



Taking Care of Business

Wisconsin Association of School Business Officials

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Inside This Issue

President's Message	3
Executive Director's Report	5
Legislative Update	7
ASBO Update	8
ASBO New Members and Milestones	9
Recognition: The WASBO Approach	11
Meet WASBO Board of Director Candidates.....	12-15
Meet WASBO President Elect Candidate.....	16
Meet WASBO Treasurer Candidate	17
Lessons Learned from Marilyn: 42 Years in the District Office.....	18
Over Utilization and Under Utilization Concepts in Relation to Your WASBO p-Card Corporate (overall) Credit Limit.....	20
Joyce Smalley WASBO's 2015 Shining Star	22
State Education Convention Recap	22
Upcoming Professional Development.....	23
The Control of Hazardous Energy (Lockout/Tagout): An Overview	24
Meet WASBO Employee Dyshaunn Simmons	26
Transportation & Bus Safety Conference Recap.....	27
Wire Fraud is on the Rise.....	28
Facilities Management Conference Recap.....	29
FBI Issues Wire Transfer Scam Alert: Millions Lost in 'Business Email Compromise' Scheme.....	30
Madison College Campuses Offer Buildings & Grounds Continuing Ed	32
Mrdjenovich: Improving Education.....	33
Schools Can Bill Medicaid for More Student-Health Services, Feds Say.....	34
2015 WASBO Accounting Conference Schedule	35
Taking Care of Our Own...And Then Some.....	36
Doing the Math on Teacher Pensions: How to Protect Teachers and Taxpayers.....	37
\$400 Million in Federal Funds Now Available.....	37
Increase Your Green: People, Planet and Profits	38
Sun Prairie School District Uses <i>Investing in Wisconsin Public Schools</i> with Community.....	40
Book Review: 5 Levels of Leadership	42
Court Decision Holds that Retiree Benefits Do Not Automatically Vest.....	43
Can the Custodian of Records Deny a Citizen's Request to Use a Smart Phone or Digital Camera to Make Their Own Copies of Public Records?.....	45
WSSCA Offers ALiCE Training	45
Welcome New Members/On the Move.....	46
Stay Connected	47

Betty Zimdars 2015 School Business Manager of the Year

We honored Betty Zimdars, Assistant Superintendent of Business Services for the Howard-Suamico School District, as the 2015 WASBO School Business Official of the Year at the State Education Convention in January. The award was presented in recognition of her leadership in schools, commitment to professional development, active participation in her profession, and role in her community.

Betty started working for the Howard-Suamico district in the mid-1980s with an associate's degree, and since that time has earned her bachelor's and master's degrees. Under her leadership, the district has received the ASBO International Meritorious Budget Award more than 15 times – an accomplishment matched by only 20 school districts worldwide. The district also has received the Wisconsin Forward Award. As a member of WASBO, Betty has served as a director, officer, volunteer, and presenter; she currently serves on the WASBO Accounting Committee. She also has been a presenter for ASBO.

Betty was nominated by WASBO's Bay Area regional and her superintendent, Damian LaCroix. Her regional colleagues cited Betty's strategic focus, and willingness to share her skills and experience. A letter of recommendation from Emily Wells of Howard-Suamico explained, "Betty has had and



Woody Wiedenhoft, Betty Zimdars and John Gahan

continues to have the foresight to maintain stability within our district and continue to move it forward during a time of financial crisis. She has been a key leader in various district initiatives, which include the overseeing of an additional elementary building. Betty's vision of providing optimal learning environments for the children of our community is also visible in the changing look and feel within our buildings. Without her financial knowledge and skills, these endeavors would not have been possible."

Superintendent LaCroix noted Betty's leadership in the schools, commitment to lifelong learning, and her active participation in the professional and community. "She is adept at listening to diverging viewpoints, working toward consensus, and making decisions that are best for students. She is a true ambassador for the profession of public education."

This honor carries with it a \$500 cash award, sponsored by Hutchinson, Shockey, Erley & Co. Betty also has the privilege of presenting a \$1,500 scholarship, sponsored by Liberty Mutual, to a 2015 graduating senior from the Howard-Suamico School District. We are pleased to honor Betty Zimdars as the 2015 WASBO School Business Official of the Year. 🇺🇸



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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

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Editor: Woody Wiedenhoef

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President's Message

What is Advocacy?

*By John Gahan, Business Manager, Pewaukee School District
President, WASBO Board of Directors*



John Gahan

With the recent introduction of the State of Wisconsin Budget Proposal, we begin the season of advocacy for every member of the WASBO organization. Part of the mission of the WASBO organization is to provide resources, training, and support to members and educational organizations to improve advocacy skills that enhance their influence on the decision making of policy makers in regard to school finance. This statement can have different meanings or form for each of our members. How are you an Advocate? How can you use WASBO members to help you build your skills and expand your influence?

One of the first necessities of advocacy is understanding. Often we see this as understanding our daily responsibilities and how we can build continuous improvement cycles to get better at what we do. This may be through the allocation of resources or by discontinuation of a program. To be effective advocates for public education, we also must take the time to understand what is being presented by the other side of the table. Taking the time to expand our knowledge will improve our effectiveness in expressing our story.

As in most cases, communication is a key element in being a successful advocate. Being effective as a communicator requires you to be organized and clear in the intent of your communications. Building large spreadsheets with a multitude of interrelated data points that can change the output with a single stroke of the keyboard are great for doing analysis of complex topics and are a necessity for most of us to forecast our budgets. However, when these are presented to constituencies who do not understand the interrelationships of the variables, the intent of the message is lost. This can be referred to as the "curse of knowledge," or in other words, just having the audience lost and overwhelmed in the details.

An effective method would be to simplify the communication. Prior to presenting the topics, take a step back to ask the question "What is the most important message I want the listener to take away?" From this point, go back to your large spreadsheet and pull the most concise data points out that support your message. This will pinpoint the communication to the small number of key messages you would like to convey.

We are very fortunate to have a membership comprised of many effective communicators. Our principal advocacy arm of our group is through the leadership of the SAA and John Forester. Please take a moment to visit the SAA website at wsaa.org and review some of the materials about effective advocacy.

Over the next several weeks, please take time to reach out to your colleagues and convey key messages about what makes your district strong. You can have a positive influence on what happens across the state through effectively advocating for public education. When advocating within the scope of your job, please remember this simple quote from Benjamin Franklin: "Tell me and I forget. Teach me and I remember. Involve me and I learn."

Thanks for all that you do as WASBO members to help advocate for public education in Wisconsin and beyond. 🇺🇸

Advertisers

A'viands Food & Services Management.....	20
Community Insurance Corporation	23
e~Funds for Schools	47
EMC/M3/Tricor	6
Hoffman Planning, Design & Construction.....	15
MEP Solutions	32
Miron Construction.....	25
National Insurance Services	10
PBBS	29
Security Health Plan.....	4
ServiceMaster	2
Springsted.....	25
WEA Trust.....	14
WEA Trust Member Benefits.....	27
Weidenhammer.....	33
WI OPEB Trust.....	16

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WASBO Leadership

By Woody Wiedenhoef, Executive Director, WASBO

WASBO is fortunate to have so many leaders in our ranks. We recognize those that excel in their districts, communities and in their profession through our Professional Recognition Program. We have a highly qualified slate of candidates running for the WASBO Board. We have representatives of our Wisconsin leadership in Tom Wohlleber as a Director on the ASBO International Board and our members who serve on ASBO committees. We lead the way in advocating for a fair, equitable and excellent education for all students in Wisconsin. And finally, we support future leaders through our Student Scholarship Program.

Professional Recognition Program

WASBO honors Betty Zimdars as the 2015 Business Manager of the Year (sponsored by Hutchinson, Shockey, Erley & Co.) Betty is the Assistant Superintendent of Business Services at Howard Suamico School District. We also honor Joyce Smalley as WASBO's 2015 Shining Star (sponsored by Quarles & Brady, LLP). Joyce is the Finance Manager at the La Crosse School District.

WASBO Professional Recognition Program nominations are due March 2, 2015.

WASBO has many deserving candidates for award nominations. Recognize them by nominating them for one of the following WASBO awards.

- 2015 Wallace E. Zastrow Award – Sponsored by Wisconsin Investment Services Cooperative (WISC)
- 2015 New School Business Manager of the Year – Sponsored by Key Benefit Concepts
- 2015 Facilities Manager of the Year – Sponsored by Stalker Sports Floors and SchoolDude
- 2015 Business Services Award – Sponsored by Baird Public Finance
- 2015 Tina Hafeman Friend of WASBO
- 2016 School Business Manager of the Year – Sponsored by Hutchinson, Shockey, Erley & Co.
- 2015 Shining Star Award – Sponsored by Quarles & Brady, LLP

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

Candidates for the WASBO Board

The success of WASBO being able to meet its mission of providing professional development, networking of WASBO members and providing advocacy for Wisconsin students is directly attributable to WASBO members serving WASBO members. I wish to thank the following people for wanting

to be involved at the WASBO Board level. The following WASBO members will be running for WASBO Director Positions – Brian Adesso, Jessica Schroeder, Lori Ames and Nathan Jaeger. Kenneth Mischler will be running for Treasurer and Pat Finnemore will be running for President Elect. Please take the time to thank them for their desire to help WASBO. The election is going to be held online in April. Please remember to vote when the link arrives in your email.



Woody
Wiedenhoef

Advocacy

There have been numerous interesting proposals made by the Governor and Legislature for the next bi-annual State Budget. Please read carefully John Forester's article as to the SAA position and strategy to address these issues. John will also be keeping us up to date on activities at the capitol. Please provide him the help he asks for in his blog in order to help the students in your school district.

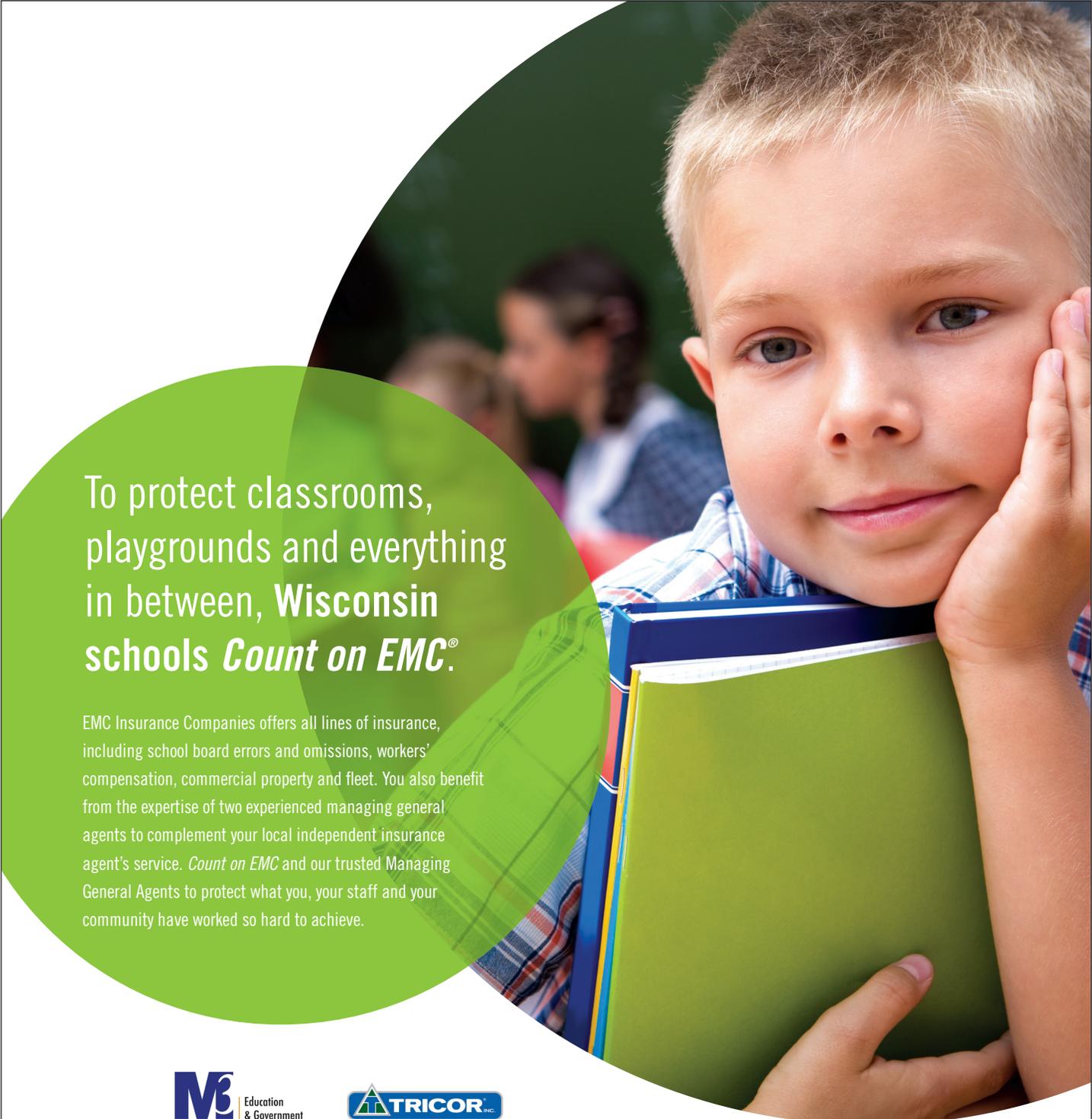
ASBO International

Have you thought about joining an ASBO International Committee but were concerned about the cost of participation? WASBO, through the fundraising efforts of our annual Spring Auction, offers support of up to \$1,000 to individuals serving on ASBO committees through the ASBO Professional Development Grant. Apply at WASBO.com.

Student Scholarships

Our next fundraising opportunity will be at the Spring Golf Outing and Bike Ride as part of the Spring Conference. We are again pleased to offer eight high school student scholarships and one scholarship for a school business management graduate student because of these activities. It is an excellent way to help the students in Wisconsin. We also need to thank our sponsors who help provide funds for these scholarships. Matching scholarships require applicants to interview their superintendent, business manager or bookkeeper regarding the effects of revenue limits on their district. We appreciate the time you offer students to assist them in their scholarship applications. If you have a graduating senior this spring, encourage him or her to apply by March 2, 2015. The Dr. Bambi Statz Academic Scholarship is offered to WASBO members enrolled in a school business management master's program.

The power of a vital WASBO Vision and Mission becomes apparent because WASBO members are active and influential leaders. Thank you for making WASBO the strong, vital organization that it is. 🇺🇸



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Budget Alert - \$150 Per Pupil Cut

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



John Forester

As you know, Governor Walker formally introduced his 2015-17 State Budget proposal and it is clear that the all-out attack on public education continues in Wisconsin. And, the lion's share of the attack can be categorized in three general areas: 1) the proposed \$150 per pupil categorical aid cut in the first year of the biennium, 2) dramatic expansion proposals for private school vouchers and privately-run charter schools, and 3) damaging education policy prescriptions on Common Core, school accountability, assessments, and teacher preparation and licensure; as well as the elimination of the Local Government Property Insurance Fund.

There is a lot of detail in this budget which impacts public education. It will likely take the Legislative Fiscal Bureau (LFB) until the end of February or more to complete their analysis of this budget. DPI will have something sooner. We will pick up the fight against voucher and charter school expansion, and policy in the budget a little later. For now, SAA members need to focus on the impact of the proposed \$150 per pupil aid cut in the first year of the biennium. Consider the following:



- Anything less than an inflationary increase in per pupil revenues will require reductions in educational opportunities for public school children.
- Governor Walker's budget plan includes no revenue limit per pupil increase in either year of the biennium.
- Although the Governor indicated in his budget address on February 3 that school revenues remained essentially flat, his budget plan actually imposes a \$150 (\$127 million statewide) cut in the per pupil categorical aid in the first year of the biennium. This \$150 per-pupil categorical aid was in the 2014-15 state budget base and expected in each year of the 2015-17 biennium.
- Therefore, even though the Governor proposes to add about \$142 million (about \$165 per pupil) to the per pupil categorical in the second year of the biennium, the net result is a cut of approximately \$135 per pupil (\$112 million) over the biennium. But, the biggest issue is the impact of that first-year cut on your budget and your ability to provide high-quality educational opportunities for the children you serve.
- In addition to the \$142 million in the per pupil categorical in the second year of the budget, the governor also proposes spending \$211.2 million in increased school levy credits (\$105.6 million in each

year) and \$108 million in increased general aid with no corresponding revenue limit increase. Therefore, this \$319 million is "school funding in name only." It simply flows to taxpayers as property tax relief and schools cannot spend one dime of it on the educational needs of their students.

The battle lines have been clearly drawn, and there is no denying that the threat to public education is very real in this budget process. I call on each district administrator to assemble your leadership team, collaborate on your district message and craft your plan for influencing your parents, your staff, your community, your media and your lawmakers — and then coordinate the delivery of that message. This budget will harm your school district and the children you serve. Never has it been more important for you to reach out to your legislators and your community. In your communication, please cover the following:

- Invite your legislators to your school(s). Use the opportunity to show them some of the great educational opportunities that kids in your district are afforded. Show them what learning looks like today in your schools.
- Highlight the budgetary and human impact that the Governor's proposed \$150 per pupil aid cut in the first year of the budget will have on your school district. Emphasize the lost educational opportunities for your students.
- Encourage your legislators to support putting the \$211 million in school levy credits and the \$108 million in increased general aid (with no revenue limit increase) into a form that you can spend on the needs of the children you serve. Many legislators have already said that they support putting more money into schools if May revenue estimates show more revenue is available. I say, "Pay the Kids First!" I believe our civic-minded Wisconsin citizens will say keep my \$5 or \$10 in projected property tax relief from this "school funding" and use it for the children.
- Tell your district's story. They need to hear it.
- Encourage your legislators to stand up for Wisconsin school children.
- Thank them for listening and for working for the citizens of Wisconsin.

Please send a letter (phone calls work too) using the

Continued on page 15

ASBO Update

The Value of Professional Association Membership

By Tom Wohlleber, ASBO International Director

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

This is the time of year when most of us are knee deep in the development of our school district budgets for the upcoming fiscal year. This normally challenging process just became exponentially more difficult with the recent introduction of the 2015-17 state biennial budget by Governor Walker.

The value of professional association membership can be especially realized when we face uncertainty, difficult or challenging times. Being able to efficiently connect/network with colleagues, sharing of strategies and best practices, access to comprehensive libraries of resources, quality professional development and the opportunity to leverage the power of collaboration are just a few of the many benefits that professional association membership can provide.

Most, if not all of us, would strongly agree that our membership in WASBO is invaluable. Having experienced the benefits of belonging to our state association, I would like you to consider the additional resources, professional growth and other benefits available to you through membership in ASBO International. Over the next few WASBO newsletters, I will highlight some of the many valuable benefits that are available to you through membership in ASBO International.

Publications, News & Information



ASBO brings you the latest in school finance news and information, best practices, and cutting-edge strategies to help you become a more effective educational and business leader. ASBO provides critical resources to its members through an array of media - from quick daily email briefings to

in-depth magazine features on relevant topics and issues facing school business officials.

School Business Affairs is ASBO International's award-winning magazine — it alone is worth the cost of ASBO membership. *School Business Leader*, ASBO's newest publication, features practical tips, case studies, tools, and advice to help you be the best school district leader you can be.

Accents Online e-newsletter provides research overviews of school business finance and administration news in addition to an overview of the best discussions and hot topics from the Global School Business Network. It provides members with the latest association event and program updates as well as a member spotlight. Our own Lori Ames was recently featured in the member spotlight. *School*



Tom Wohlleber

Business Daily is ASBO's workday morning customized email briefing that summarizes the latest and most important news in school business from around the world.

School Business Minute is a two-page, quick-read publication featuring timely, relevant topics that school business management professionals want to know more about - education funding, HR management, financial resource management, energy optimization, facilities management, and more. It highlights the key takeaways from the most popular ASBO annual meeting program sessions in a quick, easy-to-read format.

ASBO Radio, hosted by ASBO International Executive Director John Musso, is an online radio program featuring 10-15 minute interviews with school business official colleagues and leaders in school finance. *ASBO Radio* interviews have covered a variety of topics, including making effective budget presentations, serving special needs students, managing the school technology crisis,

Continued on next page

WHY ARE YOU A Member of ASBO International?



Barbara Salatto
Member Since 1989
Associate Superintendent for
Management Services
Patchogue, New York

I'm a member of ASBO International because...

"When I was first appointed to my role of assistant superintendent, I was overwhelmed by the diverse job responsibilities. I turned to ASBO International and my local state affiliate for help. From my very first ASBO International annual meeting, I brought back numerous relevant materials and ideas that I could quickly implement in my district. Twenty-five years later, I continue to find many cost-saving ideas and best practices."

Membership with ASBO International is about more than instant access to the best professional development for today's school business leaders; it's also about being part of a global network. Are you taking advantage of all that your membership offers?

Visit asbointl.org/Network to connect with colleagues like Barbara and many more of your peers.



asbointl.org

ASBO Update

Continued from previous page
coping with the healthcare mandate, and implementing radical school cost-containment strategies.

Emerging School Business Leaders Scholarship

The Emerging School Business Leaders Scholarship is a great opportunity for new school business managers with five years of experience or less to connect with peers and participate in leadership development. This new scholarship awards 18 recipients with \$2,000 to attend the 2015 ASBO Annual Meeting & Expo, October 23–26 in Grapevine, Texas, and provides yearlong mentorship and networking opportunities! All school business professionals with five years of experience or less in school business are encouraged to apply! Applications are due May 1, 2015. For more information, visit <http://www.asbointl.org/learning-career-development/awards-scholarships/emerging-school-business-leaders-scholarship>.

As always, please contact me if you have any questions or would like to provide feedback or suggestions regarding ASBO. 🇺🇸



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Introducing EMERGING School Business Leaders SCHOLARSHIP

Investing in Your Future

New for 2015, ASBO International's Emerging School Business Leaders Scholarship welcomes 18 new school business managers to the profession with a network of peers and mentors and a \$2,000 scholarship to attend the 2015 Annual Meeting & Expo.

All school business leaders with 5 years or less of experience are encouraged to apply! ASBO International or ASBO affiliate membership is not required.



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Apply by May 1

asbointl.org/Scholarship

ASBO MEETING DATES

2015 Annual Meeting & Expo
Oct. 23-26, 2015 - Grapevine, TX

2016 Annual Meeting & Expo
Sept. 23-26, 2016 - Phoenix, AZ

2017 Annual Meeting & Expo
Sept. 22-25, 2017 - Denver, CO

2018 Annual Meeting & Expo
Sept. 21-24, 2018 - Kissimmee, FL

2019 Annual Meeting & Expo
Oct. 25-28, 2019 - National Harbor, MD

2020 Annual Meeting & Expo
Oct. 2-5, 2020 - Nashville, TN



ASBO International New Members

December 2014

- J.J. Gutman, Ripon Area SD

January 2015

- Shari Kordecki, CSRM, SD of New Berlin

ASBO International Milestones

February 2015

- Jilleen Bodwin, RSBA, SD of Denmark (10 years)

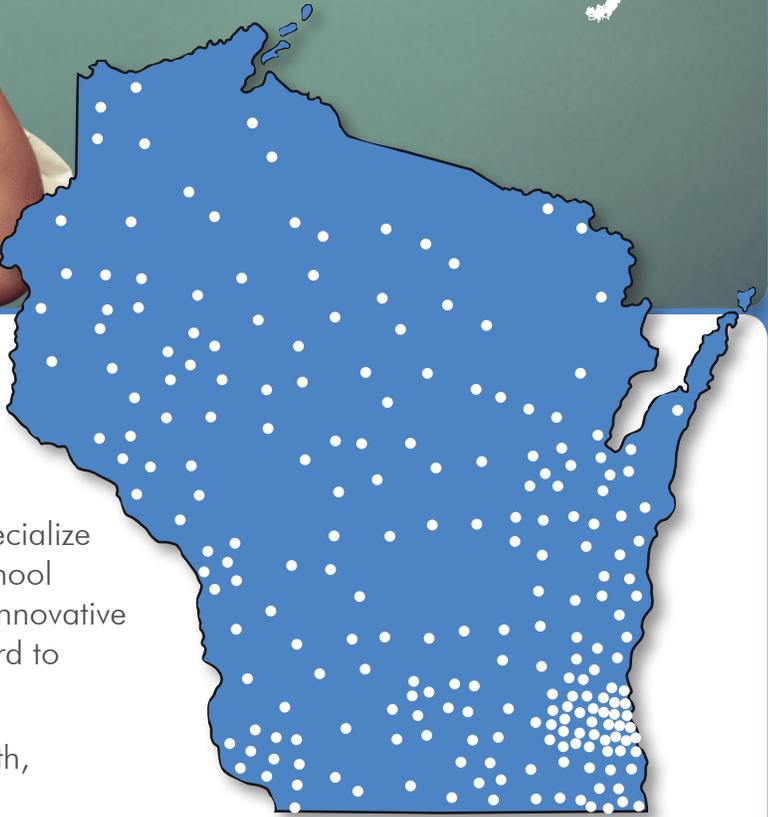


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Scott Bachhuber
Market Development, Employee Benefits
sbachhuber@NISBenefits.com

RECOGNITION: The WASBO Approach

By Jay Clark, Associate District Administrator, School District of Holmen

As my WASBO Board of Directors term comes to a close, it provides an opportunity to reflect on the experience. It has been an honor to serve. It has been humbling. It has provided a growth opportunity If you are able, I would encourage you to consider seeking a director's position.

One specific activity receiving attention during my time on the board is the WASBO Professional Recognition Program.

A little background: In my 20s I was of the mind that individual recognition was unnecessary. "Why would you get recognition for doing what you're supposed to do?" Beyond unnecessary, I was of the mind that public recognition could be downright counterproductive: "There is no 'I' in team." This early thinking was likely a product of a family environment (including a healthy dose of sibling rivalry that fed off recognition), 'Catholic guilt' (put into action anytime you started to feel proud), and a focus on team success in athletics.

Over time, my experiences leading others taught me to look at recognition differently. This new way of thinking emerged simultaneously through personal and professional reading on leadership. Being mentored by a highly effective leader and observing the mentorship of others further convinced me to see recognition as a means to help people and organizations achieve great things.

This brings me to the work being done on the WASBO Professional Recognition program. An effective recognition program is an important contributing factor to WASBO success. Our previous program had been effective. Many good people have been recognized. Yet, as new awards have been added, and feedback received, it was clear that improvements could be made to the program. A group of WASBO members set about the task. The work of this group was divided into two phases. Phase one was a review of and modifications to the existing awards. The second phase included the development of an evaluation matrix for each of the awards.

At its best, our recognition program will:

- Identify excellence that can be modeled by others.
- Provide an opportunity for a collective "thank you" to those who have made exemplary contributions.
- Address the diversity of the contributions made.

These are important goals for any Professional Recognition Program. To achieve these goals, the WASBO Professional Recognition Program needs clearly defined and rigorous standards. This ensures the proper distinction of excellence. Without such definition and rigor we might unintentionally promote typical as excellent.

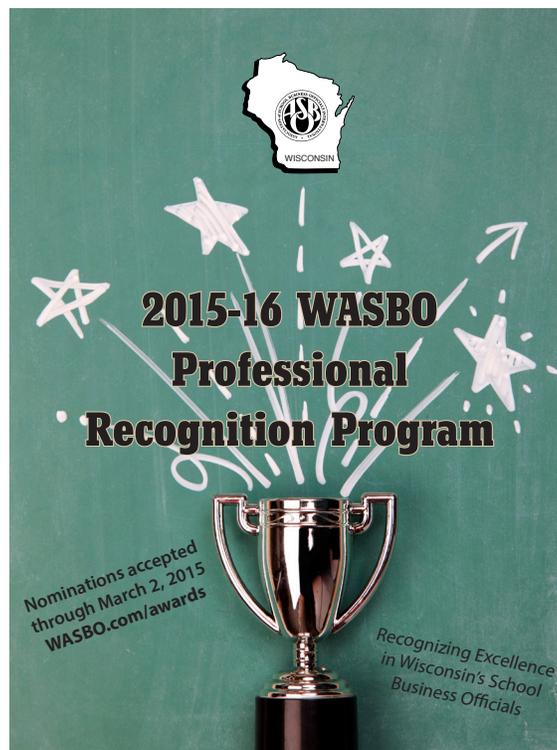
By examining all awards simultaneously, we ferreted out the unintended overlaps in qualifications and selection criteria. These previous overlaps created confusion in the nomination process as well as the award selection process. The awards program will now more fully address the diversity of the contributions made. In addition, the WASBO program is now more closely aligned with the ASBO awards program.

The second phase focused on development of an evaluation matrix for each award. The matrix ensures consistency in evaluation of nomination materials and promotes consistency in selection of award recipients. This might sound straight forward enough. However, having served in the selection process, I can attest that the application materials are anything but uniform. The disparity in application materials can lead to differences in interpretation and inconsistency in result.

Consider nominating a peer at WASBO.com/awards. Recognition helps fuel our pursuit of excellence. We are working hard to make sure that, as in so many other things we do, WASBO is recognized as doing it better than the rest. Clearly I've shaken the 'Catholic guilt' complex of my younger days. "Forward." 🐾



Jay Clark
WASBO
Director



Meet the Candidates for WASBO Board of Directors

Brian Adesso

Director of Business Services, Menasha Joint School District
Director Candidate



Hello, WASBO Members, I appreciate your consideration of my candidacy to serve on the WASBO Board of Directors. Currently, I am serving as the Co-Chair of the WASBO HR Certification committee. Through my experience leading the HR Certification committee I have had the opportunity to work with a diverse group of individuals. I have honed my ability to listen before being understood over the last six years with the over 34 Board of Education members that I have served. I believe my professional background, my ability to listen and work towards a common goal, and my desire to make WASBO the best it can be makes me a quality candidate for a leadership position within WASBO.

Through working with three different school districts, I have learned the importance of continually seeking knowledge and professional development. Additionally, I have learned the importance of listening, understanding other perspectives, collaboration, and problem solving. To me, that is the real impact of WASBO; having others to collaborate with and ensure we are making our field the best it can be.

From a personal perspective, I have been married to my wife, Anna, for nine years. We have two daughters aged 4 and 6. Both our daughters love gymnastics. As a family, we love going on walks, enjoying the various YMCA activities and community events, and cooking/baking together. My wife is 100% Italian, and we love sharing the family recipes and traditions with our daughters. I am also a pilot and have

a slight obsession with everything aviation related. I love attending air shows with my family and educating them about aircraft and aviation.

I would be honored to be selected as a WASBO Board member. It is my hope to be able to give back to our wonderful organization. I would approach this role with an open mind and a commitment to my fellow members to support our mission. Furthermore, I will honor the diversity of all members and communities WASBO represents. Thank you. 🇺🇸

Lori Ames

Fiscal Services Manager, Middleton-Cross Plains Area School District
Director Candidate



Hello, fellow WASBO members! I am so excited to present myself as a candidate for the WASBO Board of Directors. Believe it or not, I have been working in the school finance area for 24 years! Yes, I really said 24 years, and WASBO has been a part of every single one!

The story starts with my interning as the Business Assistant for the Oak Creek-Franklin Joint School District. Until then, I had spent a considerable amount of time delivering pizzas and checking out groceries. I didn't even know how to use a 10-key! To say the learning curve was as high as Mount Everest is an understatement. WASBO entered my life, and suddenly, I had a whole network of people who were willing to share and help guide me to success.

What started as an internship morphed into a full-time position. With WASBO's support, I developed the confidence to stretch my wings and became the Business Manager for the Parkview

School District and eventually the Director of Business Services for the Platteville School District. Over the course of those 13 years, I continued to grow because of the various WASBO workshops and connections with members that I had created.

My travels then took me to the Department of Public Instruction as a school finance consultant. I didn't leave school finance, but I definitely looked at it from a different perspective. I was creating the reports that I used to complete! Although my perspective changed, my relationship with WASBO remained the same. I still attended (and even presented) at workshops, but I continued to learn and grow, relying on the many positive relationships with fellow WASBO members.

After nine incredible years, I realized how much I needed to be back in the field. I wanted that visual reminder every day why I entered the field of education. I jumped at the opportunity to become the Fiscal Services Manager for the Middleton-Cross Plains Area School District and haven't regretted my decision for one minute.

During this time, I married my husband Jim and raised two children, Haley and Tanner. Jim is a job coach for developmentally disabled adults in the workplace in the Middleton area. Tanner is in his first year at UW-Whitewater. Although he has no desire to work in an office like his mother, he is interested in becoming a speech and language teacher in a school district. Haley is living in Virginia where her husband is based in the Navy. They are expecting their first child at the end of April. I am going to be a grandma!

Public education has seen its fair share of challenges over the course of the last few years. Even during the toughest of times, WASBO has stayed the course, continuing to provide knowledge and support so that we can do the very best for our students, staff,

Continued on next page

Meet the Candidates for WASBO Board of Directors

and communities.

How could I not run for the Board and hope to give back to WASBO and its members what I received for so many years? I truly understand the importance of keeping the spirit of the organization alive and strong. Thank you for your consideration! 🇺🇸

Nathan Jaeger

Director of Business Services, Whitewater Unified School District
Director Candidate



My name is Nathan Jaeger and I am proud to serve as the Director of Business Services for the Whitewater Unified School District. Thank you for your consideration of my candidacy for the WASBO Board of Directors.

Although we each took a slightly different path to get to our respective roles within the educational system, those paths likely share two common elements: a genuine belief in the value of education and some mentorship along the way.

I began my career in education as an elementary classroom teacher in Whitewater where I taught for three and a half years. As a teacher, I witnessed firsthand the impact providing a strong educational foundation can have on students. Although I enjoyed teaching, I always had a desire to impact students and serve in education in a broader capacity.

I was introduced to the profession of school business management and the WASBO organization while earning my undergraduate degree at UW-La Crosse. I didn't realize it at the time, but the individual who gave me my first glimpse of this worthy profession would play a large role in shaping my future.

Her first piece of advice was for me to join WASBO! I followed that advice, and as I began my teaching career, I continued on the path to become a school business manager. I enrolled in the UW-Whitewater graduate program and spent my summers volunteering in WUSD's business office. I had the good fortune of training under two experienced and respected business managers who were serving the district on an interim basis. These experiences, coupled with my formal education and the professional development opportunities provided by WASBO, prepared me to take on the challenge and realize my goal of becoming a school business manager in 2011. Since then, I have grown professionally through the many experiences and challenges of being a school business manager.

Throughout my career, I have been surrounded by exceptional professionals who have been gracious enough to share their time and expertise with me. These individuals epitomize one of WASBO's greatest strengths: fostering a professional network of support.

I am running for the WASBO Board because I am eager to get more involved with the organization that has been so influential in my professional growth. I look forward to advocating for public education as a member of the WASBO Board of Directors.

I would be honored to hold a leadership role in our organization and am committed to helping WASBO pursue the mission of providing professional development, fostering a network of support and advocating for outstanding educational opportunities for all children in Wisconsin. Thank you for your consideration in supporting my candidacy for the WASBO Board. 🇺🇸

Jessica Schroeder

Environmental, Health and Safety Program Manager, CESA 10
Director Candidate



Greetings, WASBO Members! My name is Jessica Schroeder and I would appreciate your consideration when voting for the WASBO Board of Directors positions.

Currently, I am the Environmental, Health and Safety Program Manager at CESA 10, a nonprofit educational agency. In this capacity, my team and I provide environmental, health and safety services to school districts across the state. The goal of this program is to protect the health and safety of students, staff, and visitors, as well as ensure compliance with local, state, and federal regulations. I have held this position for the past nine years and actively assist nearly half of the districts in the state.

In 2001, I earned a Bachelor of Science in Industrial Technology/Safety Management from the UW-Platteville. While employed at CESA 10, I have been certified as an Asbestos Inspector, Asbestos Management Planner, and Lead Risk Assessor. Other certifications I have obtained include First Responder Certification, Building Operator Certification Level 1, WASBO Facility Manager Certification, and WASBO Certified School Risk Managers (CSRM) designation.

Prior to joining CESA 10, I gained experience as a Loss Prevention Consultant at Wausau Insurance, the Corporate Environmental Safety OSHA Manager at Organic Valley, and Safety Coordinator at Miles Kimball. My career path began with two safety related internships while in college, one at Lands' End and the other at the

Continued on page 15



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Meet the Candidates for WASBO Board of Directors

Continued from page 13

State of Wisconsin, Department of Administration, Bureau of Risk Management.

In an ongoing effort to serve the school districts of Wisconsin, I serve on the Board of Directors for the Wisconsin School Safety Coordinators Association (WSSCA). Previous organizational involvement includes membership in the Reedsburg Area Jaycees, past board member of the La Crosse Area Occupational, Safety, and Health Council as well as a past member of the Oshkosh Safety Council.

I feel privileged to have been granted the opportunity to present on the topics of safety and risk management at several WASBO conferences and will soon begin

instructing the WASBO Certified School Risk Managers sessions. In addition, I serve on the WASBO Safety and Risk Management Committee. Each experience has been rewarding and I look forward to becoming more involved in the organization and to contributing to the wonderful efforts currently underway.

In our free time, my husband Brad, a Civil Engineer, and I enjoy golfing, fishing, hiking, biking, and exploring all of the wonderful opportunities available in Wisconsin and this great country!

Thank you for your consideration of my nomination for the WASBO Board. 🇺🇸

Budget Alert - \$150 Per Pupil Cut

Continued from page 7

information discussed above to the members of the Joint Finance Committee and your legislators as soon as possible. I know many of you have already contacted your legislators, and I thank you. I also ask that you contact them again.

In my 13 years of representing the SAA, I may have been in a few fights that, upon reflection, maybe I should not

have been in. This isn't one of those. So let's fight. Let's fight for everything that is good in public education. Let's fight for all the reasons we made education our life's work. But, most importantly, let's fight for the children we serve today...and for those we will serve tomorrow.

Thanks for listening, and thanks for all your efforts on behalf of Wisconsin school children. 🇺🇸

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Meet the Candidate for WASBO Board President-Elect

Patrick Finnemore

Director of Facilities,
Kenosha Unified
School District
*President Elect
Candidate*



Hi everyone, I'd like to thank you in advance for spending a few minutes reading a little about myself and the other candidates for the WASBO Board. I must admit that I find it a little uncomfortable writing about myself, but I do appreciate this WASBO tradition. I absolutely love what I do for a living, and have enjoyed each step in my path from college at UW-Platteville in the early 1980s through my current job of the past 14 years as Director of Facilities for the Kenosha Unified School District.

I have both a Bachelor and Master's degree in mechanical engineering and am a Registered Professional Engineer in the State of Wisconsin. Not the typical educational background for a WASBO member, but a transition from design engineering to facilities in the mid-1990s made school facilities a viable career destination. I started my career in the nuclear power industry and worked a total of 10 years in that field at Westinghouse Electric and Wisconsin Public Service. I worked with some amazing people and learned a great deal in those years, but was looking for a new challenge and a greater variety of projects. I took a design engineer/project manager job at Foth & Van Dyke which is a consulting engineering company in Green Bay, and found the variety of work that I was looking for. I was able to work on projects for industrial clients such as Kraft Foods and Proctor & Gamble as well as numerous commercial/institutional projects. Frequently, I found myself being asked to expand the service we were providing to include more than just design, and through that I began

performing facilities-type services for several clients. The facilities related work offered the variety and daily challenges that I was looking for in a career.

I left engineering for good in 1997 when I took a facilities director position with ShopKo Stores, and for three years I was part of a team that expanded ShopKo from 130 stores to almost 400 stores. It was an exciting time, but the near constant travel made it hard to be a good husband and father as well as ruining what had been a pretty good golf game. In the fall of 2000, I was hired as the facilities director for the Kenosha Unified School District. It was a district struggling to transform itself in a community that was rapidly growing. There were some days that I really questioned my sanity for taking this job, but it truly was a perfect fit. I have the best of both worlds to satisfy my interests — the variety of the day-to-day needs of 40-plus schools and a steady stream of large capital project work. Over the years, the food service, transportation, and warehouse/copy center departments have been moved under my areas of responsibility providing additional challenges.

Throughout this time, WASBO has been an organization that has provided me with support and opportunities for professional and personal growth. I was a member of the WASBO Board from 2003-2006, and co-chaired the Facilities Committee for approximately six years. During that time, Tom Beck from Neenah and I co-chaired the committee that developed the very popular Facilities Manager Certification program. I remain active on the Facilities Committee and am a regular speaker at the various conferences.

Finally, a little about my family. My wife Mary and I have been married for 23 years after first meeting on a blind date set up by a mutual friend. Mary is a Registered Nurse and is the engine that runs our family. We have two terrific children. David is a sophomore majoring in Finance at UW-Whitewater and Anna is a senior in high school planning on attending Whitewater as well, majoring in early childhood education. In our spare time, we love the outdoors, sports of any kind, and vacationing with family and friends.

Thanks for making it all the way to the end, and for your consideration of my candidacy for WASBO President-Elect.



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Meet the Candidate for WASBO Board Treasurer

Ken Mischler

Director of
Business Services,
Manitowoc Public
School District
*Treasurer
Candidate*



Hi. I am Ken Mischler and I am running for WASBO Board Treasurer. I am currently the Director of Business Services for the Manitowoc Public School District (MPSD). This is my 23rd year at Manitowoc. Previously, I worked 10 years as a Certified Public Accountant (CPA) and four years as the Comptroller for the Oshkosh Area School District. Thus, I am considered ancient. However, I consider myself honest, reliable, capable and experienced.

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

I was born and raised in Kaukauna. I come from a large family with 14 brothers and sisters. I got teased all the time about growing up in a big family. Did you eat or sleep in shifts? No, we slept on top of each other. I have to say I have no regrets being raised in a large family. Most of the family members meet once a

month with our own investment club in Appleton.

My wife, Cindy, is a junior high school English teacher at MPSD. We have three children. Kelly graduated from UW-Whitewater and works in marketing at Milwaukee Tool. Adam graduated from UW-Madison in chemical engineering and chemistry and is currently in graduate school at University of North Carolina. Katelynn is a junior in high school at MPSD and loves dance and volleyball. I am very proud of all of them.

I have been a member of WASBO and the Wisconsin Institute of Certified Public Accountants (WICPA) for many years. In addition, I have been a member of the WASBO Accounting Committee for about 20 years and have been the chairperson for 11 years. The WASBO Accounting Committee's main purpose is to put together the Annual Accounting Conference which meets the needs of both business managers and district bookkeepers. The committee has also been responsible for the revised *School Budget Cycle Handbook*.

I am running for treasurer because I believe I can serve the organization as both a committee chairperson and a treasurer. I bring considerable experience and knowledge to the WASBO organization as a CPA, former WASBO board member and a long-standing business manager. There are more challenges and demands on school districts now than at any time in the years I have been a school business official. In the position of WASBO treasurer, I am certain that I can contribute to the WASBO organization and help fellow business officials in these challenging times. I want to be part of the WASBO success and experience.

I have been a mentor to several future business managers through the WASBO mentor program. It is rewarding to watch individuals grow into remarkable business managers.

They start with a core background and grow into the person that you know they can be.

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

When people ask what I do for a living, I always say I am an accountant/business manager. I can add the perspective of my CPA background to the three-year WASBO treasurer position.

To conclude my message, I want to share a little joke about accountants.

A patient was at her doctor's office after undergoing a complete physical exam. The doctor said, "I have some very grave news for you. You only have six months to live." The patient asked, "Oh doctor, what should I do?" The doctor replied, "Marry an accountant." "Will that make me live longer?" asked the patient. "No," said the doctor, "but it will SEEM much longer."

Well, I think I am a little more exciting than that and will work very hard to be the best WASBO Treasurer I can be. As you know the job of a business official can be frustrating, demanding and at times difficult. On the other hand the job can be stimulating, pleasurable and challenging. It is what you make of it. 🐼

“Education is the most powerful weapon which you can use to change the world.”

~ Nelson Mandela

Lessons Learned from Marilyn: 42 Years in the District Office

By Kent Ellickson, Director of Business Services, Sparta Area School District



Kent Ellickson
WASBO
Director

This past month our long-time Business Services Administrative Assistant, Marilyn Beall, told me she plans to retire later this calendar year after 42 years of service to the Sparta Area School District. Her announcement has given me a chance to reflect on some things that I would like to share with you all. I feel badly that it took her retirement to take a moment to reflect on these things.



First, I should tell you a few things about Marilyn. Marilyn started working for the District as part of Sparta High School's Cooperative Work Experience Program. Apparently she impressed the administrators so much

back then that she was offered a job in the district office following the experience. She has been here ever since. Her responsibilities over the decades included duties in the superintendent's and business office. Her most recent decades were spent in the business office. Marilyn's 42 years of service to the Sparta Area School District is the longest of any other employee, present or former. I believe she will hold this record for some time.

About three quarters into Marilyn's career, I showed up. Yes, I came to my current position 10 years ago with several years of business manager and teaching experience in other districts, a couple of degrees, and the 08 license. However, I lacked some of the appreciation for the really important traits and understanding one picks up by faithfully serving a school district through multiple roles in the district office. These are things I am sure nobody will find overly profound or new, but people like me may not demonstrate them as consistently as we should. Hopefully, I've grown over the last 10 years and will more consistently show others I understand the importance of these things as I continue in the profession:

1. Credibility of the business office and the school district are extremely important.

If we have credibility, we have an important tool to assist us with getting through challenging situations. Marilyn constantly reminds me that it is her job to make sure we all look good. She is extremely good at reviewing communication, calculations, and other items that go out to the public to make sure the writing, math, and format are all done well.

She is even terrific about making sure I don't embarrass myself by protecting me from embarrassing situations such as leaving a tag on a new clothing item, etc. She has been like a mother to me many times this last decade.

2. It is our duty to provide respectful, prompt and courteous service to those needing assistance from the business office.

Often when people contact our office, they are communicating with us on an issue they consider to be very important to them. They may see their issue as the number-one priority of the business office or the district right now. While we may have many number-one priority issues in a given day or even simultaneously, there really is no good reason to give our different customers the feeling their question or issue is not being handled as a high priority item.

The business office handles issues that impact individuals and families in potentially big ways. These are just sampling of some of the things:

- Helping a family work through open enrollment to determine if they can attend the school of their choice.
- Facilitating solutions with the transportation department or contractor when a parent believes a bus stop may not be safe.
- Helping a teacher in February that does not know if she signed up for annualized payroll and is worried if she will have money in the summer.
- Helping the spouse of a seriously ill employee understand health and disability benefits.

Over many years of daily contact on these types of issues, it is easy to forget how the people who may need assistance may feel and the need to show proper empathy. Marilyn continually makes sure people who call, message, or visit with issues feel like their issue will be addressed appropriately.

3. Don't sweat the small things.

We all understand that the office needs to be structured, organized, and efficient. We also understand that our work needs to be accurate

Continued on next page

Lessons Learned from Marilyn: 42 Years in the District Office

Continued from previous page

and timely as we have limited human resources to accomplish what needs to be done. After all, we need to maintain credibility.

However, we are not perfect. Our co-workers are not, either. Although we may be tempted to point out, (but don't), our teachers, administrators, support staff, board members, parents, and taxpayers are also not perfect. Actions of our customers and our co-workers may disrupt to our quest to be structured, organized, efficient, accurate, and timely. These individuals rarely, if even, mean to bring ill will to us intentionally. Sometimes, things just don't go as we plan, no matter what we or others do.

Marilyn is a calming influence in the office. Not only is she calm herself, she helps everyone, including me, to keep things in the proper perspective. In 42 years, she has seen it all. There really are not that many things that are worth getting worked up over. Getting worked up makes us less productive and brings others down as well.

4. Never lose sight of the real reason we are here working in the business office.

In the business office we often find ourselves trapped in a cycle of feeling like a ping pong ball going back and forth rapidly between varied tasks. We get trapped going back and forth between a large variety of tasks

every few minutes. While we are trapped by the back and forth, it is easy to forget the true reason for the existence of our profession.

For me, I sometimes need to leave my office and head down to the three charter schools on two levels below our floor or out to one of the other seven school buildings. Marilyn does not seem to need to do this. I am lucky to hear her talk about doing things for the students all the time, particularly when we are dealing with staff forgetting to follow administrative procedure or board policy.

I will certainly miss Marilyn's technical expertise when it comes to membership reports and audits, open enrollment, foster home and state tuition reports, transportation arrangements, purchasing, e-rate materials, scheduling software, key fobs, completing the First Report for employee injuries, well-organized spreadsheets, and much more.

Most importantly, I will miss what she really brings to the school district every day. Thank you to those of you who get it and model it, perhaps better than some of us. Best wishes as you close in your final chapters of your career.

For those of you who will continue to work in the business office for years to come, let's not only trust and empower our quality people to get things done. Let's take some time to review the real lessons learned from these quality people. 🙌

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Over Utilization and Under Utilization Concepts in Relation to Your WASBO p-Card Corporate (overall) Credit Limit



Dave Wintczak

By David H. Wintczak, V.P., Sr. Relationship Manager - U.S. Public Sector, Treasury & Payment Solutions, BMO Financial Group/BMO Harris Bank N.A.

Over Utilization

It is very common to think that the sum of all the p-Cards limits in your program should equal your corporate limit. (Example scenario: corporate limit of \$50,000. Five cards at various credit limits totaling \$50,000.) However, if you find yourself “ping-ponging” credit limits too often, you can have the combined individual card limits total more than your corporate limit. (EX: Corporate limit of \$50,000. Five cards each at \$20,000 credit limit = \$100,000 in over utilization.) At your discretion, this concept could be applied to any number of your cards or just key people such as your A/P manager, IT department, or business Manager, etc. In this scenario the corporate limit is still \$50,000. Regardless of the over utilization, once the combined purchases on all p-Cards reaches \$50,000 all new purchasing attempts will get declined. So as long as you are keeping close tabs during your billing cycle on what purchases were already made, pending/authorized purchases, and your corporate limit to stay below \$50,000, you should not have an issues with getting declined. DOL (details Online®) can assist you in keeping track of your purchases already made, of course. It is highly recommended that DOL be checked frequently to help avoid situations. All your internal controls should be followed: i.e., cardholders should not be making purchases without your prior approval and authorization.

Under Utilization

Just like over utilization, under utilization of your corporate limit can be useful. (Same example scenario: corporate limit of \$50,000. Five cards each at \$5,000 credit limit = under utilization of \$25,000.) The remaining \$25,000 of corporate limit is still there, but not available to any card for purchasing in this scenario until a Program Administrator makes that adjustment in details Online®. Your p-Cards can be given any credit limit you like in \$100 increments.

Corporate Credit Limit Availability

As a reminder, please note that your available corporate credit limit is reduced by the outstanding/unpaid balance from the previous month. Still working off of the \$50,000 example, if your purchases totaled \$35,000 for last month you only have \$15,000 available for purchases until your \$35,000 payment is posted to your account.

If this inconveniences or restricts the district’s purchasing in any way, please feel free to contact Dave Wintczak at david.wintczak@bmo.com to request a corporate credit limit increase. Please allow 1 to 2 weeks for credit approval. Please include in your email any upcoming purchasing needs such as building projects, textbook adoptions, Google Chromebooks/iPads, or Teachers On Call in your requested increase. Once approved, you will see the increase reflected in the upper right-corner on the first screen in details Online®. Adjusting individual card limits is up to you as discussed above. 🙌

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Joyce Smalley

WASBO's 2015 Shining Star

Joyce Smalley, Finance Manager for the School District of La Crosse, has been chosen as the 2015 WASBO Shining Star Award in acknowledgement of her service, time, expertise, and leadership in WASBO. She has been a member of WASBO since 2001.

Joyce was nominated by the West Central School Business Officials regional. Joyce has been an active participant of the group since its inception about 20 years ago, and has served as the regional coordinator since 2010. She is also chair of the WASBO Transportation Committee and volunteers regularly at WASBO conferences. Joyce has presented at WASBO conferences and presented at the Joint Convention this year.

La Crosse Executive Director of Business Services Janet Rosseter noted that Joyce readily offered to take on the duties of regional coordinator when the position needed to be filled. "In an attempt to make our regional stronger,

Joyce continually monitors what is happening in the other regionals," Janet observed in her nomination letter. Plans are underway to have an educational component in future meetings.

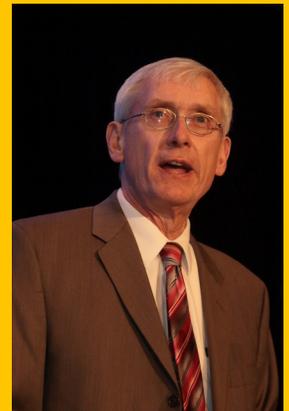
In the letter, she further noted that Joyce "doesn't think what she does is anything special or above the ordinary. She works hard to stay in the background and away from the limelight. Again, that is the fabric of who she is — service above self." Now, the limelight shines on Joyce, despite her reluctance.

This honor carries with it a \$750 professional development grant, sponsored by Quarles & Brady. We are pleased to honor Joyce Smalley as our 2015 WASBO Shining Star. 🇺🇸



Joyce Smalley

2015 State Education Convention



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(Viterbo Credit)

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Aug 12-13, 2015 - Holiday Inn, Stevens Point (Viterbo Credit)

Fall Conference

Oct 8-9, 2015 - The Osthoff Resort & Conference Center, Elkhart Lake, (Viterbo Credit)

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Oct 23-26, 2015 - Gaylord Texan Resort & Convention Center, Grapevine, TX (Viterbo Credit)

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April 29 - Holiday Inn at The American Center, Madison

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The Control of Hazardous Energy (Lockout/Tagout): An Overview

By Jessica Schroeder, CESA 10 Environmental Health and Safety Program Manager
Submitted on Behalf of the WASBO Safety & Risk Management Committee



Jessica
Schroeder

The Occupational Safety and Health Administration's (OSHA's) standard on the control of hazardous energy (lockout/tagout) (29 Code of Federal Regulations 1910.147) requires employers to establish a program and utilize procedures for affixing appropriate lockout devices or tagout devices to energy isolating devices, and to otherwise disable machines or equipment to prevent unexpected energization, start up, or release of stored energy in order to prevent injury to employees. The control of hazardous energy (lockout/tagout) covers the servicing and maintenance of machines and equipment in which the unexpected energization or start up of the machines or equipment, or release of stored energy could cause injury to employees. This standard establishes minimum performance requirements for the control of such hazardous energy.

The control of hazardous energy (lockout/tagout) standard applies to general industry employees. Although according to Subchapter III – General Requirements of Chapter SPS 332 Public Employee Safety and Health (more specifically SPS 332.15 OSHA safety and health standards), which reads, “Except as provided in s. SPS 332.16 and subch. IV, all places of employment and public buildings of a public employer shall comply with the federal Occupational Safety and Health Administration (OSHA) requirements adopted under s. SPS 332.50,” the requirements of this standard also apply to all school district employees who service or maintain machines and equipment.



Energy sources including electrical, mechanical, hydraulic, pneumatic, chemical, thermal or other sources in machines and equipment can be hazardous to

workers. During the servicing and maintenance of machines and equipment, the unexpected startup or release of stored energy could cause injury to employees.

Controlling hazardous energy sources is important because employees servicing or maintaining machines or equipment may be exposed to serious physical harm or death if hazardous energy is not properly controlled. Compliance with the lockout/tagout standard prevents an estimated 120 fatalities and 50,000 injuries each year.

Workers injured on the job from exposure to hazardous energy lose an average of 24 workdays for recuperation.

Employees need to be trained to ensure that they know, understand, and follow the applicable provisions of the hazardous energy control procedures. The training must cover at least three areas: aspects of the employer's energy control program; elements of the energy control procedure relevant to the employee's duties or assignment; and the various requirements of the OSHA standards related to lockout/tagout.

The standards establish requirements that employers must follow when employees are exposed to hazardous energy while servicing and maintaining equipment and machinery. Some of the most critical requirements from these standards are outlined below:

- Develop, implement, and enforce energy control program.
- Use lockout devices for equipment that can be locked out. Tagout devices may be used in lieu of lockout devices only if the tagout program provides employee protection equivalent to that provided through a lockout program.
- Ensure that new or overhauled equipment is capable of being locked out.
- Develop, implement, and enforce an effective tagout program if machines or equipment are not capable of being locked out.
- Develop, document, implement, and enforce energy control procedures (see 29 CFR 1910.147 (c)(4)(i) for an exception to the documentation requirements).
- Use only lockout/tagout devices authorized for the particular equipment or machinery and ensure that they are durable, standardized, and substantial.
- Ensure that lockout/tagout devices identify the individual users.
- Establish a policy that permits only the employee who applied a lockout/tagout device to remove it (see 29 CFR 1910.147(e)(3) for exception).
- Inspect energy control procedures at least annually.
- Provide effective training as mandated for all employees covered by the standard.

Continued on next page

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The Control of Hazardous Energy (Lockout/Tagout): An Overview

Continued from previous page

- Comply with the additional energy control provisions in OSHA standards when machines or equipment must be tested or repositioned, when outside contractors work at the site, in group lockout situations, and during shift or personnel change . 🇺🇸

For more information, contact Jessica Schroeder at jschroeder@cesa10.k12.wi.us

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Meet WASBO Employee Dyshaunn Simmons

WASBO is excited to introduce our newest team member and Clerical Assistant, Dyshaunn Simmons. He is dividing his time between WASBO and AWSA (Association of Wisconsin School Administrators). Dyshaunn comes to WASBO from the Monona Grove Community Vocational Program. The transition program at Monona Grove High School assists students with unique abilities as they transition from school to adult life. The program helps students have full, meaningful lives and to be as independent as possible. This means helping them achieve their academic and functional potential, utilize community resources, participate in post-secondary education or training programs as appropriate, and work in community based jobs.

All of the students in the Community Vocational Program at Monona Grove have a variety of work skills and abilities, and are eager to become contributing members of the work force. Support and training for each student is provided through the school to ensure they are successful.

Dyshaunn's Biography

My name's Dyshaunn G. Simmons. I love art and music. I work at Dane County Public Health and the Monona Public Library. I have graduated from high school, Monona Grove High School. I am 21 years old. My teacher, Sheena Behnke took me to a new job – the Wisconsin Leadership Center, where I put flash drives and name tags, and folding papers, too.

My hobbies are:

- Watching videos
- Playing on the computer
- Going on vacations and swimming
- Listening to music and stories
- Playing piano
- Going on a little free library Scavenger Hunt to find all children's fiction books illustrated by Maraja, Van Gool, Tasha Tudor, Scott Gustafson, Luigi Cavalieri, H. A. Rey, Michael Hague, and Robert Ingpen—*Alice's Adventures in Wonderland*, *The Wizard of Oz*, *The Adventures of Pinocchio*, *Beauty and the Beast*, *Aladdin*, favorite nursery rhymes from Mother Goose, classic bedtime stories, Disney's *The Princess and the Frog*, *Curious George*, *Thumbelina*, *Puss in Boots*, Disney's *The Lion King*, Disney's *Pocahontas*,



Dyshaunn Simmons

Disney's *Beauty and the Beast*, and Disney's *The Aristocats*.

- Cooking with mom and dad
- Doing art—coloring and turning characters into Disney characters on Crayola animal pages and coloring sheets with workers from my teen outreach—Megan, Simone, Emily, and Nellie.

My Special Olympics sports are:

I play basketball, track, and bowling and I'm going to jump in the Polar Plunge for the fourth time!

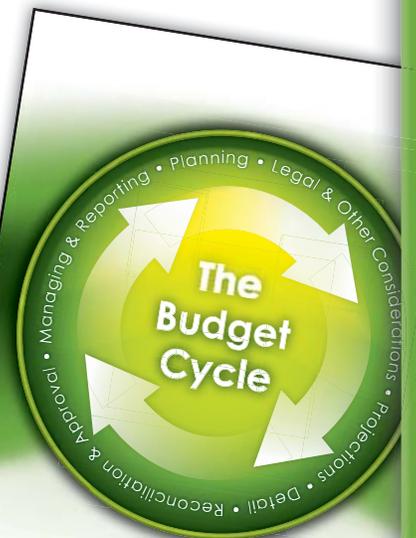
I have one brother named Darrius in college and I am living with my mom and dad in Sun Prairie, Dondieneita and Darryl.

My favorite superhero is Green Lantern. 🇺🇸

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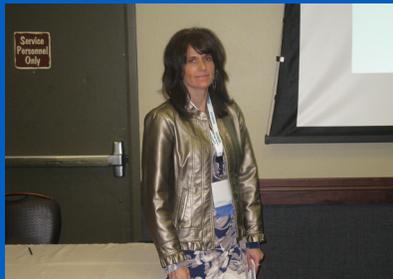


2015 Transportation & Bus Safety Conference

February 4, 2015 - Wisconsin Dells



This year's conference had record attendance with over 70 in attendance. The WASBO Transportation Committee put together a great program including sessions on risk management, hiring drivers, liability transporting to school sponsored events, improving traffic safety and McKinney Vento.



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Wire Fraud is on the Rise

By David H. Wintczak, V.P., Sr. Relationship Manager - U.S. Public Sector, Treasury & Payment Solutions, BMO Financial Group/BMO Harris Bank N.A.



Dave
Wintczak

Wire fraud is a prevalent topic in the investment world today. Thieves are becoming more and more creative about finding new ways to steal money from innocent folks. More recently, financial advisors and their clients have become large targets for fraudulent wire attempts, which have resulted in huge sums of money being syphoned away by fraudsters.

Not too long ago, fraudulent wire attempts reported by financial advisors were rare, but now the trend is increasing at an alarming rate. Charles Schwab recently reported that in 2012 its advisors “reported an average of more than one fraudulent wire attempt per day – including weekends and holidays.”

Wire fraud usually begins with identify theft; often this is done through email hacking techniques such as phishing or malware. In fact, during an internal study of fraud reports, Charles Schwab found that “more than 90% of fraud attempts reported by advisors involve email takeover.”

Here’s how wire fraud typically happens. A client’s identity or email account is compromised through phishing or malware. Once gaining access to the email account, the fraudster sends a test email to the advisor to see if they can establish a line of communication. At the same time, he will thoroughly search the emails in the account to learn about personal contacts and find key and sensitive information about the client (i.e., birthdates, account numbers, or passwords) in order to better communicate with the financial advisor, thereby impersonating the client.

While impersonating the client, the fraudster will make an urgent request to the advisor via email to wire transfer money from the client’s account to a third-party bank account that the fraudster controls. The thief will then immediately withdraw the money, and *poof*, the money is gone.

Financial advisors and their clients should be well aware of some these key warning signs of fraudulent emails:

- Bad grammar and punctuation.
- Behavioral clues like asking an advisor to pre-fill out a form and send back to them.
- Communicating a sense of urgency to force an advisor to forgo safeguards or precautions (i.e., using urgent events like funerals, tragic deaths, business or real estate transactions, or emergency surgery).
- Using a pre-existing conversation to indicate old dialogue with you, or using a recognized email address or contact in common.
- Attempt to restrict method of contact to email only.

Scammers try to avoid phone calls.

- If a phone number is given, it’s an unrecognizable number.

What proactive steps can people take to avoid falling victim to email hacking and, potentially, wire fraud in the first place? (In no particular order)

- Be careful about who you provide access to your email accounts and to your electronic devices.
- Make sure that your Internet and home network uses a password and is secure.
- Be careful about the websites you access when using unsecured Wi-Fi hotspots at public locations.
- Install antivirus and internet security software on your computer.
- Don’t open spam emails, emails you don’t recognize, or emails from someone you don’t recognize.
- If you accidentally open a “fishy” email, DON’T click on any links or open any attachments. Quickly close and delete the email.
- Create and use a “junk” email account. Use this email address when registering at websites you are unsure about, forum or chat room websites, or websites that you are just testing. This will help cut down on the spam email and potential phishing attacks in your more important personal email account.
- Turn on extra security features that are offered by your email provider.
- Don’t use the same passwords for multiple Internet accounts.
- Don’t download movies, songs, or other content from questionable or unofficial websites.
- Don’t download apps for your mobile phone from unofficial app stores.

While wire fraud is quickly becoming a way for thieves to reap huge profits, you can help protect yourself by simply using good judgment when surfing the Internet and using email. After all, your identity and your money is at stake. 🇺🇸

For more information, contact Dave Wintczak at david.wintczak@bmo.com.

2015 Facilities Management Conference

February 3-4, 2015 - Wisconsin Dells

Nearly 200 facility managers and business managers attended the Facilities Management Conference where they had an opportunity to network with colleagues and 113 exhibiting companies. There were 21 sessions that included Modules 4 & 5 of the Facility Manager Core Certification Program and recertification sessions on recycling, custodial staffing, HVAC, IEQ, building tune-ups, classroom acoustics, energy conservation, cleaning, project readiness, disaster planning, leadership and the 21st century learning environment. We thank our sponsors for their support and the WASBO Facilities Committee for planning another outstanding professional development offering.



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FBI Issues Wire Transfer Scam Alert: Millions Lost in 'Business Email Compromise' Scheme

By Jeffrey Roman, January 27, 2015, Bank Info Security Online Newsletter

The FBI has issued an alert about a fraud scam known as "Business E-mail Compromise" targeting businesses that regularly make wire transfers to foreign companies.

Some victims have reported ransomware cyber-intrusions immediately before a scam starts, the FBI's Internet Crime Complaint Center says in its alert.

The fraudulent wire transfer payments are often sent to foreign banks and may be transferred several times, the FBI says. Banks located in China and Hong Kong are the most commonly reported ending destinations for the fraudulent transfers.

Between October 2013 and December 2014, the FBI's Internet Crime Complaint Center has received complaints from 1,198 U.S. victims and 928 non-U.S. victims of the scam. Total losses for U.S. businesses are \$179 million; for businesses outside the U.S., the losses so far have totaled \$35 million.

While the scam's tactics aren't new, they have nevertheless proven successful in enabling criminals to steal money, says John Buzzard, manager for products and fraud operations at FICO Card Alert Service. "Email compromises work because many business environments today rely so heavily on instant messenger and email communication," he says. "People fall into an 'auto-pilot' mode that desensitizes their perceptions."

Certain variations of this scam have been going on for years, says John LaCour, CEO of online security firm PhishLabs. Those include social engineering attacks on wealth advisers and brokers in which the client is spoofed and the adviser/broker is tricked into sending funds belong to the client.

Attack Variants

The victims of the latest scam include businesses of all sizes that purchase or supply a variety of goods, such as textiles, furniture, food and pharmaceuticals, the FBI says. Fraudsters will typically monitor and study their selected victims before initiating the scam.

In one version of the scam, a business that has a longstanding relationship with a supplier is asked to wire funds for invoice payment to an alternate, fraudulent account, the FBI says. The request is often made by telephone or e-mail. If an e-mail is received, the subject will spoof the e-mail request so it appears similar to a legitimate supplier's account and would take close scrutiny to determine it was fraudulent, according to the FBI.

Another version involves the compromise of e-mail

accounts of high-level business executives, such as CFOs or CTOs. The account may be spoofed or hacked, and a request is then made for a wire transfer from the compromised account to a second employee within the company responsible for processing such requests, the FBI says. In some cases, a wire transfer from the compromised account is sent directly to a financial institution with instructions to urgently send funds to another bank.

A third version of the scam starts with an employee's e-mail account getting hacked. Once compromised, the fraudster will send requests to various vendors identified from the employee's contact list for invoice payments to fraudster-controlled bank accounts.



Business E-mail Compromise scams, according to the FBI:

- Frequently target businesses and personnel using open source e-mail;
- Often hone in on individuals responsible for handling wire transfers within a business;
- Use spoofed e-mails to very closely mimicking a legitimate e-mail request;
- Use fraudulent e-mail requests for a wire transfer that are well-worded, specific to the business being victimized, and do not raise suspicions to the legitimacy of the request.

Mitigation Steps

The best way for organizations to repel these types of attacks is to launch anti-virus programs and deliver education to the workforce about security best practices, FICO's Buzzard says. "Human error plays a significant role on whether these scams proliferate or not," he says.

Businesses also need to carefully monitor financial transactions, PhishLabs' LaCour says. "Balances should be checked daily, wire transfers must require two parties

Continued on next page

FBI Issues Wire Transfer Scam Alert: Millions Lost in 'Business Email Compromise' Scheme

Continued from previous page

to be authorized, and email messages from executives requesting fund transfers should always be followed up with a telephone call."

Another important step to prevent these fraud schemes is using biometric authentication to verify the identity of users requesting money transfers, says Avivah Litan, a fraud analyst at Gartner, who has advised clients on the scam. "It's not perfect, but you can get 97 percent plus accuracy rates," she says.

Organizations can also communicate fund transfer requests using online portals that utilize strong fraud controls, rather than relying on e-mail, chat applications and phone calls,

Litan adds.

Executive Editor Tracy Kitten contributed to this report. 🇺🇸

This article may be read online at:

<http://www.bankinfosecurity.com/fbi-issues-wire-transfer-scam-alert-a-7846/p-2>

“Education is the key to unlock the golden door of freedom.”

~ George Washington Carver

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Handling School Risks

March 26, Madison, Holiday Inn at The American Center

Participants will study 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.

Funding School Risks

April 29, Madison, Holiday Inn at The American Center

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

Measuring School Risks

April 30, Madison, Holiday Inn at The American Center

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

Administering School Risks

June 24, Madison, Holiday Inn at The American Center

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.

School Safety from A-Z

June 25, Madison, Holiday Inn at The American Center

Learn practical information that can be put to use immediately in your school, school district, or institution of higher learning.

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Watch for registration this spring!

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Several new professional development courses of interest to school district Buildings and Grounds staff are now being offered at Madison College campuses. These courses offer buildings and grounds employees the opportunity to become, and/or remain, in compliance with the State of Wisconsin regulations for pesticide applicator certification and NR151 Nutrient Management Plans involving larger scale turf areas such as athletic fields and school grounds.

4 courses will be held this March and April; for questions regarding these courses, contact the instructor, Rich Miller, at rlmiller3@madisoncollege.edu or 608-289-0009.

Tuition & Fee information as well as an on line application can be found at <http://madisoncollege.edu/tuition-fees>. Call (608) 258-2301, x2 or toll-free (855) 473-2301 for assistance in registering for these non-credit courses.

Horticultural Pest Management - Catalog #47001441

Course topics include various types of pest management, methods of control, calibration of application equipment and safety precautions in their use. The course will also cover economic and environmental factors involved in making pest management decisions. Participants must take the Wisconsin Pesticide Applicator exam for Turf & Landscape (& Interiorscape), Commercial Category 3.0, to successfully complete the course.

Class #65615 - 4 Sessions: Saturdays, Mar 7 2015 -Mar 28 2015
9 AM-12 PM
Madison College Fort Atkinson Campus \$179.00

Woody Plant Pruning and Management- Catalog #47001432

Learn the anatomy and functions of trees and shrubs and

correct management practices for cleaning, thinning, raising and reduction. Problems common to trees and shrubs are presented along with sessions related to property/grounds management career functions. Practice pruning deciduous and evergreen shrubs in the field is offered. Course reviews safety and tool choice, with dormant pruning lectures and supervised hands-on practice for renewal and rejuvenation pruning.

Class #65619: Monday, Mar 9 2015 9 AM-1 PM
Truax Campus-Foundation Centre, Room 111 \$99.00

Soils & Fertilizers Intro - Catalog #47001401

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Class #65621: Tuesday, Apr 7 2015 6-9 PM
Madison College Reedsburg Campus \$59.00

Class #65620 Tuesday, Apr 7 2015 1-4 PM
Truax Campus-Main Building Room C2428 \$59.00

Soils & Fertilizers Advanced - Catalog #47001402

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Class #65622 Tuesday, Apr 21 2015 1-4 PM
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Class #65623 Tuesday, Apr 21 2015 6-9 PM
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Improving Education

By Don Mrdjjenovich, Retired WASBO Executive Director

As the late, long nosed performer, Jimmy Durante so often said, “Everybody wants to get in on the act.” While it is a good thing that our country places a high value on educating its citizens, the question of how best to do it will probably never be resolved. Let’s pass a law that grades schools on some form of measurement and turn those with failing grades for a few years into charter schools. Improvement is sure to occur everywhere, every time. Research supports this approach. Really? While our state legislature is well intentioned, history tells us that there have been repeated efforts by numerous entities who have wanted to “get into the act” of improving education. So far, none have met with universal success that can be applied to all schools and school districts. That doesn’t mean that we should assume a defeatist attitude. However, it seems to imply that uniqueness is an uncontrollable variable.

Mutating viruses are a constant challenge. This year, our scientists targeted the wrong flu virus. A few years back, Chaos theorists concluded that once you have identified a problem to be solved or developed a plan to achieve a goal, so many variables had changed the plan was no longer viable. In essence, acting in real time with the best information was the best alternative. There are so many variables defining public and private education that the imposition of a single one-size-fits-all approach has little chance of achieving the level of success being sought.

On the other hand, there are numerous success stories among our nation’s schools and school districts. Most, if not all of them, were the result of methods and approaches tailored to the human and capital resources available such as the talents of the staff, community support, financial commitment, facilities and latitude permitted by policy and statutes.

Do you know anyone who shows up for their job with a mental set that says, “I think I’ll do a poor job of addressing my responsibilities today”? That would be very contrary

“The whole purpose of education is to turn mirrors into windows.”

~ Sydney J. Harris



Don
Mrdjjenovich

to human nature. It is important to our self-image and respect that we try to be successful and feel good about ourselves. So it is with teachers, administrators, support staff and governing boards. It is frustrating when conditions beyond our control stand in the way of the successful performance of our jobs. All of those conditions can’t be legislated away.

All of those served by our schools are unique. They vary in ability to learn at the same pace. They vary in home environment and support. They vary in health and readiness. The list of the unique attributes of every child is endless. That uniqueness is what educators address every day. Does an accountability measure using test results have the potential to improve a child’s home environment, health, readiness, behavior or any other unique attributes?

A recent article in the *Janesville Gazette* featured a person doing historical research about the 150 one-room school houses that once existed in Rock County. Those teachers taught as many as eight grades containing students as old as 16, and many of them started school without the ability to speak English. Instead of imposing an accountability model, they were aided by county supervising teachers and were judged by how well they did with what they had to work with. Just a thought. 🐼

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Schools Can Bill Medicaid for More Student-Health Services, Feds Say

By Evie Blad

As first appeared in Education Week's *Rules of Engagement* blog on edweek.org on December 18, 2014. Reprinted with permission from Editorial Projects in Education.



Advocates for school-administered student health services say new guidance issued by a federal agency will allow schools to bill Medicaid for more services they provide to students. Those additional reimbursements could help bolster tight budgets for school-health programs, allowing them to provide more services, such as immunizations, mental health care, and screenings for conditions like asthma, advocates say.

It's a super wonky change that could make a big difference as schools increasingly work to improve student health and well-being. Addressing health issues can clear barriers to learning, such as undiagnosed illnesses, that low-income students frequently face, supporters say.

In the guidance, issued to state Medicaid directors, the Centers for Medicare and Medicaid Services, or CMS, said that the so-called "free care rule" does not apply to schools. Under that rule, schools previously could not seek Medicaid reimbursements for services provided to Medicaid-enrolled students if they provided those services for free to other students. The rule included two exemptions: services provided to students as part of their individual plans created under the Individuals with Disabilities Education Act, and services provided under the Maternal and Child Health Services Block Grant.

The Chicago-based Healthy Schools Campaign, a non-profit organization, has campaigned for years to have the rule changed.

"Low-income and minority students are at increased risk of health issues that can hinder their learning," Healthy Schools Campaign President and CEO Rochelle Davis said in a statement. "By allowing Medicaid funding to be available to more students, school health services can provide better care for the students who need it the most. This will help more students be healthy and ready to learn."

The rule was originally included in 1997 school health guidance created by federal officials. Essentially, it meant that schools who wanted to seek Medicaid reimbursements also had to create administrative structures to bill private insurers and individual uninsured families who weren't enrolled in Medicaid.

"That was a huge burden and something that was just not practical for schools to do," said Mark Bishop, the vice president of policy for the Healthy Schools Campaign. "It became such a high hurdle for schools to seek reimbursement that many didn't try."

In a legal opinion prepared for the Washington-based School-Based Health Alliance, an attorney said the rule was

unenforceable because federal officials cited no "statutory or regulatory basis" for the policy when they first mentioned it in guidance.

School-based health centers—clinics that provide primary care services in schools, usually in cooperation with outside healthcare providers—often ensured they could be reimbursed for Medicaid-eligible services by finding ways to avoid providing free care to students who weren't enrolled in Medicaid, said John Schlitt, president of the School-Based Health Alliance. Some implemented sliding fee scales with costs as low as \$1 for low-income students, and some sent home bills they knew parents wouldn't pay.

CMS issued this week's guidance after several school districts, including San Francisco Unified, successfully challenged their state programs' refusals to not provide Medicaid payment under the rule in courts and using the federal agency's administrative appeals process. 🇺🇸

This article can be found at:

http://blogs.edweek.org/edweek/rulesforengagement/2014/12/schools_can_bill_medicaid_for_more_student-health_services_feds_say.html



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March 11	Session I	Session II	Session III	Year of Success
8:30-9:30 am	PCG School-Based Services, MAC, and Annual Medicaid Cost Settlement Program Update	Affordable Care Act Updates	Sales Tax Issues for Schools	Spring at a Glance: Budget Adjustments
9:45-10:45 am	Development of an On-Site or Near Site Employee Clinic	Unemployment Insurance Basics for School Districts	Procedures for Handling School Level Funds	WUFAR
11 am-12 pm	New GASB Statements Impacting Post-Employment Benefit Valuations	Practical Things You Can Do to Reduce Worker's Compensation	Ways to Strengthen Internal Controls in the Business Office	Special Education Fiscal Auditing
12-1 pm	WASBO Updates / Legislative Updates and Lunch			
1-2 pm	Microsoft Excel for Intermediate Users	Overview of the Omni Circular	Unscheduled Absences — What are They Costing Your District?	Importance of Fund Balance and Fund Balance Practices/GASB Pronouncements
2:15-3:15 pm	2014-15 Financial Decisions and their impact on your 2015-16 Budget	Account-Based Plans — The Alphabet Soup	Using Microsoft Excel PivotTables?	The Other Funds: Funds 21, 41, 46, 60, 80 & 90
3:30-4:45 pm	DPI Spring Workshop			
5-7 pm	Networking Reception			
March 12 <i>Kim Hall</i>	Session I	Session II	Session III	Year of Success
8-9 am	Taking a New Approach to Your Cash Flow Borrowing	Self Funded Insurance Part 1	W-9/1099 Reporting	Open Enrollment and Financial Implications
9:15-10:15 am	Discussion of Debt Financing Options with Corresponding Accounting Entries and Reporting Requirements	Self Funded Insurance Part 2	Best Practices for Payroll	Maintenance of Effort
10:30-11:30 am	Don't Let the DOL Come Knocking on Your Door! Wage and Hour Law Considerations in an Era of Increased Workplace Audits	Self Funded Insurance Part 3	Explaining the Audit Report to the BOE	Debt Service Management 102
11:30 am - 12:45 pm	Announcement of Collaborating for Change Contest Winner and Lunch			
12:45-1:45 pm	FMLA Compliance and Administration – The Confessions of a Lawyer!	Fraud Prevention	IDEA Excess Cost Calculation Compliance Requirement	Understanding and Communicating Key Budget Variables
2-3 pm	The IRS is Watching — What Can They See?			

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Taking Care of Our Own...And Then Some

By Margo Smith, Business Manager, Northland Pines School District



Margo Smith

Few in the education domain would argue that the 2015-17 State Budget proposal unveiled by Governor Walker will prove to be one of the most controversial. If the proposed budget is enacted, School Districts will face categorical aid cuts, the private school voucher program will be expanded, and a major property insurer of Districts (the Local Government Property Insurance Fund) will dissolve. Sparsity and high cost transportation aid will increase, taxpayers will see additional amounts in the school levy tax credit, alternative teacher licensing options are included, student assessment guidelines will change, and the list goes on. The debates that will ensue on many of these very important questions are sure to be passionate before the final budget is passed.

It is only natural that we tend to “look out for our own.” There will be winners on some fronts and losers on some fronts. This budget, I would argue, has provisions that from our local viewpoint are very good, and provisions that will impact us negatively. So what can we do? Balancing the needs of stakeholders in our local districts with the needs of those outside our boundaries is a balancing act, but one which we need as responsible parties to open our minds to.

Isolationism simply does not work in education. It is my hope that as the debates continue, we will look out for the good of our local educators, parents, and students, but for the greater good of our State and their children as well. Not that easy, I know. As Business Manager, I work hard to engage myself and train in a broad range of areas that may surprise some as not being within my area of responsibility as a financial manager. I would hold that a good Business Manager needs to look at the vision and mission of the District and be well educated in the many faces of education: Safety and security, emotional well-being of the children, curriculum, and financial needs are but a few of the components of a District culture. How can one only look at dollars and cents when there is so much more to consider?

Two recent experiences I had underscored my opinion as to the necessity of broadening one’s education to have at least a working knowledge of differing areas of expertise. One was a tour of a French Immersion School (a Milwaukee public school) and a Milwaukee Public School Charter School, both schools being in downtown Milwaukee. There were several common visions that both local staff and MPS staff at these schools shared for their kids. The miracle of seeing first graders speaking French fluently through a dedicated staff in a supportive environment was obvious. It was an eye-opening experience, and a poignant reminder that not all kids are given the same opportunities either good or bad whatever their District.

Another poignant reminder was an e-mail recently sent

by one of our guidance counselors. In it, we were reminded of the many grieving children we have in our midst; grieving the death of a parent, grieving a divorce, grieving a parent who is physically close but not emotionally close, grieving an incarcerated parent, grieving the loss of a trusted friend. How easy it could be to forget that something so glaring as the emotional needs of our kids is worthy of continued support through staff training and development dollars.

As the debate over dollars and cents continues, it is my hope that we as parents, educators, and community members do our best to educate ourselves not only what is right here in front of us hitting us in the face, but what is going on elsewhere in Southern Wisconsin, Western Wisconsin, and Eastern Wisconsin. We need to protect our own, but open our minds to the needs of children everywhere to make the best decisions. I would challenge each of you to get out and broaden your experiences by whatever means you have available. Our children and grandchildren who settle elsewhere need the best Wisconsin has to offer all across the State. This is a vision worth fighting for. 🇺🇸

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- Advertise in *Taking Care of Business* - contact Áine at calgaro@wasbo.com.
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Doing the Math on Teacher Pensions: How to Protect Teachers and Taxpayers

This article originally appeared in the February 5, 2015 *ASBO Accents Online* and is reprinted with permission of the Association of School Business Officials International (ASBO). The text herein does not necessarily represent the views or policies of ASBO International, and use of this imprint does not imply any endorsement or recognition by ASBO International and its officers or affiliates.

Let's address the elephant in the room, or in this case, a herd of elephants: teacher pensions. Last year, teacher pension systems had a staggering half-trillion dollars in unfunded liabilities, a debt load that has increased by more than \$100 billion in just the last two years.

It's a serious problem, yet state lawmakers, regulators, and pension boards continue to ignore or deny it, says a report from the National Council on Teacher Quality.

Doing the Math on Teacher Pensions: How to Protect Teachers and Taxpayers includes a state-by-state report card for each of the 50 states and the District of Columbia. Each one includes data on pension funding and pension system rules, as well as a grade that reflects the extent to which they do the following:

Offer the option of a flexible and portable primary pension plan, such as a defined contribution (DC) plan:

Similar to a 401(k), these have fixed contribution levels for teachers and employers but do not guarantee a set level of benefits. Alaska is the only state to earn an A in this category while Florida, Michigan, Ohio, South Carolina, and Utah offer these plans as a choice.

Ensure the portability, flexibility, and fairness of traditional defined benefit (DB) pension plans: South Dakota earns the highest grade, a B+, in this area. In addition to South Dakota's model, the report suggests that cash-balance pension plans may be an ideal hybrid model since they provide greater flexibility as well as a teacher safety net while providing states and districts with more financial stability.

Ensure that traditional systems include basic fairness

\$400 Million in Federal Funds Now Available

Provided by Dr. Appu Kuttan, Founder and Chairman, National Education Foundation (NEF) and CyberLearning

Congress recently approved the QZAB extension for one year for \$400 million, funding renovation/rehabilitation, energy projects, technology and STEM education. Every state is allocated a specific amount. School districts with 35% or more students on Free/Reduced Cost lunch are eligible to apply to the state. For additional information, please visit www.qzab.org for state allocations and state contacts.

The National Education Foundation (NEF), the national nonprofit leader in QZAB and STEM, has assured Congress that it will provide all QZAB applicants the Federally-mandated 10% match donation and the required QZAB

principles: Allow teachers to vest no later than their third year of employment; have withdrawal options that include employer-contributed funds; and purchase service time for previous teaching experience and official leaves of absence. Last year, all states but Arizona, Minnesota, and South Dakota made teachers wait more than three years to vest in retirement plans while 15 states have vesting periods of 10 years.

Shore up pension funding for existing commitments:

Inaction won't make debt disappear, and states should adopt a two-fold approach that includes adjusting unrealistic rates of return and making scheduled payments to current pension systems. Last year, just eight states and the District of Columbia had well-funded teacher pension systems. Since 2008, more than half of states have increased teacher contribution states, and in 36 states teacher contributions are considered excessive.

Require that pension plans accrue pension wealth with each year of work: States should do away with pension systems that allow teachers to earn widely-different benefits for the same number of years worked and/or backload benefits so that nest eggs aren't built until late in a teacher's career. Today, 14 states consistently base retirement eligibility on age alone, and 13 states offer plans that accrue pension benefits fairly.

With the average state teacher pension policy grade at a C-, there is clearly much work to be done. 📌

Doing the Math on Teacher Pensions: How to Protect Teachers and Taxpayers can be found at http://nctq.org/dmsStage/Doing_the_Math

academy by NEF partner, the acclaimed State University of New York (SUNY). With the support of US Dept. of Education and AASA, NEF has given over \$100 million in QZAB 10% match donation since 2000, thus enabling over 250 school districts across the U.S. to apply for over \$1 billion in QZAB funds. 📌

For more information contact:

Resident Superintendent Dr. Art Stellar (a 25-year veteran Superintendent) at 703-823-9999 or qzab@qzab.org

Increase Your Green: People, Planet and Profits

Sustainability practices make good sense environmentally and financially.

By Jennifer Seydel, Executive Director, Green Schools National Network and Erin Green, Business Manager, Greendale School District

This article originally appeared in the January 2015 *School Business Affairs* magazine and is reprinted with permission of the Association of School Business Officials International (ASBO). The text herein does not necessarily represent the views or policies of ASBO International, and use of this imprint does not imply any endorsement or recognition by ASBO International and its officers or affiliates.



Thanks to a growing body of research, we know that green, sustainable schools have a positive effect on student health and academic achievement. But sustainable practices help “green” the bottom line as well.

Sustainability makes good business sense. And as business officials, we

should focus on its benefits to people, the planet, and profits and join the effort to adopt sustainable business principles. Regardless of the size of your district, its geographic location, or its available budget, you can green your bottom line and benefit your district’s schools in the process.

Here are a few examples of successful strategies that may put sustainability on your radar:

The Business Officer as Sustainability Officer

As the business manager of the Greendale School District in Wisconsin, Erin, coauthor of this article, was invited to participate in a grant to implement the Environmental Protection Agency’s indoor air quality (IAQ) program for schools. Greendale is a suburban Milwaukee district with 2,600 students attending five schools.

Through participation in the IAQ for schools program, Erin realized that as a school business officer, she could be doing much more to create healthy learning environments. In 2010, using a shared leadership model, she created a sustainability team in Greendale composed of teachers, students, community members, and district personnel. The team’s work has produced a healthier, safer, more productive and cost-efficient environment with an annual energy cost savings of at least \$200,000 and a reduction in workers’ compensation claims that is saving the district \$50,000 a year (see Figure 1).

Initiatives that have had a positive or neutral effect on the bottom line of district operations costs include energy-efficient lighting, solar thermal panels, athletic field irrigation systems, green cleaning chemicals, and healthier cafeteria foods. Community initiatives have also had a positive effect on the health and well-being of students.

Leading sustainability initiatives has allowed Erin not only

to save precious dollars for the school district and develop relationships with faculty and staff whom she normally does not have an opportunity to work with but also to improve student and staff attendance and achievement rates.

Blazing Trails

How would you like to boast about \$38.8 million in new revenues and savings, including deferred future utility energy costs? How about \$3.5 million for lease purchase initiatives and future performance contracts related to your transportation fleet? Those amounts come from “green initiatives” implemented in the Lee’s Summit R-7 School District in Missouri and reflect the positive financial impact on the district’s operating budget through green best practices. Lee’s Summit is a suburban Kansas City district that encompasses 117 square miles with an enrollment of nearly 18,000 students.

Under the leadership of Tom Kurucz, deputy superintendent of operations (now retired), the district implemented a number of sustainable initiatives that also made economic sense and had a positive effect on the district’s bottom line during a difficult financial period. Initiatives included (a) performance contracts, (b) a green cleaning initiative, (c) use of alternative fuels in the purchase and delivery truck fleet, (d) an expanded district-wide recycling program, (e) development of an Energy Savings Olympic Competition among the K–12 schools that challenged students and teachers to change behaviors, (f) a bus-idling and sound reduction program, and (g) the integration of utility dashboard kiosks in all schools to support curriculum initiatives.

Motivated by cost savings and a desire to choose a cleaner, more modern technology, the district also shifted the bulk of its bus fleet to compressed natural gas in just two years. In the 2013–2014 school year, Lee’s Summit boasted one of the nation’s cleanest school bus fleets. With 106 of its 149 buses fueled by clean, efficient natural gas, the Lee’s Summit program is thought to be the largest of its kind in the country. With a savings of \$2.58 per gallon of compressed natural gas, the district expects to save \$11 million over 10 years in fuel and maintenance costs.

Policy Pushes the Agenda

The Boulder Valley School District (BVSD) in Colorado has focused on sustainable management for over 20 years. In the summer of 2008, the district hired a sustainability

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Increase Your Green: People, Planet, and Profits

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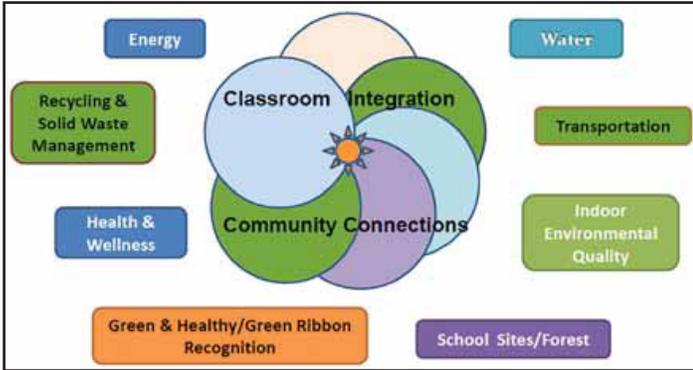


Figure 1. Greendale School District Sustainability Team Initiatives

manager, and in 2009, it implemented a sustainability management system (SMS) in partnership with a leading sustainability consulting firm. The SMS provided a comprehensive and coordinated approach to addressing four crosscutting themes: buildings, materials, transportation, and education.

The SMS baseline determined metrics of performance in each area and continues to serve as a tool to focus attention at all levels on critical environmental, economic, and social issues. In 2012, BVSD published its first “Sustainability Management System Progress Report” (www.bvsd.org/green/Documents/2012_SustainabilityProgressReport.pdf).

The board of education in Boulder advanced BVSD’s efforts by adopting a policy stating its commitment to the triple

bottom line. In simple terms, that policy, adopted in 2010, prioritizes the initiatives set forth in the sustainability management system and formalizes the accountability of school officials toward the goals of the SMS. As a result, the board exemplifies the community-wide commitment to enact policy to implement best practices related to sustainable operations and management.

Conclusion

When business officers—working with school administration, staff, and community members—assume leadership roles in such initiatives, they can create physical spaces that inspire learning and cultivate citizens with the skills and knowledge necessary for the future.

Together we can create learning communities dedicated to inspiring and motivating people, to saving the planet, and to greening the bottom line. 🌱

For more information, contact Jennifer Seydel, Executive Director, Green Schools National Network at jseydel@greenschoolsnationalnetwork.org Erin Green, Business Manager, Greendale School District at erin.green@greendale.k12.wi.us In 2014, Erin led the district sustainability team to a national Green Ribbon Award.

GO GREEN

ASBO International changed the name of its Environmental Aspects Committee to the Sustainability Committee. If you are interested in joining that group, please contact Jay Snyder at jsnyder@asbointl.org.


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Sun Prairie School District Uses

Investing in Wisconsin Public Schools with Community

Here is an example of how one Wisconsin school district is using *Investing in Wisconsin Public Schools* to talk to and interact with their community regarding school finance and budgeting. First, is the article that ran in the local Sun Prairie newspaper, *Sun Prairie*

Star, before the event. The second article is the follow up piece that ran after the event. If you have questions about how *Investing in Wisconsin Public Schools* was utilized in Sun Prairie, contact Phil Frei at pfrei@sunprairieschools.org.

Sun Prairie Community Invited to Play Budget Game

By Rebecca Rudolph, Lifestyle Editor, Sun Prairie Star

This article originally appeared in the January 4, 2015 Sun Prairie Star newspaper.

Who contributes to parts of the school district's budget, what different accounts are used for, why different amounts go to certain place – that's all going to be explained on a basic level through a board game on Tuesday, Jan. 13 for community members.

"You don't need to be a math or finance wiz to understand this stuff at all," Tom Weber, Sun Prairie Area School District school board president, said.

The Community Learning Session on School District Budgeting Planning Process will start at 6:30 p.m. on Jan. 13 at Cardinal Heights Upper Middle School in the commons area.

The public will have a chance to go through the different checkpoints of the budget process and ask questions, Weber said.

Director of Business and Finance Phil Frei will be leading the presentation.

After that, attendees will move through a colorful board game developed to reflect school budgets in Wisconsin and modified for Sun Prairie.

The activity was created by the Wisconsin Association of School Boards, Wisconsin School Public Relations Association and Wisconsin Association of School Business Officials. It's the first year the public will be invited to learn about budgeting this way.

Although school finances can be confusing, this is a broad over view about what budgeting means in Sun Prairie, Weber said.

This is one of five community engagement meetings the school board's community engagement committee has organized.

"We did a survey ... of district residents last year to find out what areas of interest there are in the community," Weber said. "The topic ideas that we're running with are based on the feedback we got from that survey."

Past meeting topics have included school assessments and technology in the classroom.

After the Jan. 13 meeting, the next meeting will be March 18 to learn about all aspects of student safety, which will be

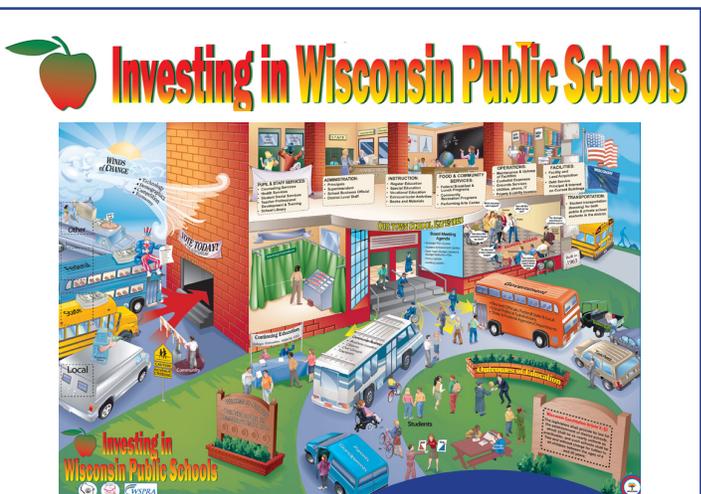
similar to the popular meeting last spring.

Then, on April 22, Superintendent Tim Culver will host a meeting to explain the district's strategic plan.

Community education on how the school board works and transparency was made a priority after conversations the district had when it was creating its strategic plan, Weber said.

"It's a continuation of that theme, the idea of getting our families and community more insight about what goes on in their schools," he said.

The school board will host its own version of this budget presentation for school board members, committee members and school board candidates from 6:30-8:30 p.m. on Wednesday, Jan. 7. 🇺🇸



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Sun Prairie Area School District Demystifies Budget

By Rebecca Rudolph, Lifestyle Editor, Sun Prairie Star

This article originally appeared in the January 16, 2015 Sun Prairie Star newspaper.

Although they all agreed the idea of a budget meeting didn't sound like much fun, a handful of community members circled around a table to talk just that.

On Tuesday, Jan. 13, the Sun Prairie Area School District hosted its third community learning session this year.

Instead of a lecture style meeting, parents and community members worked through an interactive game board about school district budgeting basics.



"It's kind of like understanding the skeleton when you're learning anatomy," compared Sun Prairie mom Kim Kelly after the meeting. "(Once) I understand the skeleton, any future information I get I can place in the right

areas and have a better ability to understand information about the school district and what they offer."

The small group first identified the purpose of public education. Then, they learned how local, state, federal and other funding interacted to create a full district budget.

"I thought our local taxes would have accounted for more. It turns out, the state puts in more of a percentage than Sun Prairie (tax payers)," Kelly said.

Then, they talked about things like competition, expenses and change in schools.

"I liked it was not just about budgeting, but the peripheral things that go into it," Uriah Monday said. "Having those things that are on the edge, but are still germane that you



generally don't think of, was valuable."

His wife is a Sun Prairie teacher, and Monday wanted to know more about how district funding worked coming into the session.



At the end, participants had a chance to reflect on what this means for Sun Prairie.

"It makes a lot of sense –the different competing factors that go into the budget," Sun Prairie mom April Krause said. "It seems like they're always struggling to make education for the kids work."

That said, the district administrators on staff were confident in how to budget and how it all worked, which is good to see since her family is new to the area, she said.

This game-style discussion was designed by Wisconsin Association of School Boards, Wisconsin School Public Relations Association and Wisconsin Association of School Business Officials.

The next community learning session is on March 18 and will be about all aspects of student safety.

Kelly has been to a couple community sessions and said the only thing that surprises her is the lower attendance levels.

"They're always interesting," she said. "I always go away enhanced, feeling like I have a better level of understanding of the subject matter."

View this article online at http://www.hngnews.com/sun_prairie_star/community/features/article_404f415c-9ccd-11e4-a312-ab59ff532fda.html

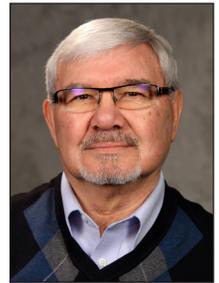
“An Investment in knowledge pays the best interest.”

~ Benjamin Franklin

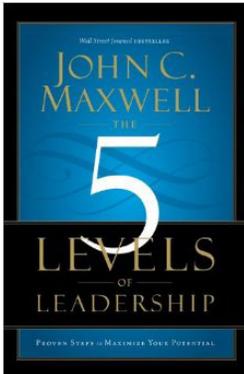
5 Levels of Leadership

Authored by John C. Maxwell

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



Orvin R. Clark,
EdD, RSBA



Author of *5 Levels of Leadership*, John C. Maxwell is a *New York Times*, *Wall Street Journal*, and *Business Week* bestselling author who has sold more than 20 million books. A few of the bestsellers are: *The 21 Irrefutable Laws of Leadership*, *Developing the Leader within You*, *Running with the Giant*, *Thinking For A Change*, *The Choice is Yours* and *Make Today Count*. He is an internationally recognized leadership expert, and is the

founder of the INJOY Group, an organization dedicated to helping people maximize their leadership potential. He is also founder of EQUIP and the John Maxwell Company, organizations that have trained more than 5 million leaders worldwide.

5 Levels of Leadership is 286 pages in length, divided into five topics supplemented with quotations, short stories and self improvement tips. The five levels of leadership are:

1. Position (Based on Rights) — People follow because they have to.
2. Permission (Based on Relationships) — People follow because they want to.
3. Production (Based on Results) — People follow because of what you have done for the organization.
4. People Development (Based on Reproduction) — People follow because of what you have done for them personally.
5. Pinnacle (Based on Respect) — People follow because of who you are and what you represent.

The levels of leadership are like building blocks. The following insights will assist you to understand how the levels relate to one another.

1. You can move up a level but you never leave the previous one behind. You add a new level to the previous one.
2. You are not on the same level with every person. Leadership is dynamic and it changes from relationship to relationship. You must earn your level of leadership with each person, and that level can go up or down at any time.
3. The higher you go, the easier it is to lead. Each

advance allows you to be more effective in leading because your influence increases as you go to a higher level.

4. The higher you go, the more time and commitment is required to win a level. Nobody achieves anything great by giving the minimum.
5. Moving up levels occurs slowly, but going down can happen quickly. Once you've climbed up to a higher level, the ones below you function as a safety net. So the more you advance up the levels, the more secure your leadership is.
6. The higher you go, the greater the return. As a leader, your return on investment increases with each level. When productivity is high, chemistry is good, morale is high, momentum is strong, and the payoffs increase.
7. Moving farther up always requires further growth. Growing as a leader requires a combination of intentional growth and leadership experience. Success at any level helps you to be successful at every level.
8. Not climbing the levels limits you and your people. Your leadership ability determines a person's level of effectiveness.
9. When you change positions or organizations, you seldom stay at the same level. Every time you lead different people, you start the process over again. However, each time you go through the process with a new group of people you become even more skilled at it.
10. You cannot climb the levels alone. To succeed as a leader, you must help others follow you up the levels.

Each chapter on the respective five levels describe the upside, downside and best behaviors; the laws of leadership; and the beliefs and guide to growing through the level. *5 Levels of Leadership* provides a clear game plan for leadership development and each level has a tag line as follows:

Level 1: Position — It's a great place to visit but you wouldn't want to live there.

Level 2: Permission — You can't lead people until you like people.

Level 3: Production — Making things happen separates real leaders from wannabes.

Continued on page 44

Court Decision Holds That Retiree Benefits Do Not Automatically Vest

By Matthew J. Flanary, Attorney, Buelow Vetter Buikema Olson & Vliet, LLC



Matthew Flanary

On January 26, a unanimous U.S. Supreme Court clarified the rules that lower courts should use when determining whether an employer can change or eliminate retiree health insurance that was originally established under a collective bargaining agreement. *M&G Polymers USA, LLC v Tackett*, No. 13-1010 (Sup.Ct. Jan. 26, 2015).

Under this ruling, lower courts should no longer apply any presumption that retiree health insurance should vest or be protected for the life of the retiree. Instead, the U.S. Supreme Court held that the lower courts should simply read the collective bargaining agreement and interpret it like an ordinary contract or collective bargaining agreement. While this may seem like a nuanced change, it is a dramatic change from the standard that at least one federal court of appeals (the 6th Circuit) applies.

Prior Legal Analysis

Before the U.S. Supreme Court decision last week, the 6th Circuit had created a presumption that: (1) retiree health insurance benefits established under a collective bargaining agreement were vested or protected for the life of the employee; and (2) the employer must prove that it reserved the right to change or eliminate those benefits once someone retires. This standard is sometimes referred to as the “Yard-Man Analysis” because it was first applied in a 1983 case titled *UAW v Yard-Man*, 716 F.2d 1476 (6th Cir. 1983). Not every circuit court in the country applied the same presumption. Indeed, several outright rejected it. Nonetheless, courts and individual judges would periodically apply the Yard-Man Analysis or cite to it when trying to prevent an employer from changing or eliminating retiree health insurance benefits.

The Impact of Yard-Man In Wisconsin

Public-sector employers in Wisconsin may wonder why a U.S. Supreme Court case about private-sector benefits from a different area of the country would apply to them at all. The answer to that question becomes obvious when you understand that Wisconsin courts borrowed directly from Yard-Man to repeatedly apply the same presumption that the U.S. Supreme Court expressly rejected last week.

The primary Wisconsin case on this subject is a 2000 Wisconsin Supreme Court decision titled *Roth v Glendale*, 237 Wis. 2d 173 (2000). In *Roth*, the Wisconsin Supreme Court adopted the same presumption as Yard-Man to conclude that retiree health insurance benefits are presumed to be vested and unalterable if a contract is ambiguous. If a Wisconsin governmental employer wants to change or eliminate retiree insurance benefits, then the

employer must overcome this presumption by presenting other evidence (e.g., plan booklets, employee letters, contract language, past practice, etc.) which indicates that the employer reserved the right to make such changes.

The Wisconsin Supreme Court did not simply develop the same Yard-Man Analysis on its own. In fact, the *Roth* decision cites to Yard-Man when justifying its decision that courts should apply a presumption that retiree benefits vest for life. The Wisconsin Supreme Court also relied extensively upon a concurring opinion from *Bidlack v Wheelabrator*, a 1993 7th Circuit case that also dealt with retiree health insurance benefits provided by a private-sector employer. *Bidlack v Wheelabrator*, 993 F.2d 603 (7th Cir. 1993)(a concurring opinion is an opinion written by a judge who agreed with the end-result, but who did so for different reasons than the other judges).

The judge who wrote the concurring opinion in *Bidlack* recommended that the 7th Circuit expressly adopt the Yard-Man Analysis. The other judges refused to adopt that presumption and the 7th Circuit has continued to reject any such presumption when dealing with private-sector benefits. By adopting this concurring opinion, the Wisconsin Supreme Court applied the Yard-Man Analysis to governmental employers. In doing so, it created a situation where those governmental employers were subject to a very different rule or standard than the one that applies to private-sector employers who operate in those same counties, cities and towns.

Much like the Yard-Man progeny that the U.S. Supreme Court rejected, the *Roth* presumption has found its way into many lower court decisions affecting employers across Wisconsin. One such example is *Champine v Milwaukee County*, 2005 WI App. 75. *Champine* is a 2005 Wisconsin Court of Appeals decision which, citing *Roth*, concluded that Wisconsin governmental employers may not reduce sick leave payout benefits for sick leave that has already been accrued.

The M&G Polymers Case

The recent Supreme Court case involved a company called M&G Polymers USA, LLC (“M&G”). Following a corporate acquisition in 2000, M&G entered into a series of collective bargaining agreements (“CBAs”) with its various unions. M&G also entered into a separate agreement that covered pension, insurance and other benefits (the “P&I Agreement”).

The P&I Agreement provided that certain retirees would

Continued on next page

Court Decision Holds That Retiree Benefits Do Not Automatically Vest

Continued from previous page

“receive a full Company contribution toward the cost of [health care] benefits,” as described in an Exhibit to the P&I Agreement. That Exhibit, however, included a clause which said that M&G would provide the specific health care benefits to eligible employees and their dependents only “for the duration of [the] Agreement.” Note the subtle difference between the promise to provide insurance to retirees and the language which reserved the right to change benefits for employees. Both the CBAs and the P&I Agreement were silent about whether retirees would be vested or guaranteed to receive ongoing health benefits as a retiree. In 2006, M&G told some retirees that they would be required to contribute to the cost of their health care benefits even though active employees would not be required to contribute to their health care costs. The unions and their employees filed a lawsuit claiming that the retirees had a vested right to receive free lifetime benefits based upon the terms of the P&I Agreement.

Although the federal district court originally dismissed the lawsuit and ruled in favor of M&G, the 6th Circuit returned the case to the district court with orders that it apply the Yard-Man Analysis. As noted above, the Yard-Man Analysis presumes that retiree benefits are fully vested and guaranteed when the individual retires. Applying the Yard-Man Analysis, the district court reversed its original decision and determined that the retirees were entitled to free lifetime health care benefits.

Supreme Court Decision. Although the 6th Circuit developed the Yard-Man Analysis and applied it most consistently, other courts and individual judges applied variations of that standard when reviewing retiree health care lawsuits. Wisconsin courts in particular applied it extensively to governmental employers within Wisconsin. It

is clear that Yard-Man was the foundation of Roth and other Wisconsin decisions which say that retiree health insurance benefits are presumed to vest when a governmental employee retires. Given how strongly the U.S. Supreme Court rejected this analysis, it seems logical to conclude that the Wisconsin Supreme Court may similarly abandon its earlier decisions if it were to decide a similar case in the future.

Conclusion. The U.S. Supreme Court decision does not directly affect Wisconsin employers and Roth remains the law in Wisconsin. Given how strongly the U.S. Supreme Court opinion was worded, however, it seems reasonable to assume that the current Wisconsin Supreme Court would take a new look at the presumption that it created in the Roth case. Public-sector employers, who have been reluctant to adopt changes to their retiree health programs because of the Roth decision, may want to reconsider their options in light of the U.S. Supreme Court decision. Those employers should review their current and prior collective bargaining agreements, bargaining notes and all health plan documents and communications to determine whether those documents include any express language that would vest retiree health insurance benefits. Employers who have considered, but not implemented, a plan to reduce retiree health insurance benefits or treat existing retirees as a new and separate group when determining future contribution rates or premiums will want to reconsider their options and risks in light of this new decision. 🇺🇸

If you have any questions or concerns regarding this decision or would like us to review your collective bargaining agreements, please contact Matthew Flanary at 262.364.0253 or mflanary@buelowvetter.com.

Book Review: 5 Levels of Leadership

Continued from page 42

Level 4: People Development — Helping individual leaders grow extends your influence and impact.

Level 5: Pinnacle — The highest leadership accomplishment is developing other leaders.

As potential leaders shape and define their leadership they need to answer “What are my values?” Your values are the soul of your leadership, and they drive your behavior. As you reflect on your values consider three key areas:

Ethical Values — What does it mean to do the right thing for the right reason?

Relational Values — How do you build an environment of trust and respect with others?

Success Values — What goals are worth spending your life on?

Read the *5 Levels of Leadership* and grow into your leadership level, therefore reach for the Pinnacle. This is an excellent book for your professional development collection. 🇺🇸

Can the Custodian of Records Deny a Citizen's Request to Use a Smart Phone or Digital Camera to Make Their Own Copies of Public Records?

By Nancy L. Pirkey, Attorney, Buelow Vetter Buikema Olson & Vliet, LLC



Nancy
Pirkey

The Attorney General recently issued a legal opinion on whether fees can be charged for copies of public records, when the requester uses their own technology to make the copies. (OAG-12-14, 12/30/14). This new legal opinion addresses the fees that can be charged for copies of court documents maintained by the clerk of courts or register of deeds. However, the legal opinion also provides helpful information for processing similar requests for records under the Public Records Law.

The question addressed in the Attorney General's opinion was whether a government entity must allow a citizen to use technology, like a smart phone or handheld scanner, to make copies of public documents and not charge a fee for these copies. The legal opinion concludes that a court clerk may not charge copying costs when a citizen uses a personal device to make the copies. More importantly, the legal opinion concludes that the court clerk has the discretion as to whether to allow individuals to make copies using a camera phone or other personal device. In reaching this conclusion, the Attorney General relies on a court case addressing that same issue under the Public Records Law.

In *Grebner v. Schiebel*, 2001 WI App 17, 240 Wis. 2d 551, a public records request was made for voting records from Polk County, but the requester sought permission to use his own portable photocopier machine to make the copies. The County Clerk's office denied this request, but offered to make the copies for the requester for a fee. The requester argued he just wanted access to the records, and would make his own copies, and then inquired as to whether he could make the copies using a digital camera or laptop computer, rather than the portable photocopier machine. This second request was granted, as long as the use of the digital camera or laptop computer did not cause damage to the documents being copied. The requester filed a lawsuit arguing that he had a right to make his own copies of public records with his own copying machine. The Court of Appeals rejected this argument and held that the custodian of records has the option of determining how public records are copied.

The Court of Appeals emphasized the fact that the requester was not denied the right to copy the records, and noted that the requester could have used a digital camera or laptop computer to make the copies. The Court stated that the issue in this case is whether the requester has a right to select the equipment to be used for copying public records without the custodian of record's permission. The Court answered this question "no." The Court held that a

reasonable reading of § 19.35(1)(b), of the Public Records Law is that the custodian of records has the option to determine how the records are copied. The Court concluded that the custodian of records has the right to deny use of personal equipment "without entering into a debate over the adequacy of the requester's equipment or the likelihood that it will destroy the document."

In light of the *Grebner* decision, as affirmed by the recent Attorney General's opinion, a government body has the right to determine how public records are copied, including whether a requester may use a smart phone or other technology to make the copies. The best practice would be to incorporate any restrictions on copying of public records into your existing public records policy so the public is aware of these restrictions before a request is made. 🇺🇸

If you have any questions about this issue or would like to discuss this decision in more detail, please contact Attorney Nancy Pirkey at 262.364.0257 or npirkey@buelowvetter.com.

WSSCA Offers ALiCE Training

Thursday and Friday, March 26 & 27, 2015
Prairie River Middle School, 106 N. Polk St., Merrill, WI

On October 21, 2013, the U.S. Attorney General, Eric Holder, told leaders at the 120th Annual International Association of Chiefs of Police Conference that new strategies and a more aggressive response needs to be taken as the number of active shooter incidents continues to rise. Holder went on to say, "Since 2009, the annual average of active shooter incidents during the previous eight years has tripled. In the last four years, there has been a nearly 150 percent increase in the number of people shot and killed in connection with active shooter incidents."

A 2014 FBI report regarding active shooter incidents indicated that 24% of these events have occurred in an educational setting.

Clearly, something must be done, and we can't wait for federal help. It starts with us – the schools. The WSSCA leadership believes that the best thing schools can do to protect their students and staffs at this place in time is to be trained by the ALiCE Institute. We are putting our reputation behind this statement. Seating is limited. 🇺🇸

For more information contact Peter P. Pochowski, WSSCA Executive Director at WSSCA@WSSCA.org

Welcome New Members • December 2014 - January 2015

District Professional Members

- **Kevin Brathol**, Maintenance Supervisor, Elmwood School District
- **Gregory John Choinski**, Custodial Supervisor, Wauwatosa School District
- **Janel DeZarn**, Fall River School District
- **Stephanie Ellwood**, Accounting and Auditing Supervisor, Howard Suamico School District
- **Paul Falb**, Maintenance Director, Clayton School District
- **Tom Frigge, Operations Manager**, West Bend School District
- **Andy Patrick Hensley**, Wauwatosa School District
- **Adam Krieger, P.E.**, Director of Facilities / Engineer, Neenah Joint School District
- **Bill Kuchan, Maintenance Supervisor**, Whitewater Unified School District
- **Bob Mueller**, Head Custodian, Plymouth Joint School District
- **Curt Schmidt**, Director of Buildings & Grounds, Montello School District
- **De’Kendra B. Stamps**, Transportation Coordinator, Madison Metropolitan School District
- **Peter Wood**, Facility Manager, Union Grove J1 School District

Service Affiliate Members

- **Michael Anderson**, Sales Engineer, Hydro-Flo Products
- **Francis Balthazor**, Operations Manager, A&J Specialty Services Inc.
- **Gregory Banaszynski**, President-Wisconsin, Activate Healthcare
- **Nicole Bianchi**, National IPA
- **Rick Braman**, Director of National & Direct Accounts, Kendell Doors & Hardware, Inc.
- **Andy Carr**, National Cooperative Accounts Manager, Tecta America Corp.
- **Chris Dahlby**, Field Consultant, TREMCO, Inc. Roofing and

On the Move

- **Kathy Davis**, from Assistant Superintendent of Business Services, Neenah to Director of Business & Auxiliary Services, De Forest
- **Andrew Thorson**, from Director of Facilities/Engineer to Business Manager, Neenah

Retirements

- **Roger Feucht**, from Director of Buildings, Grounds & Transportation, Montello
- **Diane Pertzborn**, from Director of Business & Auxiliary Services, De Forest
- **Marcia Sawyer**, from Business Director, Port Edwards

Building Maintenance

- **Tim Deaton**, Vice President, The Horton Group
- **Janet Evans**, DB Programmer, Aardvark Apps, LLC
- **Cole Firkus**, Macco’s Floor Covering
- **Michelle Froehlike**, Employee Benefits Consultant, Ansay and Associates, LLC
- **Jerry Helmer**, CEO, Master Com, Inc.
- **Dave Hoffman**, Safe-Latch LLC
- **Kurt Koepf**, Sales, Hot Water Products, Inc.
- **Anthony Kovach**, Access Security
- **Julie Metzger**, Villani Landshapers
- **Michael Michalski**, Branch Manager, Migratory Bird Management
- **William Mueller**, Mueller Electric of Central Wisconsin LLC
- **Lori Nelson**, Marketing Manager, Gaco Western
- **Stephanie Nelson**, Kenwood Communications
- **Megan Nussbaum**, Business Development Specialist, Miron Construction Co., Inc.
- **Becky Osborn**, Technology Resource Advisors, Inc.
- **Catherine Prossen**, Account Executive, nora systems
- **Troy Salchow**, Account Manager, Engineered Security Solutions, Inc.
- **LeeAnn Thompson**, etfile
- **Joyce Tomkowiak**, Moore Construction Services, LLC
- **Tim Witzmann**, Life Safety Hardware Consultants

Student Member

- **Sharon Oleinik**

New to School Business Management?

A mentor can help!

Find out about WASBO’s mentorship program:

WASBO.com/mentorship



Keep us Posted!

Retiring? Contact us before you leave so we can update your member type to retired and get your contact information. If you are interested in being added to our interim list, send an email to Woody Wiedenhoef at wwiedenhoef@wasbo.com.

Changing Districts? Be sure to update your profile at WASBO.com so you don't miss any communications. Call 608.249.8588 if you need help.



Stay Connected



Changes for Spring Conference

The 2015 WASBO Spring Conference will be held at a new location – the Madison Marriott West in Middleton. We will have a new exhibit floor plan, and exhibits will be open from 11:50 am - 5:30 pm on Thursday, May 14. Dedicated exhibit hours with no competing sessions will be 11:50 am - 2:15 pm. Lunch, afternoon breaks, a silent auction, and a raffle will be held in the exhibit hall. Winners will be posted during a networking social from 4:35-5:30 pm in the exhibit hall following sessions.

Hotel accommodations are available at the Madison Marriott West, Comfort Suites and the Holiday Inn Madison West. Go to WASBO.com/Spring for complete information.

Award Nominations

WASBO Professional Recognition Award application materials will be due

March 2, 2015. Nominate a top-notch professional in your district or regional. For more information on the WASBO Professional Recognition Program go to WASBO.com/awards.

WASBO Foundation Scholarship Applications

Each year, the WASBO Foundation and our Service Affiliate Scholarship Sponsors give out thousands of dollars in scholarships to several deserving high school graduates and one to a student in the School Business Management Masters Program. Scholarship application materials are due March 2, 2015. Get an applicator for a high school scholarship at WASBO.com/scholarships. The form for the Dr. Bambi Statz Scholarship for business graduate students is at WASBO.com/scholarships.

Interim Assignments

As school business officials (business managers, bookkeepers, facility directors

and other critical positions) 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 from 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.

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. To sign up for one of the many WASBO committees, go to WASBO.com/committees. 📌



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For More information:
Contact Richard Waelti
Phone: 262-377-8306
rwaelti@mvpbanking.com



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

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Upcoming Events - WASBO.com

Professional Development

p-Card User Group
 March 10, 2015 - Madison Marriott West, Middleton
 Accounting Conference
 March 11-12, 2015 - Madison Marriott West, Middleton (Viterbo Credit)
 Spring Conference
 May 14-15, 2015 - Madison Marriott West, Middleton (Viterbo Credit)
 New School Administrator & Support Staff Conference
 Aug 12-13, 2015 - Holiday Inn, Stevens Point (Viterbo Credit)
 Fall Conference
 Oct 8-9, 2015 - The Osthoff Resort & Conference Center, Elkhart Lake, (Viterbo Credit)
 ASBO International Annual Meeting & Expo
 Oct 23-26, 2015 - Gaylord Texan Resort & Convention Center, Grapevine, TX (Viterbo Credit)
 Midwest Facility Masters Conference
 Nov 2-3, 2015 - Kalahari Resort & Conference Center, Wisconsin Dells (Viterbo Credit)

Scholarship Fundraisers

Spring Golf Outing
 May 13, 2015 - Pleasant View Golf Course, Middleton
 Spring Bike Tour
 May 13, 2015 - Military Ridge State Trail
 Fall Conference Golf Outing & Bike Tour
 Oct 7, 2015
Certified School Risk Managers (CSRMI) Courses (Viterbo Credit) - all courses at Holiday Inn at the American Center, Madison
 Fundamentals of Risk Management
 March 25, 2015
 Handling School Risks
 March 26, 2015
 Funding School Risks
 April 29, 2015
 Measuring School Risks
 April 30, 2015
 Administering School Risks
 June 24, 2015
 School Safety from A to Z
 June 25, 2015

Committee Meetings

Fall Conference
 All meetings at 10 am, WASBO Offices, March 19; April 15
 Midwest Facility Masters Conference
 All meetings at 10 am, by conference call, April 9; May 7, June 4; July 9; Aug 13, Sept 10; Oct 15; Oct 29 (if needed)
 Safety & Risk Management
 All meetings at 11:45 am, WASBO Offices, April 7, 2015; Aug 11, 2015
 School Facilities
 All meetings at 9:30 am, WASBO Offices, Madison; April 7, 2015; Aug 11, 2015
 Spring Conference
 All meetings at 2 pm, WASBO/Conf Call unless otherwise noted.
 March 10, 2015; April 8, 2015

Buildings & Grounds Group Meetings

Coulee Region - First Thursday of the month. Meetings start at 10 am.
 Milwaukee Metropolitan- Meetings are the third Thursday of the month.

Regionals

Check WASBO.com for details.
 Bay Area/Northeast - Meetings start at 11 am. March 6, 2015; April 17, 2015, Fond du Lac; May 29, 2015, Manitowoc
 Madison Area - Meetings start at 9 am. March 6, 2015; April 3, 2015; May 1, 2015
 Northwest - Meetings start at 10 am at Lehman's Supper Club in Rice Lake. April 1, 2015
 Southeast - Meetings from 12-2:30 pm. Cudahy; April 17, 2015; Hamilton-Sussex
 Southwest - Meetings start at 12:30 pm at CESA 3. TBD
 West Central - Meetings from 10 am - 1 pm at Sparta Area SD Admin & Education Center. March 5, 2015; April 2, 2015; May 7, 2015; June 4, 2015
 WI Valley - Coffee at 9 am, Meeting at 9:30 am. March 13, 2015; April 24, 2015; August 11, 2015