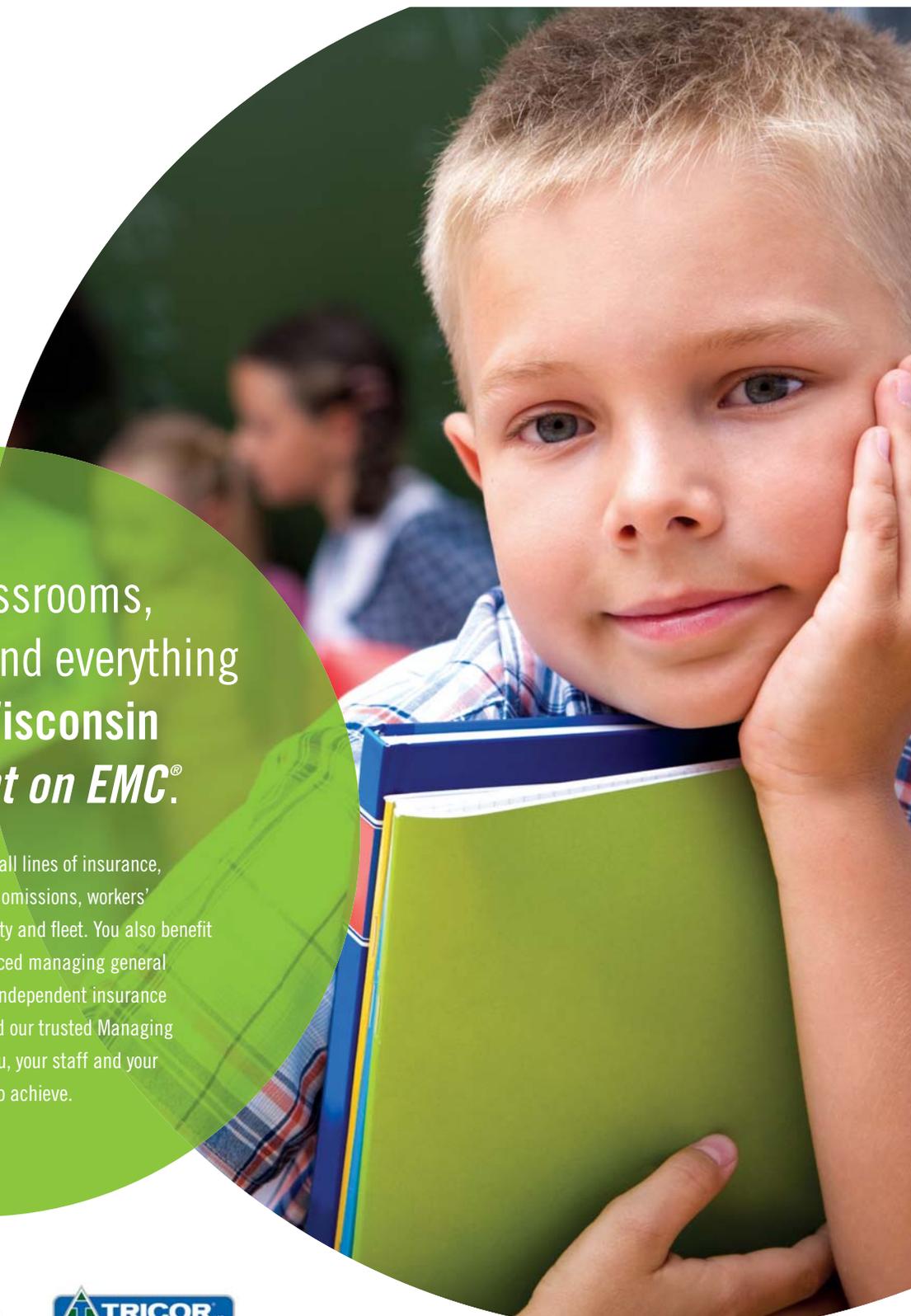
Elections for Board members will be opening in a few weeks. Candidates for the offices have written articles that you will find in this newsletter. Please take a few moments to read the articles and think about the best candidates for the offices. Good luck, candidates and thank you for your willingness to serve.

Several conferences have just concluded in Wisconsin Dells:

- Facilities Management Conference on February 26-27 at Kalahari
 - Transportation and Bus Safety Conference on February 27 at Kalahari
 - Federal Funding Conference on February 28 and March 1 at Kalahari
- And the Accounting Conference will be held on March 20-21 at Chula Vista. Spring Conference registration will also open soon.

The two surveys mentioned earlier will be coming out to you soon. Please take a few moments to respond and give us your input into these possible future projects. This is your opportunity to help steer these initiatives to best serve your needs.

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Woody Wiedenhoef

Executive Director's Report

Presented at the January 24, 2013 Business Meeting

By Woody Wiedenhoef, Executive Director, WASBO

W A S B O members pride themselves in providing outstanding professional development and a professional support network, and promoting educational opportunities for Wisconsin children. We celebrate past WASBO members who cultivated a culture of continuous improvement. Because of WASBO's exemplary past actions, we can easily envision a bright future for our Wisconsin students and society. So what are we doing today?

WASBO Professional Recognition Program – WASBO is honoring Keith Lucius, Assistant Superintendent of the Ashwaubenon School District, as the 2013 Business Official of the Year (sponsored by Hutchinson, Shockey, Erley & Co.) We are also honoring Kent Ellickson, Director of Business Services at the Sparta Area School District, as WASBO's 2013 Shining Star (sponsored by Quarles & Brady, LLP).

WASBO Professional Recognition Program Nominations were due March 1, 2013 – WASBO has many deserving candidates for award nominations.

- 2013 Wallace E. Zastrow Award – Sponsored by Wisconsin Investment Services Cooperative (WISC)
- 2013 New School Business Official of the Year – Sponsored by Key Benefit Concepts
- 2013 Facilities Manager of the Year – Sponsored by Stalker Flooring and SchoolDude.com
- 2013 Business Services Award – Sponsored by Robert W. Baird & Co.

- 2013 Friend of WASBO
- 2014 School Business Official of the Year – Sponsored by Hutchinson, Shockey, Erley & Co.
- 2014 Shining Star Award – Sponsored by Quarles & Brady, LLP

Criteria and the online nomination process can be found at WASBO.com/awards. Thank you for the nominations we have received.

Growth and Upcoming Initiatives

–Attendance at seminars and conferences continues to grow.

- Federal Funding Conference — For the second year, WASBO collaborated with WCASS and the DPI to provide this conference held February 28 and March 1. Considering the nuances of MOE and other federal funding situations, this was a very popular conference.
- The Annual Facilities Management Conference was held on February 26 and 27. This conference continues to grow every year with over 180 attendees and 126 exhibiting companies.
- The Annual Transportation & Bus Safety Conference was held on February 27. The Transportation Committee chose timely and useful sessions.
- WASB/WASBO School Finance Conference — WASBO is partnering with WASB to provide School Board members a School Finance Conference on March 12. Be thinking about bringing your Board members. Learn more and register at www.wasb.org.
- Certified School Risk Manager (CSRM) — The implementation of the new CSRM certification program has been a success. In

December 2012, WASBO became the sole licensee to offer this program and provide this national designation in Wisconsin for school employees and school insurance representatives. Dates for 2013 and 2014 will be scheduled soon.

- The Annual Accounting Conference is being held on March 20 and 21. This has become one of WASBO's most successful conferences. The sessions being developed by the Accounting Committee for this year's conference will provide valuable information to you and your district. New this year is the added pCard User Group Meeting on March 19th. If you want to learn more about this program be sure to register for this free meeting.
- Mark your calendars for the Annual Spring Conference. In response to our member survey we were able to change the dates for 2013 to the second week in May. Join us May 7 – 10 in Green Bay. Exhibitor registration is open now and attendee and golf registration will open soon.

Forecast5, WASBO, WASDA and WASB Initiative

— The WASBO Board has decided to collaborate and work with Forecast5 Analytics, Inc., WASDA, and WASB in developing a valuable school related financial analytics platform (information and data cubes), that is not readily available for schools today. The technology can be used in numerous ways to benefit education including comparative, competitive, predictive and trend analytics. In addition, the associations and Forecast5 will develop a system that provides this information in a way that can be accessed easily by association members. Specifically, this work is delegated to the WASBO

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Forecast5 Collaborative Team, who will keep the Board informed of its progress and make recommendations. The Team members are Dave Van Spankeren, Betty Zimdars, Mark VanDerZee, Bob Avery, Andy Weiland, Jeanne Stahl, Jill Collins, Lori Ames, Jeff Gross, Jay Clark and Tom Wohlleber, in addition to the leadership of Forecast5.

Investing in Wisconsin Public Schools™ — WASBO, WASB and WSPRA came together to develop an exciting new educational tool. It helps citizens and district staff comprehend the variables, stakeholders and nuances of financing Wisconsin's public schools. This interactive, hands-on activity takes participants through a process of self-discovery to lay a foundation for understanding Wisconsin school finance. You may find this exercise useful when communicating with board members, district staff, community members, parents and the business community. This tool went on sale in May 2012. Due to school districts' feedback, we have modified the conditions of use to allow districts that have purchased at least one map kit to borrow and use kits from other districts that also own at least one map kit when multiple kits are needed. WASBO plans to schedule sessions in each regional to demonstrate the value of *Investing in Wisconsin Public Schools™* and offer Table Coach training. We will be looking for districts willing to host these events. Please contact the WASBO office if you would like to host such an event or if you would like more information on *Investing in Wisconsin Public Schools™* and its potential uses.

WASBO Professional Improvement Committee Rolls Out a New Mentorship Program — The new curriculum for training mentors addresses the PI 34 process for new Business Officials and provides an

improved induction program. Diane Pertzborn and Sandy Malliet are the Mentorship Program Co-coordinators and oversee the training for mentors and protégés. Watch for information on the training process over the next several months at your Regionals and future conferences. This service is extremely helpful for our newer Business Officials who are entering the profession.

pCard — This purchasing card program was established to offer a service to districts of all sizes by providing a no fee program that offers rebates to every district. This cooperative program with other ASBO Affiliates continues to grow. Please consider the use of a pCard in providing improved operational effectiveness and savings in your school district. There will be a free pCard User Group Meeting on Tuesday, March 19 in conjunction with the WASBO Accounting Conference.

WASBO Publications — The WASBO Accounting Committee, led by Ken Mischler, is updating the Handbook for Evaluation & Improvement of Business Support Staff Functions, June 2000. We thank the Accounting Committee for its work to update and improve this important publication.

Collaborative Purchasing Group — WASBO is working with the Technical Colleges, the Governor's office, the DOA and CESAs to develop more efficient cooperative purchasing techniques. The Collaborative Purchasing Group meets regularly and presents their resources at various WASBO conferences. Please use the resources they have made available for school districts in the area of wise purchasing decisions. You can find these resources at WASBO.com. Select Resources/Links by Topic/Collective Purchasing.

ASBO International Board of Directors — Tom Wohlleber, Assistant Superintendent for the Middleton-Cross Plains Area School District, began his term on the ASBO International Board of Directors on January 1. Tom is planning to run for President-Elect in 2015. Please let him know how much we appreciate the energy he devotes to both WASBO and ASBO. Fundraising for Tom's candidacy and WASBO member participation on ASBO committees is provided through the Spring Conference Silent Auction. For our members who are participating on ASBO committees, we offer Professional Development Grants to assist in covering travel expenses to attend meetings.

Professional Development & Networking Opportunities — WASBO committees have put together timely programs to provide you with information you can use today and help you plan for tomorrow. Please take the time to thank the members of these committees for their planning efforts. If you would like to participate on one of these committees, please contact the WASBO office. WASBO continues to provide a free one-year WASBO membership for people who attend a conference for the first time and have not been a WASBO member previously. If you know someone who could benefit from WASBO, invite him or her to join you.

WASBO Service Affiliate Goal Setting — The Service Affiliate Committee continues to provide valuable input and advice to the Board, other committees and WASBO on how best to use the valuable resources of our Service Affiliates. Many of the operational changes made this year in our process of developing sessions at conferences has been because of the insight committee members have provided.

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Controlling Health Care Costs IS OUR COMMON INTEREST



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A healthy workforce is good for your school district. With less demand for health care services, healthy people help lower costs. WPS Wellness programs engage and motivate employees to address the lifestyle-related risk factors most likely to increase costs, including obesity, tobacco use, and stress. You'll have access to certified wellness coaches, turnkey kits for starting worksite wellness activities, and detailed reports so you can measure the success of your wellness program—and keep an eye on costs. Now that's something to cheer about!

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



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Student Scholarships — The next WASBO scholarship fundraising opportunities will be at the Spring Golf Outing and the Spring Bike Ride as part of the Spring Conference. We are pleased to offer five scholarships to Wisconsin graduating high school seniors thanks to our scholarship fundraisers and the following sponsors: MetLife Resources, EMC Insurance Companies, BMO Harris Bank, SchoolDude.com, Stalker Flooring, National Insurance Services and Miron Construction. These scholarships require applicants to interview their superintendent, business manager or bookkeeper regarding the effects of revenue limits on their district. We appreciate the time you offer students to assist them in their scholarship applications.

We also provide the Dr. Bambi Statz Academic Scholarship to WASBO members enrolled in a school business management masters program. This

scholarship is funded by Ehlers & Associates. We also thank WISC for providing a scholarship in the name of the Zastrow Award winner, Liberty Mutual for providing a scholarship in the name of the Business Official of the Year recipient and UnitedHealthcare for providing a scholarship in the name of the WASBO President. These award winners and the WASBO President may present these scholarships to a student in his or her district.

Democratic Process — WASBO members continue to collaborate with other associations, agencies and governmental units when appropriate alignment with the WASBO Vision and Mission occurs. WASBO is very active in the School Administrators Alliance (SAA) and in the development of the SAA Legislative Agenda. WASBO members should be meeting and conferring on a regular basis with legislators, the Governor's Office, the Department of Administration, the

Future WASBO Board Goals for Discussion and Action — The WASBO Board continues to move forward with changes that will benefit WASBO members in the future. Examples are developing programs in the areas of Payroll/HR Certification, ASBO SFO Certification Training, aligning future staff and space needs and providing online tracking of Certification Programs for members.

WASBO will continue to have a culture of engaged improvement through reflection, self-evaluation and planned action steps. WASBO endeavors to enhance our present processes, services and products or create new processes, services and products to meet the needs of our members. With such a proactive, networking, and collaborative culture, WASBO can be proud that its actions also positively affect Wisconsin's children.

WASBO Staff — I am proud that Aine Calgaro joined our staff late November. Please take some time to introduce yourself and get to know her. She is a wonderful addition to the WASBO staff. Lastly, please thank Tina, Jeanne, Deb and Aine for their professionalism and exuberance in serving WASBO. In turn, your WASBO staff wants to thank all of you for the great opportunity to serve WASBO.

"To disagree, one doesn't have to be disagreeable."

~ Barry Goldwater

President's Report

Continued from page 3

If you have any ideas or concerns about anything the Board is working on, please share them with me at jdemeuse@luxcasco.k12.wi.us.



Say "Yes" to Dual Benefits

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

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

 Association of School Business Officials International www.asbointl.org



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Meet Candidates for WASBO Board of Directors



John Gahan
Assistant
Superintendent
Pewaukee School
District
President Elect
Candidate

Hello WASBO! My name is John Gahan. I am originally from Port Washington, Wisconsin. The second of six children, I began my school career at Saint Mary's Catholic School from first thru eighth grade after attending public school in Kindergarten. I then attended Port Washington High School and graduated in 1987. After high school I attended UW-Whitewater where I obtained a BBA in Finance. It was at this point when I met George Gray and embarked on a one year journey to earn a MSE in School Business Management. My first position was with the Greenfield School District. I accepted the position as a second internship which quickly became an interim position and six months later a regular contract. I am forever grateful to the members of the Board of Education that took the chance on a 24 year old recent college grad. Thirteen years later in 2005 I was fortunate to be selected for my current position in the Pewaukee School District. My years in Pewaukee have allowed me to grow substantially on both a personal and professional level. Over 20 years in two districts I have learned that the greatest strength of an individual is the quality of the people you surround yourself with. Having said that, I have had the good fortune to be surrounded by some great staff members who have always been able to focus on the mission of doing what is right for the kids and families we serve.

I have been married for 19 years, yes

one year after I got my first job, to my supportive wife Carrie. Carrie, in her role as a School Psychologist, is often able to remind me of the other side of the educational program from what I do on a daily basis. It is amazing what our front line staff members address every day. We have three children in 11th Grade, 8th Grade, and 5th Grade. All three of our children are heavily involved in athletics at both the high school level and the youth select sports level. Carrie and I have been coaching or team parenting for most of the teams for several years.

WASBO as a family has helped me tremendously over the course of my career. My peers have always provided a great sounding board for ideas or to commiserate over issues that have arisen. The fact that members are always willing to share in a collaborative manner is by far the greatest strength of the organization. I have had the privilege to serve on the WASBO Board of Directors from 2006 thru 2009. Running for President Elect of this organization offers me the opportunity to give back to the profession that has helped me get to where I am today.



Darren Clark
Director of
Business Services
Mukwonago Area
School District
Director Candidate

Hello, my name is Darren Clark and I would like to ask for your consideration when voting for the WASBO Board of Directors. I currently serve as the Director of Business Services for the Mukwonago Area School District and have held this position for over 8 years.

Since graduating from the University of Wisconsin – Whitewater in 1993 with my Master's degree in School Business

Management, I have had the privilege of working with some great school leaders whose support and tutelage were pivotal to my career. I fondly remember working with Wendy Brockert in Lake Mills during my graduate internship, thinking I knew everything and quickly realizing that was not the case. I assisted John Coyle (retired Business Manager from Rhinelander) in Boscobel as we were trying to figure out what the QEO was. I also remember Cathy Cramer giving me my first full-time job in South Milwaukee and Bob Buchholtz, upon hiring me in Waukesha, entrusting me with building the budget after being on the job for less than an hour. Bob was a true believer in the sink or swim style of mentorship. When appointed the Director of Business Services in Shorewood, the area business officials would meet monthly. This provided a new business manager the opportunity to ask questions and seek out advice from fellow WASBO members. Even after being in this profession for nearly 18 years, I regularly seek out the help of my fellow WASBO members.

In looking back on all the support this organization and its members have provided me over the years, I decided it was time to increase my involvement in WASBO and become a candidate for director.

I have been a member of WASBO for several years and have served on many committees during that time. I have also participated in the School Finance Puzzle workshop that is held each year at the Joint Convention and work with interns from the University of Wisconsin – Whitewater graduate program.

My wife Irene and I have been married for 17 years. We are blessed with two children, Matthew (16) and Shelby (14), who are great kids, great students, and

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active in sports. Their interest in sports has provided me my favorite pastime for the last decade, coaching youth activities. Like so many of you, much of the last few years has been spent in gyms or at a baseball / football / soccer field supporting my children and their friends. Recently I've taken on a new role as driving instructor for my son. All of a sudden school business management doesn't seem so hard.

Irene and I are both from Janesville and have called the Milwaukee area our home for the last 17 years. We both come from large families so a lot of our free time is spent getting together with relatives to enjoy Badger and Packer games or to celebrate birthdays. When time allows, my favorite vacation is spending a week in Canada walleye fishing.

It is an interesting time to be in public education. Our role as business officials is more vital than ever as we assist our districts' transition to the "new normal." It is my belief that WASBO's primary objective is to continue to support the current membership and develop new professionals to fill this unique and ever changing role. I would like to be part of the successful completion of this task.

I appreciate your time and ask for your consideration for my candidacy as WASBO Director.



Kathy Davis
Business Manager
Cambridge School
District
Director Candidate

Hello Everyone! I would like to take this opportunity to present myself for your consideration for the WASBO Board of Directors. With my experiences in education and WASBO I feel that I will represent the members of WASBO

well and will make a positive impact on the organization. My public education experience started back when I was 23 and began a career as a business education teacher. I had the pleasure of teaching at Parker High School in Janesville for the majority of my teaching experience. At the time I had no plans of leaving teaching. While discussing master's degree options with a colleague of mine, it was recommended that I consider School Business Management. Shortly after that conversation I enrolled in the program at UW-Whitewater and from that point forward my career direction changed.

In 2005 I came to Cambridge as their new business manager. There are many challenges to learning a new profession, but I truly believe that my first years were made much easier by the help of my new WASBO friends and mentors. With support from some of my nearby colleagues at the time and of the many wonderful WASBO members who had reached out to support me as a new business official, I quickly recognized the benefits of belonging to such a strong organization. The benefits not only include professional support, but also emotional support which helps our sanity stay intact during trying times as well as help us appreciate the good times of the profession.

Over my career as a business manager I have participated in many WASBO and ASBO committees/groups. Just to name a few: Spring Conference Committee, Professional Improvement Committee, ASBO's SFO Certification Cut-Score, Madison-WASBO Regional Committee Chair, SAA Legislative Committee, as well as others. Participating in these committees has not only helped me to enhance my own leadership, networking, and communication skills, but has also afforded me an opportunity

to meet some amazing WASBO/ASBO members across the state and country. Recently I became a mentor and I am working with a business manager intern in my district. My participation in many aspects of our organization will also serve me well in the role as a WASBO Director.

As it has for many of us, WASBO has played a very important role in my business manager life. Each year districts face challenges and changes. WASBO is at the forefront of helping us all to navigate through the changes and difficulties that come our way. As a board member, I will do my best to ensure that WASBO continues to serve the needs of the members and continues to grow. Thank you for your consideration.



Jason Demerath
Director of
Business Services
School District of
Fort Atkinson
Director Candidate

Well, now that my boys are all grown up at all of two and four years old, I am looking for more ways to get involved in WASBO. Since I began in the School Business Management program as a student at UW-Whitewater in 2002 I have been a member of WASBO and have found the organization, and all it does for our profession, extremely valuable. At this point, I think it is time for me to give back to the organization by serving on the Board of Directors.

I bring a wide array of experiences to the table. I have been the Business Official in a district as small as 725 students with a budget of \$7.5 million, in a district as large as 13,000 students with a budget of \$130 million, and everywhere in between. I have even worked in the business office of the Madison school district. Currently I work in the School

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District of Fort Atkinson, which is a mid-sized district with 3,000 students and a budget of \$30 million.

Recently I began working to share my experiences with students in the UW-Whitewater School Business Management program as an adjunct instructor. I would also like to share my experiences with you, my colleagues through service on the WASBO Board of Directors. I believe that I would bring a unique perspective to the Board that would allow me to measure the organization's decisions and programs through various lenses. I will be able to gauge the impact of these decisions from the perspective of some of the smallest districts in the state, some of the largest districts in the state, and all of those in between. I also hope to gain some great experiences in my service to WASBO. In my positions throughout the state I have had the opportunity to meet great people in the profession and learn from them. I am hoping to continue growing through this position on the Board of Directors.

As we work through all that is being handed down to us from both the federal and state levels in the form of collective bargaining changes, health care reform, common core standards, assessment and grading, and educator effectiveness, I would like to serve our organization and help my colleagues through these changes. Adding all of this to what we are supposed to be doing every day in our position will be a significant challenge. WASBO is an outstanding organization and I am hoping you will consider my appointment to the Board of Directors to continue to serve and assist you in your professional growth as a School Business Manager. It is difficult for me to imagine a better profession or a better group of colleagues!



Kent Ellickson
Director of Business
Services
Sparta Area School
District
Director Candidate

Thank you for taking the time to review the candidate biographies. I am pleased to step forward and submit my candidacy for a WASBO Director position. The WASBO organization has been a very important part of my professional life since becoming a school business manager in January 2001. Each of our recent WASBO presidents has discussed the importance of giving back to the organization and pointed out that as we do so, we get something in return. Throughout my dozen years as a member, I have found this to be very true.

After teaching business education in the School District of Lodi for 12 years at every possible age level—from early elementary keyboarding, middle school, high school accounting and advanced accounting, to adult evening classes for Madison Area Technical College at Lodi High School, I started a new journey as a school business manager. I've enjoyed serving as the Director of Business Services for the Sparta Area School District since 2005. I moved north and west from my first position in Clinton in 2001 serving as their first school business manager, serving as a business manager for a cooperative agreement between Cambridge and Deerfield, and then serving Cambridge itself. These districts are varied in size, wealth, politics, culture, and structure and provided me an appreciation of the different environments school business officials serve. I have also enjoyed the opportunity to be a part of two different regionals within WASBO, the Madison Area School Business Officials and the West-Central School Business Officials.

The main reason I believe WASBO is successful is the collaborative approach it uses in moving forward with its mission. WASBO members collaborate with each other, as well as people outside of WASBO, to engage in activities supporting WASBO's vision - to be the most influential Wisconsin organization for state and national school business management and leadership. Within WASBO there is a willingness to bring forth ideas consistent with its vision and mission statement. Members eagerly share their energy and talents and provide encouragement to others to do the same. As a result, WASBO thrives because of the contributions of a diverse group of members with different levels of experience. WASBO is continually renewing itself and moving forward.

Over the last several years I have participated in a variety of WASBO initiatives. As the recent co-chair of the School Finance Puzzle, I am proud of the half-day pre-convention workshop and how it provides an interactive manner for school board members and others to learn about the "basics" of Wisconsin school finance. This success would not be possible without hard work of many fellow WASBO members, DPI staff, UW-Whitewater personnel, and WASBO staff who work together each year. My other WASBO involvement includes participation on the Joint Convention Committee, volunteering to co-present at a WASB New School Board Member workshop, training and participation as an *Investing in Wisconsin Public Schools* table facilitator, and completing the WASBO mentorship training.

The breadth of WASBO initiatives is as large as the scope of school business management. Achieving the WASBO vision is critical. As a candidate, I am hoping to help WASBO continue this collaborative effort to promote our profession and to represent the

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New Guidance: Athletics & Section 504

By Gary M. Ruesch, Partner, Buelow Vetter Buikema Olson & Vliet, LLC

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Buelow Vetter Buikema Olson & Vliet, LLC

Gary Ruesch

On January 25, 2013, the Office for Civil Rights (“OCR”) of the United States Department of Education issued a “significant guidance document” intending to assist school districts and other organizations in understanding their obligations under Section 504 of the Rehabilitation Act of 1973 (“Section 504,” 29 U.S.C. § 794(a), (b)). The document is in letter form, does not add statutory requirements, but is intended as formal guidance which the OCR believes school districts are well-advised to follow. Please remember that this is OCR’s interpretation of the law, which, at times, has been at a variance with court interpretations.

The document is divided into sections which are summarized as follows:

1. **Overview of Section 504 Requirements.** According to Section 504, a person with a disability is one who (1) has a physical or mental impairment that substantially limits one or more major life activities; (2) has a record of such an impairment; or (3) is regarded as having such an impairment.
2. **Do Not Act on Generalizations and Stereotypes.** A school district may not operate and base decisions in its extracurricular program or activity on the basis of generalizations, assumptions, prejudices, or stereotypes concerning disabilities. A school district also may not rely on generalizations about what students with a particular type of disability are capable of.
3. **Ensure Equal Opportunity for Participation.** A school district that offers extracurricular athletics

must do so in such manner as is necessary to afford qualified students with disabilities an equal opportunity for participation. This means making reasonable modifications and providing those aids and services that are necessary to ensure an equal opportunity to participate, unless the school district can show that doing so would be a fundamental alteration to its program.

4. **Offering Separate or Different Athletic Opportunities.** Students with disabilities who cannot participate in the school district’s existing extracurricular athletics program – even with reasonable modifications or aids and services – should still have an equal opportunity to receive the benefits of extracurricular athletics. When the interests and abilities of some students with disabilities cannot be as fully and effectively met by the school district’s existing extracurricular athletic program, the school district should create additional opportunities for those students with disabilities.

It is the last section that has received the most publicity in the media. Although activities such as wheelchair basketball and Special Olympics have been operating for years, this is the first appearance in a document of “significant guidance” issued by the OCR. Adding complexity, the least restrictive environment mandate applies so that, even in athletics, districts must ensure that children with disabilities participate with nondisabled children to the maximum extent appropriate. The advocacy by OCR of such systemic programming would seem to extend the breadth of Section 504’s reach.

School district officials must remember that they may adopt bonafide safety standards and may require a level of skill or ability for participation in a competitive program or activity. Equal opportunity does not mean, for example, that every student with a disability is guaranteed a spot on an athletic team for which other students must try out.

Finally, as with most issues involving students with disabilities, the school district officials must engage in an individualized inquiry to determine whether any particular modification is necessary. This means that a school district must make reasonable modifications to its policies, practices, or procedures whenever such modifications are necessary to ensure equal opportunity. The OCR puts the burden of proof on school districts to demonstrate that the requested modification would constitute a fundamental alteration of the nature of the extracurricular athletic activity. This includes try-outs as well as in actual competition. In addition, the requirements of the Individuals with Disabilities Education Act (20 U.S.C. § 1401, et seq.) have specific IEP requirements related to participation in extracurricular activities, including athletic activities. We recommend that school districts provide training and inservice opportunities to athletic directors, coaches and assistant coaches to ensure compliance with these dual requirements.

For more information or assistance on this topic or its impact on school districts, please contact your Buelow Vetter attorney, or Gary M. Ruesch at (262) 364-0263 or gruesch@buelowvetter.com.

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WASBO 66th Annual Spring Conference & Exhibits

Wisconsin Association of School Business Officials



May 7-10, 2013

KI Convention Center
Green Bay, WI

www.WASBO.com/spring

New Guidance: Athletics & Section 504

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This *Legal Update* is intended to provide information only on general compliance issues and should not be construed as legal advice. Please consult an attorney if you have any questions concerning the information discussed in this *Legal Update*.

Meet Candidates for WASBO Board of Directors

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membership as the organization continues to grow initiatives to serve its vision and mission. Participation in WASBO is an honor.

"A pessimist sees the difficulty in every opportunity; the optimist sees the opportunity in every difficulty."

~ Winston Churchill

**WASBO
Accounting
Conference**

March 20-21, 2013
Chula Vista Conference Center
Wisconsin Dells, WI

Register at
www.WASBO.com/accounting

Who Should Attend?
Business Managers, Directors
of Finance, Bookkeepers,
Accountants, District
Administrators, Human Resources

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Keith Lucius - 2013 School Business Official of the Year
Continued from page 1

achievements include implementing the district's one-to-one computer initiative, which provides netbooks to freshman and sophomore students; and creating an Update on Public Schools presentation for local senior citizens.

Keith took time to recognize and thank those who have supported him including his family, school board members, and superintendent. Business official support came from WASBO staff and colleagues that provided feedback, ideas and sharing. In particular, he recognized Ken Mischler, Larry Krebs, Todd Gray John Keller, Jeff Seeley and Bambi Statz.

He also thanked his previous superintendent for encouraging him to be more of an educational leader. Keith provided the following advice to his colleagues. "As educational leaders, we need to get out into the classroom on a regular basis." He then told the story of how he partnered with teachers in tutoring students on a weekly basis in math and reading. Understanding the educational process in the classroom lends necessary perspective that is needed by all educational leaders.

This honor carries with it a \$500 cash award, sponsored by Hutchinson, Shockey, Erley & Co. Lucius also has the privilege of presenting a \$1,500 scholarship, sponsored by Liberty Mutual, to a 2013 graduating senior from the Ashwaubenon School District.

Kent Ellickson - 2013 Shining Star
Continued from page 1

and interesting to the participants."

Kent thanked Quarles and Brady for their support of the Shining Star Award and Diane Pertzborn for making the nomination. He recognized Tom Wohlleber for his initiation of the Finance Puzzle session and the many facilitators and presenters who make the session possible.

He noted that a star is a source of energy. The Finance Puzzle is a great source of energy, involving many people. He also recognized WASBO's history of supporting each other.

According to Bambi Statz, Executive Director of the Association for Equity in Funding, "[Kent Ellickson] has demonstrated a high level of leadership skills in working with experts from multiple state organizations including WASBO, DPI and UW-Whitewater along with a large group of his peers to prepare over several months each year to plan a high-quality curriculum with hands-on opportunities for participants to apply knowledge gained."



*John Forester
SAA Director of
Government Relations*

Legislative Update

Private School Voucher Expansion: The Wrong Choice for Wisconsin

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

In Wisconsin, our ongoing effort to provide all children with the highest quality educational opportunities possible is now facing a crossroads.

Cleveland private school voucher programs, students offered vouchers do not perform better in reading and math than students in public schools.

In 2011, the Wisconsin Legislative Audit Bureau released a five-year longitudinal study, which concluded that students in Milwaukee using vouchers to attend private schools perform no better on standardized tests than their counterparts in public schools.

Moreover, the majority of students (approximately 75%) who had enrolled in MPCP in 9th grade had withdrawn from the program by the time that they had reached 12th grade. This means that the “success” that voucher advocates point to with regard to graduation rates and college enrollment only reflects successful students’ “exposure” to MPCP, not their long-term participation in the program.

Fact #2 - Vouchers Eliminate Public Accountability

Requirements for voucher schools stand in stark contrast to the strong controls imposed on public schools. For example, consider the following facts:

- Voucher schools are not required to meet the federal No Child Left Behind standards of hiring “highly qualified” teachers. In fact, voucher schools can even hire teachers who are unlicensed.
- Private voucher schools are not bound by most state instructional requirements.
- Voucher schools do not even follow uniform state graduation requirements.
- Voucher schools do not have to accept all students, nor do they

We can unite behind what we know works: comprehensive education reforms that emulate states like Massachusetts, which have significantly increased student performance and closed achievement gaps, or we can follow a divisive, ideologically-driven, failed experiment and de-fund public schools while expanding taxpayer-funded private school vouchers.

Over the years, private school voucher advocates have consistently pushed for their expanded use in Wisconsin, targeting students with specific needs and those in particular communities. Most recently, special needs students and students in Racine, Kenosha, Beloit, and Green Bay have been the focus of voucher expansion campaigns.

Make no mistake about it. The ultimate objective of voucher advocates is a statewide system of private school vouchers for all Wisconsin school children.

In the face of a very polished, well-financed public relations campaign by private school voucher advocates, there is a need for all Wisconsin residents to understand three basic facts about private school vouchers.

Fact #1 - Vouchers Do Not Improve Student Achievement

According to multiple studies of the District of Columbia, Milwaukee, and



have to provide students with the same due process protections afforded students by public schools.

- Even if a student is admitted to a private voucher school, the school can later reject him or her for numerous reasons of its own choosing.

The Milwaukee lawmaker responsible for founding MPCP has now questioned the dismissal policies for students at voucher schools, and has criticized the abilities of private schools to select students instead of parents selecting schools, which is what proponents of the voucher program claim will occur.

Finally, existing voucher programs, from Florida to Cleveland to Milwaukee, have been involved in scandal and fraud due to the lack of public accountability inherent to these programs.

Fact #3 — Vouchers Take Resources Away from Public School Students

Many people are surprised to learn that vouchers divert resources from public schools to pay private school tuition for a few students, including many who are already in private school. This siphoning of resources from public school students takes place in several ways.

Private school voucher advocates around the country continue to pursue the de-funding of public schools as part of their agenda. In the 2011-13 state budget in Wisconsin, the public school revenue limit was cut an average of \$550 per pupil, while the private voucher per-student amount was held

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harmless. In the same budget, state public school aids were reduced by over \$800 million, while funding for private voucher schools increased by \$23 million to support expansion.

Two recent memos by the non-partisan Legislative Fiscal Bureau (LFB) raise more startling issues that should be of concern to all Wisconsin parents and taxpayers. The first shows that while the average public school student in Wisconsin receives roughly \$4,900 of general state aid, the state guarantees private voucher school students \$6,442 in aid from the state and local school districts. Over 80% of school districts now receive less than the guaranteed voucher amount, and voucher advocates are pushing lawmakers to increase the voucher guarantee to \$8,000 or more.

Taxpayers must consider: In effect, the state requires local school districts to use local property taxes to pay part of the voucher payments to private

schools without the consent of local taxpayers.

The second LFB memo clearly shows that **voucher expansion around the state will siphon resources away from vital public school programs for all children and force local school districts to raise property taxes to make up the difference.** For many districts, raising property taxes enough to cover the entire "voucher shortfall" may place too great a burden on already cash-strapped property taxpayers. Therefore, voucher expansion will likely lead to even greater reductions in quality educational opportunities for all students.

In short: voucher expansion means property tax increases and reductions in student services.

There Is a Better Choice

In spite of overwhelming evidence that shows that vouchers do not improve student achievement, that voucher

schools are woefully deficient in their academic and financial accountability to the public, and that voucher expansion will take resources away from students attending public schools, voucher advocates continue to pursue a statewide system of private school vouchers for all Wisconsin school children (rural lawmakers and rural school districts take note: you are not immune from this issue!).

There is a better choice for Wisconsin. Wisconsin's educators, parents, taxpayers, and lawmakers must collectively unite behind a strategy of educational improvement that we know works: investing in comprehensive education reforms that follow the best practices of states, like Massachusetts, that have significantly raised student performance and closed achievement gaps, all without relying on taxpayer-funded private school vouchers.

Service Affiliate Checklist

- Sponsorship Opportunities
 - Accounting Conference
WASBO.com/Accounting
 - Spring Conference
WASBO.com/Spring
- Spring Conference Exhibitor Registration
WASBO.com/Spring
- Taking Care of Business Articles due March 15 for April issue.
- Update your profile and Buyer's Guide categories at WASBO.com.
- Join a WASBO Committee

"Silent gratitude isn't much use to anyone."

~ G.B. Stern

ASBO MEETING DATES

2013 Annual Meeting & Expo

Oct. 25-28, 2013 - Hynes Convention Center - Boston, MA

2014 Annual Meeting & Expo

Sept. 19-22, 2014 - Gaylord Palms Resort & Convention Center - Kissimmee, FL

2015 Annual Meeting & Expo

October 23-26, 2015 - Grapevine, TX

2016 Annual Meeting & Expo

September 23-26, 2016 - Phoenix, AZ

2017 Annual Meeting & Expo

September 22-25, 2017 - Denver, CO

2018 Annual Meeting & Expo

September 21-24, 2018 - Orlando, FL





Shana R. Lewis

Federal Appeals Court Rules That Act 10 is Constitutional

By Shana R. Lewis and Kirk D. Strang, Davis Kuelthau, s.c.

Reprinted with permission from Client Alert, January 21, 2013



Kirk D. Strang

The United States Court of Appeals for the Seventh Circuit has ruled that 2011 Wisconsin Act 10 is constitutional in an opinion released on Friday, January 18, 2013.

The Seventh Circuit's decision reviewed a decision

that had been issued by the United States District Court for the Western District of Wisconsin in the spring of 2012. The District Court had concluded that the majority of Act 10 was constitutional, but also found that those portions of Act 10 that required general municipal employees' representatives to face annual recertification elections and that banned union dues deduction were unconstitutional. The Seventh Circuit concluded that even these two portions of the law were constitutional, and reversed the District Court's decision on those portions of its earlier ruling. The Seventh Circuit also denied the unions' cross appeal, which challenged provisions of Act 10 that limited general municipal employees' collective bargaining rights as unconstitutional.

What Did The Court Actually Say About Act 10 And The U.S. Constitution?

Limits on Collective Bargaining

The Seventh Circuit began its analysis of Act 10's collective bargaining limitations and recertification elections requirement by reviewing the standards that the Court would use to evaluate the unions' claims that the distinctions made under the Act between public

safety and general employee groups violate the Equal Protection Clause of the U.S. Constitution. The Court noted that laws only need to have a rational basis to survive an equal protection challenge, and explained that courts cannot decide whether a law has a rational basis by considering the statements of individual legislators or other proof of what may have really motivated lawmakers. Instead, according to the Court, laws must be upheld if there is a "rational relationship between the disparity of treatment and some legitimate governmental purpose," whether that purpose actually represents the "legislature's motive" or not.

The Seventh Circuit then considered whether restricting general municipal employee bargaining to "total base wages," while leaving public safety employees free to bargain about wages, hours, and conditions of employment (with certain exceptions), violates the equal protection clause of the constitution. The Court reasoned that the state could rationally conclude that it could not risk labor unrest and potential work stoppages by public safety employees that might accompany the passage of Act 10. Based on this compelling state interest, the Court held that the state could distinguish between general municipal and public safety employees for purposes of defining their bargaining rights.

The Court rejected the unions' related claim that the distinctions made by the state were not really based on public safety considerations, noting that the legislature must decide what groups constitute public safety occupations. Consequently, the Court determined

that courts cannot assume the authority to decide which occupations would jeopardize public safety with a strike and then use that determination to support an equal protection challenge. The Court stressed that this involved a legislative policy judgment, concluding that "[d]istinguishing between public safety unions and general employee unions may have been a poor choice, but it is not unconstitutional."

Recertification Election Requirements

The Seventh Circuit began this portion of its decision by noting that many of the same considerations that related to distinctions made between employee groups' bargaining rights under Act 10 also were relevant to evaluating the legislature's decision to require recertification elections. The Court stated that Act 10 reflects "a rational belief" about the financial costs of public sector unions to the state, and the recertification provisions implement this point of view about state finances by ensuring that the state does not have to "incur the cost of unions which have uncommitted members."

The Court concluded that a legislative goal of avoiding the instability that could result from requiring similar elections for representatives of public safety personnel reasonably supports the distinction that the legislature made between public safety employees and general municipal employees for purposes of recertification elections. Consequently, requiring annual recertification elections for general municipal employees was found to be constitutional as well.

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Union Dues Deduction and Fair Share Prohibitions

The Seventh Circuit also held that Act 10's limitations on payroll deductions (union dues deduction and fair share) do not violate the First Amendment to the U.S. Constitution. The Court reasoned that use of the state's payroll system to deduct union dues subsidizes, rather than burdens speech. The Court observed that the government is not permitted to place "obstacles in the path of speech," but added that nothing requires the government to "assist others in the funding of particular ideas, including political ones."

Critically, the Court found that this is no less true in circumstances where one group of employees (public safety employees) has statutory authority to enter into union dues deduction agreements, while another group of employees (general municipal employees) does not. The Court reasoned that Act 10 does not erect a barrier to speech and, to the extent it subsidizes the speech of public safety employees, such a subsidy is not unconstitutional because the U.S. Constitution does not require that the government subsidize all speech equally. The Court added that Act 10 does not discriminate based on viewpoint and, as a result, does not violate the constitutional principle requiring viewpoint neutrality.

On this basis, the Court concluded that Act 10's limitations on payroll deductions does not violate the First Amendment.

The Seventh Circuit then began its discussion of Act 10's prohibition against union dues deduction (and its corresponding repeal of the statutory authority for fair share agreements) by noting that the prohibition only needed to have a rational basis, since the First

Amendment was not implicated by this change.

The Court then observed that the state "could have rationally eliminated all payroll deductions." Although the unions maintained that it was "wholly implausible" that the legislature could truly fear that imposing a payroll prohibition on public safety employees would trigger an illegal strike, the Court responded that the state does not have to "produce evidence to sustain the rationality" of the law. Instead, according to the Court, all that is required is "some footing in the realities of the subject addressed by the legislation," and added that the controversy and protests surrounding passage of Act 10 established that the state's fear was rational under this standard of review.

What This Means For Municipal Employers

The Seventh Circuit Court of Appeals' decision answers many questions but, because of companion state court litigation, it does not fully resolve the issues that the Court addressed for municipal employers. In this regard, Dane County Circuit Court Judge Juan Colas issued a decision in the fall of 2012, finding that many of the same portions of Act 10 that were considered by the Seventh Circuit were unconstitutional. Judge Colas' decision is currently on appeal to the Wisconsin Court of Appeals. As a result, municipal employers will still have to account for decisions from the Court of Appeals and, potentially, our State Supreme Court to determine what course of action is appropriate.

By way of background, Judge Colas ruled that parts of Act 10 were unconstitutional under the Wisconsin Constitution, as well as the U.S. Constitution (which is what the Seventh Circuit considered). Judge Colas found

that a number of Act 10's provisions were unconstitutional, including provisions requiring referendum elections for wage increases that exceed the CPI, limiting fair share agreements to public safety employee bargaining units, prohibiting union dues deductions, prohibiting collective bargaining on anything but total base wages, and requiring recertification elections for general municipal employee bargaining units. If Judge Colas' ruling concerning the limitations on collective bargaining rights for general municipal employees was to stand, "wages" became a mandatory subject of bargaining, while "hours and conditions of employment" became permissive subjects of bargaining, rather than prohibited.

However, Judge Colas reasoned that the Wisconsin Constitution provides no less rights than the U.S. Constitution and relied heavily on prior federal court decisions, including cases that were cited by the Seventh Circuit Court of Appeals. Thus, the Wisconsin Court of Appeals and/or the Wisconsin Supreme Court will have to determine whether the Seventh Circuit's opinion is authoritative in circumstances where the state court interpreted Wisconsin constitutional provisions that are themselves based on the U.S. Constitution (such as the First Amendment) and relied on federal court decisions in doing so.

As a result, because of the Seventh Circuit's decision, the motions to stay Judge Colas' decision that are now pending before the Court of Appeals take on additional importance for municipal employers around Wisconsin. The state has asked that the Court of Appeals stay Judge Colas' decision while the appeal is pending, and argued that Judge Colas' decision has created statewide confusion on the state's, as well as municipal employers', rights and obligations

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Linda Mont

Health Plan Nondiscrimination Testing

By Linda Mont, RHU, Senior Benefit Consultant and Managing Member, Key Benefit Concepts, LLP

Nondiscrimination testing applies to health plans (Section 105(h) and cafeteria plans (Section 125). The testing is different, but the goals are the same – to assure that plans do not discriminate in favor of highly-compensated employees (HCEs) for Section 125 plans and highly-compensated individuals (HCIs) for health plans in relation to eligibility, benefits or utilization. This article primarily addresses Section 105(h) nondiscrimination testing.

Nondiscrimination and Testing

Basically, if an employer wishes to provide a tax-free health benefit to employees, the employer must ensure via nondiscrimination testing, that a self-insured health plan does not favor the highly compensated individuals (HCIs) in the health plan with respect to eligibility to participate or benefits.

Section 105(h) health plan nondiscrimination testing is not a new requirement. It has been around since 1981. Currently, it applies only to self-insured health plans. A self-insured health plan is one in which the District bears the risk for paying the claims. In the future, rules similar to the ones for self-insured plans will also apply to non-grandfathered, fully-insured health plans. We are not certain when this will occur but we expect some Internal Revenue Service (IRS) guidance in the near future.

It is important to note that official guidance is very limited. There are many interpretations and unofficial guidance, which leads to questions of reliability of this information.

Most districts in the State have fully-insured medical benefit plans. While

there are some insurance requirements in Wisconsin, fully insured health plans are currently exempt from Section 105(h) nondiscrimination testing. If the plan is fully insured, there are no requirements for testing should the district provide a different eligibility requirement for coverage by employee classification or for continued medical coverage in retirement, nor if the district provided a different length of time or dollar amount of retiree medical coverage. However, it is important to include for any active or retired health plan a provision that the district reserves the right to make changes to coverage if future testing rules or plan structure (e.g., switching carriers and new carrier will not cover prior retirees) makes it impossible to provide coverage.

Note, however, that if employees make a pretax contribution for health insurance coverage (for a fully insured or self-insured plan), there is required nondiscrimination testing for Section 125 cafeteria plans that your flex administrator should currently be performing on an annual basis.

Collectively-bargained self-insured plans were likely exempt from nondiscrimination testing. Therefore, prior to Act 10, most Districts paid little attention to nondiscrimination testing. Now that benefits are no longer collectively bargained, it is important to review existing self-insured plans as well as any new self-insured plan for compliance with current nondiscrimination testing requirements.

In more recent years, the Health Reimbursement Arrangement (HRA) was introduced. The HRA is a self-insured health plan that is subject to nondiscrimination testing. However,

if the HRA is for reimbursement of medical plan premium only, some legal interpretations indicate that it is not a medical expense subject to nondiscrimination testing. Many districts introduced the HRA as a vehicle for providing a post-employment benefit to retirees. Prior to Act 10, some districts implemented the HRA as a means to provide a medical premium benefit for administrators with the intention to eventually negotiate an HRA benefit with the teachers. If the teachers' group (or teachers' and administrators' groups) could pass the nondiscrimination testing, then the benefit would be expanded from just use of HRA dollars for premium coverage to include use of the HRA dollars for other out-of-pocket medical expenses (in compliance with Section 213(d) of the IRC), much like a flexible spending account. Now that benefits are no longer bargained in the state, the district could implement such a benefit if they so choose – as long as it passes nondiscrimination testing. However, maintaining an HRA for reimbursement of premium only, while now avoiding testing, is expected to be subject to testing when new guidance is issued. HRA Retiree health plans may be exempt, but without a clear definition of a Retire Only Plan, it is still unclear.

The Tests

Section 105(h) nondiscrimination testing that applies to public entity health plans, identifies HCIs as the top 25% highest paid in an organization. Please note that nondiscrimination testing for a Section 125 cafeteria plan has a different definition of a highly compensated employee (HCE), but for our discussion about health plans, we are only talking about a highly compensated individual (HCI) as defined for Section 105(h) health plan testing.

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There are two types of testing. The benefits test requires the plan must provide the same benefits for both HCIs as for non-highly compensated individuals (NHCIs). The eligibility test is based upon meeting mathematical calculations assuring that a sufficient ratio of benefiting NHCIs to benefiting HCIs. There are also some safe harbor tests if the plan fails the eligibility tests.

Testing is performed based upon nondiscriminatory classifications of employees such as salaried, hourly, employees of a geographic region or having similar bona fide business criteria. When performing testing some employees may be excluded, including part-time employees, non-resident aliens, employees under age 25, employees with less than 3 years of service and employees covered under a collectively-bargained agreement.

Finally, there is a facts and circumstance test to determine if the plan benefits a nondiscriminatory class of employees, basically to assure that there are more than a nominal number of participating employees in the middle and lower brackets.

The Impact of Health Reform

Health care reform - the Patient Protection and Affordability Act (PPACA) - has added a new level of complexity. PPACA did not change the Section 105(h) test. Those rules exist and must be followed as best as possible under current guidance. However, as noted above, PPACA included changes which are expected to require non-grandfathered insured group health plans to satisfy nondiscrimination rules. The new nondiscrimination rules under PPACA were intended to apply for plan years beginning on or after September 23, 2010. Compliance was intended to be January 2012; however, the IRS announced a delay in compliance until

the government has **issued regulations or other guidance** on how the rules apply to insured plans. **To date, no such guidance has been provided and no compliance date has been identified.** We expect new rules and guidance to be provided in the near future - compliance may be as soon as January 1, 2014. However, the actual date is still unknown.

Until the guidance is published and these rules become applicable, insured medical plans are only subject to nondiscrimination requirements indirectly, when coverage is offered through a cafeteria plan.

There are still questions about what insured plans will be subject to the new regulations when guidance is issued. Since the new regulations are part of PPACA and there are nondiscrimination testing exemptions for certain retiree plans, it is possible that the yet-to-be published nondiscrimination requirements may exempt retiree plans as well. However, there is still some question as to what defines a retiree

plan. Further, there is some ambiguity regarding whether fully-insured health plans of non-federal government plans will be subject to the new rules.

What To Do Now

With so much unknown and with no clear idea when there will be more guidance on nondiscrimination regulation, it is important to be prudent and to thoroughly evaluate the current situation before making changes and be prepared to make changes, if necessary.

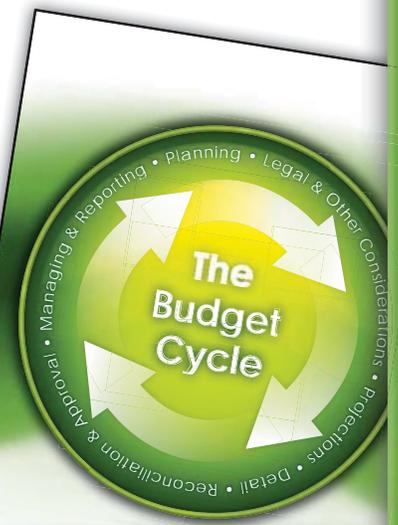
KBC is a full service actuarial and employee benefit consulting firm. We have been performing Section 105(h) nondiscrimination testing and consulting with many districts regarding current plans in light of current regulations as well as expected changes in the future.

For more information on nondiscrimination testing requirements or to obtain an independent audit of your current plans, please contact Linda Mont at 262-522-6415 or lmont@keybenefits.com.

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under the law. However, the Court of Appeals noted that the state also maintained that Judge Colas' decision does not have the force of precedent outside of Dane County, a factor that – according to the Court – tended to undermine the state's claim that Judge Colas' decision had statewide impact. The Court of Appeals also indicated that, while the unions defending Judge Colas' decision maintained that it did represent current state law, the unions had not provided sufficient authority to support this claim.

As a result, the Court of Appeals asked both parties to provide additional briefs on the question of whether the portions of Act 10 that Judge Colas struck down as unconstitutional are, indeed, invalid

statewide while an appeal is pending or whether that decision lacks the force of precedent. The briefs are due at the end of January 2013. If the Court of Appeals decides this issue directly, municipal employers should know whether they are required to follow Judge Colas' decision as the current law of the state while the state's appeal is processed or, alternatively, whether the Seventh Circuit's decision defines current law until the Court of Appeals and/or the Wisconsin Supreme Court can make a final decision on what Wisconsin's Constitution requires.

The attorneys at Davis & Kuelthau, s.c., will continue to monitor this litigation and provide our clients with information as it becomes available.

If you have questions or would like additional information on this matter, please contact your Davis & Kuelthau attorney or Shana R. Lewis at slewis@dkattorneys.com or Kirk D. Strang at kstrang@dkattorneys.com.

*"Keep your eyes on the stars,
and your feet on the ground."*

~ Theodore Roosevelt

Health Reform poses some pretty big hurdles:

- 30-hour coverage determination
- Full-Time Equivalency
- Pay or Play Rules/Penalties
- Plan Affordability
- Nondiscrimination changes
- Understanding Exchanges
- New fees and employer responsibilities



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Director's Corner

Conferences, Conventions and Camaraderie

By Jeanne A. Stahl, Business Manager, Hayward Community Schools

Jeanne Stahl
WASBO Treasurer had attended and the benefits that I derived from my attendance. It can be difficult to take the time away from the office and all of those duties and tasks that do not get taken care of in our absence and are just waiting for us upon our return. But I was very thankful for the information that I was able to obtain when I was at the convention. I am one of those people that often prefer to read about a topic because the visual word tends to stay with me longer than listening to the content. But in one particular case, namely the sessions that spoke to the Affordable Care Act, I was able to get a much better grasp of what we will be facing in order to comply with this Act.

Listening to the speaker presentations, as well as answers to questions posed by the attendees was very valuable and I was glad I had been there. The volume of documentation on this issue alone would have been very difficult for me to read and digest on my own. Attending sessions can give you a sense of relief because you know you are already in compliance or can create a slight panic when you learn about something that you didn't know you were supposed to do.

We are very fortunate as WASBO members to have so many great professional development opportunities developed by the staff and conference committee members. We obtain timely and meaningful information. These allow us to maintain and improve our professional competence. We are kept up-to-date on potential and actual

changes to laws and regulations. Best practices can be gleaned. There is also the benefit of meeting with our colleagues, which not only gives us people we feel comfortable to call upon when we need assistance or advice, but also forges the opportunity to develop friendships. We can commiserate with others that are in the same boat we are.

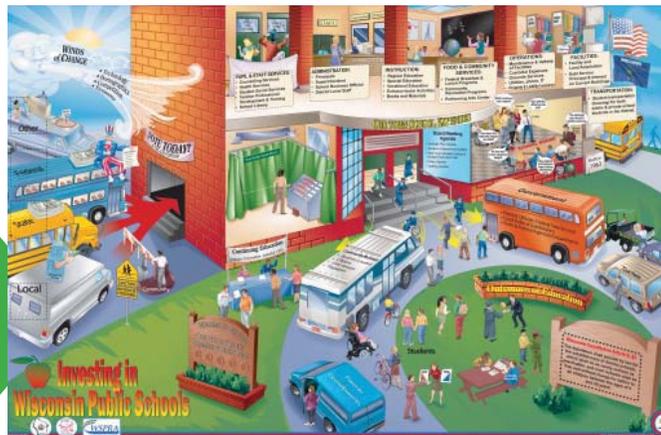
We are all facing tighter budgets and may be pressured into reducing staff development budgets and expenditures for professional memberships. But we should be defending the value we receive from our membership in WASBO and the benefits we receive from attendance at our conferences and workshops. It can be a very small price to pay when compared to the cost of a missed opportunity or not complying with a law or regulation.

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Director's Corner

Investing In Wisconsin Public Schools: An Update

By Bob Avery, Director of Business Services, Beaver Dam Unified School District

Bob Avery
WASBO Director

It has been a busy year for the team charged with developing and rolling out the Investing In Wisconsin Public Schools product. The team is comprised of a wide variety of individuals representing key stakeholders: Woody Wiedenhoef, Scot Ecker, Andy Weiland, Tina Hafeman, Deb Saeger and myself from WASBO, David Carlson representing WASB, Kit Dailey from WSPRA, and Bob Borch from PMA.

At the Joint State Education Convention in 2012, we conducted a beta test with a group of 11 school board members. At this year's convention, nearly 400 school board members and administrators expressed interest during registration to attend! Thanks to the incredible staff at WASBO, as well as twenty colleagues who volunteered to facilitate a table at one or both of the Investing sessions, we were prepared to share this with convention attendees. (Unfortunately, only about 40 people actually attended the sessions. But the feedback from the attendees has been overwhelmingly positive.)

To date, we have sold 32 kits and trained over 100 individuals to be table coaches. Personally, I purchased a kit for our district and had my board go through the exercise. Our board was very enthusiastic about it and appreciated the learning experience. We will be doing this again soon with our administrative team.

For those that have yet to participate in Investing, I encourage you to do so. Keep your eyes out for opportunities at WASBO conferences, at the regionals, and other times.

The marketing plan for Investing has changed recently as well. We attempted to negotiate an agreement with the CESAs, but were unable to resolve all issues in a way that worked for WASBO and the CESAs. Our mission now is to find a way to get Investing into as many school districts as possible and to expose as many people as possible to the process.

To that end, we have implemented a major change and are now allowing districts to share their Investing kits in order to run the exercise to larger groups without the roadblock of costs that are seen as prohibitive to conduct larger sessions. However, districts are still required to buy at least one kit and have at least one trained table coach in order to use the tool. If you want to connect with (an)other district(s), you can contact the WASBO office for a list of participating districts and available table coaches.

We hope that you consider the \$750 investment.

On another note, Woody has allowed me to use this space to ask for your help. This summer I am again riding my bike across Iowa. I will be doing this to help raise money for the LIVESTRONG Foundation. The Foundation provides support and information to cancer patients and their support teams as they wage their fight against the disease. I would greatly appreciate it if you would consider making a contribution to my fundraising efforts at <http://tinyurl.com/ba-ls-donate>. If you have any questions for me about this, please feel free to email me. Thank you!





Health Care Reform Q&A

By Christina Van Skyock, Fringe Benefit Consultant, American Fidelity Assurance Company

Christina Van Skyock

Comprehensive Health Care Reform legislation was enacted in March 2010 and has been a

topic of discussion ever since. American Fidelity Assurance Company knows it's challenging for employers to understand the new requirements, figure out how to comply, and keep up with the changing rules. This Q&A will hopefully answer some common questions employers have about Health Care Reform and how it could impact them, particularly between now and 2014.

Q What are the administrative requirements employers need to have on their radar screens?

A Health Care Reform imposes a number of new administrative obligations on employers and plan sponsors. The following are a few key provisions with upcoming effective dates:

- **Summary of Benefits and Coverage** – Plan sponsors for self-funded plans and insurers for fully insured plans must provide a Summary of Benefits and Coverage (SBC) and Uniform Glossary to plan participants. An SBC is an eight-page chart that provides participants and beneficiaries a high-level description of their available group health coverage. Plan sponsors must distribute the SBC for enrollments and plan years beginning on or after September 23, 2012. This is in addition to the ERISA requirement to provide a Summary of Plan Description

(SPD). If the plan is fully insured the plan sponsor shares responsibility with the insurer for distributing the SBC. Plan sponsors of self-funded plans must fill in the government-provided template with the required information for their plan(s). Distribution is required with all enrollment materials (including initial, annual, and special enrollments), following a special enrollment event, and upon request. The Uniform Glossary, however, only has to be provided upon request.

- **W-2 Reporting of Health Costs** – Most employers that were required to file 250 or more W-2 Forms in 2011 are required to report the cost of certain health coverage on employees' 2012 W-2 Forms (which are generally required to be provided by January 31, 2013). Employers should be working with their payroll teams now to identify which health coverage needs to be reported (the IRS has published a helpful chart), the amount that has to be reported for each (both the employer and employee contributions, similar to the way COBRA premiums are calculated), and who will be responsible for gathering the information at the end of the year.
- **New Hire Notice** - By March 1, 2013, and for all subsequent new hires, employers must provide notices to employees that include information about the state Exchanges. If the actuarial value of the employer's plan is less than 60%, the notice must also

describe the availability of a federal premium tax credit and cost-sharing reductions for Exchange coverage. The federal agencies are expected to provide a model document for this purpose.

Q Is it the employer's or the insurer's responsibility to comply with the plan design mandates that take effect in 2014?

A Health Care Reform imposes a number of new requirements on the benefits that must be covered by certain group health plans, generally those that provide major medical coverage. Many of these requirements take effect for plan years beginning on or after January 1, 2014. For example, plans may not impose waiting periods longer than 90 days, and annual dollar limits and pre-existing conditions limits will be prohibited. In addition, non-grandfathered plan deductibles may not exceed certain amounts and such plans must include out-of-pocket maximums (after which the plan must pay 100% of covered expenses through the end of the plan year). These are only a few examples of plan design mandates imposed by Health Care Reform.

The law requires group health plans and health insurance companies to comply with the plan design mandates. However, the penalty for non-compliance is imposed on the employer. The penalty is generally \$100 per day for each affected individual up to the date of correction. From a practical standpoint, there are many tasks that will likely be performed by the insurer and or plan administrator. Because the employer could be

Continued on page 27

assessed a penalty, it is important for the employer to take an active role in ensuring the group health plan's compliance with these Health Care Reform mandates.

Q What is the “employer responsibility” requirement in the law?

A Effective **January 1, 2014**, a “large employer” (with 50 or more full-time equivalent employees) that does not offer health coverage (to full-time employees working 30+ hours per week and their dependents) must pay a monthly Free Rider Penalty of 1/12th x \$2,000 x the number of full-time employees (after the first 30 employees) if at least one full-time employee enrolls in Exchange coverage and qualifies for a premium tax credit to buy Exchange coverage.

Alternatively, if a large employer offers health coverage that is either unaffordable (the premium contribution to receive health coverage from the employer costs the employee more than 9.5% of W-2 income) or inadequate (the coverage has an actuarial value of less than 60%), the employer must pay a monthly Free Rider Penalty of 1/12th x \$3,000 x each full-time employee who enrolls in Exchange coverage and qualifies for a premium tax credit, capped at the penalty amount the employer would have paid for not offering coverage.

Q Do employers have to offer health coverage to part-time or seasonal employees?

A There is no requirement to offer coverage for any employees. However, large employers that fail to offer adequate and affordable

coverage to full-time employees (and their dependents), must pay a Free Rider Penalty. An employer who wants to avoid paying the penalty would need to ensure all full-time employees (working 30 or more hours per week) are eligible for coverage. The law does not include an exception for seasonal employees.

Q How does an employer calculate whether someone is a full-time or part-time employee for purposes of the Free Rider Penalty?

A IRS Notice 2012-58 describes a safe harbor employers may use to determine whether an existing or newly-hired employee is considered a full-time employee for purposes of the Free Rider Penalty. In general, full-time status is determined for each month, and an employee who averages 30+ hours of service per week is considered a full-time employee. Employers may use an optional look-back period (of between 3 and 12 calendar months) to determine whether an employee averaged 30+ hours of service per week. If an employee was considered full-time during this “measurement period”, the employee must be treated as a full-time employee for benefits purposes for a subsequent “stability period” regardless of the employee’s number of hours worked during the stability period, so long as the individual remains an employee. If the employee was considered part-time during the measurement period, the employee may be treated as part-time for benefits purposes throughout the stability period. The stability period must be at least as long as the measurement period, and not shorter than six months.

These rules may be used for seasonal employees and for new employees who will work variable hours if, based on the facts and circumstances at the date of hire, it cannot be determined that the employee is reasonably expected to work an average of at least 30 hours per week. The rules may also be used for ongoing employees who have worked for at least one complete measurement period.

Q What are the other significant changes that take effect in 2014?

A While the Health Care Reform provisions have varying effective dates ranging from 2010 through 2018, arguably the most significant changes are those designed to increase the availability of health coverage that take effect January 1, 2014.

- **Health Insurance Exchanges** - States must establish Health Insurance Exchanges to offer private insurance choices to individuals and small employers (generally with 100 or fewer employees). If a state chooses not to build an Exchange, or doesn't have HHS approval (or conditional approval) by January 1, 2013, the federal government will operate an Exchange in that state.
- **Individual Mandate** - All individuals must obtain minimum essential coverage or pay a tax. The tax is applied for each month during which an individual doesn't have minimum essential coverage. Exemptions apply for certain individuals, such as if employer coverage is unaffordable (costs more than 8% of household income), for

low income taxpayers, and for short coverage gaps.

- **Premium Tax Credit**—A federal premium tax credit to purchase Exchange coverage is available for certain individuals with family income up to 400% of the Federal Poverty Level (FPL). A credit is not available if the individual is eligible for certain government-provided coverage (such as Medicare or Medicaid) or employer-sponsored coverage that is adequate and affordable.

Q What steps can an employer take to develop a long-term plan sponsorship strategy?

A The following action plan provides a road map for employers who are ready to consider what to do with their plans going forward:

- 1. Understanding Your Responsibilities** – The law imposes a long list of new requirements that impact employers and other plan sponsors. The first step is to understand how each of those

could impact your organization, including identification of plan provisions that may need to be changed to comply with the plan design mandates, assessing how you'll be affected by the Free Rider Penalty, and understanding the new administrative obligations.

2. Assess Whether Your Health Plan Costs are Sustainable

– A number of the Health Care Reform requirements could increase an employer's costs, such as the plan design mandates, Free Rider Penalty, new fees (i.e., the Comparative Effectiveness Research Fee, Exchange Reinsurance Fee, etc.), the Cadillac tax (a 40% tax imposed on the aggregate value of specified health coverage that exceeds target thresholds), and the various administrative obligations. After understanding your obligations related to each of these, the next step is to calculate the possible cost impact and then

determine whether it is sustainable for your organization.

3. Understand Your Choices

– After you understand your responsibilities and impact on plan costs, the next step is to understand your plan options. Generally speaking, there are four options for providing or not providing health coverage once all of the Health Care Reform provisions take effect:

- Maintain your current major medical coverage without significant changes;
- Transition to a lower cost design, like a high deductible health plan, perhaps with Health Reimbursement Arrangements (HRAs) or Health Savings Accounts (HSAs);
- Sponsor an Exchange plan (state Exchange coverage is generally available to employers with fewer than 100 employees in 2014); or
- Do not sponsor a plan – employees would be able to buy individual Exchange coverage.

You may also want to consider cost management options, such as offering wellness incentives, performing a dependent verification review to ensure plan dollars are only being spent on individuals you intended to cover, changing plan design (within the confines of the new plan design mandates), and taking full advantage of tax-favored arrangements (such as Section 125 cafeteria plans

Continued on page 29

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that allow employees to pay for health and welfare benefits on a pre-tax basis, Health Flexible Spending Arrangements (FSAs), HRAs, and HSAs).

4. Design Implementation Strategy

– After selecting the path to pursue, you need to create a detailed implementation plan that takes into account all of the following:

- Benefit design and eligibility;
- Cost management;
- Administrative obligations;
- Impact on employees;
- Employee communication; and
- Resource availability.

5. Implement Your Plan - Your final step is to implement your plan.

Caution:

This is only a high level summary that reflects our current understanding of select portions of the law, sometimes in the absence of regulations. All of the interpretations contained herein are subject to change as the appropriate agencies publish guidance. The most up-to-date summary of these rules is available on our website at HCReducation.com. American Fidelity does not provide tax or legal advice and you are encouraged to seek the advice of your legal counsel.

To learn more, go to HCReducation.com or contact Christina Van Skyock at 800-638-4268, ext. 217 or email Christina.Vanskyock@af-group.com.



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"The only bad thing about burning bridges behind you is that the world is round."

~ Anonymous

Upcoming Events

WASBO pCard User Group Meeting

March 19, 2013 - Chula Vista Conference Center, Wisconsin Dells (No Charge to Attend)

WASBO Accounting Conference

March 20-21, 2013 - Chula Vista Conference Center, WI Dells (Viterbo Credit)

WASBO Spring Conference & Exhibits

May 7-10, 2013 - KI Convention Center, Green Bay (Viterbo Credit)

WASBO Custodial & Maintenance Conference & Exhibits

June 19, 2013 - Indian Trail High School & Academy, Kenosha Unified School District

WASBO New School Administrator & Business Support Staff Conference (Year of Success Program)

TBD (Viterbo Credit)

WASBO Fall Conference

October 2-3, 2013 - Osthoff Resort & Conference Center, Elkhart Lake (Viterbo Credit)

ASBO International Annual Meeting & Expo

October 25-28, 2013 - Hynes Convention Center, Boston, MA (Viterbo Credit)

Midwest Facility Masters Conference & Exhibits

November 14-15, 2013 - Kalahari Resort & Conference Center, Wisconsin Dells (Viterbo Credit)

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Don Mrdjenovich

What's Good for the Goose

By Don Mrdjenovich, Retired WASBO Executive Director

Is also supposed to be good for the gander right? Lately I've been hearing so many of our politicians continually saying that we are being over-regulated. If only the government would get out of the way of small businesses and entrepreneurs, our economy would bounce back. They cite numerous examples alleging that the regulators are to blame for putting unnecessary obstacles in the way of our nation's job creators. It was a major theme during the last elections and the theme continues in every debate about our fiscal health. Reduce regulations, unleash the creative energies of our citizens and our country will prosper well beyond the current pace of our economic recovery. Simply put, to limit regulation is good for business, the goose that lays the nation's golden eggs.

Now let us consider the gander. The gander is force fed new and increased regulations every year. The gander is told what must be done and how to monitor it. In many instances, what the gander is directed to do is not based on research or sound reasoning. The gander is often threatened with "punitive monetary damages" if it fails to comply with what the regulators say it must do. So who are these regulators? You guessed it, the same politicians who preach that over- regulation is the source of all evil when it comes to creating a healthier economy. Who is the gander? You guessed that correctly too. The gander is public education.

Government supports public education with tax dollars. Because they do, they are prone to direct (regulate) how that money is spent and accounted for. Mandated curriculum offerings,

testing ad nauseum, one size must fit all, and the list goes on. To complicate matters even more, the regulations are usually promulgated by the political party in power and therefore subject to abrupt change at any given time. What to teach, how to teach it, and how to measure it has evolved over the years into a public education system that is increasingly being influenced and directed by various federal and state governmental entities.

Contrast that to other enterprises that are tax supported. Take this tax money and find a cure for cancer. Here is some more money, put a man on the moon. Take this money and create affordable solar energy. I could go on, but you get my point. The recipients of those tax dollars are not told how to conduct their research, how they must measure their success or how to practice their professions.

It seem to me to translate to: Too many regulations are bad for business, but more regulations are needed to improve public education.

In closing, I ask you to consider this observation. During the course of our history as a nation, when we had far fewer regulations, and the control and direction of public education was vested in local communities with limited state control, we developed the best system of public education the modern world has ever known. It is still great, but I'm not so sure it is because of the regulators, be they state or national. Why does distant government find it so necessary to be hands on with public education when they practice such a high degree of hands off in other areas of human endeavor. Looks like the health care industry, the best in the world, may be soon be keeping company with public education.

Four Generations of WASBO Mentorship

If you ever think you don't impact the future of school business in Wisconsin, think again. Last month's State Education Convention brought four generations of WASBO Mentorship together. Bambi Statz (UW-Whitewater, retired) served as a mentor to Jeff Mahoney (McFarland). Jeff passed

on all that he learned to Kathy Davis (Cambridge). Kathy is currently serving as a mentor to Martha Baldwin (Baraboo). WASBO has a culture of paying forward and this is just one example. If you are interested in serving as a mentor or would like a mentor go to WASBO.com/mentorship.



Bambi Statz, Jeff Mahoney, Kathy Davis and Martha Baldwin



The Importance of School Safety

By Lauren Wanner, Corporate Rep, Zero-Trace

Submitted by the WASBO Safety and Risk Management Committee

Lauren Wanner

As a parent of school-aged children, and as a professional who visits schools often for work, I have the privilege of seeing things that I might not see if I were only one or the other. On any given day, each school building is filled with students, teachers, and staff members, all with different agendas and itineraries. Realizing this, two thoughts enter my mind; "Are my kids going to be safe?" and, "What measures are in place to keep them safe?" I take these questions very seriously, as I am sure all parents do, especially in the wake of the tragedy in Connecticut.

With so many different schedules, having structure and procedures in place are a necessity, and the following items should be taken very seriously in maximizing the safety of our students and teachers.

A.M. & P.M. Drop Off/Pick Up

Drop off and pick up at school are the busiest times of the day, and it is imperative that our schools have logical and safe routines. Having cross guards in the parking lots help ensure safe crossing. No child should leave school without being accounted for by the registered adult on file in the office. Students congregating before or after school outside in large groups opens your school up for the risk of bullying, playground related injuries, and possible abduction or worse. Make sure that your school has written drop off and pick up procedures in place and that all students are accounted for from the time they enter the premises until the time they leave.

Entering the Building During School Hours

ALL BUILDING DOORS SHOULD

REMAIN LOCKED DURING SCHOOL HOURS! Each school has a main entrance that is usually near the school office, which should be the only door ALL visitors should use. The safest way to monitor who is entering is to have an air phone that people can use to access the office and to be let in. Once inside, each person should immediately sign in at the office and should wear a badge or name tag so that school personnel can identify who they are.

Emergency Drills in Place and Rehearsed

In the event there is a school safety incident, emergency drills should be in place and rehearsed in the classrooms quarterly. Children and adults alike feel safest when they feel in control and know what to do so rehearsing for emergency situations is vital!

Bullying

Bullying is something that has been around forever but seems to be especially rampant in the last ten years! NO child should ever feel less significant than someone else or be put down for any reason, but if they do, having people they trust and they can talk to immediately is crucial. The "bully" and "bullied" need to know consequences are in place to reprimand the action. Having a strong and exposed plan, I believe, is very important so parents can also talk it over with their children.

All of these items are important in school safety, and I urge every building to have its own procedures posted in a place that parents or officials can access them at any time. Take the safety of our children and teachers seriously, and offer ideas if you see something that concerns you in your district.

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Marty Suchorski

The State SIS: What Does it Mean to You?

January 31, 2013 Status with February Update

By Marty Suchorski, Oasys® LLC

January 31, 2013

Status

Many WASBO members have indicated they are either unaware of the WDPI's State Student Information System (State SIS) initiative, or are aware of it but do not know many details about how it will affect their district. To help districts better understand the impact the State SIS may have on them, I have been asked by WASBO to share information about the project. Oasys® LLC works closely as a Service Affiliate of WASBO, and we sponsor the popular WASBO Communication Forum.

There are currently a number of WDPI data initiatives in progress. Two that tie closely together are 1) a State SIS, which will consist of application software and a state database, and 2) WISE-Dash, which will consist of a user-interface and a data warehouse. Each project will require separate funding.

The purpose of the State SIS, as defined by the WDPI, is to collect student and educator data from all districts in the state, using a single vendor format. WISE-Dash will store the information and serve as the vehicle for accessing it.

The WDPI has decided to require all districts in the state to use a single vendor (which the WDPI will choose) as the districts' student information system. Districts will not have influence in the vendor selection. According to the Request for Proposal, documents related to the State SIS services and the WDPI budget request for 2013-15, districts will be required to pay annual license fees, support fees, and applicable hosting fees. Other costs that will be the school district's responsibility

include customization fees, bandwidth usage costs, and costs associated with connecting to other data systems such as food service or transportation. It is undetermined at this time how much, if any, the WDPI will contribute for each school district's data conversion costs and for each district's cost to retrain all users (staff and parents.) These fees will be disclosed when the Intent to Award is announced.

To see the 2013-2015 WDPI budget requests, click on this link: <http://pb.dpi.wi.gov/files/pb/pdf/budreq1315.pdf> (starting at page 43)

Originally the WDPI requested a one-time \$15 million allocation to implement the State SIS project. According to the WDPI budget request for 2013-15, \$13.8 million of that \$15 million went unused, and has lapsed back into the state general fund. In the 2013-15 budget request, the WDPI has requested \$18,421,600 for the State SIS, and 16,005,600 for WISE-Dash, for a combined total of \$34,427,200 to fund these two related projects. Please note that these figures do not include the costs to individual school districts. The WDPI requested amounts and terms will be subject to state budgeting procedures and will be submitted for review by the state Joint Finance Committee.

The Department of Administration (DOA) is the agency responsible for handling procurement of a State SIS vendor, and has issued the following timelines:

1. The DOA will announce an Intent to Award the State SIS project to a single SIS provider. The most recent date this intent was scheduled for was December 2012, however, the

- announcement is still pending.
2. Once the Intent to Award is announced, SIS providers who bid on the project have 5 days to indicate if they will appeal the decision and another 5 days to formally submit an appeal. All appeals will be resolved before the contract is signed. With the announcement of an Intent to Award, all information about the Request for Proposal to provide State SIS services (RFP) process will become public. Up to this point, the vendors who applied and were asked to demonstrate their system are confidential, as are the members of the selection committee.
3. After the State SIS contract is signed, according to state law school districts will have 5 years from the contract signing date to implement the new student information system in their district.
4. Also after the State SIS contract is signed, according to the RFP, there will be a 60-90 day beta testing period. School districts will be able to migrate to the new system if they choose. WDPI has indicated that Milwaukee Public Schools will be one of the first districts to implement the new State SIS vendor.

An ancillary concern posed by the timing and funding uncertainty surrounding the State SIS project relates to the upcoming SLD (Specific Learning Disabilities) law, which goes into effect on December 1st, 2013. The SLD law requires school districts to use scientifically based approaches in collecting data to determine if a student should be categorized as a student with a specific learning disability. Many districts have determined that a structured Response to Intervention

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" The shortest distance between
 two people is a smile."

~ Anonymous



The State SIS - What Does it Mean to You?

Continued from page 33

(Rtl) program can be a method of meeting the SLD law. It will behoove all districts to develop and implement a strategy to meet the requirements of the SLD law before the December 1st deadline.

Further information about the State SIS is available on the WDPI website at <http://ssis.dpi.wi.gov>. If you have questions or concerns about how this initiative will impact your district, you are encouraged to contact Dr. Tony Evers, State Superintendent, and your state legislators.

If you would like to learn more about Oasys®, LLC or have questions about implementing an Rtl data management system, please give us a call at 800-261-3935.

February Update

On February 1st, 2013 the state announced it was awarding the SSIS contract to Infinite Campus, a Minnesota company. At least one bidder, Skyward, has indicated it will appeal this award, which they have since done. Until the appeal(s) have been resolved, no

contract will be signed.

The WDPI has stated that districts who use a vendor other than Infinite Campus for their financial software may continue to use that vendor and do not need to switch to IC as their financial software provider.

According to WDPI and DOA, the costs and financial obligations to the school districts will not be released until the contract is signed.



Shana R. Lewis



Kirk D. Strang

School Safety Plans and Access to School Buildings

By Shana R. Lewis and Kirk D. Strang, Davis Kuelthau, s.c.

Reprinted with permission from Client Alert, January 7, 2013

As the country watched the tragic events unfold in Newtown, Connecticut, on Friday, December 14, 2012, Wisconsin's school district employees, school students, and the public began to raise questions of their own about the school safety plans in place in their local school districts. Many also posed questions about a school district's ability to prohibit certain individuals from having access to school buildings and other property.

No single initiative can ensure pupil safety and compliance with relevant school safety statutes cannot guarantee that hazards to pupils' welfare will never surface. Nevertheless, at a minimum, school officials need to be in a position to reassure the public that they have complied with applicable statutory requirements and, in addition, that they have considered those mandates in the context of school shootings and other deadly hazards.

School Safety Plans

For more than 40 years, Wisconsin public school districts have been required to conduct fire drills. In 2007, the Wisconsin Legislature added the obligation to drill pupils "in the proper method of evacuation to a safe location as if in the case of a tornado or other hazard." A few years later, 2009 Wisconsin Act 28 and 2009 Wisconsin Act 309 modified the statutes to require specific components for school safety plans and to establish minimum standards for training and practice drills under the plans.

Wis. Stat. § 118.07(2)(a), currently states:

Once each month, without previous warning, the person having direct charge of any public or private school shall drill all pupils in the proper method of departure from the building in case of a fire, except when the person having direct charge deems that the health of the pupils may be endangered by inclement weather conditions. At least twice annually, without previous warning, the person having direct charge of any public or private school shall drill all pupils in the proper method of evacuation to a safe location in case of a tornado or other hazard. At least twice annually, without previous warning, the person having direct charge of any public or private school shall drill all pupils in the proper method of evacuation or other appropriate action in case of a school safety incident. The public and private school safety drill shall be based on the school safety plan adopted under s. 118.07 (4). A safety drill may be substituted for any other drill required under this paragraph. The school board or governing body of the private school shall maintain for at least 7 years a record of each fire drill, tornado or other hazard drill, and school safety drill conducted.

Thus, as in the past, schools are required to conduct fire drills on a monthly basis. In addition, schools are also required to conduct tornado drills or drills that relate to "other hazards(s)" that involve safe evacuation procedures at least twice a year. Additionally, while it is not explicitly required by the statute, many schools conduct intruder drills to help pupils prepare for the specific dangers associated with violence in school buildings.

School boards are now also required to adopt a school safety plan. The school safety plan must be in place by May 26, 2013. The school safety plan must be created with the active participation of appropriate parties identified by the school board, which can include local law enforcement officers, fire fighters, school administrators, teachers, pupil services professionals, as defined in Wis. Stat. § 118.257 (1) (c), and mental health professionals. Moreover, the safety plan must include general guidelines specifying procedures for emergency prevention and mitigation, preparedness, response, and recovery, as well as the process for reviewing the methods for conducting mandatory drills. Furthermore, the school board must designate employees for school safety plan training, determine the frequency of the training, and develop the training based upon the school district's prioritized needs, risks, and vulnerabilities. Finally, the school board must review the school safety plan at least once every 3 years after the plan goes into effect.

As the deadline for adopting school safety plans nears, school district officials should: (1) consider the manner in which the plan has been developed to confirm that the appropriate parties were involved; (2) review the plan to verify that it includes all the necessary components; (3) evaluate the list of positions/persons designated for school safety plan training, the training materials, and the training schedule; and (4) establish a calendar that requires the school board to evaluate the plan at least once every 3 years.

Access to School Buildings

People visit the school building or other school property for a variety of reasons, and may believe they have a right to be

Continued on page 36

present at school or during a school-sponsored event. However, regulating the presence of visitors is one way that school boards protect the district's staff and students.

Wisconsin Statute Section 120.13(35) authorizes school boards to adopt rules that apply to individuals that enter or remain in a building operated by the school board, including requirements that such persons identify themselves and sign in, and designating time periods during which such persons may enter or remain in the building or any portion of the building. Some school boards prohibit visitors during the school day, except in unique circumstances. Other school boards encourage parents and other members of the public to visit the school buildings, but require them to seek approval ahead of time and/or provide a specific purpose for the visit. Most school boards require visitors to register at an office or with a receptionist when they enter a school building and before proceeding to any other location in the building.

While parents and other visitors may claim that they have a constitutional right to be present on school property, courts have consistently held that such a

right is tempered by the school district's power and authority to manage and control the schools and other district property. Thus, as long as school boards act in good faith in regulating access to school buildings and property, the courts will generally not interfere in a school board's decision to deny access to a particular person(s). See, *Hannemann v. Southern Door County School District*, 673 F.3d 746 (7th Cir. 2012) (A former student, who threatened physical violence against members of the school community, has no constitutional right to access school grounds, such that the school district could ban him indefinitely from school grounds); and *Brown v. Michigan City, Indiana*, 462 F.3d 720 (7th Cir. 2006) (A convicted child molester has no constitutional right to access City parks, such that the City could ban him from its parks based upon its compelling interest in safeguarding children).

In light of the compelling concerns that students, parents, staff and other members of the community have about safety, school district officials should review board policy governing access to school buildings in order to confirm that the policy provides adequate

protections. A policy that allows unfettered or unregulated access to school buildings by visitors should be revised. Moreover, a policy that has not been implemented or is not supported by adequate training is as ineffective as no policy at all. School district officials may also wish to take time to review these policies with school district staff, especially receptionists and other staff whose job duties make them the first point of contact with the public.

Conclusion

The attorneys at Davis & Kuelthau, s.c., recognize the important role of school district officials in maintaining the safety and security of public schools across the State of Wisconsin and throughout the country. Our hearts go out to all the victims of the violence in Newtown, Connecticut and we pledge our best efforts to help make our schools as safe as they can be.

If you have questions or would like additional information on this matter, please contact Shana R. Lewis at slewis@dkattorneys.com or Kirk D. Strang at kstrang@dkattorneys.com.

What Can You Do To Make Your Playground Safe?

Continued from page 37

- children (in guardrails or between ladder rungs) should be less than 3.5 inches apart or more than 9 inches.
- 4. Guardrails should surround all elevated platforms and should be at least 29 inches high for preschool-age children and 38 inches high for school-age children.
- 5. Look for exposed concrete footings, tree roots or rocks that could trip children.
- 6. Check for sharp edges and dangerous hardware, like open "S" hooks or protruding bolts.
- 7. Make sure your child plays on age-appropriate equipment.
- 8. Playgrounds should be maintained regularly. Report any problems.
- 9. Remove hoods or drawstrings that can get caught on equipment.
- 10. Supervise children while they play.

"To laugh often and much; to win the respect of intelligent people and the affection of children...to leave the world a better place...to know even one life has breathed easier because you have lived. This is to have succeeded."

~ Ralph Waldo Emerson



Alyssa Moen

What Can You Do To Make Your Playground Safe?

By Alyssa Moen, CSRM, Safety Consultant, TRICOR Insurance

Submitted on behalf of the WASBO Safety & Risk Management Committee

Each year more than 200,000 children visit hospital emergency rooms because of playground injuries.

Approximately 15 children die each year because of playground injuries.

Many playground injuries can be prevented. Use this guide to examine your playground so that they can run, jump, swing and slide to their heart's content—safely.

Soft Surface

Because nearly 70 percent of playground injuries are caused by falls to the ground. Improper surfacing is the first thing you should watch for when a playground is inspected. Wood chips, bark mulch, wood fibers, sand, pea gravel, shredded tires and rubber mats cushion falls well. Avoid concrete, grass and dirt, they're too hard. A minimum depth of 12 inches of material surrounding each piece of equipment in a 6-foot fall zone is recommended. And regular maintenance is also crucial; if not daily, then at least monthly.

Swings

Swings are the pieces of moving equipment that are most likely to cause injuries to children. Animal swings have caused several deaths and should be removed from playgrounds. Metal or wooden seats should be replaced with soft seats. Swings should be set far enough away from other equipment so that children won't be hit by a moving swing. Only two swings should be in each supporting framework, and they should be at least 24 inches apart. Full-bucket seats are recommended for younger children. Half-bucket seats are dangerous because babies and toddlers can slide out of them.

Smooth Sliding

Slides should be well-anchored, have firm handrails and good traction on the steps. There should be no gaps between the slide itself and the platform. There should also be a bar at the top of the slide so that children have to sit before they go down.

One of the greatest dangers with slides occurs when drawstrings on children's clothes get caught at the top of the slide. Although most children's clothing manufacturers have quit making drawstrings, many children have older clothes.

Safe Seesaws and Merry-Go-Rounds

Spring-loaded seesaws are best for young children. Avoid adjustable seesaws with chains because children can crush their hands under the chains. A traditional type seesaw should have a tire or some other object under the seat to keep it from hitting the ground. Merry-go-rounds, or "whirls" or "roundabouts", are best for school-age children. They should have good hand grips, and the rotating platform should be level, free of sharp edges and have adequate clearance to prevent crushing or severing limbs.

Climb Carefully

Forty percent of all playground injuries are related to climbing equipment. More children are injured falling off climbing equipment or horizontal ladders than anything else on the playground. Children under four shouldn't play on this equipment. However, climbers are great for encouraging upper body strength. Watch older children when they're climbing, check that steps and handrails are in good condition, and make sure a guardrail or barrier surrounds raised platforms. Any climbing ropes should be secured at the

top and bottom. The number of injuries caused by monkey bars is so significant that many experts recommend that they be removed from all playgrounds.

Playgrounds for All Children

The Americans with Disabilities Act (ADA) requires that new playgrounds make appropriate accommodations for disabled children. The most important issue is how the children get into the space. The ADA requires a 60-inch pathway that is firm, stable and slip-resistant. Rubber tiles and matting are good for accessibility, while loose-fill material like sand and wood chips are not. An easy fix for a playground is to add an adaptive swing, but ideally much more can be done. It's important to provide diverse and stimulating play experiences for children of all abilities.

Improve Your Playground

If your playground is unsafe, report problems to the owner/operator. There are no national mandatory standards for playground equipment, but Texas, California, New Jersey, Michigan and North Carolina have laws that require playgrounds to follow standards of the American Society for Testing and Materials. Some states require playgrounds to follow standards set in the Consumer Product Safety Commission's (CPSC) Handbook for Public Playground Safety.

Top 10 Checklist for Playground Safety

1. Surfaces around playground equipment should be filled with at least 12 inches of loose fill, such as wood chips, mulch, sand or pea gravel.
2. Most stationary equipment should have at least a 6-foot use zone in all directions.
3. Any openings that can trap

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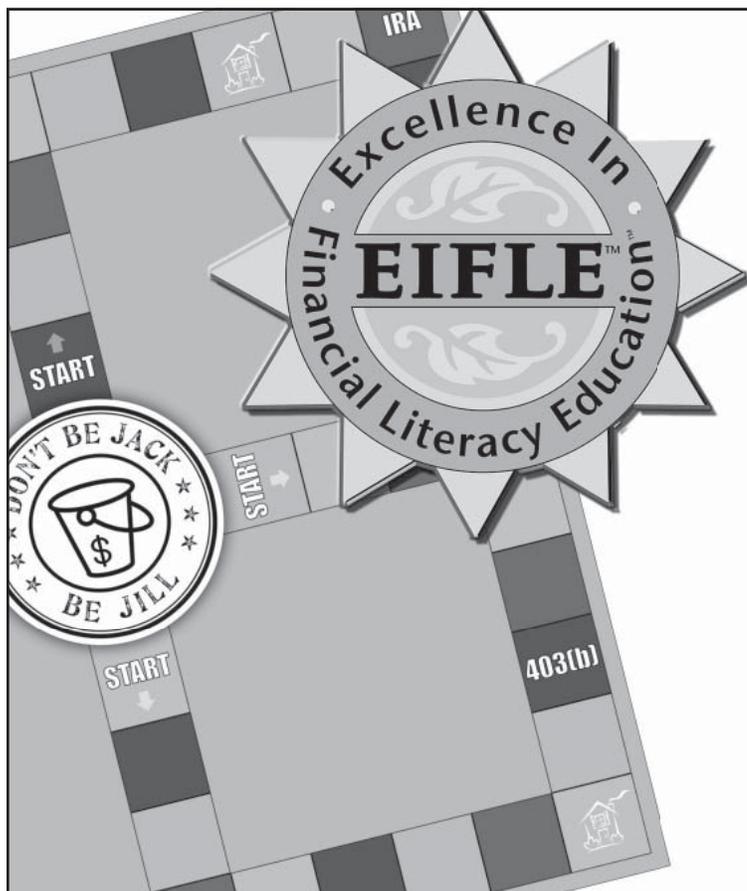
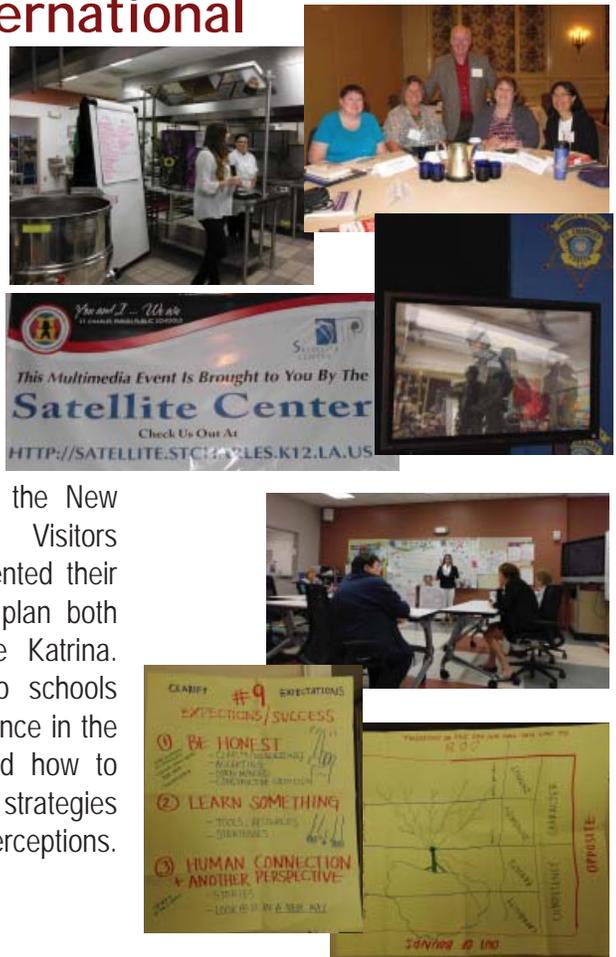
Wisconsin ASBO Attends ASBO International Executive Leadership Forum

Several WASBO members including WASBO President Janice DeMeuse, WASBO President Elect Lynn Knight, WASBO Treasurer Jeanne Stahl, ASBO Director Tom Wohlleber, Erin Green, Susan Graham, Pete Balzer, Diane Pertzborn, Joel Green, Jeff Carew, and Roger Dickson attended the ASBO Executive Leadership Forum in New Orleans, February 14-16.

The WASBO Board Leadership Team spent a day with association expert Bud Crouch, to learn about board governance and strategic planning. Sessions were offered by Ritz Carlton staff that outlined the 12 Ritz Carlton leadership principles and their philosophy on social responsibility and community engagement. An additional three-hour session delved into the philosophy of **Smart Trust** by Stephen M. R. Covey.

Attendees had an opportunity to tour the Satellite Center of the St. Charles Parish Public Schools where students presented how real world career preparation and networking were getting them ready for the future.

The conference wrapped up with a presentation by the New Orleans Convention and Visitors Bureau on how they implemented their emergency communication plan both during and after Hurricane Katrina. Correlations were made to schools as to how to restore confidence in the aftermath of a disaster and how to implement public relations strategies to develop positive perceptions.



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David Raysich

First and Second Generation Security Design Features for Schools

By David Raysich, AIA, NCARB, Managing Partner, Plunkett Raysich Architects, LLP

As a school administrator, school board member, teacher, parent or student we all are asking the same question. What measures are in place to help prevent the tragedy that happened at Sandy Hook Elementary School in Newtown, Connecticut from happening at my school? As architects we have the tools and technology to design a wide variety of security features in schools, but not all school districts have the capital to implement them. Current state-of-the-art security features include.

- Acrisis plan that involves performing two emergency drills annually.
- All entrance doors electronically locked at the start of first period.
- Heavy duty and tamperproof locks.
- Electronic surveillance cameras mounted above all entrance doors that are monitored from the office.
- The main entrance as a singular access point to the school during the day.
- A locked vestibule at the main entrance that only allows access to the school through the office.
- An intercom or telephone system that can announce or communicate an emergency situation to the entire school.
- Classroom doors with the ability to be locked from the inside preventing an intruder from entering.
- An electronic lock-down system closing all corridor doors compartmentalizing the school to prevent intruder access to the entire school.

View this detailed Power Point presentation on current school security design features. (<http://bit.ly/13DaVms>)

The above design features will deter most angry parents, sibling or outside intruders from accessing the school. The news outlets do not report the times these security measures prevent an altercation because they are non-events. The dilemma is that these security systems do not prevent a gunman from shooting their way into a school. In the wake of what happened at Sandy Hook Elementary School, what are the next generation security design features school administrators and school boards should consider in their new or existing schools? Some next generation security measures could include the following:

- Bullet proof walls and glass at all entrances to the school preventing an intruder from shooting out the glass.
- Bullet proof walls and glass in the secure main entrance vestibule preventing access to the office and school.
- If the office identifies a potential intruder in the main entrance vestibule, provide the staff the ability to lock the outside vestibule doors trapping a potential intruder until the police arrive.
- Train office staff to identify potential disruptive intruders. Anyone wearing camouflage, dressed in all black, wearing a hoody, carrying a large bag or other suspicious identifying characteristics.
- In case the office is still breached, consideration should be given to installing bullet proof glass in

corridor compartment walls and doors as well as classroom glass, doors and walls.

- Establish new protocols with local police and fire department emergency responders to ensure the fastest response time possible. This system should be tested at a minimum of twice a year.
- Consider installing metal detectors for everyone who enters the school, including students, teachers, staff and visitors.

All of these security features come with a price tag for physical improvements and staff training. The discussion on how far a school district should go with these security design features will be debated over the next several years.

For more information, contact David Raysich, AIA, NCARB at 800.208.7078 or draysich@prarch.com.

"During a negotiation, it would be wise not to take anything personally. If you leave personalities out of it, you will be able to see opportunities more objectively."

~ Brian Koslow

Joint State Education Convention

January 22-25, 2013





Mark Towers

Keys to Mental Health

Practical Day-to-Day Strategies for Maintaining Mental Health

By Mark Towers

Somewhere along my path, someone shared this bit of wisdom with me: The more options you have, the greater your

mental health will be. From time to time, this one liner snaps back into my head. Recently, it prompted me to come up with some options (thought processes) in regard to your mental health.

1. A well-lived life is three things: honest, messy, and beautiful. Drink all of those moments in by planning for the best, anticipating the potholes, and making time to celebrate them.
2. Betty White, the much-loved actress and comedian, is 91 years young. Recently, she said, "You can't help but pick things up as you go through life. You learn a lot, and you learn about having a positive attitude. Try to think of someone other than yourself, and enjoy other people's good fortunes along with your own."
3. When the going gets tough, the tough get loose. James Thurber

said, " Never take humor out of anything because humor enhances everything." In some situations, you may have to look real hard to find humor, but it is always there. The first three letters of the word funeral are f-u-n. I want my funeral to be approached from that perspective. How about you?

4. Mark Twain said, "The inability to forget is infinitely more debilitating than the inability to remember." Yesterday is a cancelled check and tomorrow is promised to no one, so embrace the present moment as if you have chosen it. All great spiritual teachings take us back to this basic awareness: Live in the Now.
5. It's best to take as much time as you need before making a decision. This enables you to survey the landscape and perhaps find more options. The best boss I ever had said this: "It's not the decisions you make in life, it's the energy you bring to those decisions." In regard to mental health and decision-making, these two principles will serve you well.
6. Learn to enjoy the detour. I've

traveled extensively for the past 25 years and I've gotten lost many times. I used to get upset about it, but I soon came to understand that I learned a lot by getting off the beaten path. In fact, one of the best meals I've ever had was in southeast Louisiana when I stopped to ask for directions.

7. Post this in a place where you can see it daily: *I will do what I love in the service of those who love what I do.* Even if you are not completely happy with your current lot in life, act as if you are. This will open up your head and more possibilities will come bounding your way.

Several years ago, I asked one of my grandsons what he'd like to be when he grew up. He said, "I either want to be a doctor or a dollar store owner." I hope he thinks that way forever! Indeed, his answer underscores that the more options you have, the greater your mental health.

© Mark "Tenacious" Towers
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WASBO/WASPA School Personnel Academy

New Realities: Opportunities and Challenges

November 28-29, 2012





pCards Points of Interest for Program Administrators

By Dave Wintczak, Vice President, Senior Relationship Manager - North American Public Sector, BMO Harris Bank/BMO Financial Group

Here are some excellent ideas to keep in mind to help you manage and grow your district's P-Card program.

Change of Grace Day Period - (due to BMO by February 28th)

School districts have the ability to change grace days once a year just before March 31st. This is the end of the billing year for the P-Card program. The grace day period is the interest free interval between the end of the billing cycle and when the payment is due. You have the choice of 7, 14, 21, and 27 grace days. If your billing date is the 5th and you have 21 grace days, your payment is due the 26th (5 + 21) of each month. With 14 grace days payment is due on the 19th. The benefit to your district is that the rebate gets higher as the grace period gets shorter. If you are paying by check, you will want to allow ample time for your payment to reach BMO after your board approval process. If you would like to make your grace days shorter or longer please send your request to Dave Wintczak at david.wintczak@bmo.com. Please send your request **before February 28th** in order to have your new grace day period set up for the beginning of the program's fiscal year on April 1st.

Corporate Limit Increase Request

The end of the school year will be here before you know it. Are you anticipating large purchases online at Amazon, CDW, Apple, HP, Dell and more? Are you finding more and more vendors will take MasterCard? It is recommended that you have a corporate credit limit (the whole district) of 1 ½ to 2 times what you usually spend each month. For example if you usually spend around \$100,000/mo., your corporate limit should be \$150,000 - \$200,000.

This gives your district room to grow and have available reserves should special projects or situations come up. The process is easy. Just send Dave Wintczak at BMO Harris Bank/BMO Financial Group an email at david.wintczak@bmo.com. In the email simply let him know your district name, current corporate limit, the new limit you are requesting, and a brief description of what area(s) of spend you plan to use the additional credit limit for. Please allow up to two weeks for credit underwriting approval. Once approved, the corporate limit will show up in your details Online and you can assign it to cardholders as you see fit, or leave it unassigned for future uses or expansion.

Looking to Increase Your Rebate?

When developing Service Bids and RFPs (Requests For Proposal) for your district, in the "Terms and Conditions" include a statement to the effect that the awarded vendor will be required to accept payment for services by MasterCard. (They do not need to know it is a p-card) This has been done for everything from building a complete new school to office supplies.

As you process checks to current vendors ask if you can pay them by "MasterCard."

Large or small... the P-Card takes it all.

- **ALL** internet purchases – IT equipment and gear, computers, iPads, printers, etc. from any vendor such as Amazon, CDW, Apple/iPads, HP, Dell, IBM and more
- Food service suppliers and equipment and food suppliers

- Bus/van/car purchases, fuel, repairs, parts, license plates, contractors
- Utilities – gas, water, electric, internet, cable, phone (May not be allowed in your area or require negotiation for no fee)
- Books and other teaching materials
- Eliminate petty cash
- Class trips, prom, dances, and any school event supplies and expenses
- Desks and office furniture
- Teacher continuing education tuition payments
- Departmental equipment – athletic, science, band, theater, pool, shop
- Meeting supplies and catering
- Travel expenses – airfare, hotel, registration, meals
- Lawn mowers, tractors, snow removal equipment
- Professional, legal, consulting fees
- USPS, UPS, FedEx, Pitney Bowes postage
- Magazines, newspapers and professional publications
- Lease and rental payments for equipment
- Professional association membership dues and conference registrations, including WASBO.
- Advertising and print shop costs

ACH Sign Up

ACH is highly recommended!! 75% – 80% of all districts are paying by ACH. More districts are requesting it each month. The benefits to you are never having a late fee/interest charge again, saving postage/courier costs, and saving you time. You can request the ACH form from Client Services at ebsclientservices@bmo.com or from Dave Wintczak. Just ask for the BMO

Continued on page 43

Harris ACH form. Payments are not transferred until the end of the grace day period each month.

Paying by Check

If you must pay by check please allow AMPLE time for the payment to be received and processed. It is suggested to mail it as much as 10 days in advance of the due date. Just like your personal credit cards if the payment is late interest/late fees will apply.

Here are some tips to help insure proper posting to your account when paying by check:

- Please provide a check for the total monthly amount along with a breakdown of payments for each cardholder. Information to be included:
 - Name of cardholder
 - Card number
 - Amount paid for each card - must match the total check amount

Checks should be written to: **BMO MasterCard**

Sending your payment by US Postal Service (regular mail)

Mastercard Corporate Clients
Payment Center
PO Box 71878
Chicago, IL 60694-1878

Sending your payment overnight

(UPS/FedEx)

HarrisTrust and Savings
311 W. Monroe
Chicago, IL 60606
Attn: 8th Floor Lockbox number
71878

PLEASE NOTE! – Using the incorrect address for your chosen delivery method will result in delays in your payment reaching BMO.

Skyward Flat File

Are you using Skyward? WASBO offers Skyward users a free custom flat file to easily have P-Card transaction information flow from details Online to Skyward. This saves you time with loading G/L codes and purchase reconciliation. Please email Dave Wintczak (david.wintczak@bmo.com) with your district name and request. He will have the BMO Implementation Team add the flat file to your corporate ID within 7 – 10 days. You would then need to contact Skyward to have them set up your software to receive the flat file.

Thank you for your continued business and participation in the WASBO P-Card program. It is much appreciated!

Resources: Did you know?

Online training services are available to you for details Online. BMO offers live or self-run training. There are

advantages to both types described below:

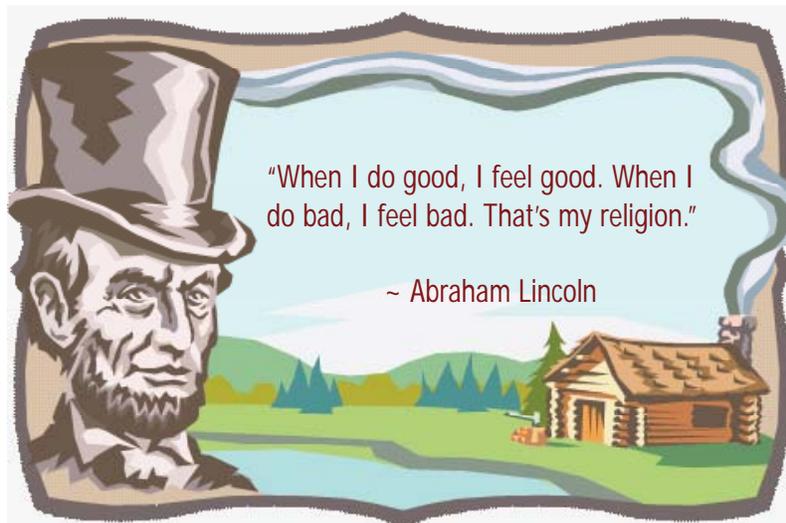
Live Training

- You are able to participate in an interactive fashion while viewing the details Online environment, meaning that you are able to ask questions and receive answers immediately.
- You are listening to an eConsultant who has extensive knowledge of details Online
- You may attend a session as often as you wish

Self-Run Training

- You are able to participate at a time that is convenient for you
- You can control the tempo of the training i.e. you can play a slide many times over if required or alternatively move quickly onto a new slide if you are already familiar with the content.
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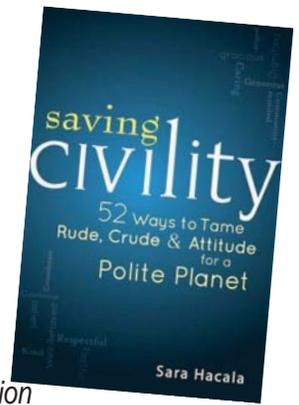
Orvin R. Clark,
EdD, RSBA

Book Review

“Saving Civility: 52 Ways to Tame Rude, Crude & Attitude for a Polite Planet”

Sara Hacala, Author

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



Saving Civility was written by Sara Hacala. Sara Hacala is a frequent speaker on the topic of civility and is president of Sara Hacala & Associates LLC, which provides full-service training and seminars in all aspects of business etiquette, manner and civility for corporate personnel, university students, and individuals. She also works in high schools with “at risk” students, teaching vital interpersonal skills to help them access the business arena and increase their opportunities for success.

Saving Civility is 212 pages in length and consists of 52 simple ways to tame rude, crude behavior which leads to stress in the workplace. Stress – the leading cause of worker disability – promotes increased rudeness and incivility and also triggers a range of spiraling negative emotions. Pearson and Porath report that stress costs American economy \$300 billion annually. The losses to a company’s bottom line caused by incivility are calculable as they are tied to:

- Lack of motivation
- Lower productivity
- Reduced commitment
- Employees offering fewer suggestions
- Greater absenteeism, tardiness, and long-term disability
- More managerial time spent dealing with employee conflicts
- Employee replacement costs, which amounts to four times a worker’s annual salary
- Less effective teamwork

Hacala presents civility as a mindset that encompasses values and attitudes that help us embrace our shared humanity. She shows us benefits that civilized behavior – respectful, thoughtful, kind, inclusive and generous treatment of others – can provide improved relationships and allow us to live ultimately a more peaceful and meaningful life. A 2008 University of Illinois study concluded that for high school students, “social skills are a more accurate predictor of one’s future success than test scores.”

The fifty-two practical ways to reverse the course of incivility are:

1. **Know Who You Are** – “He who knows others is wise. He who knows himself is enlightened.” – Lao Tzu
2. **Live in the Present Moment** – “The secret of health for both mind and body is not to mourn for the past, worry about the future, or anticipate troubles, but to live in the present moment wisely and earnestly.” – Buddha
3. **Smile** – “The shortest distance between two people is a smile.” – Anonymous
4. **See Yourself as Others See You** – “Sometimes you can’t see yourself clearly until you see yourself through the eyes of others.” – Ellen DeGeneres
5. **Sharpen Your Social Antenna** – “I think the one lesson I have learned is that there is no substitute for paying attention.” – Diane Sawyer
6. **Respect the Boundaries of Others** – “And this is one of the major questions of our lives:

how we keep boundaries, what permission we have to cross boundaries, and how we do so.” – A.B. Yehoshua

7. **Listen Up** – “Most of the successful people I’ve known are the ones who do more listening than talking.” – Bernard M. Baruch
8. **Discern the Right Meaning** – “I know that you believe you understand what you think I said, but I’m sure you realize that what you heard is not what I meant.” – Robert McCloskey
9. **Strike a Tone** – “We often refuse to accept an idea merely because the tone of voice in which it has been expressed is unsympathetic to us.” – Friedrich Nietzsche
10. **Recognize the Power of Words** – “Whatever words we utter should be chosen with care, for people will hear them and be influenced by them for good or evil.” – Buddha
11. **Hold Your Tongue** – “Never miss a chance to keep your mouth shut.” – Robert Newton Peck
12. **Resist Rhetoric** – “Education is the most powerful weapon you can use to change the world.” – Nelson Mandela
13. **Disagree Agreeably** – “To disagree, one doesn’t have to be disagreeable” – Barry Goldwater
14. **Keep a Negotiation on Track** – “During a negotiation, it would be wise not to take anything personally. If you leave personalities out of it, you will be able to see opportunities more objectively.” – Brian Koslow
15. **Don’t Burn Bridges** – “The only

Continued on page 45

- bad thing about burning bridges behind you is that the world is round.*" – Anonymous
- 16. Set Your Moral Compass** – *"When I do good, I feel good. When I do bad, I feel bad. That's my religion."* – Abraham Lincoln
- 17. Build Trust** – *"We're never so vulnerable than when we trust someone-but paradoxically, if we cannot trust, neither can we find love and joy."* – Walter Anderson
- 18. Strive for Truth** – *"If you tell the truth you don't have to remember anything."* – Mark Twain
- 19. Take the High Road** – *"The high road is always respected. Honesty and integrity are always rewarded."* – Scott Hamilton
- 20. Laugh at Least Once a Day** – *"Laughter is an instant vacation."* – Milton Berle
- 21. Just be Nice!** – *"Treat everyone with politeness, even those who are rude to you-not because they are nice, but because you are."* – Anonymous
- 22. Cultivate Optimism** – *"A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."* – Winston Churchill
- 23. Embrace Kindness** – *"Three things in human life are important. The first is to be kind. The second is to be kind. The third is to be kind."* – Henry James
- 24. Live Generously** – *"We make a living by what we get, but we make a life by what we give."* – Winston Churchill
- 25. Practice Gratitude** – *"Let us rise up and be thankful, for if we didn't learn a lot today, at least we learned we learned a little, and if we didn't learn a little, at least we didn't get sick, and if we got sick, at least we didn't die; so let us all be thankful."* – Buddha
- 26. Embody Enough** – *"To know you have enough is to be rich."* – Tao Te Ching
- 27. Adapt Adeptly** – *"When we are no longer able to change a situation, we are challenged to change ourselves."* – Viktor Frankel
- 28. Practice Patience** – *"I am extraordinarily patient provided I get my own way in the end."* – Margaret Thatcher
- 29. Drive Gently on the Road** – *"It takes 8,460 bolts to assemble an automobile, and one nut to scatter it all over the road."* – Anonymous
- 30. Pick Your Battles Wisely** – *"If you treat every situation as a life and death matter, you'll die a lot of times."* – Dean Smith
- 31. Remember What Your Mother Taught You** – *"Good manners: The noise you don't make when eating your soup."* – Bennett Cerf
- 32. Teach Your Children Well** – *"The hardest job facing kids is learning good manners without seeing any."* – Fred Astaire
- 33. Bring Back the Magic** – *"Silent gratitude isn't much use to anyone."* – G.B. Stern
- 34. Mind Your Cybermanners** – *"I hear YouTube, Twitter, and Facebook are merging to form a supersocial media site –YouTwitFace."* – Conan O'Brien
- 35. Time It Right** – *"I've been on a calendar, but I've never been on time."* – Marilyn Monroe
- 36. Delight Your Host, Please Your Guest** – *"If it were not for guests, all houses would be graves."* – Kahlil Gibran
- 37. Dress to Fit** – *"Clothes are never a frivolity: they always mean something."* – James Laver
- 38. Apologize** – *"A great nation is like a great man: When he makes a mistake, he realizes it. Having realized it, he admits it. Having admitted it, he corrects it. He considers those who point out his faults as his most benevolent teacher."* – Lao Tzu
- 39. Learn to Forgive** – *"Forgiveness is not an occasional act. It is a permanent attitude."* – Martin Luther King
- 40. Celebrate Diversity** – *"If we cannot end our differences, at least we can help make the world safe for diversity."* – President John F. Kennedy
- 41. Travel Often and Well** – *"When you travel, remember that a foreign country is not designed to make you comfortable. It is designed to make its own people comfortable."* – Clifton Fadiman
- 42. Consider Your Fellow Travelers** – *"But why, oh why, do the wrong people travel, when the right people stay at home?"* – Noel Coward
- 43. Practice Nonviolence** – *"History's worst atrocities were carried out in good faith."* – Antony D Mello, SJ
- 44. Judge Not Thy Neighbor** – *"Any fool can criticize, condemn, and complain-and most fools do."* – Dale Carnegie
- 45. Play Fair and Everyone Wins** – *"Fairness is what justice really is."* – Potter Stewart
- 46. Put All Hands on Deck** – *"We cannot live only for ourselves. A thousand fibers connect us with our fellow men."* – Herman Melville
- 47. Choose Your Heroes Wisely** – *"Keep your eyes on the stars, and your feet on the ground."* – Theodore Roosevelt
- 48. Enhance Your Likeability** – *"Basically, likeability comes down to creating positive emotional experiences in others. When you make others feel good, they tend to gravitate to you."* – Tim Sanders
- 49. Work at Workplace Civility** – *"If everyone is moving forward*

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Contact:
Dave Van Spankeren
920-236-0518
dvanspankeren@cesa6.org

www.wiopeb.com

Book Review

Continued from page 45

together, then success takes care of itself." - Henry Ford

- 50. Grow a Very Big Heart** - "Not to know is bad, Not to want to know is worse, Not to hope is unthinkable, Not to care is unforgivable." - IGBO Nigerian Proverb

- 51. Reel in What's Real** - "Be your authentic self. Your authentic self is who you are when you have no fear of judgment, or before the world starts pushing you around and telling you who you're supposed to be. Your fictional self is who you are when you have a social mask on to please everyone else. Give yourself permission to be your authentic self." - Dr. Phil

- 52. Plant a Seed** - "To laugh often and much; to win the respect of intelligent people and the affection of children...to leave the world a

better place...to know even one life has breathed easier because you have lived. This is to have succeeded." - Ralph Waldo Emerson

Saving Civility is an outstanding guide to building a culture of character and a challenge to all of us to be a part of the solution rather than a part of the problem. Reading it will remind you to do your part...be civil in thought and word!

Renew your
WASBO membership
for July 1, 2013 -
June 30, 2014
at
WASBO.com/renew





WASBO Remembers Art Olson WASBO Past President 1970-71

Arthur Harry Olson, Jr.
July 11, 1930 – January 5, 2013

Arthur H. Olson, Jr., ("Art," Uncle Art, Dad, Grandpa Heart) was born July 11, 1930 in Austin, MN to Wava Hendrickson Olson and Arthur Harry Olson, Sr. He grew up with his sister Carol Jean in Blooming Prairie, MN, where he attended school and was active in many sports, and was a member of the state championship football team. He valued and worked to pay for his education. He attended Winona State University in Winona, MN, earning Bachelor's Degrees in Business and Education, and had a Master of Arts from the University of Minnesota.

He taught and coached in Ellendale, MN, and Hammond, WI, where he became Superintendent of Schools. In 1959 he became the School Business Administrator in Oak Creek/Franklin Schools in Oak Creek, WI. While in that position he oversaw the building of the Oak Creek High School as well as several elementary schools. He held memberships and offices in the WI Association of School Business Officials and the Association of School Business Officials International. He retired from Oak Creek Schools in 1988, and then enjoyed a more leisurely part-time financial position for several years, travelling to school districts and meeting with his colleague friends.

Art married Janice Wurtz in 1954. They had five children: Gregg Olson of Eugene, OR, Christie Olson-Simatic (Russell) of Chanhassen, MN, Thomas Olson (Juliette) of Long Beach, CA; Beth Olson (Michael Williams) of Okemos, MI, and Tracy Olson of Portland, OR. They moved to Creve Coeur, MO, in 1989 where Art supported Janice in the

last phase of her career. They retired to Sun Lakes, AZ, in 2001 where Art developed many friendships, including golfing buddies that dined together every Wednesday at the Olson's, and became known as "The Geezers."

Art knew he couldn't change the world but felt he could make a difference in his little corner of it, and volunteered and performed community service wherever he lived. He was an active member of Kiwanis for 40 years in Oak Creek and in Creve Coeur, and an active supporter of the South Milwaukee Nursing Home. Art was honored as Citizen of the Year under age 35 by the Oak Creek Chamber of Commerce and again as Citizen of the Year in Oak Creek in 1988. He volunteered at Head Start for 10 years and supported the Wyman Center for teen programs in St. Louis. He was always active as a member of his churches in Milwaukee and in St. Louis, and Art and Jan were founding members of a church of fellowship, "The Community of Christ our Brother." Art was a volunteer probation officer in Milwaukee County for 10 years, and even after "Frank's" probation ended, as his only friend continued to meet him weekly for coffee until Frank passed. He was a Board Member of Trinity Community Hospital in Cudahy, WI and Board Member of National Insurance Company of Milwaukee. He volunteered with the Chandler Symphony in Chandler, AZ and served as Chair for the South East WI Retired Teacher Association while in Sun Lakes.

Art was truly a family man, spending many hours at his children's football games, softball games, tennis matches, band concerts and piano lessons. He showed his children fathers can clean, cook and do laundry. Jan and Art

opened their home to others, children and adults, throughout their lives. Art and Jan served as foster parents for nearly 20 years. Many other people came to their homes over the years for a shoulder to lean on, advice, and often a place to stay for a night, or a year.

Many people have shared memories of Art, and all loved his sense of humor. His dry wit livened many a conversation. His company was enjoyed wherever he went, and he was known for his ability to grill anything, while enjoying his Brandy Manhattan from a coffee cup. He was valued for his wisdom, combined with the calm and patient manner in which he dealt with any issue. His friendship, mentoring and fathering were extended and reached far beyond his family.

He died January 5, 2013 at his home in Sun Lakes, surrounded by family. He donated his body to Science Care for research. He had participated in three clinical research studies with the hope of helping other people. Donations are suggested to The Wyman Center, 600 Kiwanis Drive, Eureka, MO, 63025. His sister, Carol, preceded him in death. He is survived by his wife, his children and their spouses, six grandchildren and one great-grandchild, as well as his brother-in-law Sam, sisters-in-law Maxine and Phyllis, and many nieces, nephews and friends.

A memorial service was held Saturday, February 23 at 11am, at the Sun Lakes Chapel, 9240 E. Sun Lakes Boulevard North, Sun Lakes, AZ. A memorial also will be held in Wisconsin in August.



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WASBO Remembers Dietmar "Deet" Braune

Dietmar "Deet" R. Braune, 64, of Altoona, passed away suddenly on Wednesday, January 16 at his cabin on Lake Holcombe.

He was born March 30, 1948 in Gera, Germany. He was the son of Rudolf and Ilse Braune. In 1953 they came to America and moved to southern Minnesota. Deet became a US Citizen in 1958 and served in the US Army from 1966-1969.

Deet was employed by CESA 10, beginning his career there in February of 2002 as an Energy Consultant in the Chippewa Falls Office. Prior to joining the CESA 10 team, he was an Electrical Designer for Ayres Associates and Account Executive for Excel Energy. In 2006, Deet and Rita purchased The Silver Bear, a home décor shop, in Lake Holcombe.

Deet loved meeting people and had the ability to immediately make them smile with his mischievous nature. He loved relaxing at the cabin and boating on Lake Holcombe, his Alaskan and other fishing

trips, his Arizona getaways, golfing on the Lake Holcombe league, traveling, gardening and landscaping, bonfires and special times with friends and family. He thoroughly enjoyed watching the football games with friends at Big Swede's Resort on Lake Holcombe. So many treasured memories were created with his friends.

He is preceded in death by his father Rudolf and mother Ilse.

Memorials may be given in Dietmar's name to The Dietmar R. Braune Fund or The Youth of Lake Holcombe Endowment Fund, a fund he was instrumental in establishing. Both may be sent to The Community Foundation of Chippewa County, PO Box 153, Chippewa Falls, WI 54729. Donations may also be made to a place of the donor's choice in Dietmar's name.

He is survived by his soul mate and best friend, Rita Schrantz of Altoona; two children, Chad Braune (Mona Myers) of Eau Claire and Melissa Braune (Dan Markow) of Chippewa Falls; 6 grand children and one great-grand child; two sisters Robyn Thomas (Cory), Regina Hagberg (Tom), brother Steve Braune; step mother, Carol Braune and his treasured cousins in Germany and Australia, along with the many friends who loved him.



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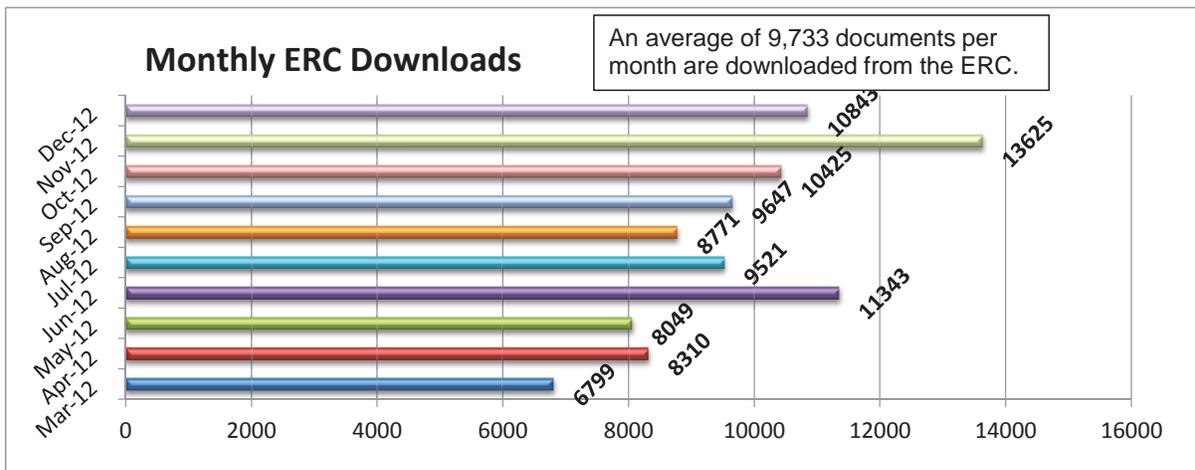
WHAT'S NEW IN THE ERC

Top Downloads:

- Student Information System RFP
- Paper Products for Custodial Warehouse
- Interview Questions, Hiring Procedures & Evaluations

Recent Additions:

- (Facilities Seminar) Teaming Up New Technologies to Build a 5 Year Plan
- (Transportation Seminar) Saving Dollars in Transportation
- School Food Service Employee Financial Incentive





Welcome New Members

November 2012 - January 2013

District Professional Members

- **Ryan Christianson**, Director of Human Resources, Wisconsin Rapids
- **Alan Goytowski**, Custodial Services Supervisor, University of Wisconsin - Whitewater
- **Jeff Hensel**, Transportation Supervisor, Black River Falls
- **Nathan Hollmann**, Transportation Supervisor, Saint Croix Falls
- **Brian Johnson**, Maintenance, Baraboo
- **Stephen Kuhn**, Mechanical/Security Systems Technician, Appleton Area
- **Gregory Nelson**, Teacher, Maple
- **Shelli Reilly**, Director of Business Services, Richmond
- **Al Sternig**, Facility Manager, Elmbrook
- **Kerri Van De Hei**, Assistant Business Manager, CESA #7

Service Affiliate Members

- **Adam Eberle**, Sales Team Manager, Skyward, Inc.
- **Karyn Biller**, DIRT Champion, Lerdahl - DIRT Environmental Solutions
- **Adam Demmer**, Systems Integration Consultant, Stanley Black & Decker
- **Mike Fetting**, Loss Prevention Specialist, SFM
- **Mark Hawley**, President, J & H Controls, Inc.
- **Jeff Hrdlicka**, Sales, Padding Experts
- **Andy Kahrs**, Sales & Marketing Manager, SERVPRO
- **Pam Lewis**, Trane
- **Al Mueller**, Vice President, Just Service / Titan Plumbing
- **Nathan Nygaard**, Energy Consultant, Focus on Energy
- **Michael Queoff**, Director of Business Development, JP Cullen & Sons, Inc.
- **Darryl Rangel**, District Sales Manager, BELIMO Americas
- **Jennifer Sulentic**, Program Coordinator, U.S. Communities Government Purchasing Alliance

"Most of the successful people I've known are the ones who do more listening than talking."

~ Bernard M. Baruch

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! If you are interested in being added to our interim list, send an email to Woody Wiedenhoef at wwiedenhoef@wasbo.com.

Changing Districts?

Be sure to update your profile at www.wasbo.com so you don't miss any communications. Give us a call at 608.249.8588 if you need help.

"If you tell the truth you don't have to remember anything."

~ Mark Twain



WASBO Career Center

Connecting school business professionals with the leading employers in Wisconsin.



The WASBO Career Center is a dedicated search and recruitment resource for school business professionals and employers in Wisconsin. We offer simple and easy-to-use tools to make searching for career opportunities and finding qualified professionals fast, more efficient, and more successful than ever before.

Tools for Job Seekers

The WASBO Career Center gives job seekers access to inside opportunities available only through the association and provides the tools needed to quickly find and apply for jobs.

Advanced Job Search

Find the most relevant jobs from top school districts throughout Wisconsin.

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Stay up-to-date on the latest opportunities by receiving automated notifications.

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Stay Connected



Share Your Best Practices - For the second year as part of the Accounting Conference, WASBO will be asking you to submit your best practices. These submissions will be reviewed by conference attendees that will vote for the one they think most benefits students and the district, and other districts could also implement. The winner will be recognized at the Accounting Conference. We thank **Key Benefit Concepts** for providing this opportunity.

It is also time to submit your best practice for the **WASBO Business Services Award**, sponsored by **Robert W. Baird & Co.** This award provides a \$1,000 professional development grant to the winning district. **Submission deadline has been extended to April 1, 2013.** Submitting your best practice not only offers your district a chance to receive professional development funds, it also benefits your school business colleagues with a good idea they can implement in their own district.

Friend of WASBO nomination deadline extended to April 1 - Do you know someone who deserves special recognition, either member or non-member, for supporting WASBO in our mission and vision? If so, take a moment to make this nomination at WASBO.com/Awards.

WASBO Spring Conference - We listened to you and moved the Spring Conference up two weeks in 2013, so it does not bump up against Memorial Day weekend. Plan to be in Green Bay May 7-10, 2013 for this year's conference. Planning is well underway. Registration will open soon. Start thinking about Silent Auction donations to benefit our ASBO International involvement.

Upcoming Sponsorship Opportunities

for WASBO Service Affiliate Members

- WASBO Service Affiliate Members provide many resources to WASBO, both educational through articles and presentations, and monetary through exhibiting and sponsorships. Both are vital to WASBO's ability to provide outstanding professional development and services to our members. If you would like to support WASBO with a sponsorship, go to www.WASBO.com. We are currently accepting sponsorships for the following conferences:

- WASBO Accounting Conference
- WASBO Spring Conference

On the Move

- **Julie Kelly** from St. Francis, to Muskego-Norway, Director of Business Services
- **Scot Ecker** from Muskego-Norway, Director of Business Services to Carthage College, Associate Vice President
- **Jeremiah Johnson** from Muskego-Norway, Building Operations Supervisor to Muskego-Norway, Supervisor of Buildings & Grounds
- **Kristin Kollath** from Greenfield, Director of Business Services to higher education
- **Jonathan Mitchell** from Deerfield, Business Manager to St. Francis, Business Manager
- **Robert Simandl** from Jackson Lewis LLP to Simandl Law Group, S.C., Founding Member and Principal

Retirements

- **Gary Rosploch**, Supervisor of Buildings & Grounds, Muskego-Norway School District

ASBO International New Members

December 2012

- **Douglas L. Johnson, RSBA**, Whitnall School District

ASBO International Membership Milestones

- **David J. Betz**, Wilmot Union SD (10 years)

WASBO Member's Proposal Accepted

- John Stellmacher (Hartford Jt. #1) left the State Education Convention to pick up his girlfriend Laura, and head to the airport for a surprise trip to Oregon. It was at Bridal Veil Falls where he popped the question, and she accepted. We are told WASBO participated as one of the props - a WASBO umbrella was part of the day. Congratulations John and Laura! Thanks for sharing your pictures.



John and Laura at Bridal Veil Falls where he proposed.



Laura and the WASBO umbrella in front of Horsetail Falls!



John & Laura at Multnomah Falls.



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prospective member!

Upcoming Events - WASBO.com

Professional Development

WASBO pCard User Group Meeting

March 19, 2013, 1-5 pm - Chula Vista
Conference Center, Wisconsin Dells (No
Charge to Attend)

WASBO Accounting Conference

March 20-21, 2013 - Chula Vista Conference
Center, WI Dells (Viterbo Credit)

WASBO Spring Conference & Exhibits

May 9-10, 2013 - KI Convention Center, Green
Bay (Viterbo Credit)

WASBO Custodial & Maintenance Conference

June 19, 2013 - Indian Trail High School &
Academy, Kenosha Unified School District

WASBO New School Administrator & Business Support Staff Conference (Year of Success Program)

TBD (Viterbo Credit)

WASBO Fall Conference

October 2-3, 2013 - Osthoff Resort &
Conference Center, Elkhart Lake (Viterbo
Credit)

ASBO International Annual Meeting & Expo

October 25-28, 2013 - Hynes Convention
Center, Boston, MA (Viterbo Credit)

Midwest Facility Masters Conference & Exhibits

November 14-15, 2013 - Kalahari Resort &
Conference Center, Wisconsin Dells (Viterbo
Credit)

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Committee Meetings

Fall Conference Committee

March 19, 2013, 3-5 pm, Chula Vista

Joint Convention Planning Committee

March 20, 2013, Chula Vista

Midwest Facility Masters Conference Committee

All meetings are by conference call.
March 14, 2013, April 4, 2013, May 23, 2013,
June 6, 2013, August 1, 2013, September 5, 2013,
October 10, 2013, November 7, 2013 (if needed)

Safety & Risk Management Committee

All meetings at 12:00 pm, WASBO Offices, Madison
April 9, 2013, August 13, 2013

School Facilities Committee

All meetings at 9:30 am, WASBO Offices, Madison
April 9, 2013, August 13, 2013

Service Affiliate Committee

TBD

Spring Conference Planning Committee

All meetings at 2:00 pm, WASBO/Conf. Call unless
otherwise noted. March 19, 2013 (Chula Vista, 6-8
pm), April 18, 2013

WASBO Business Meeting

May 10, 2013 - Green Bay, Spring Conference

Board of Directors Meetings

April 10, 2013 Manitowoc
June 11, 2013 Madison

Leadership Team Meetings

March 13, 2013
May 15, 2013

Regionals

Check www.WASBO.com for more information.

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

March 15, 2013 - DePere Jt. Mtg with NE Regional
May 31, 2013

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

April 5, 2013 - Middleton, May 3, 2013 - Lodi

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

March 15, 2013 - DePere, Jt. Mtg w/ Bay Regional,
April 19, 2013 - Fond du Lac, May 31, 2013 -
Manitowoc

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

Lehman's Supper Club in Rice Lake.
March 6, 2013, April 3, 2013, June 5, 2013

Southeast - Meetings are from 12:00-2:30 pm.

April 12, 2013 - Hamilton

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

April 17, 2013

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

the Sparta Area SD Administration & Education Center
March 7, 2013, April 4, 2013, May 2, 2013, June 6,
2013

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

March 15, 2013 - Auburndale, April 19, 2013 -
Rhineland, June 14, 2013 - D.C. Everest, August
16, 2013

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