



Wisconsin  
Association  
of  
School  
Business  
Officials



# Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 17, Number 4 - August 2013

## Inside This Issue

President's Message .....	3
Executive Director's Report .....	5
Legislative Update.....	7
Great Balls of Ice.....	9
Five Things to Grow This Summer.....	13
Four Key Elements of Successful Change.....	13
ASBO Update .....	15
Transportation Committee Update.....	16
ASBO Milestones and Meritorious Budget Awards.....	17
Four Things You Should Know About Tax Incremental Districts .....	18
WERC Publishes Annual Certification Election Emergency Rules and Act 10 Case Law Update .....	19
WASBO Mentorship Program Begins .....	23
Tips for Safeguarding Financial Records .....	24
Relational Bullying .....	25
Coulee Region Buildings & Grounds Group .....	26
Milwaukee Metropolitan Buildings & Grounds Group .....	26
Service Affiliate Checklist .....	27
SEC Charges School District with Continuing Disclosure Failure .....	28
SEC Charges School District and its Underwriter for Continuing Disclosure and Due Diligence Failures..	29
SEC Charges School District and Muni Bond Underwriter in Indiana with Defrauding Investors ...	30
WASBO Custodial & Maintenance Conference Highlights.....	32-33
Diamonds & Stones .....	36
State Budget Imposes New Requirements for School District Community Service Funds.....	37
WERC Publishes CPI Rate for General Municipal Employee Collective Bargaining Agreements Beginning January 1.....	38
Mosquito Management Takes a Community .....	39
Avoid Hazards of Coal Tar Asphalt Sealcoats.....	40
Managing Deer on School Grounds.....	41
Book Review: Emotional Intelligence 2.0 .....	42
Help for School IPM Planning.....	44
Welcome New Members/On the Move.....	45
Get Involved in WASBO .....	46
Stay Connected .....	47

## Two Pinnacle Award Winners from Wisconsin



Congratulations to the 2013 ASBO International Pinnacle Award recipients from Wisconsin!

### PINNACLE OF EXCELLENCE AWARD

#### Scot Ecker

Associate Vice President & Controller  
Carthage College, Kenosha, WI

#### *A State-wide Tool for School Finance Literacy*

Recognizing the need for a better way to present crucial, complex financial information to all district stakeholders regardless of their level of financial literacy, Ecker spearheaded the development of the Investing in Wisconsin Public Schools™ finance literacy tool. This community engagement and learning tool helps promote understanding of school finances and community-wide conversation about the needs of students. It is customizable, so education entities can adapt it to address their unique situations. *(More on page 35)*



Scot Ecker

### PINNACLE OF ACHIEVEMENT AWARD

#### Joseph Marquardt

Director of Business & HR Services  
School District of New London, New London, WI

#### *Energy Conservation and Efficiency through Kilowatt*

When the district adopted a goal to purposefully reduce energy consumption in all buildings, the Kilowatt Savings Challenge was born. All staff members throughout the district were motivated to help the district reach its goal to reduce kilowatt consumption by 5% over the previous fiscal year. School leaders and custodians shared energy saving strategies with all staff and Kill a Watt meters were placed in each building to monitor usage. Data was tracked on the business services website so all schools could see their progress. The district also instituted a two-week shutdown during the summer and during the winter break to reduce energy use. *(More on page 35)*



Joe Marquardt

Eighteen applications were submitted for the four awards granted. We are delighted to see our state so well represented as fertile ground for the creation of innovative, high caliber programs to benefit educational opportunities for our children.

**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.



# *You educate.* We insure.

Molding the leaders of tomorrow — that's education. It's about giving students the time and attention they need to learn. Don't waste time worrying about finding insurance that meets the budget. Leave that to us.

Our flexible pricing solutions help you provide great benefits to your employees — always at a great value. And if your needs change, don't worry. We're constantly coming up with services like our new focused networks that work for any district.

With benefits from the Trust, you can be confident to keep your best teachers on staff. Let us worry about insurance. You can focus on what you do best — education.



*How can we help you?* Give our Education Service Team a call:  
608.661.6633 • [education@weatrust.com](mailto:education@weatrust.com)

**WASBO 2013-14  
Board of Directors**

Lynn Knight - President  
John Gahan - President Elect  
Jeanne Stahl - Treasurer

Janice DeMeuse -  
Past President

**Directors At-Large**

Robert Avery  
Jay Clark  
Kathy Davis  
Jason Demerath  
Kent Ellickson  
Kenneth Mischler  
Rob Nelson  
Andy Weiland  
Dale Zabel

**Executive Director**  
Woody Wiedenhoef

*Taking Care of Business* is issued bimonthly by the Wisconsin Association of School Business Officials. Send address changes to:

Taking Care of Business c/o WASBO  
4797 Hayes Road, Suite 101  
Madison, WI 53704  
P 608.249.8588  
F 608.249.3163  
wasbo@wasbo.com  
WASBO.com

WASBO Inc. and the WASBO Foundation do not endorse or stand behind any claims or products advertised in *Taking Care of Business*.

Publication Policy: *Taking Care of Business* is distributed by the Wisconsin Association of School Business Officials. The ideas and opinions expressed do not necessarily represent the beliefs and policies of WASBO or its members. Neither WASBO nor any of its members or representatives accepts liability for the contents or use of the articles appearing in this newsletter. Materials that appear in *Taking Care of Business* may not be reproduced in any manner without written permission.

Editor: Woody Wiedenhoef

© 2013, Wisconsin Association of School Business Officials (WASBO)



# President's Message

## A Word From Your President

### Public Education—Where Success Begins

By Lynn Knight, Business Manager, School District of Nekoosa



**Lynn Knight**  
WASBO President

It seems every August we ask the same question....where did the summer go? It's hard to believe that in just a few short weeks our staff and students will once again be filling the classrooms. I'm not sure about the rest of you, but I think the older I get, the faster time seems to travel!

Speaking about time flying by, it's once again time to say Thank You to our outgoing Board members; Jill Collins, Dave VanSpankeren, Betty Zimdars, and Wendy Brockert. Your service has been invaluable and don't be surprised if WASBO calls you in the future to tap your expertise!

We also need to recognize our incoming Board members; Kathy Davis, Jason Demerath, and Kent Ellickson. John Gahan is returning to the Board as the newly elected President-Elect. Thank you for your commitment to serve WASBO! I look forward to lively discussions as we work to achieve our common goals this coming year.

Regarding goals, the Board is continuing its formation of the formal strategic plan. To recap the progress so far, the Board of Directors met in April to discuss the development of a formal strategic plan. So much great work has been done in the past on our strategic plan that now is the time to gather all of the information and put it into one document. The Board broke into three groups and created draft goals focusing on the three areas in our vision statement; networking, advocacy, and professional development. A survey was developed based on the draft goals to receive input from our members. The survey asked members to prioritize the draft goals based on importance. At the Spring Conference in May, the idea of a formal strategic plan was presented. The survey was handed out for immediate results. The survey was also e-mailed to the membership to gather as much input as possible.

The strategic plan discussion continued at the June Board of Directors' meeting. Based on the input from the membership,

WASBO's strength was identified as networking. The area where WASBO can improve was in opportunities. Areas of focus pointed to advocacy, developing relationships with legislators, evaluating the effectiveness of the mentorship program, and increasing the number of professional development certifications. The Board assigned the Governance Goal Action Team to "firm up" the goals, keeping in mind the objective, measurability, and developing a measurement baseline for each goal. We will continue to keep the membership updated on this exciting initiative.

In 2008-09 WASBO adopted policy governance. This type of governance basically takes the Board from an operational level to a strategic level, focusing on the strategic plan. The Board is currently using policy governance to a point. With the development of the strategic plan, the time is right to move to the next level of policy governance. Betty Zimdars gave a presentation at the June Board meeting that explained how the next level of policy governance would tie into the strategic plan and the role of the executive director and the Board of Directors. We will continue to learn more about policy governance in future meetings.

So as you can see, we have a lot on our plate. But we know that the end product will be worth it. Please be patient with us, and if you have any questions, contact any board member, Woody Wiedenhoef, or Tina Hafeman. We will try to answer any questions you have and welcome your comments.

If you were at the Spring Conference in May and heard my presentation on the strategic plan, you also heard me talk about the virtue project. The virtue project is an initiative that inspires the practice of virtues in everyday life. We already have these virtues inside of us. By hearing the

*Continued on page 17*

“When it comes to claims, we know the score!”

Beckie Januszewski, Milwaukee Branch Claims Supervisor

EMC does more than handle claims, we score them. Information gathered from adjusters and customers provides us with metrics to continually enhance the quality and promptness of EMC's claims handling. It's just one of the many reasons policyholders *Count on EMC*®.



Milwaukee Branch: 800.236.1800 | Home Office: Des Moines, IA

[www.emcins.com](http://www.emcins.com)

© Copyright Employers Mutual Casualty Company 2011 All rights reserved

# Executive Director's Report

## Worker's Compensation and Sports Officials

By Woody Wiedenhoef, Executive Director, WASBO



Woody  
Wiedenhoef

It doesn't happen often, but when it does it can be a painful experience. I am referring to school districts, attorneys, auditors and/or insurance companies mistakenly construing that all sports officials are school district employees – when they are not. The pain comes from frustrating interpretations and burdensome financial costs by school districts, the Wisconsin Department of Workforce Development (DWD), insurance companies and sports officials.

Statute 102.07 (8) (b) Wis. Stats., is the nine-point test used to determine if the person filing a worker's compensation claim is an independent contractor or employee. In fact, most sports officials meet the nine-point test found in this statute. The DWD will be providing presentations on this subject at future WASBO conferences this year. The Wisconsin Interscholastic Athletic Association (WIAA) will also be providing information to prospective officials and school district activity/athletic directors. Because schools will be holding interschool sports contests utilizing officials shortly, I wanted to get a jump on this in the August WASBO *Taking Care of Business* for school business managers so there is less confusion for superintendents, business managers and activity/athletic directors.

### So what is the nine-point test in layman's terms?

Independent Officials must:

1. provide independent officiating services that are separate business operations from your school's daily business operations and your employment expectations.
2. file their self-employment income on their state and federal tax returns for their independent work or service during the tax year. They are not required to have a federal identification number and

may file using their social security number, although it is okay to have a federal identification number if one chooses.

3. have a contract to perform specific services for a specific amount of money. The official has control and makes decisions independently about the means of performing the work. Schools can develop their own sports officials contract – or just use the one provided by WIAA.
4. incur the main expenses related to providing the service. Examples may be the cost of travel, uniforms, etc. The independent contractor income received from the district will help offset their expenses and must be reported in their income tax filing. The contract can spell out reimbursement for certain expenses if the parties mutually agree.
5. be responsible for the satisfactory completion of work or services that they perform and are liable for a failure to complete the work or service. This is similar to other independent contractor services such as architects, auditors, consultants or attorneys.
6. receive compensation for the service performed under a contract referred to in #3 above on a commission, per job or possibly a competitive bid. Income provided to the official by the school district will be reported on a 1099 form from the school district.
7. (may) realize a profit or loss under these contracts.
8. incur the independent business liabilities or obligations.
9. understand the financial success or failure of the independent contractor's business (officiating) depends on the relationship of

those specific business receipts to expenditures.

You may find this statutory checklist familiar. It is very similar to the checklist your auditor or attorney will use as a guide to determining if someone is an independent contractor or employee under tax law. Most officials are independent contractors.

Is there a way for independent contractors to be considered employees by the DWD when a claim is filed by an official? Yes, if the employer treats them like an employee. Examples would be:

1. paying the official on the school district payroll instead of an accounts payable check.
2. providing them benefits that look like other employee benefits for the work.
3. having the official's contract with the school district read like an employee/employer relationship.

Do not be over controlling and over directive in the contract with the official. Do not ask or order them to do things that are not in the contract, as can sometimes happen in an employer/employee relationship under the famous "other duties as assigned" job description line.

### So what type of contract will help school districts and officials meet the nine point test needed to have an independent contractor relationship?

A written contract must set forth the terms of the relationship. Examples are:

1. describing the services the referee will perform (there should be no illusion that the district will have "behavioral control" of the official during the event).

*Continued on page 10*



# The smart choice for educators

## WPS SchoolSelect Plans help keep members healthy and costs down

In many school districts, school board members want a health plan that does more than just pay claims—they want one that promotes health and wellness so that the teachers and support staff can focus on healthy lifestyles while the claims and premiums stay low.

Enter the WPS SchoolSelect Plans. With free access to an online health center, health risk assessments, care management, health care utilization analysis, the *Your Health Matters* blog, and more, school districts across Wisconsin now have the tools to protect their employees' health *and* their budgets.



To request a quote on a WPS SchoolSelect Plan, contact your local agent or call 608-223-5970 and reference "schools."

25858-021-1302

©2013 All rights reserved. Wisconsin Physicians Service Insurance Corporation.

# Legislative Update

## Where Do We Go From Here?

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



John Forester

In last month's legislative update, and in subsequent presentations to SAA member groups, I suggested that during the budget session the SAA took the very bad political hand it was dealt and played it about as effectively as possible. In the process, I also believe the SAA did some of its best work ever as a political organization.

In light of the enactment of statewide voucher expansion, several members have sought further explanation of the statements above. Here it is.

The 2012 elections cemented GOP control of state government as well as conservative leadership of GOP policymakers (Governor Walker, leaders of both houses). Couple that with the meteoric rise of an extremely well-connected and well-funded anti-public education lobby (private school voucher advocates) and you could easily see it was going to be a tough session for us. I will go so far as to say if we had been playing poker we should have folded.

But, we didn't fold. In fact, we had more SAA members engage in more sustained advocacy efforts throughout this budget session than ever before. And, in the final analysis, SAA members had tremendous impact on the final budget signed by Governor Walker including removal of the special needs voucher and charter school proposals, as well as ensuring a \$150 increase in per pupil

***“With WEAC essentially gone, the SAA must assume greater leadership among K-12 advocacy groups. We must ask ourselves, ‘What must we do differently in this new environment to help lead K-12 advocacy efforts?’”***

resources (even though the challenges facing school districts and the state's improving revenue picture warrants a larger per pupil increase for schools).

In my estimation, the results of the budget session automatically creates the new position from which we fight on behalf of the children we serve. But, the real question is, “Where do we go from here?”

In the short term, I think we pivot to push for voucher school accountability in areas like teacher licensing, uniform graduation requirements, due process and open records. We also must seek greater flexibility for school districts to organize and operate in order to meet the unique needs of their students in this competitive environment.

With WEAC essentially gone, the SAA must assume greater leadership among K-12 advocacy groups. We must ask ourselves “What must we do differently in this new environment

to help lead K-12 advocacy efforts?”

First, there are a couple of things at which we must improve. SAA members must communicate more effectively with legislators and we must do a better job of political fundraising (SAA leadership is already at work on these two issues). Finally, we must help build a stronger coalition of public education advocates (educators, school board members, parents, retired educators, etc.) and explore community organizing in key areas of the state.

We have a lot of work to do. And given the changing political landscape, we must contemplate how the SAA must change in order to meet the challenge. SAA staff will use the next few months to engage members in a brutally honest discussion of the SAA's future political role. I need input from all SAA members. Please contact me with your comments, questions and suggestions at 608.242.1370 or john.forester@wsaa.org. Thank you. 🍷

“Changing something that is established is rarely easy, but it is necessary if you want to get something better.”

~ Jones Loffin  
(from *Getting the Blue Ribbon*)

“Leadership is convincing people they can do things they shouldn't be able to do.”

~ Al Roberts, U.S. Army





## Contact Us Now for an Insurance Bid!

If you haven't gotten a bid on your employee benefits from us yet, call us today. Not only can we slim down your budget, but also our team of school district experts, reviewed by legal professionals, will guide you through ACA and healthcare reform every step of the way!

- Self-Funded and Fully-Insured Health Insurance
- HRA and FSA Plans
- Long-Term and Short-Term Disability Insurance
- Life Insurance
- Dental Insurance
- Vision Insurance
- OPEB Restructuring
- Onsite Medical Clinics

Don't let healthcare reform overwhelm you, subscribe to our newsletter today!

[www.ACA-Watch.com](http://www.ACA-Watch.com)



**Stephanie Laudon**  
Regional Vice President  
[slaudon@NISBenefits.com](mailto:slaudon@NISBenefits.com)



**Ken Zastrow**  
Market Development, Retirement Income  
[kzastrow@NISBenefits.com](mailto:kzastrow@NISBenefits.com)

NATIONAL  INSURANCE  
SERVICES

Client Focused. Solution Driven.

**800.627.3660**

[www.NISBenefits.com](http://www.NISBenefits.com)

# Great Balls of Ice

By Ken Mischler, CPA, Director of Business Services,  
Manitowoc Public School District

Great Balls of Ice hailed down on Manitowoc and Manitowoc Public School District (MPSD) on the evening of Thursday, June 27, leaving behind a wide swath of destruction. That is how the *Herald Times Reporter*, the local newspaper, described the storm. The hail lasted from about 6-6:15 pm and produced golf- and tennis-ball-sized chunks of ice up to 2.5 inches in diameter. The result of the hail caused major damage to many of the district buildings. The most damage occurred at the Administrative Office, which was remodeled only six years ago.

I arrived at work at 7 am the next day and, to my surprise, found that the roof was leaking from the prior day's hail and rain. Staff quickly covered everything and moved valuables out of the areas of dripping water. My attention was now on the computer wiring closet. Water was dripping down, but no major damage was found in this area. Not too bad, we thought. I quickly called the Local Government Property Insurance Fund (LGPIF) in care of the Crawford Company. LGPIF has a contract with the Crawford Company which serves as the administrator of the insurance policy. They in turn contacted Paul Davis National Restoration as the on-site restoration contractor. Paul Davis quickly determined that the district had a major insurance claim.

To speed things up, I contacted a local roofer that has worked on most of the district's roofs to patch up the thousands of holes in the roof. The roofer patched all the holes and the Friday night rain held with no leaks. Paul Davis National Restoration was able to dry up the entire building. All is good, or so we thought. As temperatures climbed during the next week, Paul Davis National Restoration and administration were unaware that the roof patches had melted. Another rain storm arrived, and water was

pouring into the building through the thousands of holes left by the hail storm. It was time to move quickly.



We had worked out a relocation plan with administrative staff during the last few days, but now the plan needed to be implemented immediately. Movers were brought in. Staff packed what they would need for an estimated two months of restoration. The rest of the items were going into four storage semi-trailers. The trailers would be locked, so there was no way to get to any of that stuff once it was packed up. Another group of movers were responsible for shipping computers, printers and files to their new temporary locations. The administrative staff was to be split up, sending staff to two different MPSD locations. There was no time to waste and a lot to do. Payroll needed to be finished by the next day.

Besides roof damage, there were electrical issues, repairs to the roof HVAC units, replacement of drywall in various sections of the building, and replacement of all the carpet. The carpet was not that old and in good condition; however, Paul Davis National Restoration and Crawford Company believed that elements coming from the roof and ceiling may not have been adequately cleaned. It was best to remove it all.

The Administrative Office was not the only location that was affected by the hail storm. There was damage to roofs at Monroe Elementary School, Jackson Elementary School, Jefferson Elementary School, Washington Jr. High School and Lincoln High School.



Ken Mischler

Half the roof at Washington Jr. High School was just replaced a few days prior to the hail storm. There was only limited interior damage caused by the hail storm in the school locations.

The total cost of the insurance claim will be well over \$1,000,000. The district is liable for only the \$5,000 deductible. I have to say that Paul Davis National Restoration and Crawford Company have been very good to work with. They have been in constant contact with our Director of Buildings and Grounds and administration. Issues or differences between MPSD, as the property owner, and the insurance company are non-existent.

There was some good that came from the hail damage. We proposed some interior changes to the Administrative Offices. The district will pay for these modifications, but the hail damage allowed the opportunity to make those cosmetic changes with very little disruption and cost. In addition, a section of the roof at Jackson Elementary School was slated for replacement next year. This will save the district a little money.

As if the disruption itself wasn't enough to deal with, some of our files are still in the semi-trailers. The audit is coming up and we are hoping that we have all the documents needed, but I know that is not looking promising. One thing the Administrative Office staff needs to be is flexible.

All the school roofs are scheduled to be complete prior to school starting, however, the MPSD Administrative Office is dependent upon the carpeting installation. Will the Administrative Office be ready prior to school starting? We hope so. In the end, it will all work out. 🍷

# Executive Director's Report: Worker's Compensation and Sports Officials

- Continued from page 5*
2. describing how much you will pay the referee (usually a fixed fee).
  3. describing how and when you will pay the referee (accounts payable check).
  4. explaining who will be responsible for expenses (independent contractors pay their own expenses).
  5. explaining who will provide certain supplies, materials and possible equipment (independent contractors usually provide many of these things).
  6. stating that the school district and the referee agree to an independent contractor relationship.
  7. stating that the referee has all of the certifications, permits and licenses required to do the work.
  8. stating that the referee will follow appropriate laws, including filing state and federal income forms and paying appropriate taxes.
  9. receiving an acknowledgment by the official that he or she is not entitled to any of the benefits you provide employees in their employee/employer relationship.
  10. receiving a statement by the official that he or she understands

- that as an independent contractor, he or she is not covered by worker's compensation insurance. Officials are liable for their own business liability insurance and/or disability insurance.
11. describing the term of the agreement (for example, one game, a tournament—there should be no allusion to permanency in the relationship).
  12. describing the circumstances under which the district or the official can terminate the agreement.
  13. explaining how you and the official will resolve any disputes.

It is important to remember that simply having a signed independent contractor contract with an official does not automatically create an independent contractor status—the official must meet the nine-point independent contractor test in the course of performing the contractual responsibilities. Using the above noted contractual suggestions will help in that regard.

**Last, but not least, can a bona fide school district/independent contractor official employment relationship inadvertently evolve into an employer/employee relationship during the course of a contract?**

Yes, it can happen—if you let it happen. If an

official is requested to do something outside the scope of the contract and is injured, he or she could be found to be an employee by asserting that he or she was performing work outside of the scope of the contract. This is also true if this official is providing a service unrelated to their independent business, which is under the direction and control of the school district, as an employee. Even a minor deviation from the contract and/or the nine point test may affect the status of an employment relationship. Any deviation from the nine-point test may cause a school district/independent contractor relationship to evolve into an employer/employee relationship.

But school districts hire independent contractors and meet the nine point test all the time. Please remember our example about architects, auditors and attorneys. Also – consider that for employees, you are required to pay for insurance, retirement, and so forth. This is not the case for those with whom we contract for services. As is true with all these contractual relationships, it is incumbent on the school district to ensure the duties of an official are limited to the duties described in the contract.

**What happens if an official is injured and they make a claim for worker's compensation benefits?**

*Continued on next page*

*→ Guiding you. Beyond the numbers.™*



August 13, 2013

Woody Wiedenhoef  
Executive Director  
Wisconsin Association of School Business Officials  
4797 Hayes Rd, Suite 101  
Madison, WI 53704

Dear Mr. Wiedenhoef:

I have reviewed your Executive Director's Report – Worker's Compensation and Sports Officials. I believe that the article clearly summarizes the factors used by 102.07(8)(b), Wis. Stats. to determine if an individual is an employee for worker's compensation purposes.

As we discussed, I believe that by ensuring that the relationship between officials and school districts meet the nine-point test, you will also be assured that the relationship will qualify under the 10-factor test used by the DWD for employment tax purposes.

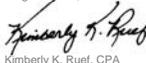
In addition, the IRS' common law rules test would most certainly be met.

As you state in your article, it is important for all parties to honor the nature of the agreement to protect the classification of the sports officials as independent contractors both for worker's compensation and employment tax purposes.

Please let me know if I may be of further assistance in this matter.

Very truly yours,

Wegner CPAs, LLP



Kimberly K. Ruel, CPA  
Partner

<p><b>Janesville Office:</b> 101 E. Milwaukee Street Suite 425 Janesville, WI 53913 P: (608) 756-4020</p>	<p><b>Baraboo Office:</b> 123 Second Street P.O. Box 150 Baraboo, WI 53913 P: (608) 356-3966 F: (608) 356-2966</p>	<p><b>Pewaukee Office:</b> W228 N3490 Pewaukee Road Suite 200 Pewaukee, WI 53072 P: (262) 522-7555 F: (262) 522-7550</p>	<p><b>Madison Office:</b> 2110 Luann Lane Madison, WI 53713 P: (608) 274-4020 F: (608) 274-0775</p>	<p><a href="http://www.wegnercpas.com">www.wegnercpas.com</a> <a href="mailto:info@wegnercpas.com">info@wegnercpas.com</a> (888) 204-7665</p>
---	--	--	---	---

# Executive Director's Report: Worker's Compensation and Sports Officials

Continued from previous page

Generally, if a claim is made by the independent contractor official for worker's compensation benefits, it is adjudicated by the DWD's Worker's Compensation Division on a case-by-case basis according to the facts and circumstances at the time of injury. This includes specifics in the contract between the school district and the official. If the official meets the nine-point independent contractor test, the official is not considered an employee and is not eligible for worker's compensation benefits. If the official does not meet the nine point independent contractor test, the official is considered an employee and is eligible for worker's compensation benefits.

## Summary:

An official is an independent contractor if the nine-point statutory test is followed. Have an independent contractor relationship that describes the event, not the specific judgments or actions during the event. Have a written contract that clearly sets forth the terms of the school district/independent contractor relationship. Do not deviate from the contract into an employer/employee relationship. Compensate the official through an accounts payable check and not through your employee payroll. (Please see a Wegner CPAs school auditor's opinion on this topic on page 10.)

You can receive specific information on these interpretations of the law from Joe Moreth, Director, Bureau of Insurance Programs, Worker's Compensation Division, Wisconsin Department of

Workforce Development at 608-266-8327 or at the website [dwd.wisconsin.gov/wc](http://dwd.wisconsin.gov/wc). See also the Worker Classification page of the website: [dwd.wisconsin.gov/worker\\_classification](http://dwd.wisconsin.gov/worker_classification).

Learn more on this topic at the WASBO Fall Conference, Oct. 3-4, 2013 in Elkhart Lake: [WASBO.com/fall](http://WASBO.com/fall).

If you have any questions, please feel free to contact me on this issue. 🍷

## Sample Contracts to Download

Below is a sample athletic officials' contract from the state of Indiana. An electronic version of this contract, along with several others, are available for download from the Taking Care of Business newsletter archives at [WASBO.com/newsletter](http://WASBO.com/newsletter). (See the links under August 2013.)

### Contract for Athletic Officials

Approved by:  
**INDIANA HIGH SCHOOL ATHLETIC ASSOCIATION, INC.**  
 9150 North Meridian Street, P.O. Box 40650  
 Indianapolis, Indiana 46240-0650  
 317.846.6601  
 317.575.4244



This form is provided for use in contracting licensed officials for IHSAA games, contests and activities.

The following School and Official licensed with the Indiana High School Athletic Association, Inc. (IHSAA) enter into an agreement for officiating:

School		Official	
Address		Address	
Phone		Soc. Sec. No.	
Fax		Phone Home & Bus	
E-mail		Fax & E-mail	

Official agrees to be present and officiate the following Contest(s) in the Sport of \_\_\_\_\_:

Date	Day of Week	Time	Location	Opponent	Total Payment

Name of other Official(s) employed for Contest(s) \_\_\_\_\_.

1. School will pay Official the amount(s) stated above for services provided. The obligations of School cease if Official ceases to be a licensed official or if the Contest is cancelled or postponed because of circumstances beyond the actual control of School.
2. If a party fails to fulfill the party's obligation under this Contract, except by mutual consent, such party shall pay the other party the Total Payment for the contest, less mileage. The parties agree that the IHSAA may adjust the matter if not voluntarily adjusted by the parties. A party who fails to honor an obligation under this Contract shall be reported to the IHSAA.
3. Official is an independent contractor, not an employee of the IHSAA or the School, and acknowledges that no medical insurance, workers compensation, unemployment insurance or other benefit are accorded Official by this Contract.
4. Official assumes all liability for injury to him/herself and waives any claim against the IHSAA for any injury, loss or damage, which may be sustained by the Official during any game, contest or activities, including any which are the result of any act or omission of the IHSAA, including any from its own negligence.
5. This Contract is void if not returned on or before \_\_\_\_\_.

**Official verifies that Official is acting as an independent contractor, is currently licensed by the IHSAA in the above listed sport, and will promptly notify School should Official no longer be licensed.**

<p><b>SCHOOL</b>                  Signature of Principal/Head _____                  Date _____</p>	<p><b>OFFICIAL</b>                  Signature of Official _____                  Date _____</p>
---	---



# WASBO Fall Conference

October 3-4, 2013

The Osthoff Resort &  
Conference Center  
Elkhart Lake, WI

*Get Award-Winning Results!*

## Getting the Blue Ribbon

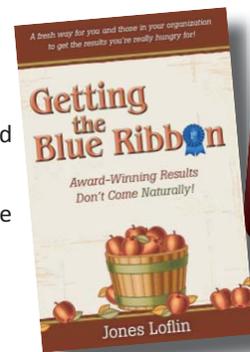
Ever feel like you spend your day rushing from one thing to another and rarely do anything well? Are you struggling to accomplish what would REALLY accelerate your success at work and in your personal endeavors? Maybe it's time you set your sights on a blue ribbon.

In this humorous and thought-provoking message, Jones Loflin offers four practical tools to use to ensure that what needs to get done gets done and is done well. Topics addressed include:

- Identifying new skills, behaviors and attitudes needed to achieve greater success
- Creating an environment where the right things get done
- "Pruning" those areas that are growing out of control
- Celebrating success when you achieve your "blue ribbon"

Attend this Keynote on October 3 to receive your free copy of **Getting the Blue Ribbon!**

*Jones Loflin's skill in helping individuals and organizations achieve greater success is known internationally. His gift of communication combined with his wit and enthusiasm create presentations that are illuminating and unforgettable. Jones is co-author of the award-winning book, **Juggling Elephants** and his message will help you and your school district or organization get the results they are really hungry for.*



*Jones Loflin*

## Scholarship Golf Outing

Wednesday, October 2, 2013  
Autumn Ridge Golf Course  
Supporting WASBO's Student  
Scholarship Program



*Don  
Mrdjenovich  
WASBO Executive  
Director, Retired*

## Perspectives on Education

Don Mrdjenovich served as WASBO's Executive Director for 11 years following a long career in education as a teacher, principal, business manager and superintendent. Listen as he shares some of the lessons he learned along the way and his thoughts about the future of education.

### Learning Opportunities in These Areas:

- Human Resources
- New Administrator and Support Staff (Year of Success Program)
- Best Practices/Money Saving Ideas/Innovative Solutions
- Facilities Certification Core Module 3 (Environmental Health and Safety)
- Facilities Certification Continuing Education Sessions
- Writing Your Professional Development Plan

**Register today!**  
**WASBO.com/fall**  
**608.249.8588**

# Five Things to Grow This Summer

By Jones Loflin

If you have been intentional about starting a flower or vegetable garden this Spring, you are probably beginning to see some initial “harvests.” The plants are growing and soon you will have beautiful blossoms or ripe vegetables to enjoy.

While you’re growing those two-pound tomatoes or six-foot sunflowers, may I suggest a few other things you should be cultivating during these warm summer months. They might include:

## **A stronger awareness of the impact of how you are spending your time.**

While in Saudi Arabia last month, I learned that they are in danger of becoming a net importer of energy by 2030—that’s right—a net importer. One of the reasons is that their population has had low energy prices for so long that they have carelessly used it. Now some difficult choices will have to be made to avoid greater problems in the future.

In the same way, we need to become more vigilant in evaluating the impact of how we are spending our time. Are we using it wisely on the things that are most important at work and in our personal life? The summer months usually offer more moments for reflection on questions such as these, and we need to take time to fully answer them—before it’s too late.

## **The willingness to do the small**

**things.** We’ve all become so crazy busy at work and in life that we don’t often take the time to do the little acts of kindness or appreciation that mean so much. Did you ever follow up with that co-worker to see how their sick parent is doing? How about the co-worker that was struggling with a difficult work assignment? Did you send a note of thanks to a teacher who meant so much to your child or the coach who made a difference? The possibilities are endless.

**The ability to focus.** At a recent training program I was shocked to learn that over 75% of the participants kept their mobile phone next to their bed—and not for use as an alarm clock! I’m hearing more and more that people are struggling to focus their time and energy in the right place at the right moment. You can download my complimentary article about focus to get you started. What do you need to do differently to better align your time and energy with what you SAY is most important?

**Your relationship with a mentor.** There’s an old saying that “when you’re green you grow and when you’re ripe you rot.” Today’s competitive workforce requires that you are always taking your career to the next level. Schedule time with those who can help you find clarity on how to improve yourself professionally. And while

you’re at it, don’t forget to seek out mentors for parenting or even your marriage. I had a planned meeting with one of my personal life mentors last week. The experience (and the wisdom shared) was just fantastic.

## **Your desire to make every moment count.**

My family and I recently returned from a trip to Italy and were absolutely exhausted. We spent every available minute exploring, enjoying and learning because we knew it was the chance of a lifetime. Last weekend my daughter graduated from high school, and as I sat there I smiled (and cried) because I could honestly say that I had attempted to take every opportunity to spend time with her. Wow! Eighteen years passed by so quickly.

Cultivate these 5 “plants” this summer and get ready for an abundant harvest of productivity, success, and peace in the coming months.

What opportunities does this summer offer you to improve professionally and/or personally? 🍷

Jones Loflin, author of *Getting the Blue Ribbon* and *Juggling Elephants*, will be the keynote speaker at the WASBO Fall Conference Oct. 3-4 in Elkhart Lake.



Jones Loflin

# Four Key Elements of Successful Change

By Jones Loflin

## **Determine The Need For Change**

To affirm whether change is necessary, evaluate your current situation with the following questions:

- What are the facts that tell me that change needs to happen?
- What are the feelings I am experiencing that indicate a need to change?

- What wisdom do I have or experiences in my past that tell me change needs to happen?

Once you have established the need for change, clarify the outcomes from a successful change. If you are successful with the change, what will you have that you don’t have now?

Lastly, ask yourself, “What is the danger of NOT changing?”

## **Enable Others To Adopt The Change**

Make a list of everyone who will be affected by the change. For each person or group, ask:

- What are their fears related to the change that might hold them back?
- What resources might they

*Continued on next page*

# Four Key Elements of Successful Change

Continued from previous page

need to be better equipped to work through the change?

With these answers in hand, begin developing a change plan that addresses their negative fears and offers the necessary resources to achieve success with the change.

Create a realistic vision of the change. In a time of change it is easy to lose sight of what people will gain as an end result. Let them know on the most fundamental (everyday) level what they will experience if they are successful with the change.

## Adjust Actions To Align With The Change

Make two lists. One should have STOP at the top and the other list should have START. For STOP, list all the things you, your department or organization needs to stop doing if you are going to be successful with the change. For START, list everything that you, your department or organization needs to start doing if you are going to achieve success with the change. Begin developing the necessary changes in routines, procedures or policies that support these “STOPS” or “STARTS.”

## Lead Others To Success With The Change

Throughout the entire change process recognize that you and others will need to take some type of leadership role with the change. That means you will need to engage in four key actions:

- Create a felt need to change
- Introduce the change
- Revise and finalize the change
- Stabilize and sustain the change

Determine your own areas of strength and weakness as it relates to any of these four areas. Your role is critical. As Alfred North Whitehead once said,

*The art of progress is to preserve change amid order and preserve order amid change.* 📌

Jones Loflin, author of *Getting the Blue Ribbon* and *Juggling Elephants*, will be the keynote speaker at the WASBO Fall Conference Oct. 3-4 in Elkhart Lake.

## Directory of Advertisers

ASBO International . . . . .	38
A'viands . . . . .	34
Community Insurance Corporation . . . . .	21
e-Funds for Schools . . . . .	23
EMC Insurance . . . . .	4
McClone . . . . .	32
National Insurance Services . . . . .	8
PBBS . . . . .	36
Precision Roofing Services . . . . .	14
SFO Certification . . . . .	36
WASB/WASBO School Budget Cycle Handbook . . . . .	28
WASBO Career Center . . . . .	18
WEA Trust . . . . .	2
WEA Trust Member Benefits . . . . .	40
Weidenhammer . . . . .	45
WI OPEB Trust . . . . .	43
WPS Health Insurance . . . . .	6

## Is Your Company Missing from the List Above?

If you aren't advertising in *Taking Care of Business*, you're missing an opportunity to **reach over 1,000 WASBO members**, including individuals in virtually every Wisconsin K-12 school district.

Past issues of the newsletter are archived at [WASBO.com/newsletter](http://WASBO.com/newsletter) for continuous exposure. Your ad will have life long after each issue's print date!

**For rates, more information, and an ad contract, go to [WASBO.com/advertising](http://WASBO.com/advertising) today.**



## NEED A FLAT ROOF REPLACED? THEN CONTACT THE SPECIALISTS

We've been installing flat roofs for over 26 years and are licensed, insured and bonded. Trust your next roofing project, including new construction, to our experts. Get started with a free, professional estimate now.



920-452-8399  
[www.precisionroofinginc.net](http://www.precisionroofinginc.net)



# ASBO Update

## Planning Ahead for Professional Growth

By Tom Wohlleber, ASBO International Director

Assistant Superintendent - Business Services, Middleton-Cross Plains Area School District



Tom Wohlleber

I hope everyone had an opportunity to take at least one quality break away from work this summer to “re-charge your battery” and help yourself mentally prepare for the opportunities and challenges that lie ahead with the new school year. During the summer you are busy wrapping up one school/fiscal year, getting ready to start a new school/fiscal year, hiring staff, managing summer maintenance projects, preparing for the audit and performing a host of other tasks/responsibilities. It is also, however, an ideal time to reflect on your professional growth during the past year, establish professional growth goals and develop a plan/strategy to support your professional growth for the upcoming year. Where do professional associations such as WASBO and ASBO International fit into your professional growth plan?

Attending conferences sponsored by professional associations you belong to are an excellent means of supporting professional growth. ASBO is holding its 2013 Annual Meeting & Expo (AM&E) on October 25-28 in Boston, Massachusetts. Please consider attending this outstanding conference — you will not be disappointed! The last day to register at the early bird rate is September 6 (payment must be received in the ASBO office by this date to receive the early bird discount). A download of the registration form can be found at: [bit.ly/ASBOreg13](http://bit.ly/ASBOreg13)



If you plan on attending the 2013 ASBO AM&E, please book your hotel room as early as possible. After Monday, September 23, or once the block has been filled (whichever happens first), reservations will be accepted on a space-available basis and at the prevailing rate. Information on hotels and transportation for the conference can be found at: [www.asbointl.org/Housing/7861.htm](http://www.asbointl.org/Housing/7861.htm)

### Meritorious Budget Award (MBA) and Pathway to the MBA Programs

These programs are designed to recognize excellence in school budget presentation, while enhancing your skills in developing, analyzing, and presenting a clear and effective budget. Howard-Suamico School District, Chilton School District and Marshfield School District were the 2012-13 MBA program recipients from Wisconsin. Congratulations to these three districts for their commitment to excellence in budget development and reporting! I would like to challenge more Wisconsin school districts to participate in this valuable and well-recognized program.

**What is the Meritorious Budget Award?** The Meritorious Budget Award recognizes school districts who have achieved excellence in school budget presentation. By participating in the award application process, school business professionals build solid skills in developing, analyzing, and presenting an award-winning budget.

**What is the Pathway to the MBA?** The Pathway to the MBA is designed for first-time applicants only. Like the MBA, the Pathway to the MBA recognizes districts who achieved excellence in school budget presentation, but is an introductory program allowing applicants to complete only two of the four MBA Criteria Checklist sections.

The MBA and the Pathway to the MBA programs:

- Provide clear budget presentation guidelines.
- Define current budget practices.
- Encourage short-term and long-range budget goals.
- Promote sound fiscal management practices.
- Promote effective use of educational resources.
- Facilitate professional growth and development for the budget staff.
- Help build solid development, analytical, and presentation budget skills.

When you participate in either program, you:

- Apply best practices to your budget development by adhering to national recognized standards in school business management.
- Build trust among your colleagues, superintendent, and the community.
- Strengthen investor confidence by developing a budget that passes a professional review.
- Receive professional recognition.

More information on the Meritorious Budget Award (MBA) and Pathway to the MBA Programs can be found at: [www.asbointl.org/MeritoriousBudgetAwards/8017.htm](http://www.asbointl.org/MeritoriousBudgetAwards/8017.htm)

Please contact me at [twohlleber@mcpasd.k12.wi.us](mailto:twohlleber@mcpasd.k12.wi.us) if you have any questions or would like to provide feedback or suggestions regarding ASBO. 🐻

# Transportation Committee Update

By Ron Olson, Business Administrator, School District of Monroe  
Submitted on behalf of the WASBO Transportation Committee



Ron Olson

There are many great reasons why it makes sense to be a WASBO member and why I am proud of my membership in our organization. A couple of those came to light in our recent Transportation Committee meeting. Our organization truly cares about our members and school districts. Our organization is willing to take feedback and evolve just as the varied duties that we all do have grown and changed over the years.

As the Transportation Committee was reviewing feedback from last spring's Transportation Conference, a few commenters noted that there were a lot of new faces in the room, both people new to a school transportation supervisor position and individuals whose positions were expanded to include transportation, but who didn't have much training or experience in that area. It was asked if there was something that could be done to help these "newbies" as well as the veterans working in a new field.

This led to a conversation about our organization. WASBO has been a great leader in providing a program that offers education and mentorship for new business managers. We even hold a conference specifically for new school administrators and business office support staff. WASBO has greatly expanded our facilities-related training opportunities and now offers a number of conferences and certifications related to buildings and grounds and risk management. WASBO has partnered with the Wisconsin Association of School Personnel Administrators to expand offerings for those with HR-related duties.

Upon reflection though, other than the spring Transportation Conference, there is not a lot of support being provided by WASBO to school personnel new to the area of transportation. Although we couldn't immediately add a new track

to the new business administrator trainings and we weren't sure if we would have enough new individuals to annually have a workshop just for those individuals new to school transportation, we did recognize that were a few things we could do right now. As the WASBO website continues to evolve we also hope to offer a transportation-related group where questions and support related to transportation can be directed.

At next spring's Transportation Conference (mark your calendar for March 13, 2014) we hope to offer a couple of sessions that should be good for individuals new to the field as well as a good refresher for those of us who have been doing it awhile. One session will relate to some of those HR basics specific to transportation such as driver licensing requirements, physicals, random drug testing, background and driving records checks, and the wide array of other personnel-related topics that might require slightly different or expanded attention when dealing with the requirements of transportation. Another session will relate to good equipment-related basics that we should all have in place to make sure we have safe and reliable equipment transporting our students and that we are meeting and complying with the requirements needed to pass the annual state school bus inspections.

We also wanted to let everyone know that whether they are new or not, they do not need to wait until the Transportation Conference to get assistance with transportation-related questions. The WASBO Transportation Committee has a wide-array of specialists including: school district transportation supervisors, contractors, business administrators, bus equipment vendors and other business associates of varying expertise. At the end of this article will be their contact information. We

encourage you to contact any of these individuals if you have a question. Based upon the type of question you have or your comfort-level with the individuals, you can select whom you think might best be able to help you. If the committee member can't answer your specific

*"...our drivers may be the first and/or last adult contact our students have on any given day. It is imperative that we do our best to help ensure that school transportation is a safe and positive experience for our children."*

question, they likely can point you toward someone else who can.

Finally, we also ask all of you for your support. We recognize that in your school the transportation supervisor or other individual assigned with those tasks may not be a WASBO member. Additionally, you may be working with a contractor who may benefit from this information. Please forward this article on to those individuals. Also, this winter when information about the spring Transportation Conference becomes available, send that information to them as well. We as school personnel along with the parents of our students entrust thousands of our children every day to school transportation, often without a second thought that they will get to school and home safely. Our drivers are often the first school-related contact a child gets every day and the last impression of school they have when they get home. Beyond that, in some cases, our drivers may be the first and/or last adult contact our

*Continued on next page*

# Transportation Committee Update

*Continued from previous page*

students have on any given day. It is imperative that we do our best to help ensure that school transportation is a safe and positive experience for our children.

Please feel free to contact any of the following WASBO Transportation Committee members:

- Joyce Smalley (Committee Chair)  
Finance Manager  
School District of La Crosse  
jsmalley@lacrosseschools.org  
608.789.7631
- Rob Nelson (WASBO Board Liaison)  
President  
Dousman Transport Company  
rnelson@dtcbus.com  
262.965.2214
- Harry Steenbock  
Transportation Director  
Hortonville School District  
harrysteenbock@hasd.org  
920.779.7905

- Chris Capstran  
Vice President  
Wisconsin Bus Sales  
chris@wisconsinbussales.com  
608.846.0776
- Rhonda Page  
Business Services Manager  
Sun Prairie School District  
rspage@spasd.k12.wi.us  
608.834.6512
- Dan Kobussen  
Vice President  
Kobussen Buses Ltd.  
dan@kobussen.com  
920.766.0606
- Ron Olson  
Business Administrator  
School District of Monroe  
ronolson@monroe.k12.wi.us  
608.328.7148
- Joan Hauser  
Marketing Consultant  
Shared Purchasing Solutions  
hauserj@sps-gpo.com  
608781-4410

# President's Message: Public Education— Where Success Begins

*Continued from page 3*

meaning of the virtue, an individual has time to reflect on how that virtue speaks to them in their everyday life. This month, I would like to focus on the virtue of Commitment. "Commitment is caring deeply about something or someone. It is deciding carefully what you want to do then giving it 100%, holding nothing back. You give your all to a friendship, a task, or something you believe in. You finish what you start. You keep your promises."

Thank you for your commitment to WASBO! And be assured that the Board of Directors is committed to doing its very best for you! 🍷

## ASBO International Milestones July 2013

- James A. Froemming, Port Washington-Saukville SD, Port Washington, WI (5 years)

## ASBO International Milestones August 2013

- Kim M. Dax, Kewaunee SD, Kewaunee, WI (5 years)
- Jenifer Frank, Osceola SD, Osceola, WI (5 years)
- Doreen M. Treuden, Evansville Community SD, Evansville, WI (5 years)
- David Van Spankeren, CESA 6, Oshkosh, WI (5 years)
- Jennifer K. Buros, Westby Area Schools, Westby, WI (10 years)
- Lisa M. Lau, Chilton Public Schools, Chilton, WI (10 years)
- Patrick J. Saucerman, Marshfield SD, Marshfield, WI (10 years)
- Jodi L. Traas, Community Insurance Corporation (CIC), Appleton, WI (10 years)
- Betty M. Zimdars, Howard-Suamico SD, Green Bay, WI (10 years)

## ASBO International New Members June 2013

- Jamie Merath, SD of Beloit, Beloit, WI

## ASBO Meritorious Budget Awards

The following Wisconsin school systems received ASBO International's prestigious Meritorious Budget Award (MBA) for their 2012-2013 annual budgets. Congratulations!

- Howard-Suamico School District, 16 years of participation
- School District of Chilton, two years of participation
- School District of Marshfield, first year of participation

## ASBO MEETING DATES

### 2013 Annual Meeting & Expo

Oct. 25-28, 2013 - Hynes Convention Center - Boston, MA  
If you plan to attend, email Tina at hafeman@wasbo.com.

### 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



# Four Things You Should Know About Tax Incremental Districts

By Lisa Voisin, Director, Robert W. Baird & Co.



Lisa Voisin

**R**ight now there are more than 1,100 active Tax Incremental Districts in Wisconsin. If you have one (or more than one) within your school district, you need to plan for its eventual closing.

TIDs are created to attract new private development that would not otherwise occur to expand the tax base. The local municipality will typically borrow funds to build the infrastructure needed to attract business, using the tax revenues generated from this added development to pay back the debt. Costs of a TID are shared with the municipality, school district, technical college and county. Once the debt is paid off, the value (i.e., the TID increment) gets added to the tax base. When a TID is created, it needs to be approved by a Joint Review Board. Anyone serving on that board should vote to approve the creation of the TID only if the following criteria are met:

- The development expected in the TID would not occur without the use of tax increment financing.
- The economic benefits of the TID are sufficient to cover the costs of infrastructure improvements. There are four key factors your board and administration should know about your local TIDs:

**1. Know when your TID is going to close** – As with so much in life, timing is everything. If your TID is closing within the next few years, you need to start planning now. A closure can mean added value to your tax base, which can lower your mill rate but after one year also impact your state aid. Knowing how those two components fit into your financial forecast is important.

- 2. Know the increment value** – How much will your tax base increase once the TID is closed? For example, one TID in Jefferson County could add more than 35% to its current tax base. If the increment value is negative, you may see that TID be extended beyond its current closing date so other area TIDs can donate to the poorly developing TID.
- 3. Understand that there is no direct impact on District taxes** throughout the life of a TID.

- 4. Plan for the possibility of residual funds available** once the TID closes.

The best way to gather this information is to discuss it with your local municipal officials. They should have a tax increment financing plan in place and be willing to explain it to you so you have the information needed to plan for your district's future. 🇺🇸



## 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.

#### Customized Job Alerts

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

#### Apply for Jobs

Create an anonymous profile and resume to quickly apply for jobs and have employers come to you.

### Advantages for Employers

Employers can fill positions faster and at a lower cost than other job websites by reaching a highly qualified and targeted audience of school administration professionals.

#### Recruit Top Talent

Target WASBO members and job seekers committed to the advancement of school administration and support professions.

#### Low-Cost Posting Packages

Reduce recruitment costs with flexible, affordable posting options.

#### Proactive and Direct Recruitment

Take advantage of search, email and online advertising options to recruit candidates.

### Visit the WASBO Career Center

Discover the difference the WASBO Career Center can make for you.

To search jobs, post jobs or learn more, visit:

[www.wasbo.com/jobs](http://www.wasbo.com/jobs)



# WERC Publishes Annual Certification Election Emergency Rules and Act 10 Case Law Update

By Richard Verstegen, partner, Boardman & Clark LLP with substantial assistance by associate, Jami Crespo



Rick Verstegen

One significant change resulting from 2011 Wisconsin Act 10 and 2011 Wisconsin Act 32 was a requirement that the Wisconsin Employment Relations Commission (WERC) conduct annual elections to certify that an exclusive representative of a collective bargaining unit continues to have support among the members of the bargaining unit. To this end, on July 13, 2013, annual certification election emergency rules were published by the WERC and took effect as ERC Chapter 70. These rules govern the cost, timing, and procedures for any requested annual certification election that is required by Acts 10 and 32. A summary and full text of the rules 70 can be found at [werc.wi.gov/doaroot/annual\\_election\\_rules\\_order\\_and\\_text\\_effective\\_7-13-13.pdf](http://werc.wi.gov/doaroot/annual_election_rules_order_and_text_effective_7-13-13.pdf). This article will provide an overview of these rules and provide an update on the pending cases related to these Acts.

## Annual Election Rules

**Application of the Rules.** At the outset, it is important to note that the rules only apply to district employees already represented by a labor organization. Under the rules, a labor organization continues to represent employees (and thus is eligible to file a certification election petition under the rules) unless that organization lost an initial annual certification election conducted by the WERC or was required to, but failed to, file a petition for an annual certification election prior to March 2012.

The WERC, however, recognized that a prior federal court order (issued in March 2012) has some impact on these elections. The federal court order enjoined such elections and resulted in the WERC suspending such elections in March 2012 until the federal court litigation was concluded. The federal court order

was subsequently reversed. As a result, the WERC has stated that the newly published emergency rules do not require the retroactive elections that would have been conducted on or before December 1, 2012, and May 1, 2013.

The rules also only apply to bargaining units who, as of August 30, 2013, are not subject to a collective bargaining agreement or are subject to a collective bargaining agreement entered into on or after June 29, 2011. Thus, essentially all school districts will be impacted by the rules.

**Filing the Petition.** Under the rules, a labor organization representing school district employees has until August 30, 2013, to file for certification and pay the required fee with the WERC. If a petition and fee are not filed by August 30, 2013, the existing representative is no longer entitled to exclusive representative status for collective bargaining as of that date if there is no collective bargaining agreement in effect. If a collective bargaining agreement is in effect, then the existing representative is no longer entitled to exclusive representative status for collective bargaining as of the expiration date of the collective bargaining agreement. The employees of a bargaining unit cannot be included in a substantially similar collective bargaining unit for at least one year if a petition and fee are not filed by August 30.

A petition can be filed by the exclusive representative of a bargaining unit or any other labor organization interested in representing the bargaining unit. There is no provision allowing petitions to be filed by employers or employees since decertification automatically results if no petition is filed. When a petition is filed with the WERC, an electronic copy of the petition must also be served on the school

district. An existing representative does not need to submit evidence of a showing of interest. However, a petition by any other interested labor organization requires a 30% showing of interest.

If no petition is filed, the district or any other interested party may request that the WERC issue a notice of the consequences of failure to timely file a petition. The notice will be provided to the district, the former representative, and any interested party that requests notice.

**Fees.** The labor organization is solely responsible for paying the fee associated with a petition for election. The fee assessed by the WERC is based on the number of eligible voters. The fees are as follows: 1-100 voters is \$200, 101-250 voters is \$350, 251-500 voters is \$500, 501-1,000 voters is \$750, 1,001-3,000 voters is \$1,500, and over 3,000 voters is \$2,000.

**Responding to the Petition.** Once the district is electronically served by the labor organization with a copy of the petition for election, the district should verify the accuracy of the information on the petition including the status of the collective bargaining agreement, the date the district was served with the notice, and the description of the bargaining unit. The description should be consistent with the WERC certification of the labor organization at its inception or from the most recent collective bargaining agreement. Any inaccuracies should be raised with the WERC.

In addition, the district is required, within 10 calendar days of the receipt of the petition, to provide the petitioning labor organization with an electronically sortable, alphabetical listing of the names of personnel

*Continued on next page*

# WERC Publishes Annual Certification Election Emergency Rules and Act 10 Case Law Update

*Continued from previous page*

employed in the bargaining unit as of the pay period in which the petition was filed. At the same time, the district is required to submit a similar list to the WERC; however, that list must also contain the last four digits of the employees' social security numbers. In addition, in certain circumstances, the WERC may direct the district to provide mailing addresses and employee work unit and location information. Again, it is important that the district determine its eligible voters by reviewing the original WERC certification and/or the recognition clause from the collective bargaining agreement.

Upon receipt of the district's list, the petitioning labor organization will have 10 days to provide the WERC with the names of personnel that it believes should be added or deleted from the district's list. As soon as possible after receipt of the personnel data, the WERC shall either direct an election, dismiss the petition, or make other orders regarding the disposition of the petition. Upon receipt of the WERC's direction, the district will have additional responsibilities such as providing a certain number of paper copies of the personnel list, submitting mailing labels if requested, and posting the WERC's notice of election setting forth the election schedule.

**The Election.** An election must be held no later than December 1, 2013, for school district employees who, as of August 30, 2013, are not covered by a collective bargaining agreement or are covered by a collective bargaining agreement that was entered into on or after June 29, 2011. All elections must be conducted by secret ballot under the supervision of the WERC or an impartial agent designated by the WERC. The WERC announced on July 13, 2013, that the annual certification election balloting period will be November 1-21, 2013, and that it expects elections to be conducted by telephonic balloting.

During the telephonic balloting process, every employee listed on either the district's or the labor organization's eligibility list will be able to vote. The ballots of employees that only appear on one list are automatically segregated without initially being counted. Once the ballots have been counted, the WERC representative must furnish the parties with a tally of the ballots. If the segregated ballots are significant enough that they could affect the outcome or if a written objection (filed within eight days of receipt of the tally) raises a substantial question that cannot be resolved without a hearing, the WERC may notice a hearing on the segregated ballots and/or objections.

**Certification / Decertification.** A proposed representative must receive at least 51% of the vote of eligible bargaining unit employees. If more than one proposed representative is on the ballot and at least 51% of the eligible voters want representation, but none of the proposed representatives receives at least 51% of the vote, the WERC can conduct a runoff election at the request of any party. If no representative ultimately receives at least 51% of the vote, and if no collective bargaining agreement is in effect, the existing representative is no longer entitled to exclusive representative status for collective bargaining as of the date the WERC certifies the election results. If a collective bargaining agreement is in place, the existing representative is no longer entitled to exclusive representative status for collective bargaining as of the expiration date of the collective bargaining agreement. The employees of a bargaining unit cannot be included in a substantially similar collective bargaining unit for at least one year if no representative receives at least 51% of the vote.

## **Pending State Court Decision Regarding Act 10**

In *MTI v. Walker*, the case challenging aspects of Act 10 and Act 32, Dane County Judge Juan Colas ruled that certain provisions of Act 10 and Act 32 were unconstitutional as they related to municipal employer-employee relations under the Municipal Employment Relations Act. On June 14, 2013, the Wisconsin Supreme Court agreed to review the circuit court's decision. According to the Wisconsin Supreme Court's website, the Court is not scheduled to hear oral arguments for cases until September 2013.

The Court's decision could impact the election rules from the WERC depending on when the decision is made. However, the WERC has stated that these rules will not be applicable to the plaintiffs, unless the Dane County Circuit Court's decision is no longer in effect.

Additionally, the plaintiffs in *MTI v. Walker* filed a Petition for Supplemental Injunctive Relief with Judge Colas on April 23, 2013. This Petition asked the Dane County Circuit Court for a permanent injunction enjoining and restraining the enforcement and implementation of the provisions of Acts 10 and 32 that were declared unconstitutional in that case. If the Dane County Circuit Court grants this injunction, the WERC rules regarding certification election may be enjoined, as well. 📌

“Inspiration exists, but it must find you working.”

~ Pablo Picasso

Is your insurance provider  
a phone number or a partner?

**Personal service.** That's the  
strength of our Community.



Community Insurance Corporation provides liability insurance coverage for cities, towns, villages and school districts. We offer broad coverage, designed to specifically meet the needs of Wisconsin public entities under ONE single liability policy form to include:

- General Liability
- School Board Legal Liability
- Auto Liability
- Public Officials Errors and Omissions

Unlike other insurance companies that provide coverages based solely on price and are not heard from again until renewal time, we work directly with our clients in partnership to control their insurance costs through a unique risk management and aggressive claims philosophy. And because we are local government, we always keep the end goal of saving taxpayer dollars in mind.

Take control of your insurance needs with Community Insurance Corporation. It just makes sense.



To learn more, please contact Kim Hurtz, Aegis Corporation,  
1.800.236.6885 or kim@aegis-wi.com

## Upcoming Events

Save with Professional  
Development Coupons  
[WASBO.com/coupons](http://WASBO.com/coupons)

### Professional Development

#### WASBO Fall Conference

October 3-4, 2013 - The Osthoff, 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, Wisconsin Dells (Viterbo Credit)

#### Winter at a Glance (Year of Success)

December 3, 2013, Marriott Madison West, Middleton

#### WASBO/WASPA School Personnel Academy

December 4-5, 2013, Marriott Madison West, Middleton  
(Viterbo Credit)

#### WASB-WASDA-WASBO State Education Convention

January 22-24, 2014, Wisconsin Center, Milwaukee  
(Viterbo Credit)

#### DPI-WASBO-WCASS Federal Funding Conference

February 24-25, 2014, Kalahari, Wisconsin Dells (Viterbo Credit)

#### WASBO Facilities Management Conference

March 13-14, 2014, Kalahari, Wisconsin Dells (Viterbo Credit)

#### WASBO Transportation & Bus Safety Conference

March 13, 2014, Kalahari, Wisconsin Dells (Viterbo Credit with  
Facilities Management Conference)

#### p-Card User Group

March 18, 2014, Marriott Madison West, Middleton

#### WASBO Accounting Conference

March 19-20, 2014, Marriott Madison West, Middleton  
(Viterbo Credit)

#### WASBO Spring Conference

May 20-23, 2014, Kalahari, Wisconsin Dells (Viterbo Credit)

### Scholarship Fundraisers

#### Fall Golf Outing

October 2, 2013 - Autumn Ridge Golf Course, Valders

#### Spring Golf Outing

May 21, 2014 - Trappers Turn Golf Course, Wisconsin Dells

### Certified School Risk Managers (CSRM)

#### Courses (Viterbo Credit)

#### School Safety from A to Z (Designation Update Credit)

September 18, 2013 - Wisconsin School Leadership Center,  
Madison

#### Fundamentals of Risk Management

October 7, 2013 - Holiday Inn, Stevens Point

#### Handling School Risks

October 8, 2013 - Holiday Inn, Stevens Point

#### Measuring School Risks

November 4, 2013 - Holiday Inn, Stevens Point

#### Funding School Risks

November 5, 2013 - Holiday Inn, Stevens Point

#### Administering School Risks

December 3, 2013 - Holiday Inn, Stevens Point

Visit [WASBO.com](http://WASBO.com) for future WASBO  
professional Development & Networking!

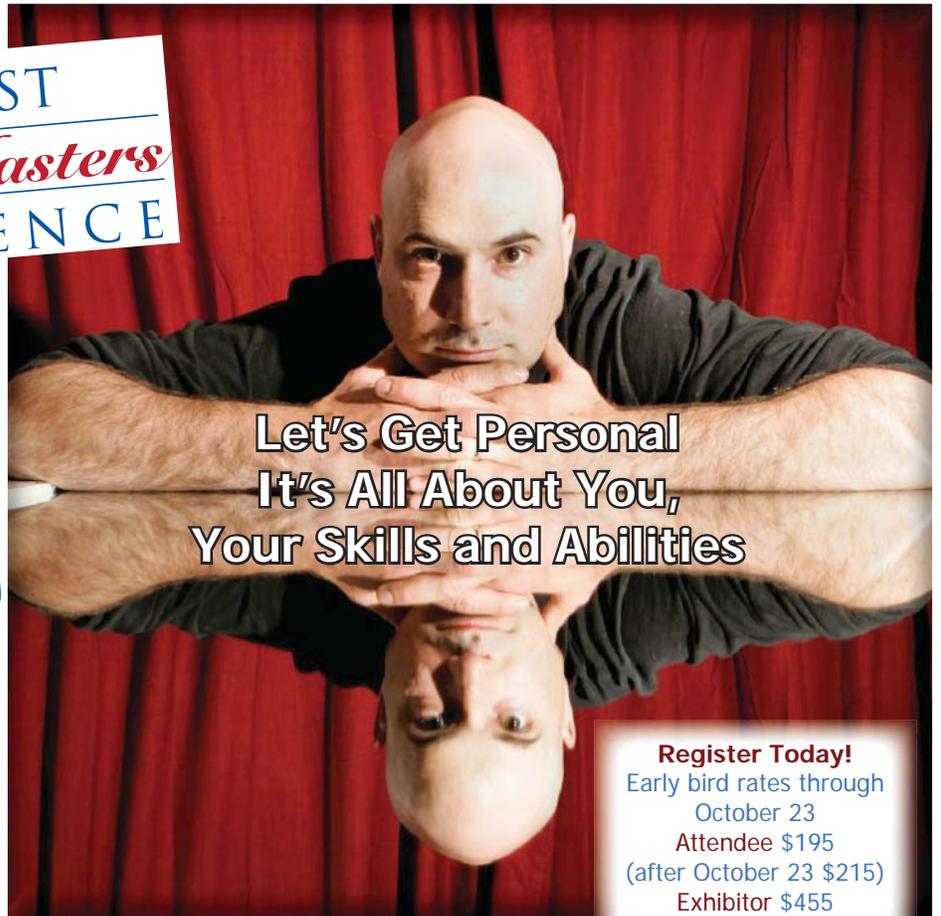


# 6th Annual MIDWEST Facility Masters CONFERENCE

November 14-15, 2013  
Kalahari Resort &  
Conference Center  
Wisconsin Dells, WI

Register at  
[WASBO.com/FacilityMasters](http://WASBO.com/FacilityMasters)

Career Development and Educational  
Training for those responsible for  
Facilities, Operations, Safety, Risk  
Management and School Finance.



Let's Get Personal  
It's All About You,  
Your Skills and Abilities

**Register Today!**  
Early bird rates through  
October 23  
Attendee \$195  
(after October 23 \$215)  
Exhibitor \$455  
(after October 23 \$505)

## Personal Accountability

Individual accountability, the alternative to victimhood, is the first requirement for individual and organizational success. Accountable people recognize the impact of outside factors on them and their situations. They also understand that the choices they make about those outside factors are often more powerful and have more impact on them than the factors themselves.

*When it comes to leadership & personal accountability, Jim Bearden, CSP, speaks from experience. From College Class President to Marine Officer to President of the Bearden Resource Group, Jim has been leading people for over 40 years.*



**Jim Bearden**

**Now, more than ever, you are being called upon to be a leader in your school district. Attend this conference to enhance your leadership skills with Knowledge & Networking.**

### General Sessions

- Personal Accountability, Jim Bearden, CSP
- Idea Exchange: Sharing Challenges and Solutions

### Learn from Peers and Industry Experts about

- Auxiliary Services
- Best Practices in School Facilities
- Leadership
- Learning Environment
- Operations
- Safety, Security & Risk Management
- SchoolDude User Training & Lab
- Technology, Social Media & Communication
- Unfunded Mandates

- **Connect** with vendors who specialize in flooring, management software, grounds equipment, maintenance, cleaning, roofing, energy, security and more, all in one place.
- **Network** with facilities, operations, safety, risk management and school finance professionals.
- **Credit** offered for Wisconsin ASBO Facility Manager Core (Modules 4 & 5) and Continuing Education Certifications and Illinois ASBO Facility Manager Certification. Certification approval requested for CPMM & CPS. Earn graduate credit through Viterbo University.

## Registration and Sponsorship

Attendee and Exhibitor  
Registration Now Open at  
[WASBO.com/FacilityMasters](http://WASBO.com/FacilityMasters)

Limited scholarships are  
available at  
[WASBO.com/FacilityMasters](http://WASBO.com/FacilityMasters)

Hosted By

In Participation With

For information on registration or sponsorship  
opportunities call 608.249.8588.



# 2013-14 Mentorship Program Begins

The WASBO Mentorship Program had a great start Aug. 12 with an orientation for mentors and protégés before the New Administrators & Support Staff Conference in Stevens Point.

Protégés had the opportunity to meet their mentors and find out what the program will entail.

PI 34 requires all initial educators, which includes administrators, to have a mentor assigned who is trained in the Wisconsin Standards. The WASBO Mentorship Program fulfills this requirement.

For more information, see [WASBO.com/mentorship](http://WASBO.com/mentorship).

*RIGHT: Sandy Malliet, Kickapoo, and Diane Pertzborn, DeForest, lead the session.*

*BELOW: Mentors and protégés meet one another and hear about resources available to them.*



## Payment Solutions for Schools!

**Pay ...**  
make payments  
24 hours a day for all  
school related expenses



**Online Lunch and Other Payments**

**Mobile/Text Pay  
In-Person Credit or Debit Card**

**e-Check and Cash**

[www.efundsforschools.com](http://www.efundsforschools.com)



### Products & Services

- Online Payments
- Cash Tracker
- Check Processing
- Sports Pass
- Mobile Pay
- Tuition Payments
- School Store
- Summer School
- Fall Registration
- Textbook Rental
- Activity Registration
- Mobile Pay
- In-Person Credit Card Payments

### Solutions

- Cost Control
- Full Compliance
- Risk Management
- Single Source Solution
- Increase Fund Raising

✓ PCI Compliant

✓ Free to the School

**For More information:  
Contact Richard Waelti  
Phone: 262-377-8306  
[rwaelti@mvpbanking.com](mailto:rwaelti@mvpbanking.com)**

# Tips for Safeguarding Financial Records

By Grobe & Associates, LLP

With the 2013 hurricane season now under way and memories of tornadoes and other natural disasters fresh in our collective minds, now is the time for individuals and businesses to safeguard their tax records by taking a few simple steps.

**Take Inventory.** Gather all of your documents and make an inventory list. You may find everything in a single location, but more likely than not, you'll have to hunt around to find all of your documents. Don't forget to check computer files, storage boxes, file cabinets, old and new computers and laptops, thumb drives, and external hard drives and backup disks.



Depending on how complex your finances are, you may opt for a single list or choose to make two separate lists. The first list might include items such as insurance policies, mortgages and deeds, car titles, wills, pension and retirement-plan documents, powers of attorney, medical directives, and so on. The second list might contain a list of less essential documents such as brokerage accounts, loans that have been paid off, end-of-year bank statements, and copies of old tax returns and supporting documentation.

**Create a Backup Set of Records and Store Them Electronically.** Keeping a backup set of records – including, for example, bank statements, tax returns, insurance policies, etc. – is easier than ever now that many financial institutions provide statements and documents electronically, and much financial information is available on the Internet.

Even if the original records are provided only on paper, they can be scanned and converted to a digital format. Once the documents are in electronic form, taxpayers can download them to a backup storage device, such as an external hard drive, or burn them onto a CD or DVD (don't forget to label it).

You might also consider online backup, which is the only way to

ensure that data is fully protected. With online backup, files are stored in another region of the country, so that if a hurricane or other natural disaster occurs, documents remain safe.

**Visually Document Valuables.** Another step you can take to prepare for disaster is to photograph or videotape the contents of your home, especially items of higher value.

A photographic or video record can help prove the fair market value of items for insurance and casualty loss claims. Store the photos or video with a friend or family member who lives outside the area, or as part of your online document backup.

**Update Emergency Plans.** Emergency plans should be reviewed annually. Personal and business situations change over time, as do preparedness needs. When employers hire new employees or when a company or organization changes functions, plans should be updated accordingly and employees should be informed of the changes.

**Check on Fiduciary Bonds.** Employers who use payroll service providers should ask the provider if it has a fiduciary bond in place. The bond could protect the employer in the event of default by the payroll service provider. 📌

“Your time is limited, so don't waste it living someone else's life.”

~ Steve Jobs

“You are growing something every day. What grows and how it grows is up to you.”

~ Jones Loffin (from *Getting the Blue Ribbon*)

# Relational Bullying

By Jackie Schoening, CESA #6, WI Safe & Healthy Schools Center, Regional Coordinator  
Submitted on behalf of the WASBO Safety and Risk Management Committee



Jackie Schoening

We have seen a significant increase in the reporting of bullying in recent years. The latest Youth Risk behavior Survey for Wisconsin shows that 24% of students report having been bullied on school property; 17% report having been electronically bullied; and 44% of youth report that bullying and harassment are a problem at their school. This does not take into account the number of students who continue to be bullied in ways that are not always identified as bullying.

Relational bullying (often called social bullying or “girl bullying”) causes considerable psychological pain which can lead to social anxiety, loneliness, depression, and substance abuse. Studies indicate that relational bullying diminishes young peoples’ social interactions, causes them to feel less safe, and sometimes even encourages them to bring a weapon to school. In brief, there are five types of relational bullying:

**1. Stonewalling:** Stonewalling [aka: the silent treatment] is a situation in which one person purposefully ignores another. Example: If two teenagers are angry at another teen, they may choose or agree to

ignore the other teen completely and without explanation.

**2. Exclusion:** A single individual may be purposefully excluded from a group of friends or colleagues and essentially cut out from all activities and participation in the group. It differs from the “silent treatment” in that the group makes sure that the excluded individual knows that he or she is not allowed to participate in the group.

**3. Taunting:** Taunting includes disparaging remarks made directly to the individual and continues even when the individual is apparently distressed or depressed.

**4. Gossip:** Bullies will often create and spread rumors about others behind their backs; at times harmful statements are even made within earshot. The goal is to ruin reputations and damage self-image through hearsay and exclusive conversations; the digital age has made this form of relational bullying easier through text messaging and social networking platforms like Facebook and My Space.

**5. Conditional Friendship:** “I’ll only be your friend if...” is used or implied in some way. For example, an individual may not be able to leave a group or must behave in a certain way or expect punishment, ridicule, or gossip for non-compliance.

The inevitable question about any type of bullying is this: Why? Most agree that in relational bullying, the intention is to socially isolate the individual and satisfy needs for power-over, control, and self-worth. The bigger question is what do we do about relational bullying and other forms of bullying? As educators, we cannot help but be committed to ending bullying of all

types and for all children; we also witness firsthand the devastating effects of bullying on the children we see in schools, clinics, domestic violence shelters, and other settings.

## What adults need to know about girl bullying

Bestselling author and girl advocate Rachel Simmons (2010) explains that in the culture of young girls, social norms dictate that conflict cannot be waged directly. While on the surface, this “no sticks or stones” policy can create a desirable level of civility, it is critical for adults to understand that just beneath the seemingly placid surface often lies an unbelievably cruel layer of planned exclusion, whispered gossip, cyber-sent rumors, and hidden hostility that pierce a young girl’s developing psyche. When bullying is disguised as friendship, and friendship is used as a weapon (Whitson, 2011), kids are left feeling confused, frustrated, humiliated and unsure of how to cope. Meanwhile, frenemies remain free and clear to carry out their hidden aggression time and time again.

There is no one single reason to explain why young people bully each other, nor is there a definitive profile of what kind of kid will become a bully, but experts agree that social status is often a prime motivator of this behavior among girls. Girls who are overly concerned with popularity often engage in behaviors in which they try to increase their own social status by publicly putting others down.

## What adults can do about relational bullying

With all of these dynamics in play how can an adult hope to be helpful? The problem seems complicated,

*Continued on page 27*

## September 26 is Bullying Awareness Day

Established to bring attention to the harmful effects of bullying in the school setting. Bullying may negatively impact a student’s connection with school, their engagement with the curriculum, and their overall ability to learn. Bullying prevention is critical to building a school environment conducive to learning and where students feel safe at all times. Observed annually on Wednesday of the fourth week in September. Enacted May 12, 2010, from the 2009 Laws of Wisconsin, Act 309.

# Coulee Region Buildings & Grounds Group

By John Daily, Buildings & Grounds Supervisor, School District of Holmen

The Coulee Region Buildings & Grounds Managers are a group of B & G supervisors and directors who meet regularly in western Wisconsin. Our mailing list includes over 30 school districts centered around La Crosse. Most managers of the group are WASBO members and have gone or are going through the WASBO Facilities Manager Certification program.

This group met somewhat haphazardly for many years. Over the last two or three years, however, the group has held monthly meetings for anyone interested to attend. The group meets on the first Thursday of the month at 10 am in the School District of Sparta Administrative building. A typical meeting may include a vendor presentation (15-minute limitation) and discussion on mutual topics concerning all of us. A wide range of topics are shared from personnel to operations. CESA 10's Environmental Health and Safety program representatives are also on the mailing list and meet with the group occasionally to give us updates

on issues concerning changes in our health and safety programs. Our recently hired supervisors have found the group meetings and topics very valuable in their acclimation and growth in their position.

Our biggest event, and quite frankly the driving force for us to start meeting regularly, was our desire to offer meaningful and affordable training for our custodial and maintenance staffs. Though WASBO offers Custodial & Maintenance conferences in the summer, the conferences were most often a long drive from western Wisconsin and somewhat expensive to send most or all of our staff. After hosting a summer WASBO Custodial & Maintenance conference in La Crosse in 2011, we thought we could plan and hold our own training seminar and do it without charging a fee for each employee. We successfully did this in 2012 and 2013. We had over 200 attendees at each conference and provided quality topics and training for our staffs. Vendors were also given the opportunity to show their wares to the end users. We thank them for

their sponsorship. Our goal was to provide affordable training for schools and give our staffs a chance to meet and network with each other. Mission accomplished. We hope to affiliate with WASBO in future conferences and offer the Facilities Certification program in our summer conference. Our focus will continue to provide the best training for our staff at a price that would encourage districts to send as many people as they can.

Our monthly meetings have been a great benefit to our buildings and grounds managers. We have been able to share ideas and learn from each other. We have worked together for the advancement in training of our employees. We would encourage other districts' buildings and grounds managers around the state to find an organization near you to join and network with. If there is no such organization, call your neighboring districts and start interacting. You will find it a great benefit to yourself and your district. 🍷

# Milwaukee Metropolitan Buildings & Grounds Group

By Brian Koffarnus, Director of Buildings & Grounds, Greendale School District

The Milwaukee Metropolitan Buildings and Grounds Group was established in 1968 and currently has 71 active members. The group represents 55 school districts and one university in Southeastern Wisconsin. A majority of our members are current Building & Grounds/Facilities Directors with a few Retired Directors still willing to share their expertise and vast knowledge with the group.

We hold our meetings on the third Thursday of the month, September through May – with exceptions for December (due to holiday break), February (so our members can attend the WASBO Facilities Management

Conference), and April. In the month of July, the group generally holds its annual golf outing where members and vendors get together for a great day of networking and fun.

Our meetings are hosted by a different school district each month. The hosting director, at his or her discretion, is responsible for providing the group with an educational presentation for the first 20 minutes of the meeting. After the presentation, the group moves into the meeting/networking session where a wide variety of topics are discussed, ideas shared, and new products and procedures are introduced.

The group elects a secretary for the year to record our meetings and to maintain our contact list. The meeting minutes and educational presentation are shared via email with the members who were not able to attend the actual meeting. Since we do maintain a current email list, members are able to access one another at any time to ask a specific question or get feedback on any topic. These types of questions are generally shared with the whole group so the ongoing networking between members is a great benefit.

For information, contact brian.koffarnus@greendale.k12.wi.us. 🍷

# Relational Bullying

Continued from page 25

yet there are basic steps adults can take to improve a school's climate, confront relational bullying, and help kids develop specific insights that can change their long-term responses to peers:

## The Bystanders:

- According to research by The Bully Project, adults may miss up to 96 percent of the incidents of bullying carried out by kids. Their targets, however, rarely miss it. Kids who are targets know all too well the soul-crushing pain of repeated assaults on their dignity.
- What's more, studies show that bystanders are either physically present or intellectually aware of the majority of instances of bullying.

- One study by the Response Ability Project (2012) shows that bullying stops within ten seconds, 57% of the time when a child intervenes and confronts a bully. When adults focus efforts on creating a school climate and classroom culture that empowers bystanders to act like heroes to victims of bullying, they send a powerful message that kindness matters and that aggression—whether physical, verbal, or relational—will not be tolerated.

By the early school years, most youngsters have experienced unspoken—but not unsubtle—acts of social aggression that shake the carefully laid foundations of their self-image and beliefs about friendship (Whitson, 2011). Kids benefit from having a supportive network of

## Bullying Prevention Resources

[www.wishschools.org/resources/bullyingpreventionresources.cfm](http://www.wishschools.org/resources/bullyingpreventionresources.cfm)  
or  
[sspw.dpi.wi.gov/sspw\\_safeschool](http://sspw.dpi.wi.gov/sspw_safeschool)

trustworthy adults who are informed about the nature of relational bullying and open to meaningful dialogue about real friendship. Though lingering social norms may still discourage kids—especially girls—from acknowledging conflict directly, adults can help kids rise above these damaging constraints by teaching them practical skills for expressing anger in constructive ways and giving them new insights to readily recognize incidents of cruelty disguised as friendship. No child should have to find their way through friendship challenges alone. 🍷

## Buildings & Grounds Group Meetings

### Coulee Region

First Thursday of the month, 10 am

- September 5
- October 3
- November 7

### Milwaukee Metropolitan

Third Thursday of the month

- September 19
- October 17
- November 21

“Either you run the day, or the day runs you.”

~ Jim Rohn

## Service Affiliate Checklist

- Renew your Membership for July 1, 2013-June 30, 2014 at [WASBO.com/renew](http://WASBO.com/renew).
- Sponsorship Opportunities at [WASBO.com/sponsor](http://WASBO.com/sponsor):
  - Fall Conference
  - ASBO Annual Meeting in Boston
  - Midwest Facility Masters Conference
  - WASBO/WASPA School Personnel Academy
- Call for Presentations at [WASBO.com/present](http://WASBO.com/present):
  - Transportation & Bus Safety Conference due Sept. 30
  - Facilities Management Conference, Accounting Conference, and Spring Conference due Sept. 30
  - Custodial & Maintenance Conferences open Aug. 15 - Sept. 30
- Exhibitor Registration Open for Midwest Facility Masters Conference at [WASBO.com/facilitymasters](http://WASBO.com/facilitymasters).
- *Taking Care of Business* Articles due Sept. 30 for October issue - send to Áine at [calgaro@wasbo.com](mailto:calgaro@wasbo.com).
- Advertise in *Taking Care of Business* - contact Áine at [calgaro@wasbo.com](mailto:calgaro@wasbo.com).
- Update your profile and Buyer's Guide categories at [WASBO.com](http://WASBO.com).
- Join a WASBO Committee.

# SEC Charges School District with Continuing Disclosure Failure

By Jerry Dudzik, Vice President, Springsted Incorporated



Jerry Dudzik

**T**imes have dramatically changed on continuing disclosure for school districts.

Having sat in your school business manager chair for many years, I feel a personal obligation to share the following matter with you, knowing that you value your job and the important role it plays in your district and community.

For the first time ever, the Securities and Exchange Commission (SEC) has charged a school district with falsely claiming that they were meeting their continuing disclosure obligations when they weren't. Based on an official statement prepared for a 2007 bond issue, the West Clark Community Schools, an Indiana school district, stated they were in full compliance with all of their prior continuing disclosure obligations. The SEC, however, found that the district had not submitted the required material event notices or annual financial reports for a 2005 bond issue.

This finding brought several charges under numerous federal securities laws. The charge was identified in a July 29th, 2013, public press release by the SEC. The press release against the school district and the related fines can be found at: <http://www.sec.gov/servlet/Satellite/News/PressRelease/Detail/PressRelease/1370539734122>

The SEC emphasized in a related press release that "this case demonstrates that we [SEC] will be vigilant in making sure municipal issuers and underwriters comply with their obligations."

As an issuer, you need to be aware of your disclosure covenants, take measures to ensure compliance and

carefully review disclosures about compliance. Due diligence and understanding your post issuance obligations are essential to good financial standing and future bond ratings.

If you feel confident that you fully comprehend the requirements and are diligent with making proper continuing disclosures on your own through the Electronic Municipal Market Access System (EMMA), great. Congratulations to you!

However, in the event you have concerns, even minor, in continually monitoring and upholding your issuer obligations with the related rules, you may want to consider contracting out the task. The cost for the service is minimal and can generally be charged and levied to Fund 39 in Wisconsin.

Some simple questions to ask yourself:

- Do I understand all material event notices?

- Do I have a good tracking system in place so I'm reminded of upcoming reporting dates?
- Do I review outstanding issues and reportable events semi-annually?

If you can't answer the above questions with a confident "YES," that's not a good sign.

You should contact an independent financial advisor that offers continuing disclosure services to provide you with a quote.

If you have questions, feel free to contact me:

Jerry Dudzik, Vice President  
Springsted Incorporated  
710 Plankinton Avenue, Suite 804  
Milwaukee, WI 53203  
414.308.5704 (Mobile)  
414.220.4255 (Direct)

**See related articles following on pages 29-31.**

## WASB/WASBO School Budget Cycle Handbook

- Comprehensive handbook written by experienced, Wisconsin school finance experts.
- Understand the school district budgeting process – from strategic planning to preparation, presentation, administration and evaluation.

Visit [WASB.org](http://WASB.org) for complete information.



# SEC Charges School District and its Underwriter for Continuing Disclosure and Due Diligence Failures

By Chapman and Cutler LLP, Attorneys at Law

On July 29, 2013, in the first case of its kind, the Securities and Exchange Commission (SEC) charged West Clark Community Schools, an Indiana school district, with falsely stating in an official statement that the school district was fully compliant with its duty to provide annual financial reporting and material event notices as required by prior continuing disclosure undertakings. The SEC further charged City Securities Corporation, the school district's underwriter, with failing to conduct sufficient due diligence to determine if the school district's representations were true.

In an official statement prepared in connection with a 2007 bond offering by the school district that was underwritten by the underwriter, the school district stated that it was in full compliance with all of its prior continuing disclosure obligations. An SEC investigation revealed, however, that the school district had not submitted any of the required annual financial reports or material event notices for a 2005 bond offering. Bringing charges under numerous federal securities laws,<sup>1</sup> the SEC charged the school district with falsely claiming in the 2007 official statement that it was fully compliant with its continuing disclosure obligations and the underwriter with disseminating a materially false official statement and failing to conduct sufficient due diligence. In the SEC's view, the school district's non-compliance with its continuing disclosure obligations constituted "a fact [the underwriter] could have easily verified through a review of public repositories."

Additionally, and apparently unrelated to the school district's misrepresentations, the SEC investigation revealed that the underwriter and its executive vice

president had provided improper gifts and gratuities to representatives of several municipal bond issuers—including travel expenses, donations to certain charities, out-of-state golf outings, and tickets to sporting events—in violation of certain rules of the MSRB.<sup>2</sup> Without the issuers' knowledge, the underwriter and its executive vice president billed these expenses back to these issuers as "miscellaneous" items relating to "printing, preparation and distribution of official statements."

Without admitting or denying the allegations, the school district, the underwriter, and the executive vice president entered into settlement agreements with the SEC, which settlements include payment by the underwriter of nearly \$580,000 in fines and disgorgement, a one-year collateral bar and permanent supervisory bar of the executive vice president, and remedial actions by the school district.

## Items to Note

- The SEC reiterated in its Orders that an underwriter must develop a reasonable basis for belief in the accuracy and completeness of the official statement by conducting its own adequate due diligence, and that "sole reliance on the representations of the issuer will not suffice."
- The SEC further noted that while the underwriter had written procedures for expense reimbursement, the investigation revealed "a long standing and pervasive culture of lax supervision and loose internal controls as it relates to expense reimbursement."
- The SEC emphasized in a related press release that "[t]his case

*In the SEC's view, the school district's non-compliance with its continuing disclosure obligations constituted "a fact [the underwriter] could have easily verified through a review of public repositories."*

demonstrates that we will be vigilant in making sure municipal issuers and underwriters comply with their obligations."

- This action is the sixth municipal enforcement action by the SEC during 2013.

To discuss any topic covered in this Client Alert, please contact an attorney in our Public Finance Department or visit us online at [chapman.com](http://chapman.com).

This document has been prepared by Chapman and Cutler LLP attorneys for informational purposes only. It is general in nature and based on authorities that are subject to change. It is not intended as legal advice. Accordingly, readers should consult with, and seek the advice of, their own counsel with respect to any individual situation that involves the material contained in this document, the application of such material to their specific circumstances, or any questions relating to their own affairs that may be raised by such material. © 2013 Chapman and Cutler LLP. All rights reserved. Attorney Advertising Material.

<sup>1</sup> Sections 17(a)(2) of the Securities Act, Sections 10(b), 15(c)(2) and 15B(c)(1) of the Exchange Act and Rules 10b-5(b) and 15c12-2 thereunder.

<sup>2</sup> Municipal Securities Rulemaking Board (MSRB) Rules G-17 and G-20.

# SEC Charges School District and Muni Bond Underwriter in Indiana With Defrauding Investors

Provided by the U.S. Securities and Exchange Commission

**Washington D.C., July 29, 2013** — The Securities and Exchange Commission today charged a school district in Indiana and its municipal bond underwriter with falsely stating to bond investors that the school district had been properly providing annual financial information and notices required as part of its prior bond offerings.

In new municipal bond offerings, an official statement is prepared by a municipal issuer or its underwriter to describe the essential terms of the bonds and other pertinent information for investors. An SEC investigation revealed that in an official statement prepared in 2007 for a bond offering on behalf of West Clark Community Schools that was underwritten by Indianapolis-based City Securities Corporation, the school district stated that it was in compliance with its disclosure obligations related to prior bond offerings. However, West Clark had not submitted any of the required annual reports or notices for a 2005 bond offering, and City Securities did not conduct adequate due diligence to detect the false statement in the course of the 2007 offering.

The SEC also charged Randy G. Ruhl, who heads the public finance & municipal bond department at City Securities, for the misconduct involving West Clark's disclosures. The SEC's investigation further found that City Securities and Ruhl provided improper gifts and gratuities to representatives of municipal bond issuers, and then wound up charging these and other expenses back to the issuers under the guise of costs for "printing, preparation and distribution of official statements."

City Securities agreed to pay nearly \$580,000 to settle the SEC's charges, and Ruhl and West Clark Community Schools also agreed to settlements, which include a one-year collateral bar

and a permanent supervisory bar for Ruhl.

## Unprecedented charges

"This is the first time the SEC has charged a municipal issuer with falsely claiming in a bond offering's official statement that it was fully compliant with the annual disclosure obligations it agreed to in prior offerings, and an underwriter and its principal for not doing the necessary research to attest to the truthfulness of that claim," said Andrew Ceresney, Co-Director of the Division of Enforcement. "West Clark Community Schools defrauded bond investors by leading them to believe that it had provided the annual financial information contractually required in a prior bond offering, when in fact for five years they failed to submit the required information. This case demonstrates that we will be vigilant in making sure municipal issuers and underwriters comply with their obligations."

Elaine C. Greenberg, Chief of the Enforcement Division's Municipal Securities and Public Pensions Unit, added, "City Securities abused its role as municipal underwriter by fraudulently obtaining reimbursement from bond proceeds for expenses unrelated to the issuance of bonds. Moreover, City Securities violated MSRB rules by providing representatives of municipal securities issuers with valuable and excessive gifts such as multi-day golf trips and tickets to various sporting events."

According to the SEC's orders instituting settled administrative proceedings, Rule 15c2-12 generally prohibits an underwriter from purchasing or selling municipal securities unless the issuer has contractually agreed to provide annual financial information and event notices to investors through information repositories. In its \$52 million municipal bond offering in 2005, West

*Rule 15c2-12 generally prohibits an underwriter from purchasing or selling municipal securities unless the issuer has contractually agreed to provide annual financial information and event notices to investors through information repositories.*

Clark agreed to submit annual reports and notices to Nationally Recognized Municipal Securities Information Repositories (NRMSIRs), an obligation it never fulfilled. In December 2007, the school district issued a \$31 million bond offering, which triggered a requirement to describe instances where it had failed to materially comply with its prior disclosure obligations. The official statement for this 2007 offering contained a section entitled "Compliance with Previous Undertakings" affirming that in the previous five years, the school district "never failed to comply, in all material respects, with any previous undertakings." The official statement was approved, certified, and disseminated to the public. The school district also signed a certificate and affidavit attesting that the official statement did not contain any untrue statement of material fact. Since West Clark had never submitted any annual reports or notices in its 2005 offering, these attestations in the 2007 offering were materially false and misleading.

## Remedial actions

Without admitting or denying the SEC's findings, West Clark consented to an order to cease and desist from committing or causing any violations of Section 17(a) of the Securities Act and Section 10(b) of the Exchange Act and

*Continued on next page*

# SEC Charges School District and Muni Bond Underwriter in Indiana With Defrauding Investors

*Continued from previous page*

Rule 10b-5. The school district has undertaken remedial actions including the adoption of written policies for its continuing disclosure obligations and the designation of an individual responsible for ensuring compliance with those obligations. The school district also has implemented annual training for personnel involved in the bond offering and disclosure process.

The SEC's investigation further revealed that between 2007 and 2010, City Securities provided improper gifts and gratuities to representatives of municipal bond issuers in violation of Municipal Securities Rulemaking Board (MSRB) Rule G-20. Without the issuers' knowledge, City Securities mischaracterized the expenses associated with these gifts and mischaracterized charitable donations, entertainment expenses, and other "miscellaneous" items as legitimate

operating costs so the company could bill these expenses back to the unknowing issuers.

City Securities consented to an SEC order, without admitting or denying the findings, to cease and desist from committing or causing any violations of Section 17(a) of the Securities Act, Sections 10(b) and 15B(c)(1) of the Exchange Act and Rules 10b-5 and 15c2-12, and MSRB Rules G-17 and G-20. City Securities agreed to be censured and pay disgorgement and prejudgment interest of \$279,446 as well as a penalty of \$300,000. City Securities has taken a number of remedial actions to enhance its disclosure and expense reimbursement policies, including reviewing and amending policies and procedures as well as engaging independent compliance counsel.

Ruhl, without admitting or denying the findings, similarly consented to cease and desist from committing or causing

any violations of these provisions of the federal securities laws. He agreed to pay disgorgement and prejudgment interest of \$20,320 as well as a penalty of \$18,155. Ruhl is subject to a collateral bar, penny stock bar, and investment company bar with the right to apply for reentry after one year, and he is permanently barred from association in a supervisory capacity with any broker, dealer, investment adviser, municipal securities dealer, municipal advisor, transfer agent, or credit rating agency.

The SEC's investigation was conducted by Peter K. M. Chan along with Eric A. Celauro and Sally J. Hewitt in the Municipal Securities and Public Pensions Unit in the SEC's Chicago Regional Office. The investigation resulted from a referral from the Chicago Regional Office's examination staff including Thomas P. Conroy, Atif M. Shameem, John W. Ekdale, and Paul N. Mensheha.

## SCHOOLS DON'T



WHEN THEY  
PLAN.

WHEN THEY  
PREVENT LOSS.

WHEN THEY  
CONTROL RISKS.

### Risk management courses designed for schools

Certified School Risk Managers (CSRM) is a five-part designation program designed for personnel responsible for school risk management. These courses help schools protect budgets and save money, by preventing loss and controlling risk.

#### Classroom and online courses:

- Fundamentals of Risk Management
- Handling School Risks
- Measuring School Risks
- Funding School Risks
- Administering School Risks

[www.WASBO.com/riskmanagement](http://www.WASBO.com/riskmanagement) or 608-249-8588



# WASBO Custodial & Maintenance Conference Highlights - Kenosha



Special thanks to conference program sponsor Performance Services



June 19, 2013



Thank you to Pat Finnemore and the Kenosha Unified School District for hosting this conference.

**Tired of the insurance game?**



Strategic. Transparent. Refreshing.

**Protect Your Business and Your Family with Our Family**

Since 1949, McClone has worked to help protect businesses, families, and communities throughout Wisconsin.

**(800) 236-1034**  
**www.mcclone.com**

Fox Valley • Oshkosh • Fond du Lac  
Milwaukee • Sheboygan  
Green Lake • Madison



**Safety Room Winners**  
**Group:** Gail Bonar, Steve Squire, Tom Robinson, and Gary Pogachar, Wilmot UHS  
**Individual:** Karl Bielewicz, Kenosha

# WASBO Custodial & Maintenance Conference Highlights - D.C. Everest



**June 26, 2013**

Thank you to Jeff Belott and the D.C. Everest School District for hosting this conference.



## Safety Room Winners

**Group:** Wayne Wendorf, Hamilton, Betsy Blaschka and Kevin Baine, Wausau (not shown: Ryan Little, Hamilton and Steve Kaiser, Mosinee)  
**Individual:** Dan Kohls, Cadott



# WASBO Certified School Risk Managers Program



Register at [WASBO.com/riskmanagement](http://WASBO.com/riskmanagement)

Curriculum & National Designation provided by



## Who Should Attend?

Risk managers, facility managers, business managers, safety personnel, HR personnel, insurance providers and agents who work in school risk management.

## Courses Available Online and In Person

Viterbo Credit Available  
Contact the WASBO office for more information

### Fundamentals of Risk Management

October 7, 2013, Stevens Point, Holiday Inn

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

### Handling School Risks

October 8, 2013, Stevens Point, Holiday Inn

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

### Measuring School Risks

November 4, 2013, Stevens Point, Holiday Inn

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

### Funding School Risks

November 5, 2013, Stevens Point, Holiday Inn

Examine various loss funding techniques, including guaranteed cost programs, deductibles and retention programs, pools, and transferring risk through contracts.

### Administering School Risks

December 3, 2013, Stevens Point, Holiday Inn

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

### Certification Update Credit

#### School Safety from A to Z

September 18, 2013, Madison, Wisconsin  
School Leadership Center

Understanding the vast amount of risks a school undertakes on a daily basis is not an easy task. The risks range from understanding how to respond to crises related to disgruntled students and the public all the way to environmental issues such as a staph infection outbreak. This course will address safety from the inside out so you can proactively approach risk and avoid the costly consequences of reacting to incidents and accidents.

**School Nutrition Made Easy**

Specializing in providing schools with customized food service management solutions to **REDUCE COSTS** and **INCREASE PARTICIPATION.**

**Purchasing Power • Staff Development • Leadership Training**  
**Nutrition Education • Financial Expertise**

Great People - Great Food      888-872-3788      [www.aviands.com](http://www.aviands.com)

**A'viands**  
FOOD & SERVICES MANAGEMENT

“Do what you can, where you are, with what you have.”  
~ Teddy Roosevelt

“Pruning at the right time encourages growth in areas of greater importance.”  
~ Jones Loflin

# 2013 Pinnacle Award Winners Scot Ecker and Joseph Marquardt

(Continued from front page)

## Scot Ecker

WASBO appreciates Scot's efforts to develop Investing in Wisconsin Public Schools with the assistance of a core group including Bob Avery (Beaver Dam), Bob Borch (PMA Financial Network), David Carlson (WASB), Kit Dailey (WSPRA) and Andy Weiland (Oregon). Scot proposed this endeavor to the WASBO Board and with their blessing and financial backing a collaborative effort between WASBO, WASB and WSPRA was underway to create a resource that would enable school districts to have a discussion around school finance that brought stakeholders together.

In just over a year, 37 school districts and WEAC have committed to using Investing in Wisconsin Public Schools™ with school boards, staff, and community. Some higher education institutions are also using



Scot Ecker helped demonstrate the Investing in Wisconsin Public Schools session Aug. 13 at the WASBO New Administrators & Support Staff Conference.

the program with students in the area of educational administration. WASBO, WASB and WSPRA have incorporated the process into professional development for school board members, business officials and public relations professionals. One hundred and 19 table coaches from across the state have been trained on the facilitation process. More information on Investing in Wisconsin Public Schools can be found at [WASBO.com/investinginschools](http://WASBO.com/investinginschools). You can experience the process in action at January's State Education Convention.

Congratulations, Scot and thank you for bringing Investing in Wisconsin Public Schools to Wisconsin!

## Joseph Marquardt

WASBO annually nominates our Business Services Award Recipient for the ASBO Pinnacle Award. Joe and the School District of New London won the 2012 Business Services Award for this energy conservation project. Congratulations, Joe for being an example to our international colleagues of the great things happening in Wisconsin!

Scot and Joe will be recognized at the ASBO Annual Meeting & Expo (AM&E) October 25-28, 2013. Join us in Boston to celebrate and honor their success. Early bird registration ends September 6. See [www.asbointl.org/AnnualMeetingandExpo/7753.htm](http://www.asbointl.org/AnnualMeetingandExpo/7753.htm) for details. 🍷

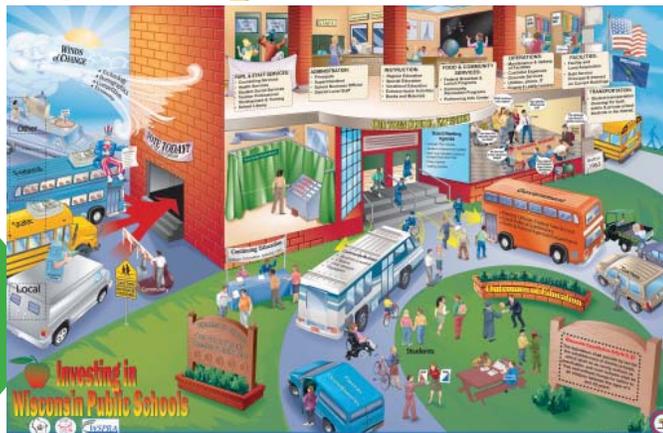


*Introducing an exciting, new, hands-on tool to provide an understanding of the variables, stakeholders and nuances of financing Wisconsin's public schools.*

### Potential Audiences

- Staff Professional Development
- Board Member Orientations
- Community Engagement
- Parent Groups
- Business Community

## Investing in Wisconsin Public Schools



- Six Components of the Map Process
- Visualization or Storyboarding of the Wisconsin Educational System & Complex Systems
  - Data Connections
  - Socratic Dialogue & Discovery
  - Learning Peripherals, Exercises & Simulations
  - Interaction in Small Group Settings
  - Trained Facilitation



For More Information and Pricing  
[www.WASBO.com/InvestingInSchools](http://www.WASBO.com/InvestingInSchools)

*Investing in Wisconsin Public Schools™ presents very targeted and provocative questions on core organization issues, challenging participants to think...often driving each person to address unpleasant but nonetheless vital systemic and environmental realities.*

Investing in Wisconsin Public Schools™ was collaboratively developed by



Wisconsin Association of School Business Officials



Wisconsin Association of School Boards



Wisconsin School Public Relations Association



edventures®  
Edventures in Learning, Inc.

# Diamonds and Stones

By Don Mrdjjenovich, Retired WASBO Executive Director



Don Mrdjjenovich

You may recall these words from the once popular song, “Some days are diamonds, some days are stone.” Those words pretty much sum up life itself. The diamonds and stones that come our way are not always ours to choose, but we do the best we can to deal with them. Let’s assume the diamonds are positive and stones are negative. Now, let’s zoom in on a much smaller target than life itself. A day is more manageable. Now take it down to a day in your work place or your work environment. Every day has the potential to be a diamond or a stone.

Some of the most common stones to be found in the work place are: petty gossipers, negative attitudes, complainers, rumor enhancers, critics, whiners, and time wasters. The extent to which they exist in any work place can determine if your day will be a diamond or a stone. If you combine and measure the weight of those stones, you will have determined the level of morale which exists in your world of work.

So much for the negatives. Your world of work also contains diamonds. Some of those diamonds are: positive attitudes, understanding, compassion, helping hands, and honesty. Perhaps the brightest diamond is the fact that we have the freedom of choice and can decide for ourselves if we wish to choose diamonds or stones. Think of the people in your life that you admire the most or have most influenced your life in a positive way. I’m certain they possess a lot of diamond attributes. Each of us can make a conscious decision to contribute to the morale of our workplaces in a positive way. Collectively, we can help to make more diamond days. It doesn’t take magic to turn stones into diamonds. It just takes an honest effort. 🍷

“ Believe you can and you’re halfway there.”  
~ Teddy Roosevelt



## SFO® CERTIFICATION IS THE MARK OF A DEDICATED PROFESSIONAL

The role of a school business official varies by district size and resources; however, the fundamental skills and knowledge needed to effectively safeguard school funds and maximize resources for students do not.

By earning an international credential, you’ll instill confidence in those around you. Give your fellow administrators, board, and community even more reassurance that you have the know-how to support them.

ASBO International’s Certified Administrator of School Finance and Operations® (SFO®) program recognizes school business officials who demonstrate a combination of experience and education and who have a mastery of the knowledge and skills required to be an effective school business leader.



Applications Accepted Year-round—Submit Today.

[www.asbointl.org/certification](http://www.asbointl.org/certification)

For more information, call 866.682.2729 x7065

### New ASBO Resource for SFO® Hopefuls

Are you preparing to take the SFO® certification exams? Thinking about starting a study group? Wondering what study materials are available? Looking for practice questions? Get a copy of The Certified Administrator of School Finance and Operations® (SFO®) Guide to Studying for the Examinations, a new resource from ASBO International, to help you excel on the SFO® certification exams.



**P B B S**  
EQUIPMENT CORPORATION

## YOUR BOILER ROOM EXPERTS

ENGINEERING | CONTROL UPGRADES | VESSEL REPAIR | SERVICE

- Boilers – Cleaver-Brooks, Raypak, Columbia
- Hot Water Heaters – Armstrong, Raypak
- Controls – Cleaver-Brooks, Autoflame, Hays Cleveland
- Burners – Cleaver-Brooks, NatCom, Webster, Limpfield

24/7 Service Available  
800-236-9620 | 262-252-7575

[pbbs.com](http://pbbs.com)

# State Budget Imposes New Requirements for School District Community Service Funds

By Kirk D. Strang, Davis Kuelthau Attorneys at Law



Kirk Strang

Wisconsin school districts are required to comply with new levy limits and reporting requirements for school district community service funds (Fund 80) under the 2013-15 State Budget.

State law authorizes school boards to establish community program service funds and provides that school districts can “[e]stablish and maintain community education, training, recreational, cultural or athletic programs and services, outside the regular curricular and extra-curricular programs for pupils, under such terms and conditions as the school board prescribes.” The statutes further provide that school boards may establish and collect fees to cover all or part of the costs of such programs and services.

State statutes have historically treated school district community service funds as exempt from general revenue limits, stating that the costs associated with such programs and services “shall not be included” in school districts’ shared costs under related revenue limit statutes. It is this less regulated aspect of these funds that came under legislative scrutiny as part of the State Budget, resulting in a series of new requirements concerning community service funds that include the following:

A school district may not levy more for community service funds than

“Challenges are what make life interesting and overcoming them is what makes life meaningful.”

~ Joshua J. Marine

was levied in the most recent year preceding 2013, in which community service funds were raised, unless a referendum approves exceeding this limit. If a school district chooses to hold a referendum, the Department of Public Instruction (“DPI”) will also require that school districts report the referendum date, the resolution, and the outcome of the referendum.

School districts are required to include Fund 80 expenditure information in their budget summaries for levies that will be established in the fall of 2013 and 2014, for the 2013-14 and 2014-15 school years. For common and union school districts that hold an annual meeting, the budget summary for the accompanying budget hearing must identify Fund 80 expenditures and indicate how those expenditures meet the criteria for community service funds. Unified school districts must provide the same information as part of the written agenda for the school board meeting at which the annual levy is established. School districts also have to report this information to DPI within ten (10) days of the annual meeting or meeting at which the levy is established.

School districts must post this information on the school district website no later than August 30, 2013.

School boards can modify the amount that is levied at a later meeting, e.g., when the levy is finally certified. If the school board chooses to do so, however, the board still must comply with the levy limits for Fund 80 established by the State Budget and comply with the same reporting and publication requirements that covered the original report.

In sum, the State Budget provides for additional scrutiny of school districts’ Fund 80 activities by creating additional reporting requirements and opportunities for public and agency

review of Fund 80 expenditures. The State Budget also aligns Fund 80 expenditures with other school finance statutes that also require a referendum if a school district wishes to exceed the revenue limits established by law.

The DPI has assembled a variety of information to assist school districts with Fund 80 issues and is currently working to modify its referendum reporting portal to accommodate this change in state law.

The DPI school finance team’s summary can be found at [sfs.dpi.wi.gov/community-service-fund-limits-and-reporting-requirements-under-2013-wisconsin-act-20](http://sfs.dpi.wi.gov/community-service-fund-limits-and-reporting-requirements-under-2013-wisconsin-act-20). However, the DPI has advised that it is not able to certify school district’s compliance with these requirements and encourages school districts to check with the school district’s legal counsel on their use of Fund 80, particularly if they plan to exceed the Fund 80 levy limit that has now been established by law.

If you have any questions regarding this article, please contact your Davis & Kuelthau attorney or Kirk D. Strang at 608.280.6203 / [kstrang@dkattorneys.com](mailto:kstrang@dkattorneys.com).

“You sometimes have to say ‘No’ to things of lesser importance so you can say ‘Yes’ to things of greater importance.”

~ Jones Loflin (from *Getting the Blue Ribbon*)

# WERC Publishes CPI Rate for General Municipal Employee Collective Bargaining Agreements Beginning January 1

By James R. Korom and Kyle J. Gulya, von Briesen & Roper

The Wisconsin Employment Relations Commission published the January 1, 2014 Consumer Price Index rate for negotiating “total base wage” one-year collective bargaining agreements between municipal employers and general municipal employee bargaining units. The January 1, 2014 CPI rate has dropped to 1.66%. The CPI rate for agreements beginning July 1, 2013 was 2.07%, and the CPI rate was 2.96% for agreements beginning January 1, 2013.

As a result of these new published rates, the municipality and the bargaining representative cannot negotiate a total base wage increase above 1.66% for agreements beginning January 1, 2014. If the municipality wants to collectively bargain a total base wage increase above 1.66%, then the municipality must receive approval from the electorate through a referendum.

Employers should also remember that WERC is once again implementing annual certification elections for general municipal employee bargaining units. These elections require the bargaining representative to receive 51% of the vote of all bargaining unit members in order to continue representing the employee group. The certification election process has already begun for school districts and bargaining representatives of school district employee groups. That election

process should finish by December 2013. We anticipate the annual certification elections for municipal collective bargaining groups will occur shortly thereafter. Further information should be released this fall.

The rules for school districts established the consequences of a collective bargaining representative’s failure to timely file a petition for election, and we anticipate these rules will remain similar for municipal entities. According to those rules, if a timely petition is not filed, then the following consequences shall apply:

- If no collective bargaining agreement is in effect, then the existing representative shall no longer be entitled to exclusive representative status for purposes of collective bargaining as of petition filing deadline.
- If a collective bargaining agreement is in effect, then the existing representative shall no longer be entitled to exclusive representative status for purposes of collective bargaining as of the expiration of the agreement.
- The employees in the bargaining



James Korom



Kyle Gulya

unit shall not be included in a substantially similar collective bargaining unit for at least a period of one year following the petition filing deadline or the expiration of the collective bargaining agreement.

We believe WERC will use the same telephonic voting process they previously used during the first round of certification elections involving school districts. 🗳️

“The difference between a successful person and others is not lack of strength, not lack of knowledge, but rather a lack of will.”

~ Vince Lombardi

**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](http://www.asbointl.org)

# Mosquito Management Takes a Community

Courtesy of School IPM 2015

**M**osquitoes are a growing concern as a public health risk in the US. West Nile Virus has overtaken bee stings as the leading insect-related cause of death in the US. The virus, transmitted through saliva when the mosquito feeds, results in fever in one in five cases. More serious neurological complications develop in less than 1% of infections, resulting in 286 deaths in the US in 2012. Outbreaks of West Nile Virus are often precipitated by a mild winter, wet followed by dry weather, and high summer temperatures.

There are 172 species of mosquitoes in the US. They live from four to 30 days, depending on the species, with much of that time spent in or near water. Mosquitoes are broadly categorized as floodwater or standing-water species. Floodwater mosquitoes are excellent fliers, traveling five to ten miles to find a host, which makes them difficult to manage. Their eggs can also survive in dry soil for up to two years while waiting for rain. Fortunately, most are not disease vectors. According to Mike Merchant, extension urban entomology specialist with Texas A&M AgriLife Extension Service, management strategies include draining marshes, floodwater control and avoidance. Standing-water species include more disease vectors. Many are not great fliers and do not stray as far from their breeding site to find a host.

Mosquitoes breed anywhere there is standing water, which can include playground equipment or empty soda cans left behind by students. "It doesn't take anything more than some water and a little bit of organic matter and bacterial growth to encourage mosquito breeding," comments Merchant. Anything that holds water for ten to 15 days will work. Breeding sites can be in hidden spots where people do not frequently go. "It's not always very obvious that you have

mosquito breeding going on," warns Merchant.

In addition to eliminating standing water on school campuses, mosquito mobility dictates that school districts work with their local governments to address sources beyond the campus. Community mosquito management programs should use the SSLAP approach: surveillance, source reduction, larvicides to treat breeding sites, adult mosquito control and public education. "You can't eliminate any of these things and still get effective control," says Merchant.

Surveillance includes checking breeding sites. "This is a challenging job because the breeding sites can be hidden or in locations that can't be easily accessed," notes Merchant. Several options for monitoring are gravid traps and light traps. Gravid traps are essentially plastic tubs filled with fermented water and grass or hay infusions, called "stink water," and a trap above with a fan that draws the mosquitoes in. Light traps are often paired with carbon dioxide or dry ice to make them more attractive.

Merchant recommends setting up permanent traps and monitoring them consistently on a weekly basis throughout the season. Traps should be set up every one to four square miles, which can be labor intensive and expensive, but is necessary to monitor effectively. Trapped mosquitoes should be sent to a lab that is capable of analyzing for disease pathogens.

There are some effective standing water treatments, including *Bacillus thuringiensis* granules or briquettes, methoprene granules and biodegradable films. Fish can also be used as a biological control in abandoned swimming pools, temporary ponds and streams. Merchant notes that insecticide use for adult mosquitoes is neither effective nor desirable. "We would



much rather stop the mosquitoes before they become adults," he says. With this in mind, spray trucks are viewed as a tool of last resort. Residual insecticides can be used for temporary control while students are in school in the spring or fall, as long as they are not applied in areas where children could come into contact with them. Bug zappers and citronella plants are not effective. Make sure you have a policy of keeping exterior doors closed to keep mosquitoes out of school buildings.

Many personal repellents are effective against mosquitoes. DEET repellents are one option, and the Centers for Disease Control and Prevention has identified other types that work well. Repellents that do not contain DEET will need to be reapplied more frequently. Some options include repellents that contain Picaridin (Cutter brand), lemon oil of eucalyptus (Repel brand), soybean oil (Bite Blocker), and 2-Undecanone (BioUD).

For more information on mosquito management, visit:

- Mosquito Safari [mosquitosafari.tamu.edu](http://mosquitosafari.tamu.edu)
- the Insects in the City blog [citybugs.tamu.edu](http://citybugs.tamu.edu)
- the eXtension page on mosquitoes [www.extension.org/pages/65133/mosquitoes-hot-topics](http://www.extension.org/pages/65133/mosquitoes-hot-topics)
- a recent eXtension webinar on mosquito prevention and management [learn.extension.org/events/1095](http://learn.extension.org/events/1095)



## Avoid Hazards of Coal Tar Asphalt Sealcoats

*UW-Extension offers guidelines to help communities, businesses reduce costs to health and environment*

Most of us are familiar with the odor and deep black appearance of freshly sealcoated asphalt. Sealcoats are used to improve the appearance and prolong the life of driveways and parking lots.

Some sealcoat products contain coal tar, a byproduct of coke manufacturing, which is a health and environmental hazard.

A new series of fact sheets produced by the UW-Extension Solid and Hazardous Waste Education Center discusses the toxicity, health and environmental hazards of coal tar and suggests ways to reduce risk.

Topics covered include:

Keeping Coal Tar Out of School Yards:  
[www4.uwm.edu/shwec/publications/cabinet/p2/Coal Tar and School Yards 3-19-13.pdf](http://www4.uwm.edu/shwec/publications/cabinet/p2/Coal%20Tar%20and%20School%20Yards%203-19-13.pdf)

Choosing a Coal Tar-Free Sealcoat:  
[www4.uwm.edu/shwec/publications/cabinet/p2/Choosing\\_A\\_Sealcoat\\_5-28-13.pdf](http://www4.uwm.edu/shwec/publications/cabinet/p2/Choosing_A_Sealcoat_5-28-13.pdf)

Following the lead of Dane County and the State of Washington, Minnesota recently enacted a ban on the sale and use of coal tar-based asphalt sealcoats that will take effect in January 2014, bringing the entire state in line with bans already in place in 28 Minnesota counties.

To learn more about UW-Extension's work to enhance Wisconsin's environment and economy, visit the Solid and Hazardous Waste Education Center on the web at:  
[www4.uwm.edu/shwec/index.cf](http://www4.uwm.edu/shwec/index.cf)

You also may contact David S. Liebl, 608-265-2360, [liebl@epd.engr.wisc.edu](mailto:liebl@epd.engr.wisc.edu).

Renew your  
WASBO membership  
for July 1, 2013 -  
June 30, 2014  
at  
[WASBO.com/renew](http://WASBO.com/renew)



## Unless you have one of these >>> Don't pay for services you don't need.

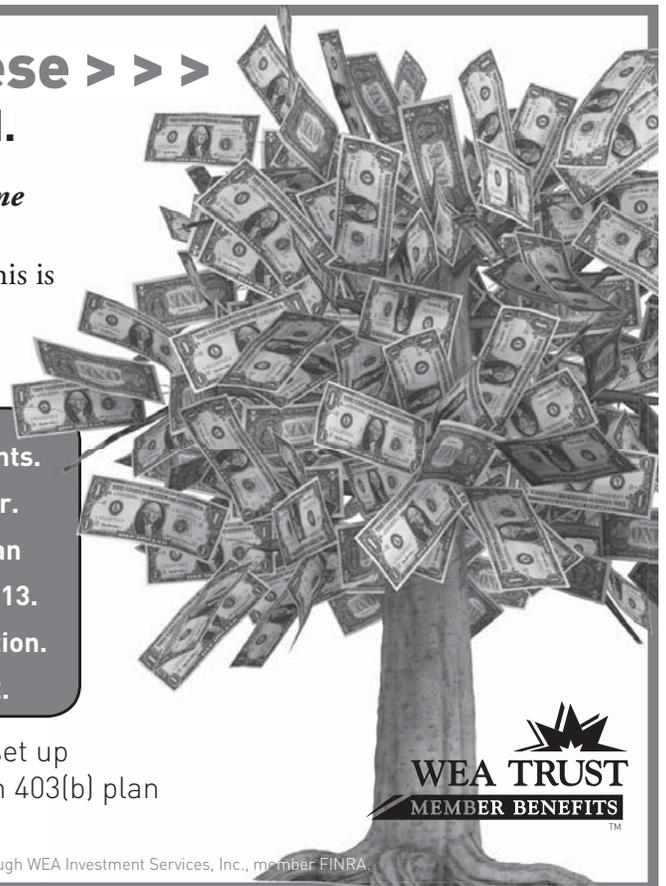
Districts around the state are *saving money and staff time* by taking advantage of our *no-cost* value-added 403(b) services to administer their plan. With fewer resources, this is the time to eliminate inefficient and redundant services.

### We can help.

- 133 districts are now using our sample plan documents.
- 42 districts are using us as their sole 403(b) provider.
- Last year, 19 districts transitioned to our sample plan documents and 10 districts transitioned so far in 2013.
- 6 districts dropped their TPA as a result of the transition.
- More than 250 districts had plan reviews in 2012.

**Save time and money.** Call 1-800-279-4030 to set up an on-site plan review with Scott Thomas, our expert in 403(b) plan administrative solutions. Or, visit [weabenefits.com](http://weabenefits.com).

The 403(b) retirement program is offered by the WEA TSA Trust. TSA program securities offered through WEA Investment Services, Inc., member FINRA.



# Managing Deer on School Grounds

Courtesy of School IPM 2015

Deer become a problem on the grounds of schools and other facilities when they eat ornamental vegetation or damage trees by rubbing their antlers on the bark. There are three main species of deer: white-tailed deer, which live throughout the US, black-tailed deer, distributed mainly along the Pacific coast, and mule deer, found primarily in the West.

According to Scott Hygnstrom, professor and extension wildlife specialist at the University of Nebraska-Lincoln, an appropriate tolerance level is 30-35 deer per square mile. Besides seeing deer on the property, a common sign of deer damage is plants that are broken off unevenly. Deer have no upper incisors so they must tear their food, leaving twigs and stems looking ragged.

“There are no silver bullets or magic potions when it comes to deer damage management,” comments Hygnstrom. Tactics include habitat modification, repellents, frightening devices and manual population reduction.

Cornell Cooperative Extension created a fact sheet (online at [bit.ly/172PBnG](http://bit.ly/172PBnG)) that lists ornamental plants categorized by their susceptibility to deer damage. Some plants that are listed as “rarely damaged” by deer are Barberry, Common Birch, Common Boxwood and American Holly. If possible, choose plants that are native to your area to reduce maintenance requirements. Check with your local extension office for more recommendations.

Exclusion can include cylinders around small seedlings or young trees. “This is one of the better approaches in dealing with deer because you can physically keep them from the resources that you want to protect,” says Hygnstrom. Cylinders can be made from sheep wire, woven wire, or any other type of wire that is convenient, or they can be purchased.

They will have limited benefit as the trees grow because deer can reach up about six feet high when grazing.

Fencing is another option to keep deer out. Hygnstrom calls the woven wire fence the “Cadillac of deer fences” because it excludes deer very well. However, it costs \$5-10 per foot in materials and about the same in labor. To be effective, fencing must be eight to ten feet high. Electrified high-tensile wire fences are a cheaper option. “These fences become not only a physical barrier but also a psychological barrier,” says Hygnstrom. Electrified polytape can also be used, but Hygnstrom recommends spreading peanut butter at regular intervals along the tape to attract the deer. Once they have licked the tape, they will associate that area with pain and may be less likely to return. Use extreme caution with electrified fencing in the vicinity of school buildings; it should only be used in areas where children will not go and should be clearly marked as electrified.

Repellents can be used to cause pain or fear. Hot sauce animal repellent (capsaicin is the active ingredient) and ammonia products cause pain when eaten or smelled, and coyote urine products may make deer think predators are lurking nearby. Deer Away, which contains putrescent egg solids (i.e., rotten eggs), has been effective in several studies.

“Deer acclimate quickly to frightening devices, especially the auditory varieties that go off in a repetitive pattern,” notes Hygnstrom. Auditory frightening devices can include propane cannons, pyrotechnics and sirens. Visual devices include effigies, scarecrows and lasers. A deer-activated bio-acoustic device has shown some efficacy in studies.

There are no toxicants registered for use on deer. Surgical sterilization and immunocontraception are options for



fertility control, but are very expensive and do not reduce the population immediately. Many states do not allow translocation of white-tailed deer because habitats have filled and there is a risk of disease spread, warns Hygnstrom. Additionally, studies have shown that up to 80% of translocated deer die within six months

Deer damage management is a community decision. All affected parties should be included in the discussion about management options. “You should try to reach a consensus but often you can’t,” comments Hygnstrom. “The community has to make a decision anyway, and move forward with that decision.”

For more information, see a recent webinar hosted by the Urban CoP eXtension: [learn.extension.org/events/1078](http://learn.extension.org/events/1078) 🍷

“Life is what happens to you while you’re busy making other plans.”

~ John Lennon

# Book Review

## *Emotional Intelligence 2.0*

By Drs. Travis Bradberry & Jean Greaves

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



Orvin R. Clark,  
EdD, RSBA

**E**motional Intelligence 2.0 was written by Drs. Travis Bradberry & Jean Greaves, award-winning authors and the cofounders of TalentSmart™. TalentSmart is a global think tank and consultancy that serves more than 75% of Fortune 500 companies and is the world's leading provider of emotional intelligence tests and training.

*Emotional Intelligence 2.0* (EQ) is 250 pages in length, organized around the four EQ skills (Self-Awareness, Self-Management, Social Awareness and Relationship Management), 66 strategies and online access to the EQ test, (the Emotional Intelligence Appraisal™). Based on research 90% of top performers are high in EQ. EQ is twice as important as IQ in exceeding your goals and achieving your fullest potential.

When emotional intelligence was first discovered, it served as the missing link in a peculiar finding: “people with the highest levels of intelligence (IQ) outperformed those with average IQ’s just 20% of the time, while people with average IQs outperformed those with high IQs 70% of the time.” This anomaly created confusion in what many people had always assumed was the source of success—IQ. After years of research and countless studies emotional intelligence (EQ) was identified as the critical factor.

Knowing what emotional intelligence is and knowing how to use it to improve your life are two different things. *Emotional Intelligence 2.0* delivers a step-by-step program for increasing your emotional intelligence using the four core EQ skills and a few strategies as outlined in the following highlights:

*“people with the highest levels of intelligence (IQ) outperformed those with average IQ’s just 20% of the time, while people with average IQs outperformed those with high IQs 70% of the time.”*

### **Self-Awareness Strategies: (To know yourself as you really are)**

1. Feel your emotions physically
2. Know who and what pushes your buttons
3. Stop and ask yourself why you do the things you do
4. Visit your values
5. Get to know yourself under stress

### **Self-Management Strategies: (Your ability to use awareness of your emotions to actively choose what you say and do)**

1. Create an Emotion vs. Reason List
2. Count to 10
3. Smile and laugh more
4. Visualize yourself succeeding
5. Learn a valuable lesson from everyone you encounter

### **Social Awareness Strategies: (Your ability to recognize and understand the emotions of others—to learn about and appreciate others)**

1. Greet people by name
2. Watch body language

3. Don't take notes at meetings
4. Practice the art of listening
5. Go people watching

### **Relationship Management Strategies: (All relationships take time, effort and know-how...the know-how is emotional intelligence)**

1. Be open and be curious
2. Take feedback well
3. Build trust
4. Have an “Open Door” Policy
5. Explain your decisions, don't just make them

The relationship management skills can be learned, and they tap into the three other EQ skills that you will become familiar with—self-awareness, self-management and social awareness. The Emotional Intelligence Appraisal™ will show you where your EQ stands today and what you can do to begin maximizing it immediately. These are practical strategies that anyone can use to his or her advantage. With EQ twice as important as IQ in getting where you want to go in life, you can't afford to ignore it! *Emotional Intelligence 2.0* will become your ready reference. 📖

# SHARE YOUR EXPERTISE!

WASBO invites you to share your experience and expertise by completing the *Call for Presentations* for our upcoming conferences.

**District Professional?** Consider teaming up with your colleagues/vendors to present a session on an innovative idea or best practice you have implemented in your district.

**Service Affiliate Member/Vendor?** Join with a school district professional to co-present educational and informative solutions that address the needs of school districts.



Applications are now online!  
**Questions?** Contact Jeanne Deimund,  
deimund@wasbo.com.

[WASBO.COM/PRESENT](http://WASBO.COM/PRESENT)

Available Statewide



**Employee Handbooks =  
New Post-Employment  
Options**

**LET'S TALK!**

## ALL-IN-ONE SOLUTION

The **Wisconsin OPEB Trust** program, from CESA 6, has options to manage, analyze and innovate the right post-employment benefit choices for your school district including health reimbursement accounts (HRA).



[www.wiopeb.com](http://www.wiopeb.com)

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

# Help for School IPM Planning

Courtesy of School IPM 2015

The New Orleans Mosquito and Termite Control Board (NOMTCB) hosted a workshop last month to help schools write IPM plans. Participants came from many different backgrounds, including US EPA, pest management companies, the Division of Health and Hospitals, and both public and charter schools in five Louisiana parishes.

“We wanted to make it easy for schools to get into compliance with the laws, and also to understand what true IPM really is,” comments Claudia Riegel, director of NOMTCB. The workshop was scheduled for a full day. Part of the next day was allotted for individuals to meet with instructors to complete their IPM plans. “We had a great turn out and schools got a lot of good work done,” says Riegel. She has several recommendations for others who want to host a successful IPM plan workshop.

## Work with collaborators to find diverse attendees

“Talk to your contacts to get names of people to invite,” says Riegel. Seek help from people who work with school districts and already have a rapport with them. Try to attract people from diverse disciplines and departments to facilitate conversations about what each person needs from others. “We tried to invite people from different disciplines because it’s very valuable for school employees to talk to health department officials who will be inspecting their schools and pest management companies who will be providing contracted services,” comments Riegel. A disconnect forms when these entities don’t have an opportunity to work together.

## Include multiple services

As an additional incentive, Riegel suggests including an opportunity for pesticide applicator testing and recertification during the workshop. Also consider offering continuing

education units (CEUs) for attendance. Many facilities department employees and sanitarians are required to get CEUs each year.

## Provide ready-to-use templates

“People are busy and don’t have time for a lot of additional work,” says Riegel. “We also don’t need to reinvent the wheel for each school.” Put together an IPM plan template ([www.ipminstitute.org/school\\_ipm\\_2015/IPM\\_Plan\\_Generic](http://www.ipminstitute.org/school_ipm_2015/IPM_Plan_Generic)) to hand out to attendees that complies with all laws and regulations in your state, and goes over and above legal requirements. Riegel suggests that this is a great time to implement IPM that is a little more high-level than what is required by law. Be careful not to overwhelm participants who may be new to IPM.

## Allow lots of time for discussion

Riegel recommends providing meals for attendees. “We always provide lunch because we don’t want people to leave the building and disconnect,” says Riegel. Lunch and breaks can be optimal times for discussion among people from different backgrounds. Try to facilitate IPM discussion from the moment participants arrive to the moment they leave. Riegel has found that there can be a lack of understanding about pest control in general among school employees, because often services are contracted out. “Pest control companies are our partners, and people in the schools need to ask questions and be more educated about the action plans that are available,” comments Riegel.

## Provide resources

Give schools as many resources as you can provide without overwhelming them with unnecessary details. Provide them with language they can actually use in their IPM plan. In addition to the IPM plan template, consider supplying:

- Sample pest sighting logs

[www.ipminstitute.org/school\\_ipm\\_2015/Kitchen\\_pest\\_log](http://www.ipminstitute.org/school_ipm_2015/Kitchen_pest_log)

- Sanitation reports  
[www.ipminstitute.org/school\\_ipm\\_2015/Pest\\_inspection\\_sanitation\\_report](http://www.ipminstitute.org/school_ipm_2015/Pest_inspection_sanitation_report)
- Annual deep cleaning recommendations  
[www.ipminstitute.org/school\\_ipm\\_2015/Annual\\_Deep\\_Cleaning.pdf](http://www.ipminstitute.org/school_ipm_2015/Annual_Deep_Cleaning.pdf)
- Rules and regulations from your state (such as this example from Louisiana: [www.ipminstitute.org/school\\_ipm\\_2015/School\\_IPM\\_LDAF](http://www.ipminstitute.org/school_ipm_2015/School_IPM_LDAF))
- Information on the basics of IPM.

To help schools gain administrator buy-in for IPM implementation, consider giving them copies of *The Business Case for IPM in Schools* ([www.ipminstitute.org/school\\_ipm\\_2015/ipm\\_business\\_case.pdf](http://www.ipminstitute.org/school_ipm_2015/ipm_business_case.pdf)) and *Reducing your Child’s Asthma using IPM* ([www.ipminstitute.org/school\\_ipm\\_2015/ipm\\_asthma\\_document.pdf](http://www.ipminstitute.org/school_ipm_2015/ipm_asthma_document.pdf)).

Direct participants who want more information to websites such as [www.extension.org](http://www.extension.org), US EPA school IPM ([www.epa.gov/pesticides/ipm](http://www.epa.gov/pesticides/ipm)), School IPM 2015 ([www.ipminstitute.org/school\\_ipm\\_2015](http://www.ipminstitute.org/school_ipm_2015)) and extension IPM programs in your area. Pest Press fact sheets ([www.ipminstitute.org/school\\_ipm\\_2015/resources.htm#Pest\\_Presses](http://www.ipminstitute.org/school_ipm_2015/resources.htm#Pest_Presses)) can provide more detailed information on specific pests.

An IPM plan can get staff on the same page about pest management and help schools work more effectively with contracted pest management professionals. 🍷



## Welcome New Members

June 2013 - July 2013

### District Professional Members

- **Wendy Baackes**, Exec. Asst. Business & Operations, Sheboygan Area
- **Rich Boesel**, Facility Manager, Elmbrook
- **Bridget DeMott**, Business Operations Associate, Portage Community
- **Melissa Fifer**, Administrative Assistant, Elkhorn Area
- **Patti Gilbertson**, Bookkeeper, Ashland
- **Kay Goss**, Finance Manager, Augusta
- **Sue Green**, District Administrator, Oakfield
- **Cari Guden**, District Administrator, Edgar
- **Linda Heins**, Lead Day Custodian, Lodi
- **Lisa Lamers**, Systems Operations Manager, Appleton Area
- **Janice Lewicki**, Compensation Manager, West Allis
- **Morgan Mueller**, Accounting Manager, Edgar
- **Barb Ploessi**, Finance Secretary, River Ridge
- **Gary True**, Facility Services Coordinator, Marshall

### Service Affiliate Members

- **Brad Beyer**, Account Executive, Johnson Controls, Inc.
- **Dena DiVincenzo**, Waupaca Sand & Solutions
- **Brian Frantl**, President, Frantl Industries Inc.
- **Tom Gregory**, SVP, BMO Harris Bank N.A.
- **James Hill**, Life Safety Disaster Plan & Response Specialist, A&J Specialty Services Inc.
- **Peter Jakob**, Business Development, Asset Control Solutions
- **Timothy Krueger**, Kulps of Stratford LLC
- **Patrick McCarthy**, Director of Government Banking, First Merit
- **Erik Miller**, Sales Manager, Skyward
- **Hans Noel**, Senior Development Engineer, Nexus Solutions
- **Joy Reilly**, Senior Manager, American Appraisal Assoc., Inc.
- **Dave Tregay**, Midwest Regional Sales Manager, Aiphone
- **Doug Young**, Marketing Director, Hastings Air Energy

### 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 Wiedenhoeft at [wwiedenhoeft@wasbo.com](mailto:wwiedenhoeft@wasbo.com).

**Changing Districts?** Be sure to update your profile at [WASBO.com](http://WASBO.com) so you don't miss any communications. Call 608.249.8588 if you need help.

### On the Move

- **Jason Austin** from Administrator of Business Services, Holmen, to Colorado
- **Janice DeMeuse** from Luxemburg-Casco, Business Manager, to Fox Point-Bayside, Director of Business Services
- **Judy Dilley** from Wauzeka to Verona, Payroll and Benefits Specialist
- **Conrad Farmer** from Weston, Superintendent, to Cedarburg, Human Resources Director
- **Erik Kass** from K-12 Business Solutions, President to Assistant Superintendent for Finance, Human Resources and Operations, Elmbrook
- **Kristin Kollath** from Greenfield, Director of Business Services, to Grafton, Director of Business Services
- **Roger Kordus** from Wauzeka-Steuben, District Administrator to Cuba City, Superintendent
- **Kerri Minett** from Wonewoc-Union Center, Administrative Office Manager, to Wauzeka-Steuben, District Bookkeeper
- **Morgan Mueller** from Edgar, Bookkeeper, to Edgar, Accounting Manager
- **Stephanie Ziegler** from Waunakee, Accounts Payable Specialist to Middleton-Cross Plains

### Retirements

- **Roger Kleinstick**, Edgar
- **Dick Koeshall**, Pittsville
- **Kathy Olson**, Augusta
- **Paul Reichert**, Business Manager, Kewaskum
- **Esther Schutt**, District Bookkeeper, Shawano

**alio**<sup>®</sup>

World Class  
Financial  
Management  
Software

**Weidenhammer**  
Go Paperless with **alio**  
866.497.2227 | [www.hammer.net](http://www.hammer.net)

# Make the Most of Your Membership, Get Involved in WASBO!



Dear WASBO Members:

WASBO is a professional association that depends on the willingness of its membership to play an important role in planning and carrying out its numerous functions. We do not rely on an expensive dues structure or a large number of salaried staff. We divide our activities and services into manageable pieces. A lot of people give their time and talents to keep WASBO a responsive and healthy organization.



## Available Committees:

- Accounting
- Collaborative Procurement
- Constitution/Governance Goal Action Team
- Fall Conference
- Membership
- Member Resources & Technology Goal Action Team
- Nominating
- Professional Improvement Goal Action Team
- Retirement
- Safety & Risk Management
- School Facilities
- School Finance Puzzle
- Service Affiliate
- Spring Conference
- State Education Joint Convention
- Transportation

Please consider serving on a WASBO committee or sharing your expertise at a conference during this upcoming fiscal year. Whether you are new to WASBO or have been involved for years, please submit committee membership requests and/or calls for presentations to help keep your organization strong.

Thank you,

*Lynn Knight*

WASBO President, 2013-14

## Committee Participation

WASBO offers a variety of committees which plan conferences, develop policy positions, manage aspects of governance and bylaws, and provide direction on membership needs. From these varied options, you are sure to find a committee that matches your interests as well as your available time. For additional details on each committee's mission and goals and to indicate your interest in joining a committee, visit [WASBO.com/committees](http://WASBO.com/committees).

## Call for Presentations

WASBO provides programming for 12 or more conferences every year and is therefore continually considering presentation topics. If you are interested in presenting at one of WASBO's professional development activities, please complete the online form at [WASBO.com/present](http://WASBO.com/present). Final programming decisions are made by the appropriate planning committee for each event.

**Selection criteria includes, but is not limited to:**

- Presentation fits the planning criteria of the conference planning committee
- Presentation is informative in nature (not a marketing pitch)

**We also look for members to submit articles for our newsletter, *Taking Care of Business*. Learn more at [WASBO.com/newsletter](http://WASBO.com/newsletter)**



## Stay Connected



### Don't Stop Receiving This Newsletter!

To continue receiving the benefits of your WASBO membership, including your subscription to *Taking Care of Business*, please take a few minutes to renew at [WASBO.com/renew](http://WASBO.com/renew). If you need assistance, give us a call at 608.249.8588. Your membership saves you money on seminar and conference registrations. WASBO keeps you informed through this newsletter and the daily Wisconsin Education News. You can access resources such as the Electronic Resource Center and the Peer to Peer Communication Forum. When you are the only one in your district who does your job, you need to stay connected to your colleagues across the state that are faced with the same challenges. The small investment in your membership will come back to your district.

### Are You Going to ASBO International This Fall?

If you are making plans to attend the ASBO International Annual Meeting in Boston this October, please let us know. We want to be sure you're kept in the loop regarding state gatherings in Boston. You'll also have the opportunity to order WASBO apparel to make it easier for Wisconsin attendees to spot one another on site. Email Tina at [hafeman@wasbo.com](mailto:hafeman@wasbo.com) if you'll be attending.

### Mark Your Calendars for Future Seminars and Conferences

Registration is open for the WASBO Fall Conference and the Midwest Facility Masters Conference. Your participation in these professional development opportunities is an important investment for you and your district. Professional development is sometimes characterized as a travel expense or unaffordable consumption

of time. Actually, it is an investment for the future. The expense of not staying up-to-date in our evolving demands and proficiencies may be far greater than staying current. Networking and gaining proficiency in our ever-changing world will pay dividends. See the back cover of this issue for dates of future seminars and conferences or go to [WASBO.com](http://WASBO.com).

Looking for products and services? Check our WASBO's Service Affiliate Members on the Buyer's Guide at [WASBO.com](http://WASBO.com) Member Central



### Coupons Let You Attend WASBO Conferences for Less

Professional development coupons allow you and your district colleagues to attend WASBO conferences at a 15-25% savings. Coupons are only transferrable between employees of the same school district, and must be used by June 30, 2014. Find out more at [WASBO.com/coupons](http://WASBO.com/coupons).

### Call for Presentations Now Online for Early 2014

Share your innovative idea or best practice by teaming up with a colleague or vendor to present a conference session. Call for Presentations applications are now online for the 2014 WASBO Transportation & Bus Safety Conference, Facilities Management Conference, Accounting Conference, Spring Conference, and Custodial & Maintenance Conference. Go to [WASBO.com/present](http://WASBO.com/present) for details or to access the application forms.

### Network by Participating on a WASBO Committee

Do you want to meet professional school colleagues and service affiliates, share ideas, enhance WASBO services and enrich your professional development and that

of your peers? Serving on a WASBO committee can help you do all that, and more. We know it is great to meet in person, but we have options to participate by conference call as well. To sign up for one of the many WASBO committees, go to [WASBO.com/committees](http://WASBO.com/committees).

### Interim Assignments

As school business officials take new positions or retire, the districts they depart are left with a void. In addition, many districts are in need of consulting help on project or oversight work. These districts are in need of assistance for interim school business officials until their openings are filled or specific projects are completed. If you would like to be considered, please send a one-page resume and other pertinent details to Woody at [wwiedenhoeft@wasbo.com](mailto:wwiedenhoeft@wasbo.com).

### And Now, it's Back to School

It seems as if we just said goodbye to our graduates and saw students head out for their summer activities. Now the teachers are readying their classrooms while we prepare for the hustle and bustle of fall. Soon our school hallways will be filled once again with students eager to start a new year of learning. Remember that you, too, have a duty to continue building your knowledge base so you can do your part to provide outstanding educational opportunities for the children in Wisconsin. 🇺🇸

Connect on WASBO's Peer to Peer Communication Forum at [WASBO.com](http://WASBO.com) Member Central





**Wisconsin Association of School  
Business Officials**  
4797 Hayes Road, Suite 101  
Madison, WI 53704

PRSRT STD  
US POSTAGE  
PAID  
MADISON WI  
PERMIT NO 801



Please share with a  
prospective member!

## Upcoming Events - WASBO.com

Printed on Recycled Paper. Made with 100% post consumer waste.



### Professional Development

#### WASBO Fall Conference

October 3-4, 2013 - The Osthoff, 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, WI Dells (Viterbo Credit)

#### Winter at a Glance (Year of Success)

December 3, 2013, Marriott Madison West, Middleton

#### WASBO/WASPA School Personnel Academy

December 4-5, 2013, Marriott Madison West, Middleton (Viterbo Credit)

#### WASB-WASDA-WASBO State Education

#### Convention

January 22-24, 2014, Wisconsin Center, Milwaukee (Viterbo Credit)

#### DPI-WASBO-WCASS Federal Funding Conference

February 24-25, 2014, Kalahari, WI Dells (Viterbo Credit)

#### WASBO Transportation & Bus Safety Conference

March 13, 2014, Kalahari, WI Dells

#### WASBO Facilities Management Conference

March 13-14, 2014, Kalahari, WI Dells (Viterbo Credit)

#### p-Card User Group Meeting

March 18, 2014, Marriott Madison West, Middleton

#### WASBO Accounting Conference

March 19-20, 2014, Marriott Madison West, Middleton (Viterbo Credit)

#### WASBO Spring Conference

May 20-23, 2014, Kalahari, WI Dells (Viterbo Credit)

### Scholarship Fundraisers

#### Fall Golf Outing

October 2, 2013 - Autumn Ridge Golf Course, Valders

#### Spring Golf Outing

May 21, 2014 - Trappers Turn Golf Course, WI Dells

### Certified School Risk Managers (CSRM) Courses (Viterbo Credit)

#### School Safety from A to Z (Update Credit)

September 18, 2013 - Wisconsin School Leadership Center, Madison

#### Fundamentals of Risk Management

October 7, 2013 - Holiday Inn, Stevens Point

#### Handling School Risks

October 8, 2013 - Holiday Inn, Stevens Point

#### Measuring School Risks

November 4, 2013 - Holiday Inn, Stevens Point

#### Funding School Risks

November 5, 2013 - Holiday Inn, Stevens Point

#### Administering School Risks

December 3, 2013 - Holiday Inn, Stevens Point

### Committee Meetings

#### Fall Conference

All meetings are by conference call at 2 pm. Sept. 11, 2013

#### Joint Convention

TBA, 10 am, WASBO Offices

#### Midwest Facility Masters Conference

All meetings are by conference call at 10 am. Sept. 5, 2013; Oct. 10, 2013; Nov. 7, 2013 (if needed)

#### Safety & Risk Management

All meetings at 12 pm, WASBO Offices, Madison Aug. 13, 2013; Oct. 15, 2013; Jan. 14, 2014; April 8, 2014; Aug. 12, 2014

#### School Facilities

All meetings at 9:30 am, WASBO Offices, Madison Aug. 13, 2013; Oct. 15, 2013; Jan. 14, 2014; April 8, 2014, Aug. 12, 2014

#### Spring Conference

All meetings at 2 pm, WASBO/Conf. Call unless otherwise noted. Aug. 21, 2013; Oct. 3, 2013, 6:30 pm, Elkhart Lake; Nov. 6, 2013; Dec. 12, 2013; Jan. 13, 2014, Milwaukee; Feb. 13, 2014; March 18, 6 pm, Middleton; May 1, 2014

### Transportation

Oct. 16, 2013, 10 am, Sun Prairie; Nov. 26, 2013, 10 am, Conference Call

### WASBO Business Meeting

January 23, 2014, WI Center, Milwaukee  
May 23, 2014, Kalahari, WI Dells

### Board of Directors Meetings

September 19, 2013	Fort Atkinson
December 11, 2013	WASBO, Madison
February 12, 2014	Beaver Dam
April 9, 2014	Pewaukee
June 12, 2014	Madison

### Leadership Team Meetings

Aug. 20, 2013; Nov. 12, 2013; Jan. 8, 2014; March 5, 2014; May 14, 2014

### Regionals

Check WASBO.com for details.

#### Bay Area/Northeast - Meetings start at 11 am.

Sept. 6, 2013, CESA #7; Dec. 13, 2013, Kimberly; Feb. 21, 2014, DePere; April 4, 2014, Fond du Lac; May 30, 2014, Manitowoc

#### Madison Area - Meetings start at 9 am. TBA

#### Northwest - Meetings start at 10 am at Lehman's

Supper Club in Rice Lake. Sept. 11, 2013; Oct. 2, 2013; Nov. 6, 2013; Dec. 4, 2013; Jan. 8, 2014; Feb. 5, 2014; March 5, 2014; April 2, 2014; May 7, 2014; June TBA

#### Southeast - Meetings from 12-2:30 pm. TBA

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

CESA 3. Oct. 23 2013; Nov. 20, 2013; Feb. 26, 2014; April 23, 2014

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

Sparta Area SD Admin & Education Center. Sept. 5, 2013; Oct. 3, 2013; Nov. 7, 2013; Dec. 5, 2013; Jan. 2, 2014; Feb. 6, 2014; March 6, 2014; April 3, 2014; May 1, 2014; June 5, 2014

#### WI Valley - Coffee at 9 am, Meeting at 9:30 am.

Aug. 16, 2013, Antigo; Sept. 20, 2013, Merrill; Oct. 18, 2013, Lakeland; Nov. 15, 2013; Dec. 13, 2013, Wausau; Feb. 14, 2014, Stevens Point; March 14, 2014, Auburndale/Stratford; April 18, 2014, Minocqua; June 19, 2014, D.C. Everest; Aug. 15, 2014, Antigo