



Taking Care of Business

Wisconsin Association of School Business Officials

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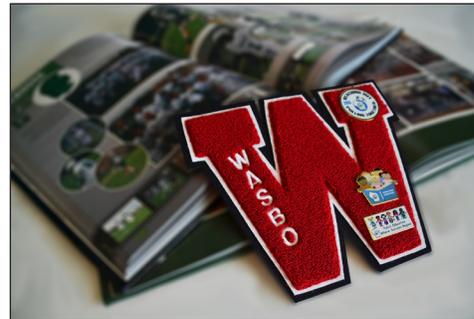
Celebrate Your School Spirit at this Year's Spring Conference



Kathy Davis

By Kathy Davis, Co-Chair, WASBO Spring Conference Committee
Director of Business & Auxiliary Services, De Forest Area School District

Please join us at the Kalahari in Wisconsin Dells from May 24-27 for this year's WASBO Spring Conference. Wear your school colors throughout the conference and help us kick off this year's conference theme "School Spirit: Celebrate Education."



The conference starts off with a "Homecoming" reception at the Double Cut at the Kalahari Tuesday night at 8 PM. This is a great opportunity to catch up with your colleagues and meet some new friends.

On Wednesday enjoy the day outside with your peers by participating in either the scholarship bike ride or golf outing. Bike ride participants will spend the day on the beautiful 400 Trail, leaving from Reedsburg (for a longer ride) or Lavallo. Lunch will be provided at Spring

Valley. Golf participants will get to play on the beautiful Trappers Turn Golf Course in the Dells. Proceeds from both events go towards student scholarships.

The networking opportunities continue Wednesday night with a networking reception at the Kalahari Conference Center. Please wear your school colors and be prepared for a night of fun activities.

Take the time to enhance your professional development by attending a variety of sessions put on by your peers and industry experts on Thursday and Friday. Sessions include areas in technology, finance, facility maintenance, human resources, and more. Enjoy a conference welcome and keynote speaker Thursday morning on the topic of the Impact of the Clean Power Plan on school districts. Also spend some time with our many WASBO Vendors in this year's exhibit hall on Thursday. While you're catching up with the vendors come check out the silent auction and raffle items that will be located in the exhibit hall. Proceeds from the auction and raffle will benefit WASBO members' involvement in ASBO International.

Continued on page 16

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

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

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Editor: Woody Wiedenhoef

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President's Message

Reaching Out – Pulling Together

*By Bob Avery, Director of Business Services,
Baraboo School District
President, WASBO Board of Directors*



Bob Avery

Spring in WASBOland means a full schedule of conferences and workshops for professional development and networking with colleagues and peers from across the state. Federal Funding, Transportation, Facilities, Accounting and of course, our flagship conference, the Spring Conference all between February and May. Plus five CSRSM certification workshops. Staff and conference committees are incredibly busy turning your ideas into a program. April is the slow month during the spring, but it is also the time when attention and energy are focused on the Spring Conference. I want to be sure to thank staff – Jeanne, Deb, Áine, Kristin, and Kaitlyn – for all their hard work and dedication to making sure that these events are properly prepared for and go off smoothly. While we have the opportunity to network at receptions at the end of the day at these conferences, they are busy putting things away and preparing for the next day. Thank you!

Speaking of the Spring Conference, you have by now received the emails from the WASBO office that conference registration is open. I encourage you to attend. The committee has put together another great program and there will be some really good sessions over the course of the two days. Lots to learn or get refreshers on. Thank you in advance to our speakers for sharing their expertise and insights with the membership. Also at the conference, we will have our semi-annual WASBO membership meeting on Friday morning. WASBO's constitution is being presented for its second reading. If approved, the proposal will be adopted. (It was presented and approved at our meeting in January at the State Education Convention.) The change reflects the Association moving to a policy governance model of operations. There currently are

some policy items in the Constitution that would come out. Constitution Committee chair Bob Borch will share information about this on May 27 at the Kalahari beginning at 7:30 AM.

I am pleased to say that we will have a few guests joining as well and look forward to welcoming them to Wisconsin. Ed Chabal is a business official in Iowa and sits on the ASBO International Board of Directors. Doug Nefzfer is the President of Iowa ASBO this year. Jennifer Bolton Carls is from New York State and currently serves as President-Elect of ASBO International. I hope you get a chance to meet our colleagues and introduce yourself to them. It is another way to Reach Out and Pull Together. Be sure to ask Ed or Doug about the 400+ day delay in school funding in Iowa, or Jennifer about the budget bill in NYS. School funding issues are not isolated to Wisconsin. The details vary by state, but we're all in the same boat.

This month, six people have placed their names for your consideration on our Board of Directors. I strongly encourage you to read what Kent, Jason, Nate, Bob, John and Greg have to say about why they are running for the WASBO Board of Directors. I want to thank all of them for stepping up and throwing their hats in the ring. Jason and Kent are running for President-Elect; Nate for a two-year seat to complete a vacancy created by a resignation; and Greg, John and Bob are running for the two three-year seats on the board. Good luck to you all. Balloting continues online in April – you should have received an email from the WASBO office with your link to vote.

Finally, as we approach the end of this school year, I want to encourage you to consider joining one of the 19 WASBO committees. The success of the

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Leadership, Sustainability and Leaving a Legacy

By Woody Wiedenhoef, Executive Director, WASBO



Woody
Wiedenhoef

Festival Foods opened a new store last week in Madison with some fanfare. So what in the devil would that have to do with WASBO Leadership, Sustainability and the prospect of Leaving a Legacy? There are some thought-provoking similarities so I hope you stay with me on this. The majority owner of Festival Foods is the Skogen Family. They started their business in 1946 in a 3,000 square foot store, struggling to be a successful startup business. They now operate over 20 stores.

WASBO was created in 1947 by only a few business managers. WASBO now has over 1,400 members. Growth is not the most important aspect. Why the growth and sustainability happened is of the utmost importance over the last 70 years. Both organizations have been built on very clear principles of sustainability. Both organizations do this clearly through their vision and mission.

Festival Foods' wish to provide "Extraordinary Food with an Exceptional Experience." WASBO wishes to be the most influential Wisconsin organization for state and national school business management and leadership. Festival Foods' goal (mission) is "to give each and every guest the personal attention and support that is expected for our own families. We go above and beyond to ensure our products and services meet our guests' high expectations." It all boils down to the "Boomerang Principle." Every business decision they make is based on the question, "Will it bring the guest back?" WASBO's mission is "to provide professional development, to foster a network of support and to advocate for funding

that ensures outstanding educational opportunities for all children in Wisconsin."

There are only three areas that need to be continually addressed by both organizations because of their clear principles of mission and vision.

Social: Both organizations directly and powerfully have decided we are a people business first. Festival Foods and WASBO operate with the same servant leadership philosophies. WASBO members and Festival employees expect passionate service. WASBO "fosters a network of support." "Your success will be defined not by what you do, but rather by what you get done through others." — Dave Skogen, Chairman of Festival Foods.

Environmental: Both organizations wish to ensure products and services meet the customer's highest expectations in pleasing settings. Both organizations expect knowledgeable expertise.

Economic: Both organizations invest prudently for the future building of its environmental and social imperatives. Leave more than what you inherit. Extraction rates are less than insertion rates.

Just as every business decision Festival Foods makes is based on the question, "Will it bring the customer back?" every decision WASBO makes is based on its value for WASBO members as we serve each other.

Recently the Member Resources and Professional Improvement Committees reviewed results from the member surveys. They identified nine themes from the responses. Through an affinity process each member of the two

committees narrowed the list to four areas of focus for future SMART Goals:

1. Assess WASBO's offerings to those new to school business to determine how we can more effectively support this large component of WASBO membership.
2. Comprehensively review how and when WASBO delivers content.
3. Assess methods and strategies to encourage participation and engagement in WASBO regionals.
4. Leadership development through participation in WASBO.

These four areas of focus were presented to the Board of Directors at the April 13, 2016 board meeting for consideration, and the Board will use the findings from the WASBO member survey and committees' work as it refines the organization's strategic plan, ensuring that WASBO continues to provide value to its members.

The social, environmental, and economic values both WASBO and Festival Foods have adopted could be perceived as "soft" competencies and that is true. But the "soft" skills are valuable only if the "hard" skill of getting something done comes out of these principles. So what is one "hard" action you can do as a WASBO member right now? Vote! There are six wonderful volunteers who are running for WASBO Board positions in April. Please act and vote for your choices as your action. And when possible, please thank all of them for volunteering to participate in WASBO in such a significant way. 🙌



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Assessing Progress on SAA Advocacy Agenda

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



John Forester

Most SAA members recognize that the SAA fundamentally changed its approach to advocacy more than a year ago. Yet, it's highly likely that a high percentage of SAA members have a few questions about what has transpired on our advocacy agenda this past year.

Therefore, in this article I will seek to answer four questions regarding SAA's journey in advocacy this past year: (1) Once again, why did we do it? (2) What have we done this past year? (3) What have been the initial results? and, (4) How do we move forward from here?

First, let's take a look at why the SAA changed its approach to advocacy. Increasingly, the environment inside the Capitol for public education has been crumbling, with decreasing numbers of pro-public education legislators and diminishing influence of those that remain in the legislature. In the current environment, advocates for private voucher expansion are the 800 lb. gorilla of education politics in Wisconsin. We simply cannot compete by playing defense against an anti-public education foe bankrolled by out-of-state billionaires. In order to compete more effectively, we will have to accumulate more voices advocating in unison on behalf of Wisconsin school children. We need to follow a more pro-active approach, in which education policy development is based not on ideology, but on the evidence of what moves the needle for kids. We must change the conversation and expand our influence in order to raise achievement for all kids and close achievement gaps.

In beginning this journey nearly two years ago, the SAA did three major

things. First, we developed the SAA's Evidence-Based Policy Agenda. Next, we communicated the importance of that agenda to multiple constituencies including the news media, legislators, the business community, parents and staff. Finally, we developed, implemented and disseminated information on our local advocacy model.

The development of the SAA's Evidence-Based Policy Agenda began with the convening of the SAA Policy Research & Development Team in April 2014. The R&D team consisted of 12 SAA members and the SAA Executive Committee. Lynn Knight, Don Hietpas, and Keith Lucius represented WASBO on the R&D team. For this effort, the SAA partnered with researchers at the Wisconsin Center for Education Research (WCER) to provide the R&D team with research briefs and ongoing policy support. The R&D team met three times between April and September of 2014 and sought input from the full SAA membership on a draft of the policy agenda. This process culminated with the SAA Legislative Committee's adoption of the Evidence-Based Policy Agenda as the SAA's Legislative Agenda in October 2014.

The introduction of the SAA Agenda occurred on November 19, 2014 at a news event in Madison. This event served as the launching point for our efforts during the 2015-16 legislative session. Following this news event, we made several editorial board visits. We also briefed key lawmakers and education news reporters. Our evidence-based agenda became the basis for our communication strategy. In fact, we immediately

began wrapping our news releases, testimony, and letters to legislators in our evidence-based frame.

In addition to our evidence-based policy agenda, local community engagement is a vital component of our advocacy strategy. The SAA represents more than 3,500 influential education/community leaders throughout Wisconsin. All SAA members understand that advocating for the children they serve is an important part of their job. The SAA developed its local advocacy model in an attempt to engage SAA members in a more systematic way to advocate more efficiently and effectively on behalf of children. The core of the local advocacy model involves organizing a district's local advocacy efforts around the district administrative team and the leadership of the Superintendent, and planning as a team to engage the key constituencies in your community.

So, what were the initial results of this fundamental change in our advocacy strategy? Many advocates for public education see the 2015-17 state budget as perhaps the worst state budget for public education in Wisconsin's history. In spite of that fact, we can identify many indicators of our initial success. First of all, it was our advocacy efforts that helped to achieve better results in an admittedly bad state budget (i.e., restoration of the proposed \$150 per student cut and increases in transportation, sparsity and technology funding). This past year witnessed more SAA members active in advocacy than ever before. During the budget battle, SAA members engineered hundreds

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ASBO International New Members

February 2016

- **Jonathan Mitchell**, St. Francis SD, St Francis, WI

ASBO International Membership Milestones

March 2016

30 Years

- **Michael R. Garty**, Retired, Slinger, WI

15 Years

- **Kevin J. Hanson**, West De Pere SD, De Pere, WI



Awards Season at ASBO International

It's awards season at ASBO International! Take part in honoring dedicated school business officials who are making a difference in their school districts—apply or nominate today!

Emerging School Business Leaders Scholarship

Recognizes 18 rising school business officials for leadership potential and dedication to learning, awarding \$2,000 to attend the Annual Meeting & Expo! Applications are due May 1. Apply at <http://bit.ly/2016ASBOscholarship>, or nominate a colleague at <http://bit.ly/ASBO2016nominate>.

Pinnacle Awards

Recognizes 4 creative leaders who have successfully implemented innovative projects or programs that have enhanced school systems. Applications are due May 1. Apply at <http://bit.ly/ASBO2016pinnacle>, or nominate a colleague at <http://bit.ly/ASBO2016pinnaclenominate>.

Eagle Awards

Recognizes 4 visionary school business officials for lifetime achievement and leadership in school business. Applications are due June 1. Apply at <http://bit.ly/ASBO2016eagle> or nominate a colleague at <http://bit.ly/ASBO2016eaglenominate>. 🐦

Win a Free 2016 Annual Meeting & Expo Registration!

What if you could attend ASBO International's premier professional development event—for free? ASBO's Annual Meeting and Expo will be held Sept. 23-26 in Phoenix, AZ.

Enter the drawing for your chance to win 1 of 16 FREE annual meeting registrations! Go to <http://asbointl.org/toenter>.

In addition to unmatched networking and educational opportunities, learn how to turn district setbacks into successes during the First General Session with creative inspiration from acclaimed artist and TED speaker Phil Hansen—with stunning visuals and a special collaborative experience, your own creativity is sure to surprise you!

No purchase necessary to enter or win. Limit 1 entry per person. Drawing closes at 11 PM EDT on April 21. View Official Drawing Rules at <http://bit.ly/ASBO2016drawingrules>. 🐦

Reaching Out — Pulling Together

Continued from page 3

organization is due to the work of the membership. We need your input to make sure that the conferences have full slates of sessions that are relevant and informative; your participation to prepare documents like the Budget Cycle book, *Roles and Responsibilities of the School District Business Office*, and updating the curriculum in the Facilities Manager Certification program. You don't need to wait until membership renewal to join a committee. The Fall Conference Committee is already at work preparing for October and could use your participation now. Just let anyone on staff know you're interested and they will connect you to the committee chair. Thanks for your consideration.

WASBO is a participatory association. This is how we Reach Out and Pull Together. See you at the Kalahari in May! 🐦

ASBO INTERNATIONAL MEETING DATES

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

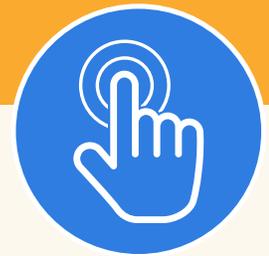
2019 Annual Meeting & Expo
Oct. 25-28, 2019 - National Harbor, MD

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





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Using a Blended Model of District and Outsourced Custodial Staff

By WASBO Director Nathan Jaeger, Business Manager, Whitewater Unified School District



Nathan Jaeger

Most school districts subscribe to the philosophy that their buildings and grounds belong to the community. They take a great deal of pride in maintaining their facilities and making them available to all members of the community. Ensuring our buildings remain bright, clean, and positive places to learn and congregate requires the coordination of a well-rounded and skilled cleaning, custodial, and maintenance staff.

For many years we have used a combination of school district staff and contracted services to meet our custodial needs in Whitewater. We have found this staffing model to provide many benefits. Our district staff consists of both full- and part-time custodians who fall into one of two categories: Custodian I or Custodian II. The Custodian I positions are primarily responsible for cleaning and light setup and takedown for events. The Custodian II positions are our lead building custodians with a much broader range of responsibilities including light maintenance, alarm monitoring, snow removal, and building checkups. In addition to our team of custodians, we also contract with an extraordinary cleaning company that provides services using both full- and part-time employees who range from cleaners to supervisors. Below are some of the benefits and challenges of this staffing model:

Benefits

Cost Effective – One of the main reasons districts look to outsource some or all of their cleaning services is that it can be more cost effective than maintaining the services in-house. Periodically bidding out cleaning services can ensure you are getting the best price for the scope of services you

desire. A contracted cleaning company may also be able to provide supplies and equipment at a lower rate due to their purchasing power.

Added Flexibility – Our contracted cleaning company is able to provide subs or extra staffing on very short notice. If we have one of our staff members out, they are quick to fill in or pick up where needed.

Minimized Management – The evaluation, hiring, training, discipline and a whole host of other management and HR duties are minimized or shared by contracting out some of your cleaning services.

Outside Expertise – A contracted cleaning company has the benefit of focusing their energy on being experts in one field. This allows them to be more up to speed on new technology, equipment, supplies, and best practices.

You Are the Customer - When you contract out services, you are in a position where your service provider will be responsive and cater to your needs because you are the customer.

Maintain District Staff in Key Positions – Utilizing a blended model of in-house and outsourced custodians and cleaners allows you to maintain your core district staff of custodians. These individuals are some of the most important and influential team members in each of our buildings. They know their buildings inside and out. These are also employees who tend to be vested members in the community who take a great deal of pride in their work.

Challenges

Limited Oversight – Transferring supervisory duties such as hiring,

evaluations, training, and discipline can be a terrific benefit, but it also means forfeiting quite a bit of oversight. It is critical that there be strong communication between the supervisors of both the district and contracted staff. This will help ensure consistency in expectations and performance.

Turnover – While both in-district and outsourced cleaning services are vulnerable to turnover, higher rates of turnover are often a downside associated with contracted cleaning services. This is an important factor to consider when determining if you are going to contract services, and, if so, at what level.

Limited Flexibility – While we have found our contracted cleaning company to provide us an incredible amount of flexibility and serve as a safety net for temporary staffing shortages, there are limitations to the services they can provide. Our district custodial team is expected to perform a broader range of services than what we might expect from a contracted cleaner. This might include setup and takedown for events, light maintenance, and day-to-day activities unique to each building.

Increasing building utilization and budgetary limitations are two reasons for districts to reevaluate their custodial staffing model. Although there are some challenges associated with using a blended model of both district staff and contracted services, it can prove to be a very effective and efficient staffing model. 📍

If you have questions about this article, you may contact Nathan at njaeger@wwusd.org.

A View from a Different Perspective

By: WASBO Director Brian Adesso, Director of Business Services, Menasha Joint School District, and Anna Adesso, NCC and Licensed School Counselor



Brian Adesso



Anna Adesso

Brian: As School Business Officials, we often only work with the administrative side of things. It is seldom that we get to interact with school counselors due to their busy schedules and the confidentiality of their work. Like many of you I am fortunate enough to live with someone that also works in the educational field. I wanted to take this opportunity to have my wife educate us on the school counseling field as we look towards creating our budget for the 2016-2017 school year. School counselors are a critical part of any school district. My hope is that with this article you will discover how important school counselors are to each and every school.

Anna: School counselors have diverse roles within the K-12 setting. The ASCA Mindsets and Behaviors for Student Success places emphasis on three areas that every school counselor should build their program around: College and Career readiness, academic success, and social/emotional development. These standards are based on a lot of research and best practices in student achievement.

Social/Emotional

First, I would like to discuss with you the social/emotional area. Currently, Wisconsin does not have a ratio standard of students per counselor. However, ASCA recommends that per every 500 students there be at least one counselor within the school. During my graduate program we learned that ideally there should be 250 students for 1 counselor. ASCA states that, "school counselors do not work in isolation; rather they are integral to the total educational program." School counselors have to deal with an array of student concerns. I believe the

stigma of mental health is beginning to change and people are seeing how important mental health professions are to our society. The National Alliance on Mental Illness (NAMI) states that "Approximately 1 in 5 youth aged 13-18 (21.4%) experiences a severe mental disorder at some point during their life. For children aged 8-15, the estimate is 13.3%." Therefore, in each classroom there are 4 kids with some type of mental illness at any given time.

The National Alliance on Mental Illness (NAMI) states that "Approximately 1 in 5 youth aged 13-18 (21.4%) experiences a severe mental disorder at some point during their life. For children aged 8-15, the estimate is 13.3%." Therefore, in each classroom there are 4 kids with some type of mental illness at any given time.

Behavioral problems can take away from the classroom environment and change the entire dynamic of a classroom setting. Therefore, it is imperative the counselor is knowledgeable about all mental health concerns facing our youth. School counselors have to know how to restrain students that become aggressive and angry, so that they can keep themselves and the students safe. Unfortunately, these violent encounters happen multiple times on an almost daily basis. Typically, students just need to be removed from the classroom for short

periods of time to calm down and regroup. School counselors provide that support alongside student aides and other school staff (i.e., teachers, school social workers, school psychologists, principals, police liaisons, etc).

Social skills are also a critical aspect of a school environment. Weekly meetings with students are an essential part of the job as well. Whether it be through groups or individual check-ins with students, I want the students to know that I am there for them and support them. I firmly believe that sometimes kids just want someone to listen and once heard they can be a much more productive students. School counselors use classroom lessons, groups, and individual counseling to help students become more confident in their ability to socialize. School counselors have a variety of curriculums that can help students learn how to get along with others. These lessons provide ideas on how to resolve problems with bullies, friends that do not get along and lifelong skills about how to kindly handle difficult situations. For example, the lessons could help the counselor teach kids how to talk it out, find another game/friend to play with, or walk away. Overall, these curriculums help students deal with day-to-day social concerns and as counselors we advocate for this time with students. Additionally, counselors facilitate groups to help students with higher needs. Some groups that are often facilitated are friendship groups, anger management groups, coping skills and new student groups.

Academic

Secondly, I would like to discuss with you the academic area of school

counseling. I believe before we can even look at students' academic records we must understand the student as a whole. We have to understand them as people and where they come from. If a student is hungry, tired, or even is not dressed appropriately for the weather how can they put their entire focus on academics? Some days things that are planned do not get done because of a crisis that occurs within a student's life. A school counselor's day is very unpredictable because the main focus is students. Advocating for students is a huge part of a counselor's job. If a student's basic needs are not met, how can they be expected to learn? If you have on your schedule to teach a classroom lesson, but a student comes to your office in tears or is discussing suicide; the classroom lesson will have to wait. Building relationships with students and with school staff is critical to the students' academic success. If a student has a parent that works two jobs and they have to care for younger siblings at home, when does that leave time for them to do their school work? Also, when are they able to develop good study habits without parental guidance? School counselors often fill that space, we teach study skills and build students up. We remind students how incredible they are and how lucky we are to know them. Once we have learned what students are dealing with outside of school, we can then learn what they need to make them successful academically.

Career Development

Third, I would like to discuss career development and the role it plays in a school counselor's job. School counselors collaborate with teachers to find a weekly/biweekly time that they can go into classrooms and give 30-minute counseling lessons. One of the topics heavily discussed is careers. Depending on the grade level the curriculums vary. For example, 5th graders may just be beginning

to explore possible careers and discovering their likes and dislikes whereas 12th graders need assistance with college readiness.

At many schools, counselors have the lead roles in scheduling and attendance concerns. Truancy is often a problem in many school districts. This is often an issue that involves entire families. Many times it is a cultural issue. School counselors have to be culturally competent. Again, if you have built those relationships with students, their teachers and the families it may make it easier to pinpoint why students are truant or why they are acting out. With scheduling many counselors use career interest inventories to help students pick courses that they would enjoy. Furthermore, counselors help students to understand that life choices they make will directly affect their future. For instance, counselors give lessons on the dangers of social media and help students to understand that the choices they make will impact the rest of their lives. If a future employer sees the student in an inappropriate way it may affect the outcome of them getting a job.

School counselors are like chameleons; they are constantly changing roles to meet students' needs and advocate for the students within their schools. School counselors offer students a place where they can feel safe and one where students know they can be heard.

Changing Roles

Finally, I would like to discuss how school counselors are like chameleons; they are constantly changing roles to meet students' needs and advocate for the students within their schools.

School counselors offer students a place where they can feel safe and one where students know they can be heard. Counselors have the skills to quickly build relationships with students as well as school staff. Students know that the counselor is there to help them through difficult times in their lives as well as to celebrate their successful days. Counselors often act as the non-biased party and help people see how they can meet in the middle. Several years ago character education was the hot topic. Currently, PBIS is the positive tool within schools to promote good behavior from students. Just this year the state changed from using Wiscareers to ACP career tool. Counselors have to educate themselves or take the time to attend trainings to keep their knowledge current. Therefore, professional development is essential to the counseling profession.

It is my firm belief that everything in life is what you make of it. School counseling is just that, it is what you make of your program. I love school counseling and the challenges it brings to my daily life. I personally feel that being challenged keeps my life interesting. I love connecting with students and watching them thrive. I feel very lucky to have found a job that I love and where I can make a difference in people's lives.

Brian: *My wife writing this article actually started out as a joke, but once our discussion escalated, we realized how important every aspect of the district really is for the students. We both learned a different perspective and it is our hope that this article will also help you see things in our educational systems in a new light.* 🙌

If you have questions about this article, contact Brian at adessob@mjsd.k12.wi.us.

Leaving a (Positive) Legacy!

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



Ken Mischler

A friend of mine asked me the other day, if I died would people show up for my funeral? My response was, yes. "You are well liked and have made a positive impact in people's lives. You have family members, work colleagues, neighbors, and others you have met and positively influenced throughout your life." What legacy will we leave behind?

Kalu Ndukwe Kalu stated it best, "The things you do for yourself are gone when you are gone, but the things you do for others remain as your legacy." When we think about people leaving a legacy, we often think of the rich and famous, but that is not necessarily correct. Many of them have left negative legacies such as Joseph Stalin or Adolph Hitler. In fact, we all leave a legacy; in life, at work and through organizations (such as WASBO). The problem is that we usually only start talking about a legacy after that person has left (retired, left position, moved away or died).

Merriam-Webster defines legacy as something transmitted by or received from an ancestor or predecessor or from the past, or in simple terms something that happened in the past or that comes from someone in the past. The legacy I am talking about isn't about leaving what you earned, but instead about what you learned and what others learned from you. We all have an opportunity to make a difference. It doesn't call for wealth, fame or even taking giant steps. Baby steps are fine. You don't have to be a Mother Theresa to leave a positive mark.

If you gave your notice today, how would you be remembered by your colleagues and company leadership? Would they still be talking about you next week, next year, in five years? Were you the hot head, or the star

manager? Did you get involved or sit on the sidelines? Who wants to go through life with no positive impact on others around them? We have been taught to look out for ourselves because no one else will. But if we are all consumed with pursuing only our selfish interests, what positive change or accomplishments will occur in this organization, community, or world?

Currently, WASBO is looking for volunteers and leaders in the WASBO organization. Volunteerism is defined as the practice of giving one's time or talents for the benefit of others. Every one of you can make a difference, because each of you has many talents and each of you matter. Many of the WASBO committees are feeling the effect of members retiring which makes it an opportune time for new and current members to consider volunteering for a committee. WASBO committees are a great way to not only give of your time and talent but also to meet people and learn from others in our field. It is an opportunity to make a positive difference in the lives of others and in your own life too.

People are most energized when they are using their strengths and talents for a purpose beyond themselves. Make your life about something bigger than you. Why? Because you are not going to live forever. You can live on through the legacy you leave and the positive impact you make in this world.

Hopefully, you have no immediate plans to leave your current school district or company which puts you in a good position to start thinking about what you want your legacy to be and gives you time to build it. Of course, we all leave our jobs and organizations at some point, for any number of reasons. Some departures are involuntary: an untimely death, organizational change, or downsizing. There are also many

positive reasons for saying goodbye; a new job, a move, retirement, or time off for family or education. Regardless of the reason, we all leave a legacy in our wake.

Think about what you want your own legacy to look like. How do you want your organization to know you, now and after you're gone? There are many ways to leave your mark, and not all of us want the same thing. What is important to you? What parts of your work do you most value? What gets you excited? Is there a need in the organization you can fill? Don't be afraid to think how big-grand-scale ideas can transform WASBO, your district, community or the world.

Think about being a WASBO mentor. A mentor by definition is a more experienced or more knowledgeable person with an area of expertise. Everyone has some significant knowledge to share with others that will guide less experienced people in life. The WASBO mentor/mentee relationship involves personal development and support and helps both people. Sometimes these relationships last a lifetime, even when the mentee has moved on to influence others. What a great way to have a positive legacy.

You need to support the people and causes that are important to you. Two of the most important attributes of friendship is relationship and support. There isn't any more wonderful feeling in life than making the choice to sustain loyalty to a friend by having a relationship that supports everything that is good and right about that person's life. We remember one another's legacies through recalling our work, life and family.

To accomplish a positive legacy, one

needs to be aware of some critical factors. According to Eric Harvey and Scott Airitam, watch out for the big four factors that lead to negative behavior and thus a negative legacy:

- 1. Greed** – the drive to acquire or possess more and more in one's self-interest;
- 2. Speed** – the motivation to cut corners in response to the warp pace of business;
- 3. Laziness** – taking the easy path of least effort and resistance; and
- 4. Haziness** – acting and reacting without thinking.

Thinking about your job in terms of the legacy before you leave brings a fresh perspective to your work. It gives you a longer term view, and helps you make better decisions because you look at your job not just in a vacuum, but how it influences and impacts the

entire organization. You don't need to be a pope or a politician to make a difference. How will your colleagues remember you?

Business office managers can also help employees and leadership develop strategies to help them reach their goals – and affect their legacies. What are the first steps they will need to take? What is a realistic timeline? Who else will need to be on the team? Goals can only become reality if there is a workable plan in place.

Employees want to know that they had a positive impact on their colleagues, that the work they did mattered, or perhaps that the company internalized an initiative they launched. Business office managers may want to consider incorporating this exercise into the review process. Instead of the typical and tired questions (“What do you want to accomplish this year?” and “Where

do you see yourself in five years?”), encourage employees to frame their annual and long-term goals around what they envision their legacies will be. A goal of mine is to leave a positive legacy.

People often ask if I am retiring. The response is not yet. I have a few more good years left (I think). What legacy will I leave behind? I don't know, but hopefully it is positive. We can influence that legacy regardless of how old we are or at what stage we are in our career. Please consider volunteering in the WASBO organization on your journey to your legacy. If you ask yourself, “Do I have the talents WASBO needs?” The answer is yes. 🐼

If you have questions about this article, contact Ken at mischlerk@mpsd.k12.wi.us.

Assessing Progress on SAA Advocacy Agenda

Continued from page 7

of budget resolutions, letters to the community and to legislators, and news media events. We achieved increasing support from the major news media and chambers of commerce. Parent advocacy groups are forming around the state. And, the Marquette Law School Poll provided two indicators from this past year that our work is making a difference. In April 2015, 78% of poll respondents opposed cuts to public schools and, in February 2016, 57% of respondents believed that public schools don't get enough funding from the state. These poll results are a testament to the work SAA members, and their collaborative partners, have been doing in the field.

In addition to these indicators, many political pundits also see a changing political landscape in Wisconsin. Many believe the GOP sustained significant damage on the education budget and subsequent education legislation. Some GOP lawmakers even believe they have gone too far. The Marquette Law School Poll consistently shows

voter approval for Governor Walker and the GOP-controlled legislature hovering around the 40% mark. Many sense that the political pendulum has begun to swing back. But the real question is, when will that be reflected in the Capitol?

How do we move forward from here? We continue to advocate for education policy based on sound evidence. We constantly remind policymakers that the real objective for education policy in Wisconsin is improving student achievement for all kids and closing those stubborn achievement gaps. We also encourage legislators and news reporters to ask this question about education policy proposals, “Where's the evidence this will be good for kids?”

The SAA has also continued to encourage members to implement our local advocacy model. In each of the last two years, WASDA's regional meetings have been focused on district team planning and local community engagement. Building greater influence among the key constituencies in your

local community also builds greater influence for public education in the State Capitol as well. You see, all politics is local. By building greater influence with local citizens, you are also influencing your legislator's election base. The advocacy shorthand is undeniable: engaging your community equals more voices in advocacy, greater influence on state policy, and more support for public schools and public school children.

So where do we go from here? The initial results of our advocacy journey are very encouraging, but, this is a long term strategy. We need to stay the course and continue advocating for evidence-based policy and encouraging effective local community engagement. Imagine what's possible if all SAA members commit to influence the key constituencies in their communities. Imagine what's possible if we all encourage our parent groups to engage in advocacy. Imagine what's possible if we all build stronger relationships with our business community, news media and legislators. 🐼

Thoughts of Sustainability

By WASBO Director Lori Ames, Fiscal Services Manager, Middleton-Cross Plains Area School District



Lori Ames

Early this month, I attended the National Green School Conference & Expo. Incredible, amazing, eye-opening.....these are just some of the words that described my experience. I came back to my district rejuvenated and excited to delve into the area of sustainability!

Before I went to the conference, I thought of sustainability as mainly associated with energy conservation and just one more "project" I needed to put on my already full plate. I couldn't have been more wrong. Sustainable practices involve so many areas including:

- community involvement
- energy
- environmental & sustainable education;
- environmental health (indoor air quality, chemical management, integrated pest management)
- health & wellness (student & employee)
- recycling & waste management
- school site
- transportation
- water

As leaders in school business operations, we are working with so many of these areas already. Long term sustainable success means incorporating sustainable practices into our current operations. What do I mean? Think about district purchasing. We currently request proposals from companies in order to compare quality and price. Purchasing with a sustainable mindset could be adding a component to the purchasing process to see how companies are working to create a smaller environmental footprint, or maybe our purchasing specifications require the product

to contain a certain percentage of recycled material. We aren't adding a new project, but rather looking at the existing project through a different lens.

Creating that sustainable mindset is our challenge. In most instances, our professional classes didn't prepare us for the sustainable options and opportunities that exist today. We need to identify strategies and practices specifically for leaders that help us understand how healthy, sustainable schools can decrease costs, improve student and staff health and well-being, and improve student achievement and environmental literacy.

Fortunately, we are not alone. Many partners and resources currently exist so that we don't have to re-invent the wheel. The Wisconsin Department of Public Instruction, Wisconsin Green and Health Schools Program, Wisconsin Sustainable Schools Coalition, and the Green Schools National Network are just a few of the partners who provide resources and assistance. Even our own organization, WASBO, has many leaders who have already taken great strides in incorporating sustainable practices into their everyday operations.

In this newsletter, the Green Schools National Network has announced its first-ever membership program. (See *next page*.) As a member, we will have access to the latest news, trends, and best practices in all areas of green schools, as well as unique professional development opportunities.

What I am most excited about is the opportunity to have a positive, direct impact on the students in our district. Although I know that indirectly my work impacts students, I sometimes

feel removed from the daily instructional environment. The sustainability practices incorporated into our buildings and operating procedures can be used as a direct teaching tool with students. I can help create environmentally literate citizens that will ultimately help ensure an ecologically and economically sustainable environment.

In the words of my teenage son, "How cool is that?!" 🇺🇸

If you have questions about this article, contact Lori at lames@mcpasd.k12.wi.us.

Celebrate Your School Spirit at this Year's WASBO Spring Conference

Continued from page 1

New this year will be the Learning Lab. Bring your software and forecast model questions with you. Representatives will be available to assist you with Google Docs/Sheets or Excel, and from Baird, Skyward, and PMA on Thursday, May 26, from 2:15 to 4:45 PM.

Looking for ways to give back? Consider donating your time and/or your blood. There are plenty of volunteer opportunities available, please contact Kaitlyn Hafeman at kaitlyn.hafeman@wasbo.com for more information. The Red Cross will be present from 8 AM to 1 PM on Thursday, May 26, for those wishing to donate blood.

The WASBO Spring Conference Committee is looking forward to seeing all of you at this year's conference. Don't forget to wear your school colors! 🇺🇸

Sustainability for WASBO Members

WASBO pushes to be looking toward the future when providing professional development and advocacy opportunities to members. It is through partnerships with other organizations that WASBO is best able to stay current.

Wisconsin is lucky enough to have multiple organizations with sustainability in our school districts

at the forefront of their mission and vision statements. Sustainability is about more than energy – sustainability encompasses the health of our students and the communities where they live.

There are many opportunities to get involved in the sustainability efforts that are going on at the state and national levels, many of

your colleagues have already gotten involved in these organizations and earned recognition for their districts. I encourage you to research these opportunities and pursue them as you look to make your district more sustainable and healthy.

– Woody Wiedenhoef, Executive Director, WASBO

Green & Healthy Schools Wisconsin: Providing Recognition for Wisconsin School Districts

Green & Healthy Schools Wisconsin provides recognition to Wisconsin PK-12 public and private schools working to reduce environmental impact and costs, improve health and wellness, and increase environmental and sustainability literacy through a self-paced, voluntary, web-based application. Administered through a partnership between the Department of Public Instruction, Department of Natural Resources and Wisconsin Center for Environmental Education, the goal is to provide educational opportunities and resources to school staff and community members that are interested in green and healthy initiatives in Wisconsin schools.



WASBO Members are already active in the Green & Healthy Schools Wisconsin program, gaining recognition in one or more of their nine focus areas. Along with this, WASBO partnered with Green & Healthy Schools Wisconsin to spearhead the formation of the Indoor Environmental Quality Task Force.

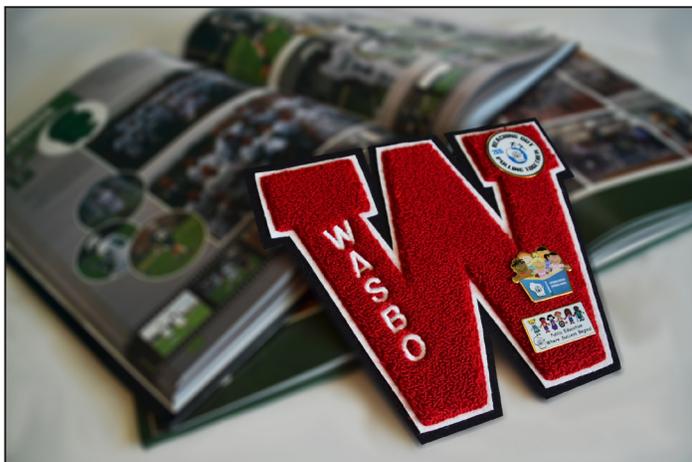
Additional information on Green & Healthy Schools Wisconsin can be found at <http://ghswisconsin.org>. To apply for recognition through the program, please visit <http://myghswisconsin.org/>.

Green Schools National Network Launches Membership Program

Erin Green, Treasurer of the non-profit Green Schools National Network (GSNN), is excited to announce the launch of the Network's first ever membership program! Are you an educator, school business official, or facility director who uses sustainability to save money and/or drive innovation in your classroom or school? GSNN wants you! As a member, you will have access to the latest news, trends, and best practices in all areas of green schools, as well as unique professional development opportunities. Learn from and be inspired by the people who are transforming schools across the country.

More information on the Green Schools National Network can be found at www.greenschoolsnationalnetwork.org.

Join and be a Catalyst for Change! To answer your membership questions, refer to GSNN's membership guide at <http://ow.ly/10euVP>. Check out GSNN's member launch video at <http://ow.ly/10euY8>.



WASBO Spring Conference & Exhibits

May 26-27
Kalahari, WI Dells

Golf & Bike
Scholarship
Fundraisers,
May 25

[WASBO.com/
spring](http://WASBO.com/spring)

Staying on Track . . . and Climbing the Mountain

By Margo Smith, Business Manager, Northland Pines School District



Margo Smith

I recently read the classic tale of *The Little Engine That Could* by Watty Piper to my grandson. For those unfamiliar with this tale, a train full of toys is left stranded at the bottom of the mountain, after which time the toys implore several train engines passing by to please help them over the mountain so they may get to the children who are waiting on the other side. They are refused by several engines for various reasons: Too busy, too tired, too old. That is, until one little blue engine takes on the task with the mantra "I think I can, I think I can, I think I can." Slowly and steadily, the little blue engine completes the journey.

Many of us can relate to this theme. Like you, at Northland Pines in Eagle River we have had to "climb our mountain" this year on several fronts. Probably the most important was working and preparing for our 3.9 million operating referendum this March. This is extremely formidable in our District, as we are a property-rich, declining enrollment district with

only \$72,540 coming to us as Special Adjustment Aid and zero equalization aid. With the help of the staff and community support, the referendum passed successfully. The Affordable Care Act regulations have been dealt with and our 1095-C's sent out. We have a new student wellness initiative, and opened a new Montessori, a new charter high school, and a new building for special education students.

It feels like we reached the top and are sliding down the mountain to our destination. However, as adults we realize that when one mountain is crossed, another one soon looms on the horizon. 2016-17 (our "new mountain") will be looking at us with its many obstacles and new terrain very soon. In our District Office, we have begun the budget process, and are looking to receive training and implement a pilot at the High School to automate the budget development process. We also want to provide better fixed asset tracking and develop sounder cash control policies. The list is getting longer

every week.

With the presidential election on the horizon this fall and the stark differences in party views on healthcare, Medicaid, bargaining, tax reform, and immigration, our heads begin to spin as we think of what might be "undone," "re-done," or newly enacted. When one thinks of how just about every tax form, employment form, insurance form, or benefit form could change it makes our shoulders tense up just thinking about it. We will need to re-educate ourselves as necessary to be poised for any and all new legislation at the federal level affecting school governance.

So, while it may feel at times that we are too busy, too tired, too old, or simply cannot endure the continuous change, I think we can, I think we can, I think we can. 🦋

If you have questions about this article, contact Margo at masmith@npsd.k12.wi.us.

Intrigued by solar power

**BUT CONVINCED
IT'S OUT OF REACH?**

**It's time to speak with
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Hoffman found a way for the Darlington Community School District to install Wisconsin's largest solar array for a public school district....with **minimal up-front costs**.

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

Upcoming WASBO Events

Professional Development

Spring Conference **

May 26-27, 2016 - Kalahari Resort & Conference Center, WI Dells

Custodial & Maintenance Conferences

June 23, 2016 - Muskego High School, Muskego

July 13, 2016 - Sparta High School, Sparta and DC Everest High School, Weston

July 27, 2016 - Menasha High School, Menasha

Mentorship Program Orientation

Aug 16, 2016 - Holiday Inn Madison at the American Center, Madison

New School Administrators & Support Staff Conference **

Aug 17-18, 2016 - Holiday Inn Madison at the American Center, Madison

Fall Conference **

Oct 6-7, 2016 - The Osthoff Resort, Elkhart Lake

Scholarship Fundraisers

Spring Golf Fundraiser

May 25, 2016 - Trappers Turn Golf Course, WI Dells

Spring Bike Fundraiser

May 25, 2016 - 400 Trail

Fall Golf Fundraiser

Oct 5, 2016 - Autumn Ridge, Valders

Fall Bike Fundraiser

Oct 5, 2016 - Old Plank Road Trail

Certified School Risk Managers (CSRM)

Courses **

Fundamentals of Risk Management

Sept 20, 2016 - WI School Leadership Center, Madison

Handling School Risks

Sept 21, 2016 - WI School Leadership Center, Madison

Measuring School Risks

Oct 19, 2016 - WI School Leadership Center, Madison

Funding School Risks

Oct 20, 2016 - WI School Leadership Center, Madison

Administering School Risks

Nov 9, 2016 - WI School Leadership Center, Madison

Workers' Compensation

Dec 6, 2016 - Madison Marriott West, Middleton

** Viterbo University graduate credit available

**Visit WASBO.com for future WASBO
Professional Development & Networking
opportunities!**

**Invest in yourself and your district by attending
WASBO professional development.**

Candidate Résumés for WASBO President Elect

Jason Demerath

Director of Business Services, School District of Fort Atkinson

President-Elect Candidate



Kent Ellickson

Director of Finance and Business Services, School District of Onalaska

President-Elect Candidate



Work Experience			Work Experience		
2013-present	UW-Whitewater	Adjunct Instructor in School Business Management Program	2015-present	SD of Onalaska	Director of Finance and Business Services
2009-present	SD of Fort Atkinson	Director of Business Services	2005-2015	Sparta Area SD	Director of Business Services
2007-2009	SD of Waukesha	Controller & Executive Director of Business Services	2003-2005	Cambridge/Deerfield SDs	Cambridge SD Business Manager 2004-05; Cambridge/Deerfield Cooperative Business Manager 2003-04
2007	Oshkosh Area SD	Executive Director of Business Services	2001-2003	Clinton Community SD	Business Manager
2004-2007	Deerfield SD	Business Manager	1990-2001	SD of Lodi	Business Education Teacher
Educational Experience			Educational Experience		
2014-2017	ASBO	Certified Administrator of School Finance & Operations (SFO)	1996-1999	UW-Whitewater	Wisconsin School Business Manager Licensure Program 08
2014-2016	National Alliance	Certified School Risk Manager (CSRM)	1991-1995	UW-Eau Claire	Master of Science in Teaching - Business Education
2002-2004	UW-Whitewater	MS in School Business Management	1984-1990	UW-Eau Claire	Bachelor of Science - Business Education
1995-2001	UW-Green Bay	BS in Business Administration and Economics			
Professional Activities			Professional Activities		
WASBO: Board Member, Member, presenter at various conferences ASBO: Member WSSCA: Member UW-Whitewater: Adjunct Instructor in School Business Management Program, Intern Supervisor of School Business Management Program			WASBO: Board of Directors, School Finance Puzzle Co-Chair, Joint Convention Committee, Scholarship Committee, Mentor, WASB New Board Member Workshop Presenter ASBO: Member for 15 years WCBSO and MASBO Regionals: Member for 11 and 4 years		
Community Activities			Community Activities		
Former member, Fort Atkinson Lions Club, Fort Atkinson Golf League, Deerfield Lions Club, Madison Bass Club. Former Finance Committee Chair and Council Member, First Congregational United Church of Christ			Member, Onalaska Area Business Association; Ex-Officio Member of School District, Sparta Chamber of Commerce; Festival Volunteer, La Crosse Irishfest; Member, Sparta Community Education Committee; Board of Directors, Tanglewood Condo Association		
Interests & Hobbies			Interests & Hobbies		
Family, Bass Fishing, Bow Hunting, Golfing			Music (play double bass and piano); Travel (history and geography/reading maps); Biking		

Candidate Résumés for WASBO Board of Directors

Nathan Jaeger

Director of Business Services,
Whitewater Unified School District

Director Candidate
(Two-year term)



Greg Gaarder

Business Manager, Tomah Area School
District

Director Candidate
(Three-year term)



Work Experience			Work Experience		
01/2011-present	Whitewater Unified SD	Director of Business Services	08/2004-present	Tomah Area SD	Business Manager
9/2007-12/2010	Whitewater Unified SD	Elementary Classroom Teacher	07/1999-08/2004	Adams-Friendship Area Schools	Business Manager
			07/1993-07/1999	Adams-Friendship Area Schools	Elementary Principal
			01/1990-06/1993	Tomah Area SD	Elementary Physical Education Teacher
			10/1983-12/1986	UW Marine Corps Reserve	Heavy Equipment Mechanic
Educational Experience			Educational Experience		
2009-2011	UW-Whitewater	Master of Science in Education (MSE) School Business Management	2000	UW-Superior	School Business Management
2008-2010	UW-Whitewater	Master of Business Administration (MBA) Finance & Management	1991-1992	Winona State University	Elementary Education
2001-2006	UW-La Crosse	Bachelor of Science (BS) Elementary & Middle School Education	1983-1989	UW-La Crosse	Physical Education
Professional Activities			Professional Activities		
WASBO: Board of Directors (current), 2014 New School Business Official of the Year, Joint Convention Planning Committee, Safety & Risk Management Committee Madison Area School Business Officials (MASBO): Member ASBO: Member UW-Whitewater: Guest Presenter - Educational Leadership & Policy Analysis Degree Program			WASBO: Member WSCBO: Member		
Community Activities			Community Activities		
Board Member, Rotary Club of Whitewater; Vice Chairperson, Whitewater Parks & Recreation Department; Board of Directors, Whitewater Aquatic Center (WAC)			Past Member, Tomah Lions; Board of Directors, Tomah Boys' and Girls' Club		
Interests & Hobbies			Interests & Hobbies		
Golf, Reading, Outdoor Recreation, Family			Family, Home Brewing, Personal Health and Fitness, Outdoors, Hunting, and Boating, Ryute Karate		

Candidate Résumés for WASBO Board of Directors

John Stellmacher

Director of Business Services,
School District of Hartford Jt #1

Director Candidate
(Three-year term)



Bob Tess

Chief Finance and Business Services
Officer, Wausau School District

Director Candidate
(Three-year term)

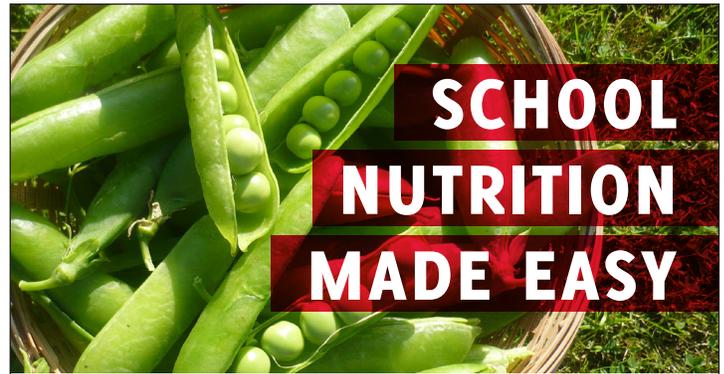


Work Experience			Work Experience		
2011-present	School District of Hartford Jt. #1	Director of Business Services	2013-present	Wausau SD	Chief Finance and Business Services Officer
2010-2011	Waupun Area School District	Director of Business Services	2010-2013	Oshkosh Area SD	Executive Director of Business Services
2007-2010	Barron Area School District	Business Manager	1990-2010	Marathon School District	
Educational Experience			Educational Experience		
2005-2006	UW-Whitewater	Masters in School Business Management	2010-2012	Marion University	Business Manager Certification
2002-2005	UW-Whitewater	BBA in Finance/Actuarial Science	2006-2009	UW-Stevens Point	Masters of Arts and Education
			1986-1990	UW-Madison	Bachelor of Science in Math Education
Professional Activities			Professional Activities		
WASBO: SAA Primary/Alternate Voting Member (2008-present); Joint Convention Committee Member (2008-present) and Co-Chair (2011-present); Mentor (2012-present) Waukesha Area Schools Health Cooperative: Member (2011-present); Board of Directors Concordia University: Adjunct Instruction, School Finance/Leadership for Change (2015-present)			WASBO: Presenter at various conferences, Joint Convention Planning Committee Wisconsin Investment Series Cooperative: Commissioner on WISC Board		
Community Activities			Community Activities		
Board of Directors, Treasurer, Hartford Rotary; Board of Directors, Vice President, Barron Kiwanis; Coach, Wisconsin Basketball Coaches Association (WBCA); Treasurer, Boys and Girls Club Board of Directors					
Interests & Hobbies			Interests & Hobbies		
Tri-Wisconsin Triathlon Team, Stellmacher Family Running/Cross Country Ski Team, Fatherhood - Proud Dad of Catherine			Outdoor Activities; Camping; Playing Sports, Following Packers, Brewers and Badgers; Listening to Music		

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- Sponsorship Opportunities:
 - Custodial & Maintenance Conferences (June 23, July 13, and July 27)
 - New School Administrators & Support Staff Conference (Aug. 17-18)
 - WASBO activities at ASBO International (Sept. 23-26)
 - Fall Conference (Oct. 6-7)
 - Midwest Facility Masters (Nov. 7-8)
- *Taking Care of Business* articles due May 15 for June issue.
- Advertise in *Taking Care of Business*.
- Update your profile and communication preferences at WASBO.com.
- Join a WASBO Committee.



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35 Lifesaving Tips When Facing an Armed Intruder or Active Shooter

By Mike Bolender, Peaceful Warrior Training, and Ted Hayes, M3 Insurance
Submitted on behalf of the WASBO Safety & Risk Management Committee

Even with all of the violent incidents occurring in today's world, your chances of being involved in an active shooter situation are slim; unfortunately, armed intruders and active shooter situations are occurring with greater frequency every year.

Statistics indicate that a little more than 60% of active shooter situations are over within five (5) minutes – the shooter leaves the area, the shooter takes their own life (about 40%), or law enforcement/a prepared citizen neutralizes the situation. Knowing exactly what to do during those few minutes may mean the difference between life and death for you, a coworker and many others in your building.

Simply stated, an active shooter seeks three factors:

- Easy 'targets of opportunity'
- Little or no barricades or restrictions that will limit their movement
- Little or no supervision or confrontation that will restrict or end their actions

Whether your school uses A.L.I.C.E., Run-Hide-Fight, Lockdown, Evacuation or other employee crisis action protocols, it is critical to comprehend how to place as many 'roadblocks' as possible between yourself and the intruder/shooter to increase your chances of surviving an active shooter event.

Honestly ask yourself, is everyone in your school prepared to deal with an armed intruder or an active shooter? Take the time to share these proven lifesaving ideas with everyone:

Be prepared to 'act not react.' People die when they mistakenly believe they must confirm the crisis is real. If

you hear a sound that you perceive to be a gunshot, it is a gunshot until proven otherwise. It's acceptable to individually initiate your lockdown or run-hide-fight protocols – if it's proven to be a non-crisis, that's OK.

Create mental 'action scripts.' An 'action script' is a mental rehearsal plan of 'what if' scenarios regarding your immediate response to variety of crises – 'if this happens I will do that.'

Lockdown & Barricading Concerns

Practice 'rapid response' lockdown. Identify the process and actions that you will take to lockdown and/or barricade your occupied space.

Make your barricade response 'gross motor skill based.' Remove any body actions that are 'fine motor skill based' – for example, placing keys in the door keyhole and turning, any precise movements or tasks with your fingers such as tying rope or computer cable to the door knob. These actions will be slow and at times impossible to perform. Simplify by using pre-tied items, carabiners, or pre-lock doors so all you have to do is shut the door.

Identify objects that will be used to barricade your location. This means pre-plan your lockdown and barricade actions and identify the exact objects that will be utilized.

Plan the barricade objects in order – even number the order in which they are to be used when barricading. Always use objects of substantial size and weight when barricading. Don't just pile chairs in front of the door, they will not stop an intruder and will limit or obstruct your ability to respond and get out of the room if the door is breached. If barricaded properly, a door breach should be a rare occurrence.

Once barricaded or in lockdown, avoid



Mike Bolender



Ted Hayes

standing directly in front of the door in case the shooter fires through the door. This area is known as the 'fatal funnel.'

Make it appear as if no one is in the room. Turn off lights, silence all cell phones, keep quiet, and don't cast shadows under the door.

Identify a secondary exit (door, window, breach a wall) that you can get out if needed.

Assume the 'Defend Your Room' position if you cannot get out. Position yourself against the wall, 2-3 feet from the knob side of the door. Have a 'pre-planned, improvised weapon' and be ready to use it. It's time for 'action vs. reaction' – you attack first – action always beats reaction.

Day-to-Day Awareness

Day to day awareness is your best personal and professional protection mechanism. No matter where you are or what you are doing, develop a thorough understanding of your surroundings. Know how to safely evacuate the area; know how to barricade your area/room; and as a last resort understand how and when to fight the intruder.

It is important to always be observant. Use all of your senses, being attentive to your surroundings at all times. 'Intuitive concern' means trusting your instincts and intuition. We get in trouble when ignoring what our gut is telling us. When you sense an unexplained concern or uneasiness about someone or something, look deeper at the situation or person and identify if there is danger or pending attack.

Understand your surroundings every time you enter a building. Look around

– try to find at least two (2) exit routes out of each area/room and the building itself. Take the time to enter and leave the building using different routes. This familiarity with the building layout will be beneficial during a real evacuation.

Always ‘Say Something.’ Learn to report all suspicious activities, people, or vehicles to law enforcement. It is law enforcement’s job to determine if the activity is something other than it appears to be. The safest schools are those that expand this concept and follow ‘Hear or See Something, Say or Do Something.’ If you hear something (in person) or see comments, statements or questions on social media that cause concern, bring that concern to a supervisor and/or the authorities. This also means if you see or hear signs of imminent danger - gunshots, yelling, screaming, or reports of an intruder - don’t go to verify what is happening, ACT!!!! - by initiating your pre-planned ‘action script.’

Maintain your brightly colored crisis plan in the same location in every area/room.

Look around the room for potential weapons. Every building/room contains many objects that can be used as weapons to distract or even disable an armed intruder or shooter.

Know how to implement your personal ‘Ripple of Safety.’ During a lockdown or evacuation, know how to:

- Get yourself safe as quickly as possible
- Notify others so they can get safe and begin their own ‘ripple of safety’
- Activate your school’s emergency notification system
- Call ‘911’

Initially your biggest obstacle will be DENIAL – get by denial and ACT!

Run – Hide – Fight Concerns

Remember, you can survive an active shooter incident. The best response plans are those that allow you to switch and move between response alternatives as the context of the

incident evolves and changes.

‘Move With Purpose’ – playing dead or freezing will most likely get you killed – action will provide a chance and may save your life – so learn to ‘move with purpose.’ The context of your situation will dictate your purpose. An armed intruder or active shooter situation will evolve rapidly and new details may be limited; you must also be able to adjust as the situation changes.

If you are in another area of the building when an initial attack occurs, your response alternatives will differ from those individuals who are in the immediate area of shooter. Active shooter situations are dynamic and evolve quickly. If the shooting starts down the hall from your location, your options are to lockdown/barricade (if you are in a lockable space) or create distance if you have no lockable space or there is a clear path to an exit.

The shooting down the hall could very quickly migrate to your space which dramatically changes what life saving alternatives work best. The closer you are to the shooter, the less response alternatives you will have. If you are near the shooter and your exit is blocked and there are no secondary exits (windows, doors, etc.) you probably have two choices - do nothing and die or go on the offensive and give yourself a chance to live.

If you are in close vicinity to the shooter, utilize a distraction. Throw anything at his/her face to create ‘openings of opportunity’ for you to create distance between yourself and the shooter, lockdown/barricade, leave the area through a secondary exit, or if no other option exists – engage the shooter.

Run

Simply stated, you run to get out of the area quickly and safely creating distance between yourself and the shooter. Always run away from the sound of gunfire.

If you are in a hallway or open space with the shooter, create more distance between you and the shooter by

placing large heavy items called ‘cover’ – items that will stop bullets – steel, concrete, large heavy planters filled with dirt, etc.. At times all you may have is ‘concealment’ - beneficial, but it only protects you from the shooter’s view and will not stop bullets. Concealment objects include drywall, bushes, hollow core doors, most furniture, etc... Understand once the shooter knows you are on the other side of the concealment item you could be shot directly through that item.

When running from a shooter, create distance and 90 degree angles between you and the shooter. This can be accomplished by moving into opposing hallways, rooms, alcoves, doorways, etc.

Once you have evacuated the immediate area, scatter from others and run as far away as you can. Once you are safe, call ‘911.’

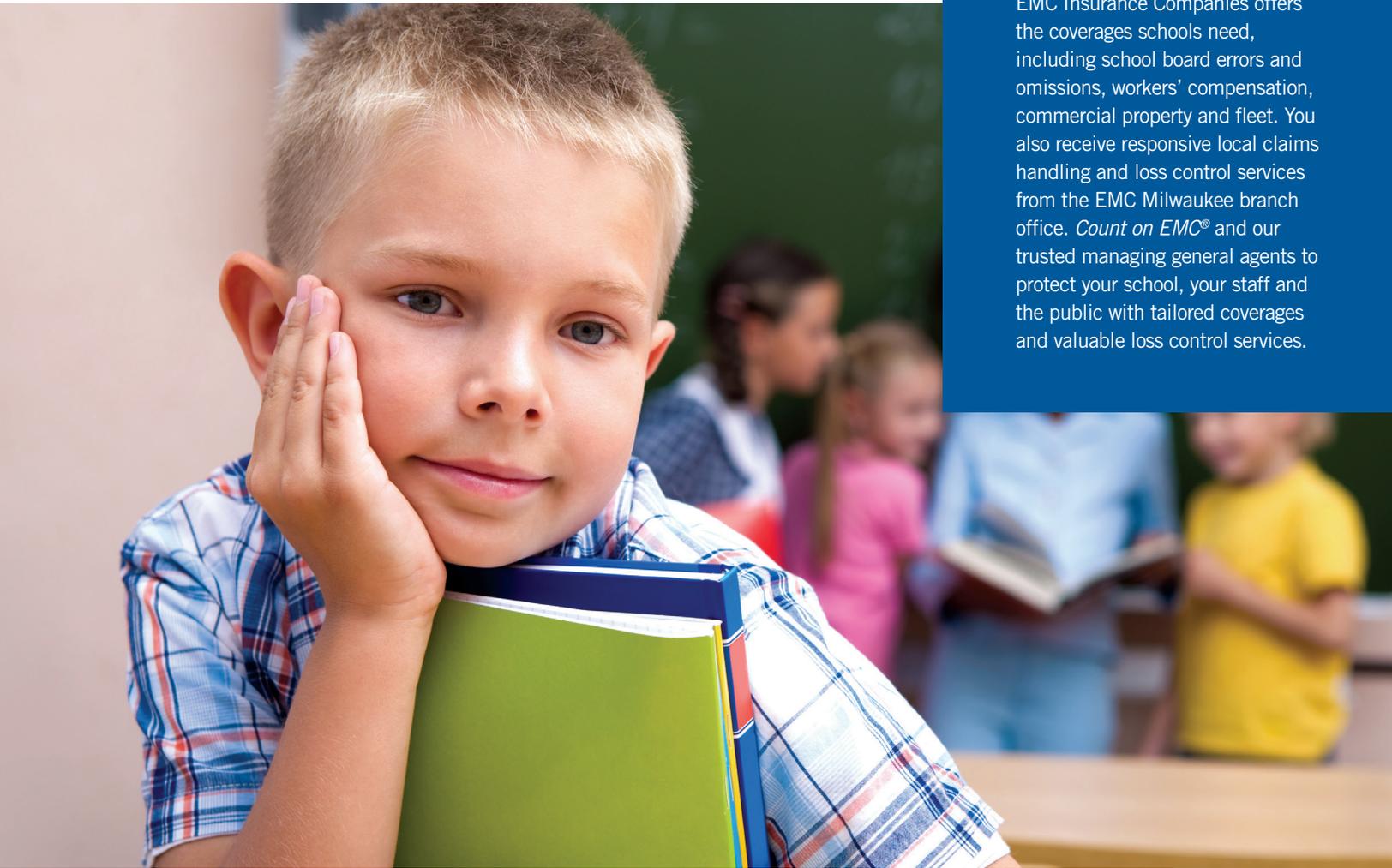
Be prepared to provide exact details to the ‘911’ operator. When you call ‘911’ don’t assume the person you are speaking to knows your exact location; some ‘911’ calls go to a county wide dispatch center. Inform the operator of the city and your exact location, “I’m at ABC Company, 123 Main Street, Wausau Wisconsin and there is an active shooter in the building.” If possible give description of shooter’s appearance, weapon types, location, direction of travel in building, location of known injured, etc.

Hide

If you hear gunshots (or what you perceive to be gunshots) and can’t get out of the building, it’s time to lockdown and barricade. Simply hiding under a table or desk with no barricade between you and the shooter will not protect you. When no other alternative is available - you can’t create distance, lockdown barricade, or get out of a secondary exit - find a distraction object to throw at the shooter and create a plan in case the shooter finds you.

Plan to throw objects at the shooter’s face and eyes - when they flinch it’s

Continued on page 27



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35 Lifesaving Tips When Facing an Armed Intruder or Active Shooter

Continued from page 25

time to act - initiate your plan which could be to create more distance, get to a lockable space, create 90 degree angles or engage/attack the shooter.

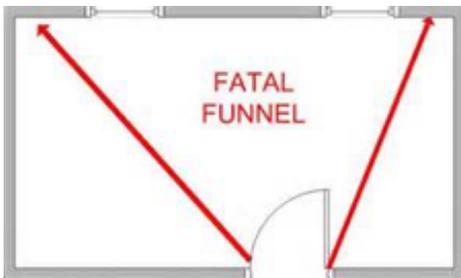
Immediately lock and barricade the door. Use large, heavy, moveable objects to barricade the door. Tables, desks, filing cabinets, chairs and other objects can be used to block entry in to the room. These objects should also be used to block the door window so the shooter cannot easily see in to the room.

Turn off the lights and silence all cell phones. The noise or the illumination emitted from a cell phone may tip off the shooter of your location.

Always spread out throughout the room. Don't huddle together and create easy targets for the shooter.

Keep calm and quiet in the room. Make it appear that 'no one is home.'

Once your lockdown and barricading is complete, look for a secondary exit to get out of your location if necessary. Break a window and evacuate if you are able.



Never stand in the 'fatal funnel.' Past history indicates that shooters do not spend a great deal of time trying to breach a door unless they have a specific target in mind. Shooters understand they are 'on the clock' knowing that law enforcement will be responding soon. They may attempt for 4-6 seconds to enter the room. If unsuccessful in their efforts, they may fire a few rounds through the door, hoping to strike someone inside. It's then time to move on and look for

'easier targets of opportunity.' Instruct everyone to never stand in front of the door...avoid the 'fatal funnel.'

Fight

Engage the shooter if running and hiding are not options.

Find anything to use as a weapon – a stapler, the fire extinguisher, your lap top computer, your forearm/elbow, etc...

Attack the 'Trauma Susceptible Targets.' This includes the eyes, all sides of the neck, the clavicle, the solar plexus, the groin, ankles, and knees. Identify your target and 'drive through' with your weapon.

If possible, attack with numbers. If you have no other options, attack the shooter 'Gang-Fu' style. If even one person attacks the shooter, validate their decision and HELP THEM!

Team Tactics (Gang-Fu)

If you are using team tactics to attack the shooter, the first person attempts to control the weapon/arm to get the weapon pointed in a safe direction. The second person attacks 'Trauma Susceptible Targets' with a planned or improvised weapon or their forearm/elbow. Repeatedly strike through the target until the shooter is completely disabled.

When the weapon is disengaged from the shooter, remove it as far away from the shooter as possible. Do NOT have weapon in your hands as you exit the building or when law enforcement enter the building. Remember, law enforcement does not know who or where the shooter is located; having a weapon in your hands could lead to deadly consequences.

When law enforcement enters the area, listen and strictly follow their commands. Always maintain your hands above your head unless you are containing the gunman. Always allow law enforcement to take command of the situation. 🇺🇸

About the authors:

Captain Mike Bolender is a 25-year veteran with the Oak Creek Police Department (OCPD) commanding their patrol division, emergency communications and use-of-force training.

As one of OCPD's SWAT team leaders, his first shooter incident occurred in 2004 at a hotel where the shooter killed several innocent people and barricaded himself in a room with a hostage. In 2012, Mike was involved in his second active shooter situation at the Sikh Temple (Gurdwara) in which Captain Bolender was tasked with being the incident commander overseeing law enforcement operations and response to the shooting.

Previously Mike spent 15 years on Oak Creek's Emergency Response Unit (SWAT Team), ten of which as a team leader. Additionally, he has been a use of force instructor for 23 years and oversees the Oak Creek Police Department Training Cadre. Mike received his Masters Degree from Marquette University in Administration of Justice along with a certificate in Leadership.

Mike and his team created a three-pronged approach to active shooter events which is unique from any other program. The Peaceful Warrior Program can be incorporated with any current active shooter protocols or be utilized on its own. It is specifically designed to 'fill the gaps' that individuals who have experienced an actual shooter event have found to exist. Two of the active shooter programs Mike and his team have created are "Active Shooter Preparedness and Response" and "First Care."

Mike can be contacted at www.pwtraininggroup.com or by email at pwtraininggroup@gmail.com.

Ted Hayes consults with businesses, school districts, and municipalities throughout Wisconsin to develop safety programs and risk management strategies. For over 29 years, Ted has served as a security and safety consultant to clients in Wisconsin and throughout the United States. In 2001, Hayes and Waukesha County (WI) Sheriff Bill Kruziki authored the book, *Not In MY School! A Pro-Active Guide to School Violence Prevention* and in November, 2014, Ted authored his second book, *If It's Predictable, It's Preventable - More than 2,000 Ways To Improve the Safety and Security in Your School*. You may get in touch with Ted at ted.hayes@m3ins.com.

REFERENDA RESULTS

APRIL 5, 2016



SUMMARY

53 Wisconsin school districts chose to go to referendum on April 5th. Over 77% of the referenda questions passed.

April 2016 Referendum Breakdown:

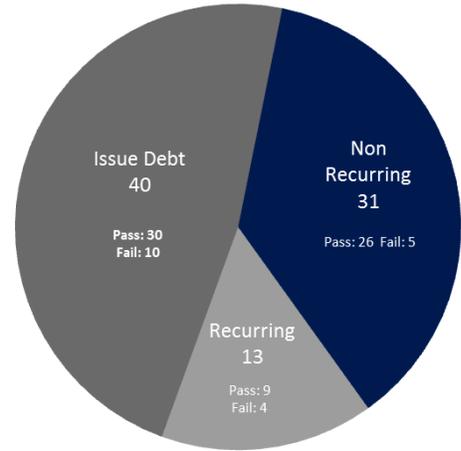
- 36 questions asking residents to issue debt totaling \$696,170,000.
- 23 questions asking residents to exceed the revenue limit on a non-recurring basis in an amount totaling \$141,548,000.
- 12 questions asking residents to exceed the revenue limit on a recurring basis in an amount totaling \$16,198,000 per year.

Results:

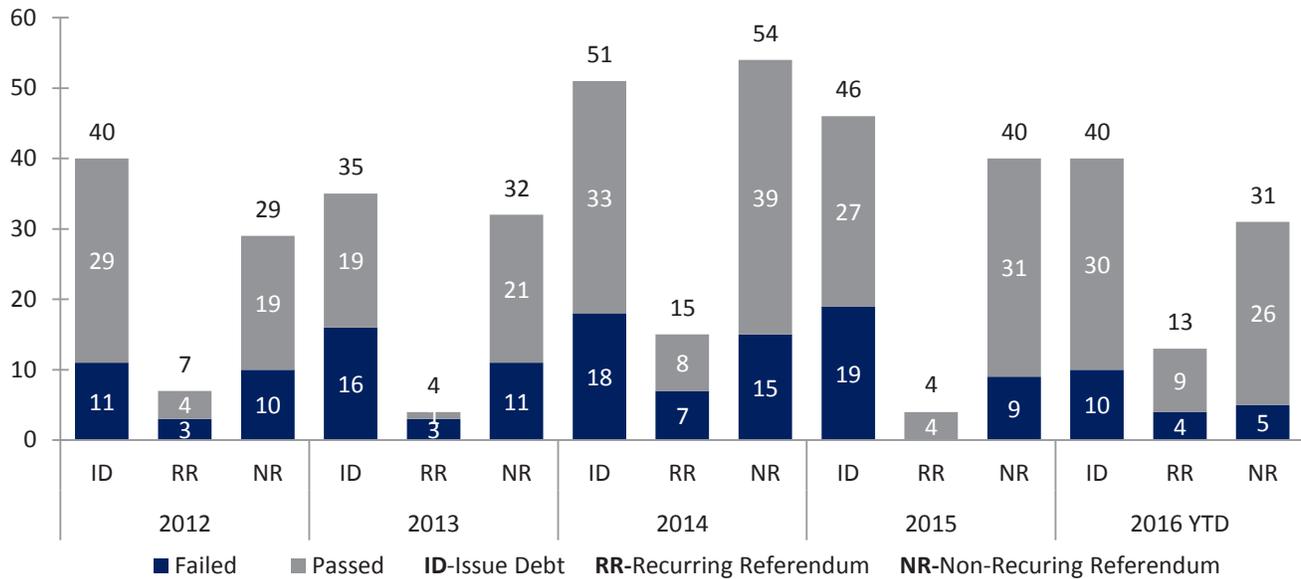
43 school districts celebrated success:

- 26 Debt questions passed totaling \$492,495,000.
- 20 Non-recurring questions passed totaling \$128,250,000.
- 9 Recurring questions passed totaling \$9,865,000.

2016 Referendum Breakdown YTD



HISTORY



UPCOMING REGULAR ELECTION DATES¹

	2016		2017		2018	
	Primary	General	Primary	General	Primary	General
Spring			02/21/2017	04/04/2017	02/20/2018	04/03/2018
Fall	08/09/2016	11/08/2016	No Fall Elections		08/14/2018	11/06/2018

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¹The governing board required to file adopted referendum ballot resolutions with their municipal clerks at least 70 days prior to the election date indicating the amount and purpose.
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The Fed Revises Forecast, Signals Two Rate Hikes

Many school districts are seeking voter approval in 2016 to issue new debt to pay for school facility improvements. This means that district officials will prepare their district to access funding from investors via municipal bond underwriting companies like Baird in the municipal bond market. The prevailing interest rate levels in the municipal bond market are influenced by many factors including the political environment, the supply of and demand for municipal bonds, and current economic conditions both in the United States (the “U.S.”) and globally. The Federal Reserve Board (the “Fed”) monitors economic data points and makes Monetary Policy decisions that impact the supply of money available to borrowers. Baird’s Fixed Income Analytical team regularly monitors these Fed decisions and economic data to provide insight on the direction of interest rates. Below is a recent interview with Craig Elder, a senior member of the Baird’s Fixed Income Analytical team.

The Federal Reserve reconvened March 15 and 16, and again took a pass on raising interest rates, signaling instead that it plans to raise rates only twice in 2016, not four times as initially expected. Baird sat down with Senior Fixed Income Analyst Craig Elder, author of “Fixed Income Weekly,” for his perspective on the meeting.

Baird: Craig, what did you find most interesting about the Fed’s March meeting?

Craig: The tone of this meeting was more dovish. While we’ve been predicting two rate hikes for quite some time, today Fed officials confirmed that the pace of rate hikes will be slower than originally planned. They put back in their statement that global economic and financial developments of recent months have given them cause to adjust course. It’s worth noting that it was not a unanimous vote this time. Kansas City Fed President Esther

George voted no, citing she was in favor of raising rates at this meeting.

Baird: How have the markets responded to the Fed’s decision not to raise rates?

Craig: Overall Treasury prices are higher, with the yield on the 10-year Treasury note down about 5 basis points. I would expect market volatility to continue, but I think it would take a major outlier event to move the markets significantly over the next couple weeks, which are typically quieter due to the Easter holiday.

Baird: How concerned is the Fed about inflation?

Craig: The Fed did note that inflation has picked up in recent months, but it’s still below their target of 2%. The core PCE (personal consumption expenditures excluding food and energy prices) number, which they will be monitoring closely, is close to 1.7% now.

Overall, they don’t seem to be too concerned about wage inflation specifically because the average hourly earnings number last month was down. However, my thinking is that if the unemployment rate continues to trend down, you’re going to get some wage inflation. That could become a concern as it would ultimately drive inflation higher.

With that said, even if overall inflation goes above 2%, I think the Fed will still take a “measured” approach in raising rates. I do not believe that hitting a 2% inflation target will force their hand.

Baird: At this point, what are you expecting in terms of future rate hikes this year?

Craig: I’m still calling for two rate hikes. It’s possible there might only be one, but I do think June is on the table. I think the Fed will raise rates another 0.25% at the June meeting and then again in December, as it did last year. I think a September rate hike is less likely given the impending presidential

election.

Baird: What will Fed officials be watching as they consider when to raise rates next?

Craig: The Fed will be looking at what’s happening, such as the European Central Bank’s recent decision to expand its stimulus program. Additionally, they’ll be monitoring inflation, with an eye toward the core PCE and employment numbers specifically. It’s very difficult because we are in a period of slow economic growth. Hopefully we get to GDP growth in at least the 2.2% to 2.3% range this year. Ideally what the Fed would like to see is 3.5% to 4% GDP growth overall.

Baird: The Fed has changed course a few times now. Could this waffling damage the Federal Open Market Committee’s (FOMC) credibility?

Craig: There has been some criticism that the Fed is saying one thing and doing another. It’s our view that the FOMC is in a tough position. Inflation has increased recently, but economic growth remains tepid. Additionally, growth in China is slowing, while Japan and Europe have little or no growth, and the Fed needs to take the global economy into consideration. We believe that’s why they need to be data driven and stay flexible.

In summary, the U.S. bond markets function within an increasingly complex, global economy with many factors that influence the direction of interest rates. Access to this information enables school districts to better understand the variables impacting the current market environment and helps them to make informed decisions as they structure new debt offerings. 📊

Five Steps to a Safer Playground

By Jodi L. Traas, Certified Playground Safety Inspector (CPSI), Senior Risk Management Consultant, Community Insurance Corporation
Submitted on behalf of the Safety & Risk Management Committee



Jodi Traas

Where do elementary students have the greatest frequency and severity of injuries?

The Playground! Play is more than just fun during recess. Play can benefit a child emotionally, physically, cognitively and socially. A wide body of research supports that children NEED play to develop properly. The following steps and guidelines will assist in keeping the children safe during play.

1) Playground Equipment Purchases & Installation

- Choose a playground vendor that has a salesperson that is a Certified Playground Safety Inspector (CPSI). ASTM F1487 & CPSC Public Playground Safety Handbook standards and guidelines are updated and your sales person should be re-certified every 3 years to ensure they are aware of these requirements. Consider IPEMA (International Play Equipment Manufacturers Association) Certified equipment.
- The equipment is designed for specific age groups: 2-5 year olds and 5-12 year olds. If you are purchasing playground equipment for early childhood students or 4 year old Kindergarten then the equipment must be for 2-5 year olds. Students who are above 12 years old should not be utilizing 5-12 year old equipment but rather adult equipment designed for ages 13 and older. A new ASTM Standard F3101 as of December 2015 addresses adult equipment and how it is to be separated from children's equipment. This is becoming a popular option for neighborhoods to offer items for all ages. The equipment designed for ages 13 and older is not designed

or recommended to be used by younger students.

- The playground equipment should be installed by the manufacture representative instead of a community build to ensure the installation is correct. It is not unusual to find serious injury potentials such as a head entrapment on equipment installed incorrectly. If there is only a manufacturer representative to supervise installation, the playground equipment should never be used until it is completely audited by this representative to ensure it is safe for use.

2) Playground Equipment ADA Accessibility Guidelines

- In 2010, The American with Disabilities Accessibility Guidelines (ADAAG) were updated from the original requirements from 2004 for all new and additional playground equipment.
- These requirements are not optional, and your playground vendors should be providing you with ADAAG conformance for every design provided. This must be part of each installation and cannot be delayed until further funds are raised or Phase II.

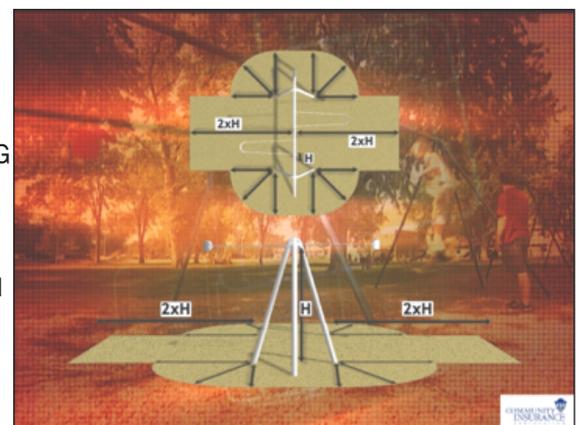
3) Proper Surface Materials & Use Zones

Reducing serious injuries on a playground can be achieved by having proper surfacing materials, whether unitary or loose-fill. Loose material examples include rubber mulch, engineered wood fiber, pea gravel, sand or wood chips. Rubber mulch,

wood chips and engineered wood

fiber must comply and be tested to specification following ASTM F1292. Engineered wood fiber should meet the specifications for ASTM F2075 specifically for this material. ADA accessibility guidelines for stability and firmness are based on compliance with ASTM F1951. The depth of each of the materials also have guidelines through the ASTM F1487 as well as the CPSC Public Playground Safety Handbook.

The use zone is the area around each piece of equipment that the surface material must be in place to reduce injuries. Swings have a greater use zone than other playground equipment. Most equipment use zone is 6 feet only. For example, the use zone for a belt swing should extend to the front and rear of a belt swing a minimum distance of twice the vertical distance from the pivot point and the top of the surface material. (See diagram below.)



4) Audit & Inspections

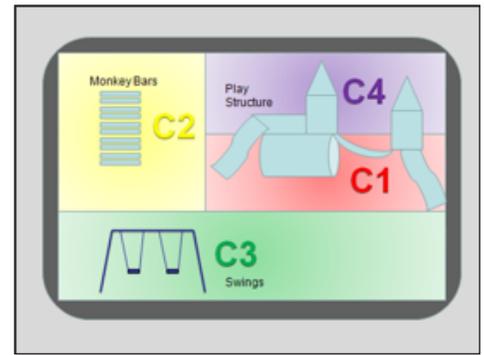
Every playground should have an audit conducted. Ideally that would be immediately following installation but one should be completed on any equipment. The frequency of playground inspections after the initial audit depends on the frequency of

use. Schools have the greatest usage of equipment by hundreds of students on a daily basis. Inspections must be documented for each playground and should be conducted on a weekly or monthly basis depending on how in depth the inspection. This is an essential component to keeping the playground equipment and surface materials safe and reducing both the frequency and severity of risk.

5) Playground Supervision

Supervision is a key component to enforcing proper behavior on the playground during the school day. The most common question is how

many supervisors should be on the playground? The standard answer is the same ratio that you have in a classroom. Playground supervision training and expectations should include all playground supervisors wear a neon or yellow vest to allow students to find them quickly in the case of an emergency. The playground equipment area should be broken down into zones with supervisors working each zone, rotating so they are constantly on the move to reduce inappropriate behavior and play. (See diagram at right.) Each supervisor must consistently reinforce playground rules.



Following these 5 steps can help reduce the frequency and severity of playground injuries. 📌

If you have questions about this article, you may contact Jodi at jodi@aegis-wi.com.

Planning for Summer: Reducing Workers' Compensation Costs

By Kathy Johnson, CSR, Independent Risk Management Consultant, Risk Management Strategies LLC
Submitted on behalf of the WASBO Safety & Risk Management Committee



Kathy Johnson

As the end of the school year approaches, districts are preparing for many activities and events: prom, graduation, award ceremonies, audits and more. Those who are responsible for managing Workers' Compensation injuries and their impact on the district's costs may not be aware of a very effective tool to reduce costs as the school year ends: offering work within an injured employee's physical restrictions to avoid the carrier paying Temporary Total Disability (TTD) over the summer.

The Workers' Compensation Act dictates that when an injured employee is unable to return to his regular job, TTD will be paid by the carrier (or you may continue wages) unless you offer work within the doctor-prescribed restrictions, which halts the TTD payments. You know that applies during the school year when all employees are scheduled to work, correct?

But, did you know that when the school year ends, an employee who is still unable to perform his normal

job duties—even though his job does not require him to work during the summer—will continue to collect TTD, unless you offer work that is within his physical restrictions? Being prepared for the year-end injury and ensuing disability with restricted-duty tasks will mitigate the impact of that injury on your Experience Mod, and perhaps your dividend. Often, the job doesn't have to be within the employee's department or a job even close to the employee's own.

And the even greater savings occur when you return to the employee to restricted duty before the state-imposed 3-day waiting period occurs. You save 70% on how that claim is calculated into the Experience Mod.

Many times, the employee has summer plans that discourage or prevent him from accepting the offer of work. Fortunately, when the offer is refused, the carrier's obligation to pay TTD ceases and your Workers' Compensation exposure is reduced. To ensure that there is no misunderstanding regarding the offer

to work, especially when the employee learns that the TTD payments cease, it is wise to prepare a document outlining the work offered and obtain the employee's signature declining the offer. Provide that to your carrier's adjuster to halt any TTD payments.

As always, an insurance agent or consultant who provides claims consulting services will assist you with this strategy. 📌

“Change is the law of life. And those who look only to the past or present are certain to miss the future.”

~ John F. Kennedy

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Where the Puck is Going to Be

By Rolf Wegenke, PhD, President & CEO, Wisconsin Association of Independent Colleges and Universities



Rolf Wegenke

Hockey great Wayne Gretzky is credited with saying, “a good hockey player plays where the puck is; a great hockey player plays where the puck is going to be.”

Mr. Gretzky’s insight is applicable to the challenge faced by policy makers, higher education leaders, families, and students alike. Colleges and universities prepare students, not only for their first job, but also for the jobs of the future – and not only for jobs, but for lives of purpose and meaning.

When it comes to jobs, too often we play to where the puck is today. There are in fact shortages today – of family practice doctors and welders, for example. There are also looming shortages in areas such as engineering and teaching. Students entering kindergarten last fall need to be prepared for where the puck will be in 2030. Recent National Governors Association (NGA) estimates are that 52 percent of the jobs of the future will require a postsecondary degree. For Wisconsin specifically, others prognosticate that 62 percent of the jobs of the future will require postsecondary education. The numbers vary a little – point is the same! Tomorrow will not be like today.

Also complicating our efforts to locate the puck is the fact that – according to the US Bureau of Labor Statistics – today’s students will change jobs an average of 11 times in their working careers.

Sometimes, it seems that instead of playing where the puck will be, we spend our time arguing about what the puck is. Today’s shortages are real and must be addressed, but we must get ready for tomorrow. Instead of disparaging particular fields of study or occupations, we need to embrace the interconnectivity of today’s and tomorrow’s economy. It is not a question of either-or; we need – and need to honor – all occupations.

Back again to how WAICU-member colleges and universities are locating the puck. Two of the many ways:

“Yesterday is not ours to recover, but tomorrow is ours to win or lose.”

~ Lyndon B. Johnson

First, because the puck will always be in motion, we emphasize the importance of “learning how to learn.” In four years of college, you cannot learn “all you need to know” for the 11 different jobs you will hold or for the jobs that do not yet even exist. A quality education includes content, but most important, develops the students’ abilities to pursue a lifelong love of learning and to embrace continuous learning.

Second, employers and colleges and universities recognize that the most important outcome of higher education is what I have called the “4-Cs.” CEOs already “get it,” finding greatest value in communications skills (89 percent), critical thinking/reasoning (81 percent), character (75 percent), and creativity (70 percent). [Source: Raising the Bar, Hart Research Associates]

If we are going to “play to win,” we’re going to have to get our facts straight and “play to where the puck is going to be.” 🐼

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Reducing School Cost of Risk Through Risk Transfer

By Marty Malloy, CSRM, MS, Arm-P, CPCU, M3 Insurance

Submitted on behalf of the Safety & Risk Management Committee



Marty Malloy

One of the most efficient methods for a school district to handle risk is to transfer the risk of an exposure to another party. There is generally no cost to the school district in transferring risk, but the reduction in a district's total cost of risk can be substantial.

There are two primary areas where risk can be transferred: workers compensation and general liability. This article will examine common workers compensation and general liability exposures and methods to transfer the risk of these exposures to others. It will also discuss best practices for transferring these exposures. It will then discuss some statutory methods which give a school district immunity from liability which negates the need to transfer those exposures. Finally, it will talk about best practices when a district is asked by another party to transfer risk to the district.

This article is not meant to be a comprehensive guide to risk transfer. When implementing a risk transfer program you should work with your attorney and insurance professional. Every school district's risk profile and risk tolerance is different. Your insurance professional can help you determine those parameters. The transfer of risk often involves contracts which you should have reviewed by legal counsel.

Workers Compensation

Common workers compensation exposures:

- Employee use of weight rooms and other school facilities for wellness activities
- Independent Contractors
- Sports Officials

Most schools allow employees to use

school facilities to help employees maintain health and wellness. It is important that the school district have an employee sign an acknowledgement that use of the facilities is voluntary and not a requirement of any work sponsored wellness program. Some employees have received workers compensation for injuries sustained in employer provided wellness facilities. The employees claimed they were working out at their place of employment as part of an employer sponsored wellness program. A properly executed waiver and/or acknowledgement should prevent this type of claim.

The Wisconsin workers compensation statute has a nine point test that defines who is an independent contractor in Wisconsin and who is an employee. If a party does not meet all nine points they are considered your employee under the workers compensation statute. This means if they are injured while working for you their claim will be covered by the district's workers compensation program. Their payroll can also be added to the districts workers compensation policy. One way to assure that an independent contractor does not affect the district's insurance is to obtain a Certificate of Insurance showing that the independent contractor has workers compensation insurance. (Certificates of Insurance will be discussed in more detail later in this article.)

The nine points to determine independent contractor status are:

1. Maintain a separate business
2. Obtain a Federal employer identification (FEIN) number from the Federal Internal Revenue Service (IRS) or have filed

business or self-employment income tax returns with the IRS based on the work or service in the previous year (a social security number cannot be substituted for a FEIN)

3. Operate under specific contracts
4. Be responsible for operating expenses under the contracts
5. Be responsible for satisfactory performance of the work under the contracts
6. Be paid per contract, per job, by commission or by competitive bid
7. Be subject to profit or loss in performing the work under the contracts
8. Have recurring business liabilities and obligations
9. Be in a position to succeed or fail depending on business expenses and income.

Sports officials generally do not meet the nine point test. However, your district can protect itself by using the WIAA contract for officials. The August 2013 Taking Care of Business has an excellent article by Woody Wiedenhoef discussing this contract and its approval by the Wisconsin Department of Workforce Development.

Common Liability Exposures:

- Parties performing a service for the school district
- Parties using school district facilities

When your school district hires third parties to provide services the risks involved in performing those services should remain with that third party. This can be done through indemnity and hold harmless agreements in favor

of the school district from the third party. An emerging risk management practice is to ask your vendors to run background checks on their employees. Part of your agreement with your vendors should state that your vendor will not allow any employee with a criminal history that is substantially related to children and/or a school be allowed to work on your school district grounds.

Outside groups commonly use school facilities. Your district should have a facility use agreement that spells out the responsibilities of outside groups that use your facilities. This agreement should also have indemnity and hold harmless clauses in favor of the school district.

Certificates of Insurance

Once a risk is transferred, the school district needs to make sure the transferring party has insurance to cover the risks that have been transferred. Always obtain a Certificate of Insurance from all vendors or parties that use school facilities or grounds. This certificate should show proof of worker compensation and liability insurance. It is also important that these parties add the school district as an additional insured on the vendor's liability insurance policies. The district should also always ask for a copy of the endorsement to the liability policy that adds the school district to the policy. There are dozens of different additional insured endorsements.

It is very important that the endorsement match the type of activity covered by the Certificate of Insurance. If the two do not match,

there is a possibility that the school district will not receive coverage from that policy. For example, an additional insured endorsement for "lessors of leased equipment" would not provide coverage for a special event held on school property by an outside group.

Statutory Protections

As a public entity, the state of Wisconsin provides you with liability protections. Under Wisconsin statute, your district has limited liability for "actions founded in tort" in state courts. Under the recreational immunity statute, school districts have immunity for recreational use of school grounds. The recently passed "Open Gym Act" grants this immunity to the use of indoor facilities for community health and recreation. There are some important differences between recreational immunity and the immunity provided by the "Open Gym Act." The "Open Gym Act" requires specific postings and signatures from parties using your facilities. The WASB website in the Insurance Plan section has some excellent examples of these documents. Your insurance provider and attorney should have examples as well. Finally the "Open Gym Act" does not apply to swimming pools, weight rooms and gymnastic equipment. (Please note: These limits and immunities are not absolute. There are some exceptions. You should check

with legal counsel regarding these exceptions.)

Caution: Don't Transfer Your Insurance Limits Away

Your school district will also be asked to add other entities as an additional insured to your liability policies. It is in the district's best interest not to name an additional insured to its policy unless that additional insured is another Wisconsin public entity. As discussed previously, your district has liability limitations in the state of Wisconsin. Non-Wisconsin public entities do not have those liability limitations under state statute. When you add them to your policy they have access to your entire policy limits. Your district has purchased its insurance limits based on the fact that you enjoy statutory liability limitations. An additional insured could easily use up your limits leaving no available limits to pay for a claim from the district.

Conclusion

Your district can transfer risk to others and reduce your overall cost of risk. However you need to work with your insurance professional and counsel to make sure you are properly transferring risks. WASBO CSRMS courses also have extensive information on risk transfer and other methods to reduce the cost of risk for your district. 📌



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Case Study: Blue Valley School District's IAQ Program Supports Optimal Learning Environments for Student Achievement

By Cyndy Merse, GSNN Content Writer



Cyndy Merse

Blue Valley School District (BVSD) in Overland Park, Kansas is committed to providing opportunities for academic and personal growth for each of its 22,023 students. This commitment was a driving force behind the district's adoption of a comprehensive indoor air quality (IAQ) program in 2000. In addition to addressing increased parental interest in environmental issues, BVSD wanted to ensure its students had the healthiest learning environment in which to learn and succeed.

Framework for Success

BVSD turned to the Environmental Protection Agency's (EPA) IAQ Tools for Schools Framework to bring together the district's successful existing programs (e.g., building envelope program, preventive maintenance program) and design a plan that addresses IAQ through high performance building design. For BVSD, this meant not only incorporating design elements in schools that have a positive impact on IAQ, but recognizing how these elements (e.g., a strong building envelope, highly insulated roofs, efficient mechanical systems) contribute to healthy learning environments.

Using the Tools for Schools Program's guidance, BVSD identified procedures, resources, and personnel that were key for improving their facilities management plan. The district also adapted their existing standard operating procedures (SOPs) for facility design and capital construction projects, the building envelope, and mechanical programs to establish new IAQ protocols, and tied the new SOPs to the goal of creating healthier learning environments that promote

student success. This link was deemed particularly important in persuading school decision-makers and staff to buy-in to the IAQ program and support its activities.

Ongoing Assessment

Constant monitoring and assessment are at the heart of BVSD's IAQ program. The district's IAQ team conducts frequent walkthroughs and employs a suite of sensing devices to measure important IAQ indicators, including temperature, humidity, air flow and ventilation rates, and CO2 levels, among others. The assessment data is compared to baseline IAQ information that has been collected for each school to better understand what is going on in a particular school's environment and identify inconsistencies. Using technology to track and monitor IAQ indicators allows the district IAQ team to gather data more quickly than they could in the past, which in turn enables team members to develop solutions faster to prevent potential IAQ problems.

A Breath of Fresh Air

One of the ways BVSD has been improving IAQ is by removing underperforming systems and replacing them with displacement ventilation (DV) systems. Traditional air delivery systems introduce fresh air from the ceiling. To reach building occupants (i.e., students and teachers), the fresh air must fight its way through stale, warm air that may be full of CO2 and other contaminants. DV systems deliver fresh air closer to the floor where students and teachers normally sit. This means the fresh air reaches occupants quicker, and is less likely to be contaminated by CO2 and other particulates. The district's success rate with installing DV systems

has been very good; in one school alone, the fresh air ventilation rate was improved by over 50% and overall building energy consumption was reduced by 17%. BVSD has been gradually introducing DV systems in 1-2 schools per year and aspires to outfit all of its schools with DV technology.

IAQ is a Team Effort

BVSD's IAQ team is a true interdisciplinary collaboration. The team is led by an IAQ coordinator, the "go-to guy" for IAQ in the district as well as a program ambassador to key district decision-makers and school staff. Other team members include staff from design and construction, risk and safety, energy, operations and maintenance, and custodial departments. The IAQ team meets on a regular basis to exchange information and stay abreast of IAQ issues and concerns. They also meet monthly with members of the Board of Education so these key school leaders understand what is being done to improve IAQ and the learning environment for the district's students.

Another major component of BVSD's IAQ program is educating facilities staff about IAQ. Custodians are considered the IAQ team's "eyes and ears" since they are in the school buildings every day. BVSD trains its custodians to conduct walkthroughs, identify the root causes of IAQ problems, document potential IAQ issues, and train their colleagues to do the same. BVSD's IAQ team also works with principals on a regular basis to educate them about the IAQ program and share a list of the roles, responsibilities, and contact information for facilities department staff. As a result, of this engagement, many BVSD principals have become active site managers.

Communication and Accountability are Key

Communication has been essential in the success of BVSD's IAQ program. From the start, IAQ team members stressed the importance of good IAQ and its link to student learning and the overall classroom experience. By tying the IAQ program to a goal the district cared about (student academic achievement), the IAQ team was able to build the support they needed to implement the program and sustain it over the last 16 years. BVSD also communicates regularly with parents, school stakeholders, and the community about the need for an IAQ program, its successes, and how the program protects students and promotes healthy, positive learning environments.

BVSD also believes in holding itself accountable for its IAQ program. The district has incorporated its IAQ goals, plans, and measures into its strategic plan, facility operations plans, staff training programs, and operating manuals. Doing this has not only institutionalized the IAQ program, but has made BVSD publicly accountable for IAQ program's performance by evaluating progress against their goals. Another way BVSD demonstrates accountability is by being as transparent as possible with the community and everyone involved in the IAQ program. The IAQ team follows up on complaints within 24 hours and communicates frequently with the complainant, informing them of what was found, how they intend

to address the issue, and when they expect a resolution. Taking this a step further, BVSD solicits feedback through annual surveys of building occupants that asks them to rate the school's indoor environment as well as the performance of the IAQ team.

Positive Impact on Students

Since implementing its IAQ program in 2000, BVSD has noted a number of positive results including fewer per capita IAQ concerns per year, a decrease in lost instructional time due to facility issues, and reduced operating costs due to IAQ upgrades. Most significant, however, has been the impact on student academic performance. BVSD students have demonstrated dramatic increases in math and reading scores on standardized tests since the IAQ program was implemented, and BVSD is the only district with over 20,000 students in the nation that has met the Adequate Yearly Progress guidelines for the entire district.

BVSD's focus on student health and performance through improved IAQ has garnered national attention. In 2003, BVSD was recognized by the EPA with an IAQ Tools for Schools National Excellence Award. Two years later, BVSD received EPA's IAQ Tools for Schools National Sustained Excellence Award and in 2007 was awarded EPA's IAQ Tools for Schools National Mentorship Award. These awards serve to validate the district's efforts to ensure that its students have the best learning environments possible for their academic success.

Best Practices

BVSD recommends the following best practices for schools and school districts looking to implement or improve an IAQ program.

- Start small. IAQ programs take time to implement and show results. Set reasonable goals and find opportunities to improve IAQ that cost little to no money. Small wins go a long way to generating momentum and support for a program. As noted by Dave Hill, Executive Director of Facilities and Operations for BVSD: "Our program's success didn't materialize overnight. It started with a vision and expectation of excellence, and we have continued to push the program forward at every opportunity."
- Build a district IAQ Team. Build a group that represents stakeholders from across the district, from school leaders and Board members to custodial and maintenance staff. Provide training and education on IAQ so everyone involved understands their roles and responsibilities in implementing the program.
- Plan your IAQ activities. Include short- and long-term activities and IAQ goals in the district's strategic plan and SOPs so they become ingrained in the district's culture and daily operations. Be sure to establish metrics that can be used to measure progress against the program's goals.
- Communicate widely and often. Openly communicate IAQ program benefits, successes, and challenges with everyone involved as well as the larger school community. Being transparent about the work being done will help maintain support and enthusiasm for the program.
- Always look for ways to improve. Be open to suggestions and recommendations from both program participants and build occupants. Stay abreast of new technology and techniques that can be employed to further improve school IAQ. 🇺🇸



Photo credit: Blue Valley Schools

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The Clean Power Plan: Opportunities and Challenges for School Districts

New EPA ruling may significantly affect school districts

By Arthur Harrington and Jon Anderson, Attorneys, Godfrey & Kahn, s.c.

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In October 2015, the U.S. Environmental Protection Agency (EPA) announced a final rule for emission guidelines. Commonly referred to as the Clean Power Plan (CPP), the guidelines will assist states in developing their state implementation plans to address greenhouse gas emissions from existing coal-fired electrical generation units (EGUs).

States were required to submit their implementation plans as early as June 2016, however in February, in a

terse one-paragraph order, the U.S. Supreme Court voted 5 to 4 to stay the CPP while awaiting a decision on a challenge to the CPP pending in the U.S. Court of Appeals for the D.C. Circuit and a future Supreme Court decision on whether to review the D.C. Circuit decision.

Because coal-fired EGUs provide a large percentage of the respective baseload electrical generation in many states, this rule will have an enormous effect on utilities and their customers. School districts, as major consumers of electricity, will be affected by the CPP.

Given the strategies for compliance proposed by EPA in this rule package, there will almost certainly be “winners” and “losers” when the rule is finalized and implemented by the states. School districts should begin planning now to maximize their opportunities to mitigate their electricity costs associated with this far-reaching EPA rule package.

School districts should begin planning now to maximize their opportunities to mitigate their electricity costs associated with this far-reaching EPA rule package.

Key Elements of the CPP

Originally proposed in June 2014, and with feedback from approximately 4 million commenters, the CPP provides guidelines for states to develop mandatory plans to reduce CO₂ emissions by approximately 32% by the year 2030. The CO₂ reduction goal identified in the final CPP is actually 9% more aggressive than had been proposed in the June 2014 rule. The targeted reductions, called CO₂ emission performance rates, vary by states, but less so than in the proposed rule.

The CPP identifies “building blocks” that states should use to reduce CO₂ emissions, including:

- Directly reducing EGU CO₂ emissions.
- Increasing the power generation load at existing EGUs fueled by natural gas.
- Expanding clean renewable energy production.

Currently, approximately 26 states are participating in a lawsuit challenging the CPP. However, many of those states that have voiced their opposition have also started preparing for compliance. Moreover, for those states



that “just say no” to preparing their own CPP implementation plans, the EPA has “upped the ante” by direct EPA oversight, known as a federal implementation plan (FIP). The EPA is also issuing a proposed FIP to serve as a template for states to use in designing their respective plans.

The FIP will also be used by the EPA as a backstop enforcement hammer to impose implementation of the final CPP in the event a state fails to meet its implementation plan requirements under the final rule.

Certain additional elements of the final CPP deserve highlighting:

Clean Energy Incentive Program

- The final CPP includes a concept known as the Clean Energy Incentive Program, which provides unique incentives for states that are early adopters of their implementation plans.
- Credits for electricity generated from renewables in 2020 and 2021 will be awarded to projects that begin construction after participating states submit their final implementation plans.
- The program also prioritizes early investment in energy-efficiency projects in low-income communities, including school projects, by awarding those projects double the number of credits in 2020 and 2021.

Timing

- The final rule affords states more flexibility in implementation by developing “trading ready” plans to participate in an emissions credit trading market with other states taking parallel approaches without the need for interstate agreements.
- Although state implementation plans are still due in 2016, states that need more time can make an initial submission and request extensions of up to two years for final plan submissions.
- The compliance averaging period

The Wisconsin Association of School Business Officials (WASBO) has created a working committee to gain a better awareness of the CPP and its impact on school districts. WASBO has led the effort through education programs at state and regional meetings. The group is developing a strategy to engage state regulators at the table where the state plan will be crafted.

Woody Wiedenhoef, the executive director of WASBO, understands the importance of taking an active role: “Local school districts cannot afford to sit on the sidelines as the CPP is played out at the state level. School districts have an excellent opportunity here to be leaders in shaping the implementation of this law.” For more information on the WASBO committee, contact Woody at woody.wiedenhoef@wasbo.com.

begins in 2022 instead of 2020, as was the case in the proposed rule.

- Emission reductions are phased in on a gradual “glide path” to 2030 (rather than the regulatory cliff that began in 2020 and 2030 under the original EPA proposal).
- The new flexible provisions are paired with the Clean Energy Incentive Program to drive early deployment of renewable energy and low-income energy efficiency before 2022.

A growing consensus is that the most efficient means of achieving state compliance with the CPP will be multistate market-based trading mechanisms. Under the CPP, states also have the ability to adopt market-based trading programs within their boundaries to meet the CO₂ reduction goals.

Opportunities and Challenges

States are largely in control of their own destinies by fashioning the appropriate state policies to meet the national goals, and school districts, as electricity consumers, must be engaged in the CPP policy formation and implementation process. Further, with proper input by interested parties such as school districts, states have an opportunity to design innovative regulatory programs whereby utility investments can minimize impacts on local school districts and other customers to meet the CO₂ reduction targets, such as tax, environmental, reliability, and other policies.

However, to ensure that those goals

are met, school districts need to organize and be “at the table” when the state implementing agencies, such as the state environmental agencies and public service commissions, design those programs to meet the goals of the CPP. (See sidebar above.)

Observers agree that the CPP will undoubtedly create the potential for increased electrical generation costs. Yet school districts also have potentially significant financial opportunities that can account for energy-efficiency projects undertaken since 2013 that have resulted or will result in a reduction of CO₂ emissions or demand for CO₂-emitting energy. Districts that have implemented such projects should be able to receive the qualified CO₂ reductions credits and the significant monetary benefit associated with those credits.

States will be turning over every stone to find CO₂ emission reductions to accomplish their 32% reduction goal. Forward-thinking districts that help lead the way in those energy efficiency efforts will brand themselves to the public as sustainable and part of the solution to meet the CPP goals.

The Decision to Stay the CPP

The death of Justice Antonin Scalia creates some interesting legal dynamics regarding the future of the CPP. Justice Scalia voted with the 5 to 4 majority to issue the stay order. In the event the D.C. Circuit affirms the CPP and there is no replacement for Justice Scalia at the time the case reaches the U.S. Supreme Court (as

Continued on next page

The Clean Power Plan: Opportunities and Challenges for School Districts

Continued from previous page

early as late 2016), a 4 to 4 vote in the Supreme Court could result in an affirmation of the D.C. Circuit decision on the CPP.

Although the Supreme Court's ruling by no means kills the CPP, at a minimum, it will delay it and therefore multiply the uncertainties surrounding this EPA regulation. For example:

- Even if upheld eventually by the Supreme Court, the CPP will almost certainly not go into effect until after the presidential elections. Given this delay, the outcome of these elections could have an impact on the implementation of the CPP.
- Given the issuance of the stay, the Supreme Court obviously decided there was a likelihood that the opposition to the CPP will prevail on the rule challenge. The death of Justice Scalia creates more uncertainties about what the future holds for a Supreme Court decision on the CPP.
- This case has a potential significant impact on the United States commitment to the December 2015 Paris Accords. The CPP was an important element on the CO₂ reduction commitment made by the United States in Paris.

The implications of the Supreme Court's decision on the regulated utility sector must be tempered by what is happening in the electrical generation marketplace:

- Congress' recent extension of

tax credits for solar, wind, and other qualified renewable energy projects will certainly continue to drive interest in clean renewable energy projects, regardless of the ultimate decision by the Supreme Court on the CPP.

- The unprecedented recent decline of the cost of natural gas will also be a market driver for switching away from coal to natural gas as fuel for combined cycle facilities for utilities as well as for combined heat and power projects for industry.
- EPA had projected that coal share of America's power mix would shrink to 27% in 2030 under the CPP. It is already down to 29% in November, based upon government data, as a result of cheap natural gas and renewables stealing market share from coal.

What the CPP Means for School Districts

School districts and their education leaders should take the following practical steps now to reduce costs and increase revenue opportunities under the CPP:

- Document energy-efficiency gains and establish baseline calculations of energy usage and CO₂ emissions.
- Consider developing means for generating clean energy on-site, including solar, wind, and other qualified renewable energy projects, which are afforded investment tax credits and

production tax credits under the 2016 Appropriations Act. Frequently, those benefits can be maximized by bringing private investors into such on-site school district energy projects.

- Clearly document ownership rights of environmental attributes and CO₂ reduction credits, even with contractors who are providing energy-efficiency services to school districts.

Crucial Planning

We live in uncertain times, and uncertain times create opportunities for some and challenges for others. The surprising decision to issue a stay by the Supreme Court and the sudden death of Justice Scalia will certainly add to the uncertainty regarding the implementation of and planning for the CPP. School boards must continue to monitor the CPP and consider the challenges and opportunities that the CPP presents.

The potential for EPA to supplant state programs through the proposed FIP is a powerful incentive for education leaders to prepare to come to the table and help craft the plan for their state's implementation as soon as possible.

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Blue Valley: Envisioning Excellence: Lessons from Effective School Indoor Air Quality Programs - A Snapshot of Profiles in Excellence. Environmental Protection Agency. ([www.epa.gov/iaq-schools/blue-valley-envisioning-](http://www.epa.gov/iaq-schools/blue-valley-envisioning-excellence-lessons-effective-school-indoor-air-quality-programs)

[excellence-lessons-effective-school-indoor-air-quality-programs](http://www.epa.gov/iaq-schools/blue-valley-envisioning-excellence-lessons-effective-school-indoor-air-quality-programs))

Creating Exceptional Learning Environments through Comprehensive Indoor Air Quality Management Webinar: Transcript and Slides. Environmental Protection Agency. May 21, 2013. (www.epa.gov/indoor-air-quality-iaq/creating-exceptional-learning-environments-through-comprehensive-indoor-air)

Hill, David M. "Why a Healthy School Matters." *Educational Facility Planner*. Vol. 42: Issue 4. 2008. Pgs. 26-29 (<http://media.cefpi.org/HealthyHPS.pdf>)

How to Approach Your IAQ Upgrade from Dave Hill. *FacilitiesNet*. June 20, 2007. (www.facilitiesnet.com/iaq/audiovideo/How-to-Approach-Your-IAQ-Upgrade-from-Dave-Hill-180)

MAKING THE GRADE

HOWARD-SUAMICO SCHOOL DISTRICT

Renovations to the 1970s pool at Lineville Intermediate School rejuvenated an important asset in the Howard-Suamico community. Two additional lanes allow the district to host competitive meets, while the updated infrastructure and equipment increase the efficiency of operations. Over 20 community groups and countless community members enjoy the benefits of the upgraded facilities.



Building Excellence

Wisconsin Federal Funding Conference Feb. 17-18, Kalahari, WI Dells



More than 550 school personnel, including WASBO and WCASS members, attended the popular Wisconsin Federal Funding Conference.



DPI staff presented the latest information about education funding.

Facilities Management Conference March 8-9, Kalahari, WI Dells



Nearly 250 attendees converged on the Kalahari for the Facilities Management Conference and its sold-out exhibit show. Thank you to all exhibitors who donated prizes and helped us raise a record \$2,725 for the Joel Konze Memorial/Facilities Management Conference Scholarship.



A new networking event in the resort's indoor theme park was a fun addition to the conference.



GOLD



Transportation & Bus Safety Conference

March 9, Kalahari, WI Dells



The Transportation & Bus Safety Conference was held concurrently with the Facilities Management Conference, focusing on issues unique to school transportation

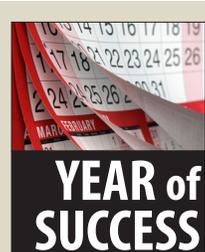
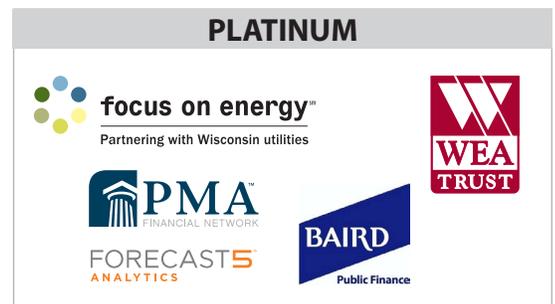
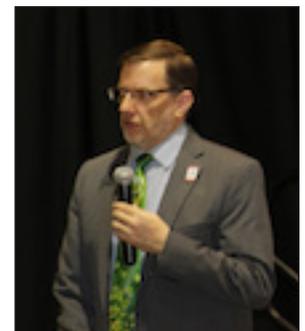


Accounting Conference

March 16-17, Madison Marriott West, Middleton



More than 400 business officials attended the Accounting Conference in March. Immediately before the conference, a p-Card Users Group explored operations and benefits of the WASBO p-Card program.

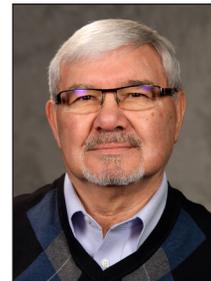


The Wisconsin Federal Funding and the Accounting Conferences are part of the WASBO Year of Success program, a six-conference series to designed to offer new business managers, bookkeepers and district administrators with the timely knowledge they need to succeed in a typical school business office year. The year's final offering is the Spring Conference May 26-27. Year of Success begins again in August.

A New Breed of Leader

Authored by Sheila Murray Bethel, PhD

Review by Orvin R. Clark, EdD, RSBA, Retired



Orvin R. Clark,
EdD, RSBA

A *New Breed of Leader* is by Sheila Murray Bethel, PhD, who has authored four books including the national bestseller *Making a Difference: 12 Qualities That Make You a Leader*.

Dr. Bethel is recognized as one of the “21 Top Speakers for the 21st Century” by *Successful Meetings* magazine. She is a member of the Speakers Hall of Fame, and is creator and host of two national television specials: *Making a Difference* and *Saving Our Kids*. Dr. Bethel has worked on projects with four U.S. Presidents and was appointed to the Board of Directors for America’s Promise: The Alliance of Youth by General Colin Powell. She has served on the adjunct faculty of Indiana University, Purdue University, San Francisco State University and the University of Southern California.

A New Breed of Leader is 374 pages in length divided into eight chapters on the leadership qualities that matter most in the real world: Competence Matters (Building Purpose), Accountability Matters (Fostering Trust), Openness Matters (Generating Integrity), Language Matters (Connecting Relationships), Values Matter (Forging Community), Perspective Matters (Establishing Balance), Power Matters (Mastering Influence) and Humility Matters (Inspiring Authenticity). The format of the book uses stories to tell about a specific quality, quotations to emphasize the principle, examples to reinforce the principle and action steps to be utilized for self-improvement. Each of the eight qualities discussed in this book is a piece of the New Breed Leadership Puzzle. The value of each piece lies in the tools it gives you to shape your personal leadership strength and reinforce your ability

to serve others. It represents where you will grow and where you can maximize opportunities to expand on any of the eight qualities that you may need. Because leadership is a never ending cycle of growth and change, the possibilities are what will take you into the future. True leadership is not something you learn once; it is an ever evolving pattern of skills, talents and abilities that you craft and seek to perfect over a lifetime.

Chapter One - Competence Matters (Building Purpose) identifies four critical parts-intellectual, emotional, strategic and instinctive competences that give your vision its strength.

Chapter Two - Accountability Matters (Fostering Trust) in the realm of leadership is probably more important than other parts of the puzzle. Leading is primarily about the relationship between the leader and the led. Trust is at its core.

Chapter Three - Openness Matters (Generating Integrity) and associated values of honesty and truth are bedrock qualities of equal importance in your leadership tool bag. Openness involves candor and frankness that a leader lives by and demonstrates. Its most important by-product, integrity, is at the heart of earning the right to be called a leader.

Chapter Four - Language Matters (Connecting Relationships), Communication is your most critical tool for motivating your followers to take responsibility for creating a better future. “If I went back to college again I’d concentrate on two areas: learning to write, and to speak before an audience. Nothing in life is more important than the ability to communicate effectively” – Gerald Ford, 38th U.S. President

Chapter Five - Values Matter

(Forging Community), your cherished core values give you a personal moral compass. With a pen prioritize the words 1 through 15; they need not be in numerical order; any order you rank them in is right for you. Values people strive toward are:

- Independence
- Good Health
- Acceptance
- Wealth
- Self-respect
- Accomplishment
- Power
- Fun
- Status
- Spiritual Wholeness
- Self-expression
- Recognition
- Security
- Relationships
- Simplicity

Note: Take your top three values and write why that value(s) is important to you. You will then know the values that are important to you and so vital to your stewardship.

Chapter Six - Perspective Matters

(Establishing Balance) If you are a student of history, you gain a much broader perspective from which to make wise decisions. You learn from the mistakes and lessons of others, and can discover how it plays into your life and life situations. Being on target with your viewpoint of a present situation can spell the difference between failure and success. It is time to fill your leadership tool box with as much intellectual, emotional and physical perspective as you can gather for your journey to the future. The following books are filled with not only wisdom but practical ideas that will

give you fresh insights so that it seems you're looking at life and business from the highest point.

- *The Hidden Persuaders*, by Vince Packard
- *The Seven Sisters: The Great Oil Companies & the World They Shaped*, by Anthony Sampson
- *Corporate Cultures: The Rites and Rituals of Corporate Life* by Terrence E. Deal and Allan A. Kennedy
- *What the Great Religions Believe*, by Joseph Gaer
- *The Lessons of History*, by Will and Ariel Durant

Chapter Seven - Power Matters

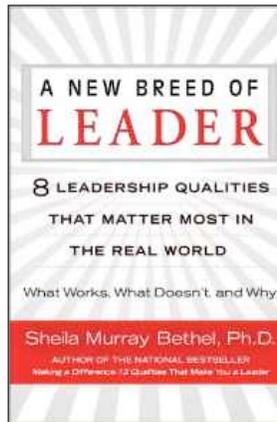
(Mastering Influence) A thesaurus offers these synonyms: direct authority, influence, strength, hierarchy, rank, superiority, clout, prestige, sway, mastery, and persuasion. No matter how you define it, you recognize power when you see it. Personal power comes

from within you. Position power comes from holding a particular place. If you ever need to choose between the two, always choose personal power.

Personal power will outlast position power every time. Being a good leader isn't about who has the most power. It's about who earns power by motivating and inspiring others, showing them how to make their lives better.

Chapter Eight - Humility Matters

(Inspiring Authenticity). The most humble and effective leaders, don't even think about taking steps to be humble. They just "are." Humility is a state of "being." The best way to teach humility is by telling



stories and showing examples. It's fine to think of humility in terms of modesty, an unassuming nature, inconspicuousness, and lack of pretention. However lack of arrogance is the better definition. Arrogance is about fear: fear of personal inadequacies, fear that people will find out the "truth." Arrogant leaders have low self-esteem or poor self-image and a deep need to prove how smart they are. Don't misinterpret the two. Humility is not weakness and arrogance is not strength. The better you know yourself, the wiser you become. Awareness of both your limitations and your potential enhances humility.

Your assignment is to read *A New Breed of Leader*, develop action plans on each of the eight leadership qualities, and just do it! 🧠



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

Welcome New Members • February - March 2016

District Professional Members

- **Mike Aide**, Director of Maintenance, Dodgeville SD
- **Julie Baumann**, Payroll Specialist, Merrill Area Public Schools
- **Traci Calvert**, Bookkeeper, Benton SD
- **Josh Carter**, Operations Supervisor, Pewaukee SD
- **Tracy Case**, Payroll and Benefits Specialist, Parkview SD
- **Michael Chisholm**, Assistant Director of Transportation, Maintenance & Safety, Ellsworth Community SD
- **Karen Cogswell**, Director of Finance, SD of Luck
- **Ben DeGross**, Transportation Director, Glenwood City Schools
- **Roger Dolliver**, Maintenance, SD of Marinette
- **Jennifer Drost**, Accounting Assistant, SD of Lomira
- **Tom Fisher**, Building Engineer, La Crosse SD
- **Rodger Goke**, District Transportation Director, Belleville SD
- **Mary Jo Herrmann**, Auxiliary Services Coordinator, Franklin Public Schools
- **Steve Herzberg**, Buildings & Grounds Supervisor, SD of Nekoosa
- **Richard Hiltunen**, Buildings and Grounds Superintendent, Wisconsin Resource Center
- **Craig Hohlfeld**, Building & Grounds Supervisor, SD of Turtle Lake
- **Evonne Johnson**, Transportation Coordinator, SD of Waukesha
- **Stefanie Johnson**, Accounting Associate, Edgerton SD
- **David Kapp**, Assistant Director of Building Services, Madison Metropolitan SD
- **Frank Kehinhofer**, Master Electrician, SD of Elmbrook
- **Daryl Kirchner**, Transportation Supervisor, Tomah Area SD
- **Angela Knapp**, Facility Foreman, SD of Menomonee Falls
- **Tracy Kurtzbach**, Student Transportation Secretary, Sheboygan Area SD
- **Mike Louis**, Maintenance, SD of Marinette
- **Brent Maron**, Coordinator of Buildings and Grounds, Beaver Dam Unified SD
- **Yvette McGhee**, Grant Accountant, Milwaukee Public Schools
- **Douglas Nimke**, High School Head Custodian/CPO, Oshkosh Area SD
- **William Robers**, Buildings, Grounds & Safety Supervisor, Horicon SD
- **Paul Uhren**, District Administrator, SD of Ladysmith
- **Susan Van Der Geest**, Accounts Payable, Merrill Area Public Schools
- **Donald Vogel**, Accountant, Watertown Unified SD
- **Chad Wiese**, Director of Building and Technical Services, Madison Metropolitan SD
- **David Yaeger**, Transportation Director, Wittenberg-Birnamwood SD

Service Affiliate Members

- **Scott Adams**, VP Development, Design & Support, TEL-Americas
- **Mark Boland**, President, Boland Recreation
- **Nicholas Boyce**, Treasury Consultant, BMO Harris Bank N.A.
- **Greg Brickl**, Business Development, Brickl Bros., Inc.
- **Mary Brunner**, Customer Care Rep, SimplexGrinnell
- **Jim Camacho**, Property General Adjuster, ASU Group
- **Bryan Chance**, Risk Manager, Aegis Corporation
- **Kim Cullotta**, Senior Manager, Member Product Support, Federal Home Loan Bank of Chicago
- **Kevin Garrow**, Vice President-Commercial Banker, JP Morgan
- **Arlene Gavin**, Director of Marketing, Performance Services
- **Becky Grimm**, Admin. Assistant, Baseman Floors Inc
- **Nick Jarmusz**, Director of Public Affairs, AAA Wisconsin
- **Mark Jordan**, President, Dairyland Buses, Inc
- **John Kerlin**, Owner, Complex Security Solutions
- **Dana Marble**, Great Expectations Manager, Anchor Moving Systems
- **Curt May**, AXA Advisors, LLC
- **Mark McGinnis**, Certified Consulting Meteorologist, Fair Skies Consulting, LLC
- **Nikole McMyler**, Account Executive, Aon Risk Solutions
- **Mike Mitchell**, VP Business Development, VALIC
- **Michael Niemuth**, Area Sales Manager, Enterprise Fleet Management
- **Mark Ramljak**, Vice President of Operations, Krapf School Bus
- **Tom Reed**, Business Development, Instructional Communications Systems
- **Travis Runke**, Sales Account Executive, Vesta Technologies Inc.
- **Adam Weber**, Account Executive, Enterprise Fleet Management
- **Sharon Witt**, Benefits Consultant, Willis Towers Watson

Keep us Posted!

Retiring? Contact WASBO before you leave so we can update your member type to retired and get your new contact information. Email Kristin Hauser at kristin.hauser@wasbo.com. If you are interested in being added to our interim list, send an email to Woody Wiedenhoef at woody.wiedenhoef@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



Vote for your WASBO Board

Remember to vote in the WASBO Board election through April 30. Members, check your email for a link to your official ballot.

Member Moves and Retirements

On the Move

- **Bob Avery**, from Director of Business Services, Beaver Dam Unified SD, to Director of Business Services, Baraboo SD
- **Janel DeZarn**, from District Bookkeeper, Fall River SD, to Director of Business Services, Mayville SD
- **Emily Koczela**, from Director of Finance and Operations, Brown Deer SD, to Messmer Catholic Schools
- **Zoran Krecak**, from Business Development Manager, Performance Services, to The CTS Group
- **Angie LaBine**, from Business Manager, Southern Door County SD, to City of Appleton
- **Jeff Pruefer**, from Business Manager, Baraboo SD, to Director of Finance, Brown Deer SD

Retirements

- **Paul Buchholz**, District Coordinator of Buildings & Grounds, Beaver Dam Unified SD
- **Daniel Van De Water**, Executive Director - Business Services, Eau Claire Area SD

Interim Assignments

As school business officials take new positions or retire, the districts they depart are left with a void. In addition, many districts are in need of consulting help on project or oversight work 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 Wiedenhoef at woody.wiedenhoef@wasbo.com.

Network by Participating on a WASBO Committee

Meet professional school colleagues and service affiliates, share ideas, enhance WASBO services and enrich your professional development. Serve on a WASBO committee — you'll do all that, and more. Find out more at WASBO.com/committees. Contact Kristin Hauser at 608.729.6641 or kristin.hauser@wasbo.com.

Submit a Newsletter Article

Has your school district implemented a new practice? Do you have a story to tell? Share your experience by writing an article for *Taking Care of Business*. Email your submission to Aine Calgaro at aine.calgaro@wasbo.com.

Mentorship Program Orientation

Looking for a mentor, or interested in becoming one? A WASBO Mentorship Program Orientation will be held August 16 at the Holiday Inn at the American Center in Madison. Contact Mary Jo Filbrandt, Mentorship Coordinator, at maryjo.filbrandt@wasbo.com for information or to sign up for the program.



WASBO Foundation Custodial & Maintenance Conferences

June 23, 2016

- Muskego High School, Muskego
(Facilities Core Certification Module 5 offered)

July 13, 2016

- Sparta High School, Sparta *(Module 1 offered)*
- DC Everest High School, Weston *(Module 6 offered)*

July 27, 2016

- Menasha High School, Menasha *(Module 4 offered)*

Conference Tracks

- Cleaning
- Environmental Safety
- Green Schools
- Grounds
- Maintenance
- Retirement Planning
- Best Practices
- Safety Room

Watch for details about keynote speakers!

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budget and send your
entire team.

Why Attend?

- Many Educational Offerings
- Equipment Demos & Exhibits
- Safety Challenge Room
- Learning and Leading as a Team
- Networking

Exhibit and Sponsorship Opportunities

Meet the custodial & maintenance staff in Wisconsin's K-12 public schools. Exhibitor rates starting at only \$175. For more information go to WASBO.com/custodial or call 608.249.8588.

Registration coming soon: WASBO.com/custodial 608.249.8588



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

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Upcoming Events - WASBO.com

Professional Development

- Spring Conference (Modules 4 & 5)
 May 26-27 - Kalahari Resort & Conference Center, WI Dells (Viterbo Credit)
- Custodial & Maintenance Conferences
 June 23 - Muskego High School, Muskego
 July 13 - Sparta High School, Sparta and DC Everest High School, Weston
 July 27 - Menasha High School, Menasha
 Mentorship Program Orientation
 Aug 16 - Holiday Inn Madison at the American Center, Madison
 New School Administrators & Support Staff Conference
 Aug 17-18 - Holiday Inn Madison at the American Center, Madison
 Fall Conference (Modules 6 & 7)
 Oct 6-7 - The Osthoff Resort, Elkhart Lake
- 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.

Scholarship Fundraisers

- Spring Golf Fundraiser
 May 25 - Trappers Turn, WI Dells
- Spring Bike Fundraiser
 May 25 - 400 Trail
- Fall Golf Fundraiser
 Oct 5 - Autumn Ridge, Elkhart Lake
- Fall Bike Fundraiser
 Oct 5 - Old Plank Road Trail

Upcoming Facilities Certification Modules

- Modules 4&5 - Spring Conference, May 26-27, WI Dells
- Module 5 - Custodial Conference, June 23, Muskego
- Module 1 - Custodial Conference, July 13, Sparta
- Module 6 - Custodial Conference, July 13, DC Everest
- Module 4 - Custodial Conference, July 27, Menasha
- Modules 6 & 7 - Fall Conference, Oct 6-7, Elkhart Lake

Certified School Risk Managers (CSRIM)

- Courses** (Viterbo Credit) - all courses in Madison unless otherwise indicated
- Fundamentals of Risk Management - Sept 20
- Handling School Risks - Sept 21
- Measuring School Risks - Oct 19
- Funding School Risks - Oct 20
- Administering School Risks - Nov 9
- Workers Compensation (update credit) - Dec 6, Madison Marriott West, Middleton

Committee Meetings

- Midwest Facility Masters Conference
 Meetings by conference call at 10 AM.
 May 12, June 2
- Safety & Risk Management
 All meetings at 11:45 AM, WASBO Offices in Madison. Aug 9; Oct 11; Jan 10, 2017; April 7, 2017; Aug 1, 2017
- School Facilities
 All meetings at 9:30 AM, WASBO Offices in Madison. Aug 9; Oct 11; Jan 10, 2017; April 7, 2017; Aug 1, 2017

State Education Convention (Joint Convention)

Meetings by conference call at 1 PM unless otherwise noted. May 18 (2 PM, School Leadership Center, Madison); June 1; June 15

Regionals

- Check WASBO.com for details.
 Bay Area/Northeast - Meetings start at 11 AM. May 13, Manitowoc
- Madison Area - Meetings start at 9 AM at Stoughton Area School District.
 May 6
- Northwest - Meetings start at 10 AM at Lehman's Supper Club in Rice Lake
- Southeast - Meetings at 1 PM.
 TBD
- 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. TBD
- WI Valley - Coffee at 9 AM, Meeting at 9:30 AM. April 22, Northland Pines; Aug 19, Merrill