



Taking Care of Business

"By the end of the decade, the Wisconsin Association of School Business Officials shall be the most influential organization on significant Wisconsin school business management issues."
WASBO Vision

A Bi-Monthly Publication of the Wisconsin Association of School Business Officials - Volume 10, Number 6 - December 2006

Can School Renewal Really Be Funded Without Capital Outlay?

It not only can be done, it is being done. Moreover, most importantly, many are predicting it will become the key to sustainability for every school in the US.

By David Mitchell, Senior Account Executive, Siemens Building Technologies

The concept of Performance Contracting has lain dormant among most schools for decades primarily because its methodology and application were misunderstood. In other public and private sectors performance contracting has proven itself as the primary delivery agent in freeing up hidden capital to fund much needed efficiency and infrastructure improvements for aging school facilities. Here are a few secrets on how to steer your school district into a veritable gold mine of accessible funding for those sorely needed improvements.

In these times of shrinking budgets and mounting public scrutiny, school business officials have a more difficult task than ever in meeting the challenges of sustainability. But there are school officials that have implemented an old and often overlooked solution to infrastructure improvement that breaks the vicious cycle of budget constraints. These visionaries are benefiting their respective school districts immeasurably by discovering innovative ways to finance projects without having to burden tax-payers with the costs.

For those who may be new to the school administration profession, or for those who are less familiar with the concept, performance contracting provides public entities with a means of leveraging the equity that is

locked up in their assets to make energy and other infrastructure improvements, all without tapping cash or raising up front dollars. In most school infrastructure improvement cases where there was no capital available; performance contracting was the sole means of getting the job done.

"The performance contracting construction delivery and financial model enabled our district to accomplish projects that, barring asking the community for more money, simply couldn't be done any other way. Any district with deferred maintenance should seriously look into this concept."

Nicholas C. A. Alioto, CPA, RSBA

Anyone who is concerned about their school's quality of services to students and teaching staff is well aware of the challenges in preserving and maintaining their buildings. Classrooms, computer labs, auditoriums, gymnasiums and other school facilities have relentless needs to be kept in top physical and aesthetic condition. Unfortunately, in most cases, it is a frustrating and often neglected discipline that adds to the nation's mounting statistics of deferred maintenance.

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Editor: Woody Wiedenhoeff

Our Greatest

Association
Students
Staff
Educational Opportunities
Team Work & Networking
Service Affiliates



A Message from the President

Our Greatest ASSETS
Staff - Professional & Support



Gail Moesch
WASBO President

Our theme for 2006-07 is “**Our Greatest Assets**”.

- A. Association—WASBO, ASBO, Regionals**
- S. Students**
- S. Staff—Professional & Support**
- E. Educational Opportunities—Seminars, Conferences**
- T. Team Work & Networking**
- S. Service Affiliates**

This is the third newsletter for 2006-07 and we continue down the list for the theme of my messages. The theme of this message will be “**Staff—Professional & Support**”.

Staff is defined in the dictionary as “people who are employed by a company or individual” or “a group of people who serve a leader or an executive of a company, organization or institution.” I think our staff is so much more than that.

We are proud of the schools and the school district we work for. When we consider why, we quickly realize that it is not the brick and mortar that make our schools great. It is our staff--administrators, teachers, secretaries, aides, cooks, custodians and everyone else involved in our schools. A school without a staff would serve no purpose.

Without the leadership of our administrators in our schools, there would be no teachers or other staff, no curriculum, class scheduling, classroom supplies, or organization in our schools. Administrators work year round to make our schools function.

Without the teachers, we would not have the guidance and influence on learning that our students enjoy. Outstanding teachers are critical for our schools. As Henry Brooks Adams said “A teacher affects eternity, he can never tell where his influence stops.”

Without our secretarial staff, there would be no one to direct the telephone calls, respond to visitors, help the student who is injured, and more. Secretaries are many times the first contact that a parent or a visitor has in our schools.

Without the aides, students who need special attention would not have their needs met. Aides also monitor study halls, libraries, lunchrooms and playground areas. Teachers would not have assistance in the classrooms.

Without the custodians, the sidewalks would not be cleared of snow, the halls and classrooms would not be cleaned. Custodians make sure our buildings are heated and we have proper lighting in our classrooms. Custodians do their

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Woody Wiedenhoft
WASBO Executive Director

Exec's Reflections

Business Relationships and Public Stewardship

Business officials may wonder should I, or should I not, accept an offered item, service or object from a business vendor? While we would like a clean straightforward black and white answer, it is not so simple. I was a guest at the last Northeast Regional meeting, and this topic came up. I told the attendees that

I would gather some resources and report back to all WASBO members. WASBO thanks Mike Julka and Shana Lewis, Partners with Lathrop & Clark LLP, and Steve Hintzman, WASB Director of Legal and Policy Services, for allowing WASBO to reprint excerpts from their materials.

WASB Legal Services Membership Legal Notes, Lathrop & Clark, October/December 1991

"...Some Common Questions Arising Under the New Code of Ethics..."

3. *Does the Code of Ethics prohibit a school official or employee from accepting gifts awarded by a contractor with whom the school district has done or may do business?*

...one must first ask whether

...an item of more than nominal or token value...is being offered to an official because of the official's position...for private benefit.

If the answer... is "no," then one must still ask whether

...anything of value as defined by statute...is being offered to an official for any reason...that could be reasonably expected to influence the official's judgment or actions or be considered a reward for past action.

In its opinion letter dated November 6, 1991, the Ethics Board stated that "normally, local officials may accept items such as informational or educational materials of unexceptional value, plaques, and inexpensive advertising giveaways." ...

4. *May a school district official or employee who is attending a seminar or convention where issues of concern to school districts are being discussed accept meals or refreshments from the seminar or conference sponsor?*

In its opinion letter dated November 6, 1991, the Ethics Board opined that "in general, officials may accept meals, refreshments, and the like that are provided,..., by the conference organizer and authorized by the school district." Although the opinion did not so state, based on prior opinions of the Ethics Board, the Ethics Board would probably draw a distinction between a conference or seminar designed to facilitate a discussion of public policy from other kinds of gatherings. While a provision similar to s. 19.56(1) of the Code of Ethics for state public officials does not appear in the Code of Ethics for local officials, it is reasonable to assume that the public policy stated therein, whereby state public officials are encouraged to meet with groups to discuss public policy issues, would be applicable to local officials as well...

In an opinion dated January 22, 1987, the Ethics Board considered whether a coalition that included
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municipalities, one or more agencies, and various businesses could furnish all legislators with lodging and meals in connection with their attendance at a dinner meeting and program. The board opined as follows:

A key to determining the propriety of the event you wish to sponsor is determining whether you wish to sponsor a substantive discussion of issues or a social event. The statutes specifically encourage the former, and we advise you against the latter... Consistent with the Ethics Code, your coalition may pay all the costs of such a meeting, including legislators' costs of meals and lodging,...provided the meal and accommodations provided are reasonable and neither lavish nor extraordinary. 9 Op. Eth. Bd. 43 (1987).

CONCLUSION

In the view of the strict provisions of the new Code of Ethics for local officials, school officials should, as a matter of policy, refuse to accept any gift that is offered as a result of the public position held, as well as any gifts that might conceivably be considered an attempt to influence present or future actions. School officials should avail themselves of the opportunity to obtain advisory opinions from the school district's attorney regarding the application of the new Code of Ethics, especially during this initial period of adjustment."

Conflicts of Interest and Ethics, Presented by Mike Julka, Lathrop & Clark, September 7, 2001

...B. Prohibitions

1. *No local public official may use his/her public position to obtain financial gain or anything of substantial value for the benefit of himself/herself or immediate family members or for an organization with which he/she is associated.*
2. *No person may offer or give to a local public official (directly or indirectly), and no local public official may solicit or accept from any person (directly or indirectly) anything of value if it could reasonably be expected to influence the public official's vote, judgment, or official action, or could reasonably be considered as a reward for any official action or inaction on the part of the local public official...*

Although the Ethics Board has not identified a specific figure, previous opinions suggest that anything worth more than several dollars is suspect"...

For additional resources on this topic, please go to the WASBO web site, Resources tab, and then to the Wisconsin Ethics Board tab. You can find opinions, guidelines, and publications from the Wisconsin Ethics Board at this link. Guideline 219 provides information about receipt of food, drink, favors, services, etc. Guideline 222 provides information regarding conferences, seminars, and receptions. In addition, the Wisconsin Association of School Boards' legal staff is a valuable resource. If further clarification or detail is needed, it would be best to obtain a legal opinion from your District's legal counsel.

WASBO members are proactive in regards to ethical behavior and I thank the Northeast Regional for reminding us to review this topic. Please know the law and use good judgment. The alternative could be reading about alleged impropriety in newspaper headlines and blogs. We want our press to be about positive educational topics.



SEEKING BOARD OF DIRECTOR CANDIDATES

The WASBO Nominating Committee is seeking candidates for two elected Director positions on the WASBO Board of Directors. The names of the candidates are required to be presented to the membership at the January Joint Convention. Any active WASBO member who desires to have their name placed on the ballot should contact a member of the Nominating Committee before December 31, 2006.

Sincerely,
WASBO Nominating Committee Co-Chairs
Mary Ellen Van Valin
maryellen_vanvalin@mononagrove.org
and
Tom Wohlleber
tomw@mcpasd.k12.wi.us

Nominating Committee Members - Jan Carlson (Somerset), Mike Garty (Germantown), Dianne Meyer (Milton), Diane Pertzborn (Sauk Prairie), Mark Powell (Cedarburg), and Bonnie Stegmann (Ashland)

Can School Renewal Really Be Funded Without Capital Outlay?

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Equally important, everyone involved with K-12 schools understands that aging infrastructures -- facility HVAC and lighting systems, stadium lighting and water and sewage systems, etc. -- all pose significant opportunities for conservation and savings, if the capital is available to fund the improvements.

So why isn't every school in America working on a performance contract? The reasons are due largely to a basic misunderstanding of how the performance contract is structured and applied. Every school official with whom I have had the privilege of working with has professed the very same sentiments: "The performance contract has been a real eye opener for us; it was a win-win proposition for the school, enabling us to make valuable improvements that would have been difficult or impossible otherwise."

Performance Contracting has evolved and been reshaped to include energy, operational efficiencies, and budgeted capital that reduce the costs associated with operating a school facility.

Not designed as a "quick-fix" scheme, the performance contract was originally created as a solution exclusively for energy efficiency initiatives for those public entities that found it difficult or impossible to fund such projects otherwise. However, since its origin, the performance contract has evolved and been reshaped to include energy, operational efficiencies, and budgeted capital that reduce the costs associated with operating a school facility. This is a critical distinction of which some school officials are still not aware.

The first performance contract was authorized by the Ohio State Legislature back in the 1980s when the state created its landmark House Bill 264. Since then, virtually every state has followed suit to enable public entities such as K-12 schools, counties and other state agencies to negotiate a resolution for their own issues of asset waste. Most recently, this issue is becoming known as a "sustainability strategy", which by today's standards translates into continuous infrastructure renewal.

Redefining the Performance Contract

Essentially, performance contracting has emerged as a key delivery agent for sustainability. By its latest definition, it is a contract that guarantees performance for not only public entities, but for industry, healthcare and higher education as well. The performance

contract provides operational equipment upgrades and replacements by an energy services company without up front cash expenditures. The performance contract is self-funding, in that the improved efficiencies and resulting savings pay for the project throughout the contract's term. Therefore, under a performance contract, a school would simply redirect funds from savings and budgeted capital expenses to meet project payments as they come due. The service provider handles the financing and assumes the risk; if the guaranteed savings fall short, the provider makes up the difference.

As a simple way of redefining the performance contracting in terms that relate to sustainability some use the acronym PRP, which stands for *procurement* (of services), *restoration* (of facilities and infrastructure) and *partnering* (with a reliable service provider).

As a means of **procurement**, the performance contract is a methodology of financing a capital improvement project out of a school's operating budget. The procurement aspect, in its simplest terms, means that the performance contract must find ways to reduce energy and operational waste, recommend ways to effect the savings, then finance or "procure" the funds necessary to pay for the improvement measures using the future savings as collateral. This aspect is accomplished through the Request for Qualifications (RFQ) or the Request for Proposal (RFP) process as legislated by Section 66.0133 of Wisconsin Municipal Law. This procurement aspect frees the school from the financial risk and from the burden of having to go to the taxpayers for more money.

The three most important aspects of a performance contract are: Procurement, Restoration and Partnering.

As a means of **restoration**, the performance contract is a school's mechanism for new facility and technology infrastructure modernization and upgrades. Certainly, energy-related projects are included, such as building automation and control for "smart buildings", new HVAC equipment, energy conservation and energy cost reduction strategies. But it can and often does include other operational cost reduction, structural and productivity improvements, fire alarm/life safety and security systems, utility cost management and water management, and even construction of new power plants. The extent to which your school chooses to

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use a performance contract can be governed by both need *and* imagination. (See sidebar: “The many facets of today’s performance contract.”)

As a means of *partnering*, the performance contract establishes a relationship with a reliable and competent service provider that is based on mutual accountability. The relationship provides the school district with single-source responsibilities for the procurement, restoration and completion of the project, which can be of significant value to the school participants. When formed properly, the relationship allows the school official to focus on what they do best: focus on the students and teaching staff while the supplier tends to the myriad details. For the relationship to work best both parties must commit to defining the school’s business objectives and must remain fixed on achieving them.

Cure for the ‘vicious cycle’

The concept of the performance contract may sound too good to be true, which may be another reason why it hasn’t caught fire among school business officials in the past. Those same officials were caught up in the “vicious cycle” of school business wherein revenues diminished while costs continued to escalate. In addition, routine maintenance and other facility-care disciplines were being deferred at alarming rates in an effort to make up for the shortfall in operating budgets. Deferred maintenance is the silent, creeping disease that creates system stresses and inefficiencies, raises consumption costs, increases incidences of equipment breakdowns and failures, and fosters an environment that supports an atmosphere of mediocrity.

Further, startling statistics show that schools in Wisconsin spent more than \$159 million last year to operate K-12 school districts. Much of that money was wasted unnecessarily in the operation of inefficient HVAC and lighting equipment. In many cases, energy expenses in school buildings are second only to salaries. By simply implementing strategic energy conservation measures and maintenance programs, and by tracking energy consumption, schools can significantly reduce operational costs and utility bills.

Conclusion

The performance contract can be the key to sustainability for every school in the US. The benefits are many. It can allow much-needed capital

improvements to be made within the existing budgets while freeing up time and money, which can be better spent on your students and staff. Performance of the performance contract is guaranteed, which ensures accountability of the results. Your budgets are controlled via reduced expenditures. Your school will be better able to accommodate facility changes with less time spent trying to find funding sources. Best of all, your school district’s taxpayers won’t be burdened with new taxes and the student and teaching staff can enjoy higher levels of comfort, safety and aesthetics right along with energy and resource conservation.

About the author, David Mitchell...

Dave is a senior account executive for Siemens Building Technologies working from Fontana and Milwaukee. The company is headquartered in Buffalo Grove, IL, a Northern IL suburb, and is the industry leader in facility infrastructure performance solutions for the public and private sectors worldwide. He may be reached for questions at: tel. 414-788-0898.

The many facets of today’s performance contract.

Today’s performance contract for K-12 schools can cover considerable ground in terms of improvements for your school’s facilities. The extent to which your school district chooses to use a performance contract can be governed by both need *and* imagination. Here are a number of examples of services and improvements that could be included in your school’s performance contract project:

- Administrative services
- Capital improvements
- Compliance and regulatory requirements
- Computers and computer networks
- Electrical systems
- Energy consulting and utility bill management services
- Energy control/management systems
- Energy recovery systems
- Fire alarm/life safety systems
- HVAC equipment
- Insulation
- Inventory control and reduction
- Lighting equipment and retrofits
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Tom Helgestad
WASBO Director

Director's Corner

Facility Management in Wisconsin Schools

Tom Helgestad, Director of Buildings & Grounds, Wisconsin Rapids Public Schools

When Woody called and asked if I'd write a column as one of the duties of being a current board member my mind went blank, and I asked what it should be about. His answer

was simply, "Whatever you're passionate about." Well, anyone who has seen my golf game knows that's out. Curling season is starting so that was a possibility, but most people won't know what I'm talking about as bonspiels, takeouts, hog line, inside turn, out turn and other curling terminology will just confuse people, let alone trying to explain the scoring board.

So that leaves me with how the school facilities in the state are being maintained as one of my passions. Other school district facility managers must share some of this passion when you look at how many are enrolled in the WASBO Facilities Manager Certification Program.

As we all know, maintenance has been deferred in most districts in Wisconsin since revenue caps were imposed, and I would venture to say even before that. Yes, some districts are in better shape than others but on the whole we can see by the number of referenda that we are on a downward slide, especially since energy costs have increased significantly.

As new schools are built and old schools get remodeled, the facilities get to be more technologically advanced and sophisticated to operate. We have to educate the people operating these buildings on how to effectively maintain and manage their operation or thousands of dollars can be wasted before you know it. We must continue to provide opportunities to our facility people, whether they are custodians, maintenance employees, grounds workers, or supervisors, to grow and learn about their buildings and new technologies coming down the road.

The Facilities Manager Certification Program has been a step in the right direction to get qualified people operating and managing school facilities today. The DPI has recognized the importance of this program by their support our efforts. In addition, WASBO

trains between 500 and 600 custodians at the Annual Summer Maintenance & Custodial Conference. I'd like to encourage more business managers to enroll in the program or take some of the classes to stay informed on facility issues.

The need to change how facility maintenance and operations is funded in the State is another issue. Relying on referenda to maintain our buildings is a dead end street as sooner or later the voters will have had enough of the never ending requests for money. The increases in energy costs, contracted services, building materials, and supplies will continue to put stress on already tight budgets. Most voters don't understand school finance; they just want us to maintain their buildings within economic reason. It's our job to convince the legislators in Madison and the taxpayers of Wisconsin to provide us with the necessary resources to effectively manage our school facilities.

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BOOK REVIEW

We Got Fired! and It's the Best Thing That Ever Happened to Us

We Got Fired! and It's the Best Thing That Ever Happened to Us was written by Harvey Mackay. Mackay is the author of four *New York Times* bestsellers: *Swim with the Sharks Without Being Eaten Alive*, *Beware the Naked Man Who Offers You His Shirt*, *Dig Your Well Before You're*

Thirsty; and *Pushing the Envelope*. His books have sold more than ten million copies worldwide. He is a nationally syndicated columnist for United Feature Syndicate, a popular and entertaining business speaker, having been named one of the top five speakers in the world by Toastmasters International, and chairman of MacKay Envelope Company, \$100 million company he founded at age twenty-six. In April 2004, Mackay received the prestigious Horatio Alger Award. *We Got Fired! and It's the Best Thing That Ever Happened to Us* is 331 pages in length and is a must read.

We Got Fired! and It's the Best Thing That Ever Happened to Us is based on a series of short stories, experiences on getting fired, survival techniques, and success guidelines. The short stories are experiences of famous business, broadcasting, political, entertainment, and sports personalities. The personalities include:

- Donald Trump
- Lou Holtz
- Bernie Marcus
- Bill Belichick
- Jesse Ventura
- Joe Torre
- Larry King
- Michael Bloomberg
- Billie Jean King
- Muhammad Ali
- Lee Iacocca

The book offers some excellent advise on firing.

Firing is Rejection:

- When you're rejected, don't take it

personally.

- Don't waste time on bitterness.
- Accept rejection as a fact of life.
- Don't let go of your dreams.
- Figure out why you were fired.
- Don't burn bridges.
- Don't wallow in failure, even when you're clearly responsible for it.
- Visualize acceptance.
- Do doable things.
- Do some work for charity.
- Find things that motivate you.
- Finding a job is a matter of direction and selection, not rejection and dejection.

Cold Truths About Firing...and Being Fired:

- The real reason for being fired is rarely the reason you are given.
- The best time to hire people is during a downturn when everyone else is firing them.
- It's not the people you fire who make your life miserable...it's the people you don't fire.
- The time to start worrying about what you'll do when you're fired is the day you get hired.
- The nicest, most loyal, and most submissive employees are often the easiest people to fire.
- The suspicious resumes are the ones with unexplained voids or breaks in a career.
- It doesn't matter who hired you yesterday. It only matters who can fire you today.
- The likeliest managers to get fired are often those who have the most trouble firing others.
- Maybe what you did wrong got you fired. It's only what you can do right that will get you hired again.
- The only way a fire can hurt you is if you don't know what you're playing with.

In closing I share the following two quotes with you.

“Learn from the mistakes of others. You can't live long enough to make them all yourself.”

Eleanor Roosevelt

“Past failures often furnish the finest material from which to build future success.”

Using Technology to Improve School Procurement:

Best Practices from an Industry Expert



Technology has invaded most aspects of our life. Yet in many dealings with school district procurement departments, school districts do not often leverage the power of technology to improve the procurement process.

While many districts now have some automation surrounding the requisition and purchasing process, the vast majority of procurement processes have not changed much in the past ten or twenty years. Procurement remains largely a paper-based process, even with the myriad inefficiencies and errors brought about by the typing and re-typing and re-typing associated with ignoring the power of electronic data transfers. In addition, newspapers nationwide continue to be filled with school bid proposals, despite the power and convenience associated with using online marketplaces to tap into a nationwide network of vendors.

However, several school districts are using technology to answer their business needs and challenges. Described below is how three separate districts use technology to improve their procurement processes. The goal is that WASBO members will be able to use this information to improve their own procurement processes. The common link is that the technology involved is not extremely advanced. In fact, you will find that most often a new application of an old technology dramatically improves the procurement process for these agencies.

Detroit Public Schools: Using internet-based bid aggregation to reduce costs

Every school business official knows that each dollar saved in the procurement process is an extra dollar that can go to the district's real purpose: education. The Detroit Public Schools reaps real rewards from using online bidding for the majority of its purchasing. In fact, DPS saved more than \$300,000 on a single purchase of textbooks last year using that method (that savings represented about 10% of the purchase price).

Detroit Public Schools, which educates 153,000 students and has an annual operating budget of \$2.4 billion, has been using the DemandStar system from

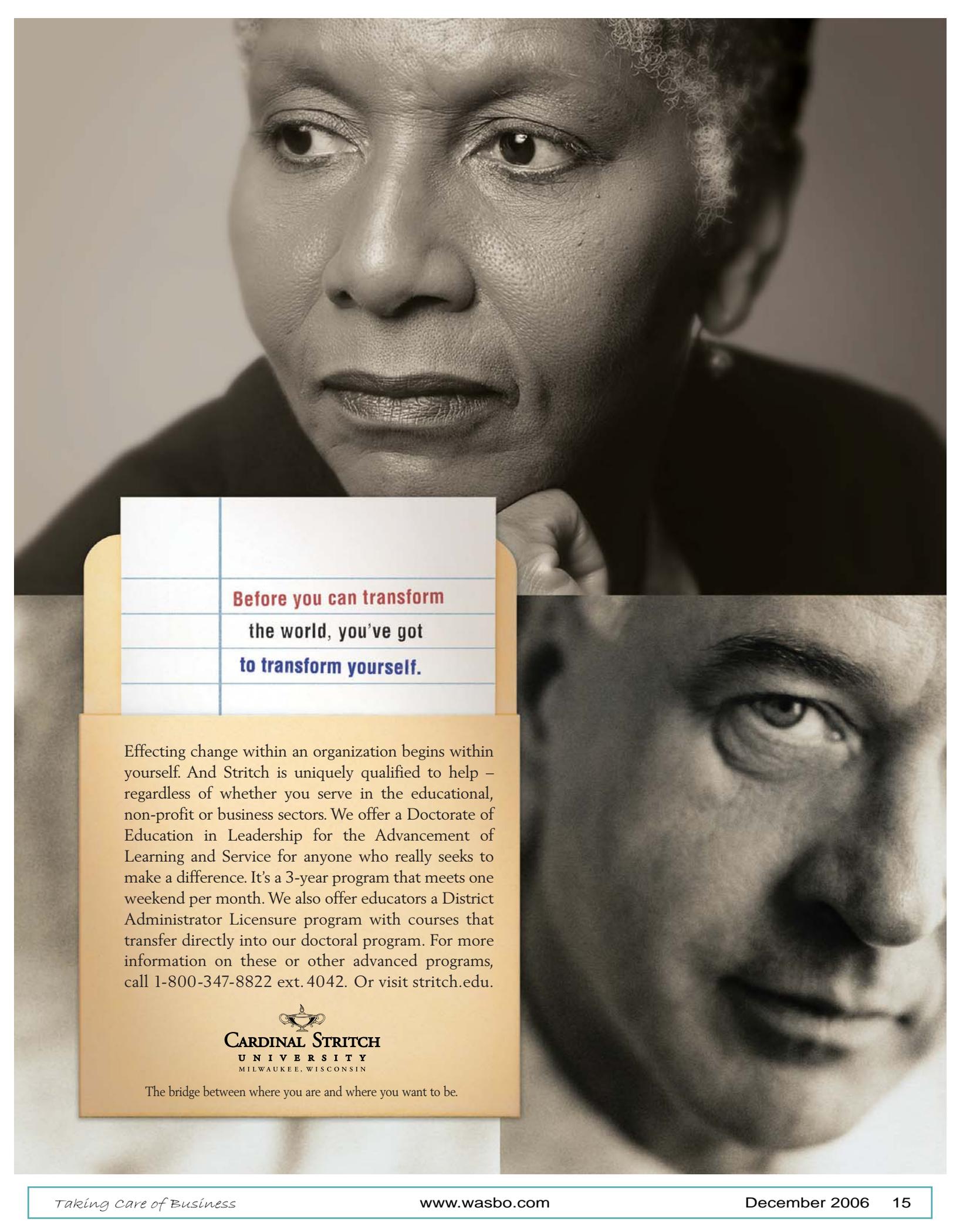
Onvia since April 2001. "We use DemandStar because it significantly reduces our administrative workload," said Hildred Pepper, Jr., CPPO, CPM, the district's Chief Contracting Officer. "We don't have to print out copies of solicitations anymore. In fact, [vendors] cannot even pick up documents in our office anymore. They have to go online to get the solicitation." Although he cannot quantify the effect, Pepper is confident that the increased competition from having more businesses responding to solicitations brings down overall purchasing costs.

DemandStar is but one of several services which aggregate government purchasing information on behalf of businesses who provide products and services to government agencies (others providers include BidNet and GovernmentBids.com). These companies publicly announce open solicitations, aggregate responders to those solicitations, and improve the transfer of information between respondent and the agency. Almost all of those services are free for public agencies.

"It really is an efficient system. Everyone is notified at the same time [of open solicitations]," said Peppers. "And we choose DemandStar because the price that vendors pay is very reasonable." In fact, Peppers reports that in the more than four years that his district has used DemandStar, not a single vendor has complained about the \$30 monthly cost for a business to subscribe the service. (Businesses can view a single solicitation for \$5).

Before Peppers arrived at Detroit Public Schools in 2001, the district complied with state competitive bidding laws in the same fashion as other school districts: by sending out solicitations to vendors who had previously expressed interest in the product or service. However, that process was very time-consuming, expensive and ineffective at bringing in as many responses as possible. "Using DemandStar has lead to a significant jump in the number of vendors who know about the open solicitation. I'd say that it has increased by 400% or 500% [over the previous form of notification]". In fact, for solicitations more than \$250,000 opened in the last three years, DPS data

Continued on page 18

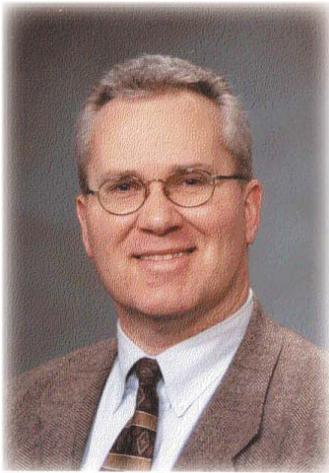


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John Forester
SAA Director of
Government Relations

Legislative Update Doyle, New Legislature Face Tough Budget

Increases in health care costs and operation of the state's correctional institutions, as well as declining revenue projections, will present Governor Doyle with major challenges as he prepares the 2007-09 biennial budget to be presented to the Legislature in late January or early February.

Doyle prepares his budget. The Legislative Fiscal Bureau may use new estimates when it produces a General Fund condition statement for the Legislature in January.

Suffice to say, the job of securing adequate resources for educating Wisconsin school children in the 2007-09 state budget just got tougher. And that means the SAA will have to do a better job than we have ever done in advocating for our kids during the upcoming budget session.

In a report on agency budget requests and revenue estimates for the next biennium released by the Department of Administration (DOA) on November 20th, the figures show that even though state tax revenues are projected to increase over both years of the next biennium, the increases, if realized, would be \$1.63 billion less than state agencies are seeking in their spending proposals.

The figures released today do not include any funds for prospective increases in debt service, fuel and utilities, state employee compensation and fringe benefits or UW faculty pay adjustments. Consequently, total spending requests are understated in the report. Also not included are capital budget requests. The DHFS budget request does not include any provider rate increases under the Medical Assistance program.

State tax revenues are projected to increase from \$12.491 billion in the current fiscal year (which ends June 30, 2007) to \$12.941 billion in FY 07-08 and to \$13.462 in FY08-09. Over the biennium, the total increase would be more than \$1.4 billion. **(On August 15th, DOA projected revenue growth of \$1.9 billion.)** Meanwhile, existing tax law changes and property tax credits will reduce revenues and increase state spending by more than \$600 million in the next biennium.

The revenue estimates assume the national economy will continue to grow over the next three years, with Wisconsin's economic outlook reflecting the national projections. Estimates released on Monday reflect current appropriations and agency requests for the next two fiscal years. The projections will be reviewed again by the Departments of Administration and Revenue as

Invite Your Legislators to School

Have you invited your legislators to school this school year? The November election has created a new political environment in Madison. Many of you now have new legislators, but even if you don't, now is a good time to renew your relationships.

It is clear to me that in order to meet the challenges posed by the 2007-09 state budget, SAA members must enhance their ability to influence their legislators at the grassroots.

The best way to influence your legislators is to develop relationships with them. Each legislator has a "small circle of experts" that they count on for advice on various legislative issues. It is important for you to become one of your legislator's experts on K-12 education issues. Inviting your legislators to your school is a great way to begin or continue developing this relationship. Use the visit as an opportunity to showcase your school and to let your legislator know that you are an important source of information for them on K-12 education issues. You'll also have an opportunity to discuss the major issues impacting K-12 education.

If you have not invited your legislators to school in 2006-07, take the time to extend that invitation. In fact, make it a point to meet personally with each of your legislators to review key issues at least once a year. It's a good idea to coordinate these visits with your district's administrative team.

Remember, the SAA's success on state legislative issues is, in large part, dependent upon your ability to influence your legislators at the local level.





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*Thomson Financial Securities Data, 2005

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Jerry Weisman



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show that an average of 204 companies has received a *notification of solicitation* through DemandStar for each newly opened bid for the Detroit Public Schools. An average of 35 companies end up downloading and viewing the actual solicitation over the same period.

Nevertheless, DPS is not resting on its laurels. Instead, it is always trying to improve the procurement process. The district currently requires that all bids be submitted in hard copy, but it has experimented with online submission. They opened one bid last year for online submission only. "It [the experiment] was successful, and we do eventually plan to go with everything in electronic form. It will likely occur this year," said Pepper.

York County Central Purchasing: Using an intranet to share information about purchasing with all the county's users

York County, Virginia, lies in the heart of this country's colonial history. The 19 schools that comprise the York County School Division sit but a cannon's shot from Colonial Williamsburg and the battlefield of Yorktown. The district has roughly 12,800 students, and an annual operating budget of \$94.7 million.

Based on a mutual agreement between the schools and county government, the York County Central Purchasing Department handles purchasing for the York County School Division. T.W. Sawyer, CPPO, CPPB, is the Purchasing Agent who oversees purchasing for both the county and the school district. In addition to nearly forty years of public procurement experience, Mr. Sawyer possesses a strong background and interest in technology. He uses that enthusiasm for technology to solve many of the challenges presented by the distributed nature of his county's purchasing customers.

Of the county's many interesting technologies, the biggest improvement probably lies in using a system to help respond to the countless "What is the status of my purchase request?" inquiries that any purchasing department faces. Instead of fielding phone calls to respond to those mundane (but understandable) inquiries, the York County Central Purchasing department makes most of its purchasing documents available to every county employee via the county's intranet. To do this, the county Purchasing Department currently scans in an image of every important page from each bid that it maintains. "It

ends up being just about every signature page," said Mr. Sawyer of those pages that his department decides to image. Those images are stored using an online, digital imaging solution provided from Laserfiche, a document management company based in Long Beach, California. The scanned images form the basis of the system, which the purchasing department uses to keep its internal customers apprised of the status of their procurement requests.

Using Laserfiche's Weblink product, the central purchasing department maintains an intranet page that is accessible by every county employee. Therefore, the requesting individual at York County Schools is able to view a fully executed copy of a purchase order and supporting documents with just the click of a mouse. "It didn't take a lot of training," said Mr. Sawyer. "And customers (county agencies) really seem to enjoy it."

In fact, while the county is not able to monitor precisely the traffic on its intranet, a similar internet site which provides information about available bids (and which is available for the public to view via the World Wide Web) gets more than 3,000 hits a month. That is many incoming phone calls that the central purchasing department is able to avoid each month!

The School District of Philadelphia: A paperless procurement office unleashes the power of the district's historic procurement information

The School District of Philadelphia's 217,000 students make it the seventh largest in the nation. The district has an annual operating budget of \$1.9 billion, and operates 273 public schools. However, despite the size and complexity associated with managing the purchasing needs of such a large agency, until recently its procurement department kept hard-copy records for every one of its more than 200 public bids a year.

Nevertheless, the department, led by Kimberly Sangster, CPPO, CPPB, the Senior Vice President, Procurement Services, realized that those hard-copy records held quite a bit of valuable information that could be used to speed the procurement process, increase the district's purchasing power and ensure compliance with law and regulation. The district hoped to abandon the hassle and cost of maintaining paper records.

The School District of Philadelphia hired Freerain

Systems, Inc., to undertake that process. Freerain oversaw the document scanning process for every paper file covering the last year of procurement (which amounted to 130,000 individual pages of information). At the same time, the database held key information from each bid. The database captured the commodity code, product description, vendor name, contract date, amount awarded, M/WBE status—28 fields in all—which form the data on which the district’s buyers can now perform searches.

Using Freerain’s Bid Information Management System (BIMS), the District Procurement Office is now a paperless office. Every piece of information in the procurement process is stored electronically and accessed through a secure, internet-based web page. Every member of the procurement department has access to that web page at different levels of access based on the specific needs of their particular jobs. The information stored includes not just images of every vendor response, but also the Microsoft Word and Excel files that are used by the procurement department as well as esoteric file types that might accompany a specialized bid. The result is a complete, secure, online accessible historic bid record.

Whereas researching and retrieving information from the paper-based documents used to take hours or

days (if the searches were possible at all), retrieving information is now no more than a couple of mouse clicks away. Using the BIMS product, the School District of Philadelphia can now uncover information it never would have been able to access previously. Take, for example, a search for every response received from a particular vendor in the last year. That would have been impossible a year ago. Now it is a 30-second process.

The BIMS process also brings other benefits, including ensuring complete procurement records. “I really like the fact that I know our records are complete. If we’re missing a piece of a complete bid package, the system warns us before it becomes a problem,” said Ms. Sangster. “Whereas before there was no way of knowing whether we were missing a signature page, an award sheet, or a pricing quotation.”

Author bio: Josh Karp is the founder and CEO of Freerain Systems, Inc., Chicago-based Software Company focused on improving procurement for school districts and other government agencies. He is an accomplished technologist, consultant and entrepreneur with significant experience in systems and procurement for the educational field.

The best contact for communication about this article is: Andrew Taylor, ataylor@freerainsystems.com, 312.893.5055



JENNIFER KUEHL
High School Math Teacher
Verona

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President's Message

Continued from page 3

part in ensure our students are in a safe and pleasant environment.

Without the cooks, the students and staff would not have a healthy breakfast or lunch served to them daily. The "lunch lady" replenishes our students physical needs by serving them healthy meals to help them learn in the classroom and to excel in extra curricular activities.

It takes many people with various areas of expertise to make our school run efficiently and to help our students reach their maximum potential. As we visit our schools, take time to observe how our schools run and the important role each of our staff members provide to make this happen. Let's not stop there, take a moment to say "thank you" to our staff members. They will appreciate your kind words and know they are an important part of the school.

In addition to our schools, we need to look at our WASBO staff. They work very hard on a day to day basis to provide information and answer our questions in regards to school business management. They are always pleasant and helpful when you call. They have done a great job in getting a web site running that is helpful to us. They have the expertise to put on great seminars and conferences. The staff spends countless hours to make this a great organization in every way. I would like to take this opportunity to say "Thank you" to Woody, Tina, Jeanne, Marsha, and Bonnie for everything that you do to help us do our job better. We truly appreciate you.

A few additional thoughts:

On November 7, our school district held a vote to see if our district would remain the Shawano-Gresham School District or it would become two districts. The overwhelming majority of the voters from the Gresham attendance area voted to break away from Shawano and form their own district. This was a historic vote in that there has not been a new district formed for many years. As we work through this separation, we have many questions as to what our new district will look like. The more difficult question is what will the new Gresham district look

like? Our pledge is to work together to make this transition as smooth as possible for both districts involved. I plan to keep notes on this historic event and will be willing to share them at a later date.

I would like to take this opportunity to wish you a very Merry Christmas. With our busy schedules and the total commercialism of Christmas, it is easy to direct our ambitions in the wrong direction. Take time to reflect on the real meaning of Christmas. Take time to relax and enjoy the company of your family and loved ones.

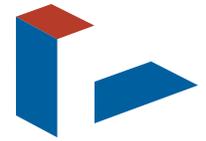
I would also like to take this opportunity to wish everyone a Happy New Year. May 2007 be a prosperous and rewarding year for you both personally and professionally.



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Does Your Safe School Plan Make the Grade?

Our educators cannot educate and our children cannot learn if they do not feel safe in school.

By: Dave Young, CSP

EMC Insurance Companies

Article submitted by the WASBO Safety Committee

Rarely does a day go by where we *don't* hear of an incident at a school affecting the well-being of the students and/or staff. With violence, bullying, drugs, guns, terrorism, hazing, drinking, and natural disasters to consider, creating a safe environment at our schools has become almost as integral to the education process as the courses we teach in our classrooms. While many schools across the country spent a great deal of effort creating safe school plans since the Columbine incident six years ago, recent school attacks have once again shaken the image of schools as reliably safe and secure environments. How could such attacks happen with all of our planning?

Developing a safe school plan is the first and often most difficult part of creating a safe school environment. But proper implementation, training, and testing are imperative if the plan is expected to work. Without regular reviews of policies, staff in-service training, drills, and facility audits, your safe school plan may be of no more value than the paper it is printed on.

Recently, threat assessment surveys were performed for a large school district written by EMC Insurance Companies. The district had requested the surveys to test their safe school plans, but did not expect the significant deficiencies discovered. While some of the deficiencies were physical (unlocked perimeter doors, easy access points to roofs), **lack of compliance with established district rules and policies was their greatest problem.** During the surveys, EMC representatives were able to enter buildings through blocked open or unlocked doors, walk unquestioned with no identification past staff or students in school hallways, enter unoccupied class areas (tech ed shops, computer labs, chemistry labs) that should be secured, and even enter school buildings during evening hours.

While the school district had a written safe school plan, and felt good enough about the plan to request reviews by an outside party, their plan was not working. There was no ownership or accountability.

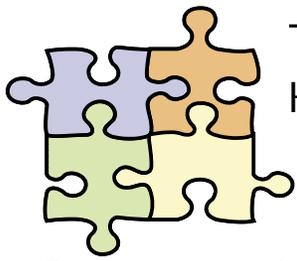
Follow through was lacking. What was written and what was happening were not the same.

Staff and students need to understand, believe in, and follow your safe school plan if it is to work! If there are lapses or non-compliance problems, school administration must take action. Critical issues that must be followed by anyone who uses a school facility, but are commonly overlooked include:

- Perimeter doors must be secured at all times.
- Visitors must go to the main office for sign-in.
- Visitors must wear identification at all times during school hours.
- Identification must be worn in the open and be clearly visible.
- Staff and students must challenge or report unauthorized individuals.
- Security drills must be implemented and participated in by all.
- Involve the entire community in training (staff, students, parents, police, fire, medical, community leaders).

It is difficult to predict and plan for every possible school security situation. However, we must implement reasonable security measures in our schools, regularly look for deficiencies in our plans, and take a proactive approach to correcting them. By taking these fundamental actions, the chances of a tragic event occurring in your school district will be reduced.

EMC Insurance Companies is a property and casualty insurance company that provides a comprehensive insurance program designed for public school districts. The program includes policies for fire, errors and omissions, fleet, general liability, and workers compensation. EMC currently writes over 1400 schools across eight states. In Wisconsin, all services, including policy issuance, claims, audit, and loss control are provided through our branch office located in Brookfield. In 2006 the branch celebrated its 50th year of operation. Two general managing agents, Mortenson, Matzelle and Meldrum, Inc. and Tricor, Inc. represent EMC Insurance Companies and can assist with questions regarding our policies and services.



The School Finance Puzzle

How the Pieces Fit Together

Representatives from WASBO and DPI School Finance Team are presenting a Pre-Joint Convention Workshop on the topic of school finance. The goal of the workshop is “to take the confusion out of school finance by equipping school board members with a **conceptual** understanding of the major components (revenue limit, equalization aid, property taxes, referendums) of the Wisconsin school finance system, how the various components interrelate, and how these components impact Board decision-making.” The program has been developed with the following outcomes in mind:

- 1) To enhance the base awareness and understanding of school finance.
- 2) To raise the comfort level and confidence of School Board members in discussing and communicating school finance topics.
- 3) To increase the knowledge of School Board members in order for them to foster an environment of trust within the community.

The workshop is not a traditional lecture style program. The program will utilize an activity-based approach

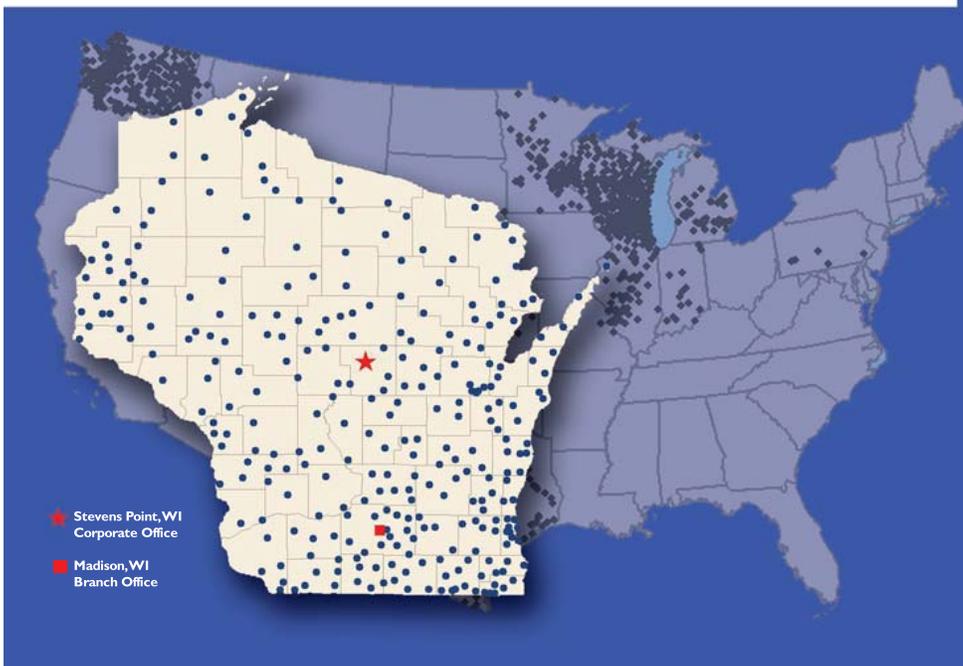
that will engage the participants in a meaningful discussion of school finance while focusing on their role as School Board members. Four-year old (4K) kindergarten will be the basis for the activity.

School business officials and superintendents are encouraged to attend with their Board members.

Program team members are Bambi Statz, Bob Borch, Diane Pertzborn, Karen Kucharz, Lori Ames, Jim King, Brent Richter, Kent Ellickson, Ric Ericksen, Cathy Cramer, Janet Rosseter, Woody Wiedenhoef, Janice DeMeuse, Tina Hafeman, Jan Carlson, Bob Avery, Nancy Hendrickson and Tom Wohlleber.



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ASBO Update

A Report from the ASBO Board

To Do List for 2007:

1. Put **October 12-15, 2007 in Toronto at the ASBO International Annual Meeting on your calendar!**
2. **Get a passport!**
3. **Join ASBO!**

Erin Green
 Director, ASBO International
 Director of Business Services
 Greendale School District

4. Join an ASBO or WASBO Committee!
5. Think about running for the WASBO Board, write an article for WASBO or ASBO publications, make a presentation to your WASBO or ASBO colleagues at an upcoming meeting.

Soon, work will begin on implementing areas of these reports. Major efforts underway involve new ASBO task forces:

- Affiliate Relations Task Force will focus on affiliate communications, visitations, annual meeting host responsibilities, annual meeting program creation process, and annual meeting site selection process. I will work on visitations with Denny Costerison from Indiana.
- A new Ethics Committee has been formed to deal with the ethical issues and opinions.
- A new Leadership Task Force will examine how best to advance the goal of ASBO to serve as a source of Gold Standard Leadership Training for its members. The Eagle Institute held in July will likely become another opportunity for world class leadership training, open to anyone.

ASBO = Excitement for 2007! What's New?

1. ASBO is entering into a partnership with Manchester Metropolitan University in England to sponsor a "Virtual Conference". Twelve ASBO members from England attended the ASBO Conference in Pittsburgh. We are looking forward to an interesting partnership as ASBO moves to truly becoming International.
2. A session in Pittsburgh given by Tom White, Executive Director of Michigan ASBO, described education in a country with more English speakers than the USA. ASBO is becoming part of the global education network.
3. Three significant reports have been completed:
 - ASBO Membership Report
 - ASBO "Futures" Committee Report
 - ASBO Strategic Plan –Ten Years Out

Volunteers are being sought to work on these new efforts. Think about it!

One ever present challenge for business officials is how to fund attendance at seminars and conferences. Consider earmarking a small part of your district's worker comp dividend towards attending a conference where you can obtain information to further work on risk reductions. Make a presentation at a conference to justify your attendance and gain experience in making presentations. There is no doubt you will come back with more than you left with in the way of professional networks, ideas and experiences!

WASBO Members Attend the ASBO International Annual Meeting & Exhibits in Pittsburgh



Left Jane Nikolai (Racine) and Bill Barrow (CESA) stop between sessions.

Right Susan Graham (Kettle Moraine) and Betty Zimdars (Howard-Suamico) plan their time in the Exhibit Hall. Don't miss our President, Gail Moesch (Shawano-Gresham) in the background!



WASBO Past President Ed Kwaterski Passes



Edmund Albert Kwaterski, 85, passed away in his sleep on Tuesday, Nov. 21, 2006, at St. Francis Home in Fond du Lac.

He was born on August 1, 1921, the son of the late Leo F. Kwaterski and Louise Netols Kwaterski.

In 1939, he graduated from Green Bay East High School. He received his Bachelor of Education Degree in business administration in 1943 from Whitewater State Teachers College. In 1953, he earned his Master's Degree in administration and supervision from the University of Wisconsin School of Education.

On Nov. 27, 1943, he married Garnet Schott Kwaterski at St. Joseph's Church in Green Bay.

He then served in the U.S. Navy from 1943 to 1946, with a rank of lieutenant junior grade.

From 1946 to 1955, he was assistant principal and math teacher at East De Pere High School. In 1955, he and his family moved to Brussels, Wis., where

he was school administrator for the Brussels School District. He was appointed superintendent of the Southern Door County School District in 1960.

In 1963, his family moved to Fond du Lac, where he served as director of business services for the Fond du Lac School District, retiring in 1984.

Ed was active in the Holy Name Society in Green Bay and Fond du Lac. He was given the Holy Name Man of the Year in Education Award in 1963. Ed was a member of the 4th Degree Honor Guard of the Knights of Columbus in Fond du Lac, and a member of St. Mary's Church since 1963.

He was a member of the Wisconsin Education Association, National Education Association and Fond du Lac Retired Educators Association, of which he served as president. He was an active member of the Association of School Business Officials and served as president of the Wisconsin chapter in 1980.

Surviving are his "bride" of 63 years, Garnet; his six children, Anne Miers (Randy) of Rochester, Minn., Edmund "Guy" Kwaterski, Jr. (Robin) of Cedarburg, Laura Scho-misch (Bill) of Kalamazoo, Mich., Kathy Chandler (Mark) of Fitchburg, Greg Kwaterski (Robin) of Kewaskum and Jean Kwaterski (Joe Abhold) of Oshkosh; his 12 grandchildren, Natalie, Galen and Ryan Jones, Scott and Steve Kwaterski, Michael, Marisa and Matthew Schomisch, Mary and Jacquelyn Kwaterski and Jordan and Noah Abhold; and his great-grandchildren.

Also surviving are his siblings, Geno Hoepfner, Helen Pierquet, Isadore and Carol Kwaterski, Nance Kwaterski, Kitty Hujet, Sister Louise Kwaterski and Dr. Mitch and Carol Kwaterski; and a large number of nieces and nephews.

Preceding him in death were his parents; his brothers, Dominic and John "Jack" Kwaterski; his sisters, Agnes Nielsen, Beatrice Kwaterski, Sally Bickel and Felicia Van Beckum; his brothers-in-law, Meredith Nielsen, Paul Bickel, Raymond Hoepfner, Cletus Pierquet and Richard Hujet; and one grandchild, Emily Schomisch.

A memorial in his name will be established.

The family would like to thank the staff of St. Francis Terrace and St. Francis Home in Fond du Lac, where Ed and Garnet lived for the past three years. Your care and concern for our parents are greatly appreciated.

Another in a Series of Management Short Courses

By Professor Wilhelm WASBO

The Art of Worrying

1. To worry is natural. Everyone does it.
2. Some do it more than others.
3. When you worry, ask yourself, "Can I control what it is that I am worried about?"
4. If not, don't worry, be selective, be happy.
5. Life is a journey. "A journey is like marriage. The certain way to be wrong is to think you control it." *John Steinbeck*



Getting Ready for the New 403(b) Regulations

What's Happening?

There have been numerous changes in tax and pension laws over the last three decades, but much of the guidance from the Internal Revenue Service (IRS) addressed their impact on 401(k) retirement plans. Finally, the IRS is focusing on 403(b) programs and how these programs should be operated.

On November 15, 2004, the IRS issued the first comprehensive and extensive guidance regarding Section 403(b) arrangements in over forty years. The IRS indicated that, by consolidating statutory changes and previously issued guidance into one set of regulations, its intent was to make it easier for school business officials to administer the 403(b) programs offered by public schools properly.

The IRS recently determined that in order to provide employers, employees, insurance carriers, and mutual fund companies involved in section 403(b) arrangements a reasonable advance period before the regulations go into effect; the final regulations generally will not be effective earlier than January 1, 2008 for most 403(b) plans.

These proposed changes will place added responsibility on school districts and other employers with 403(b) plans. To help you understand the proposals better, here are the background and highlights of the much-anticipated proposed regulations that will have significant impact:

Setting the Stage – Exploring the Current Environment

Historically, public schools have not been involved in the administration of 403(b) programs because such programs are individual contracts owned by the participant. Instead, the investment providers have been responsible for ensuring that the 403(b) arrangements comply with IRS requirements.

Currently, most school districts take a “hands off” approach to their 403(b) programs. The IRS only required the employers to have a salary reduction agreement with employees, deduct the agreed upon contribution from the employees paycheck and forward it the insurance/investment company the employee selected. Traditionally, 403(b) plans have been treated as an accommodation more than an employee benefit program. The purpose of the new proposed regulations is to change the responsibility of administering 403(b) plans from the investment provider and employee to the employer.

The Proposals

Recent changes have brought the rules governing these 403(b) programs more closely in line with other retirement

arrangements that include salary reduction contributions, such as 401(k) plans offered by private sector employers. Because of its audit activity of 403(b) programs, the IRS identified that, broadly, 403(b) regulations were not being implemented correctly. The proposed 403(b) regulations reflect the IRS’ perspective that the employer, as the plan sponsor, should be responsible for administering their 403(b) program.

Written Plan Document

It is expected that when new regulations are approved, they will include a requirement that all 403(b) plans have a written plan document. A plan document specifies all the rules that govern a retirement including provisions for eligibility, benefits, contribution limits, distributable events, loan provisions, hardship withdrawals and approved investment products.

Universal Availability

The IRS wants to make sure all employees who are eligible to participate in the 403(b) program know about it. More employees would be covered under the new rules. Generally, employees expected to work at least 1000 hours must be allowed to participate in the 403(b) plan. In addition, employers will be required to provide an annual notice of employees’ rights to participate.

New Distribution Requirements

The proposed regulations would add restrictions on when a participant could receive a distribution from the plan of amounts *not* contributed under a salary reduction agreement (such as employer contributions or employee after-tax contributions). In addition, employer oversight will now be required for hardship withdrawals and loans.

Revised Transfer Rules – 90-24 Repealed

Transfers rules governing 403(b) plans will be brought in line with transfer rules for other employer-sponsored retirement plans. Transfers for active employees will be limited to employer approved investment providers only. After separation from service, plan

Continued on page 27

“Baby steps count. But you’ve always got to be moving forward.”

**Chris Gardner
Speaker at 2006 ASBO
Conference and subject of the
soon to be released movie
“The Pursuit of Happyness.”**



Getting Ready for the New 403b Regulations

Continued from page 26

participants will be eligible under universal portability rule for IRA rollovers and transfers to employer-sponsored retirement plans.

Be Prepared

Remember that the current 403(b) guidance is only proposed and that 403(b) sponsors need not make any changes until the IRS releases final regulations. However, employers should become familiar with the new concepts now. We do not expect the final regulations to vary substantially from the proposed regulations.

Now is the time to start reviewing your current 403(b) offering. Once the regulations are finalized, you will need to update your program to ensure compliance with new regulations. Areas to review include employee handbooks and communications, existing 403(b) contracts, service agreements and collective bargaining agreements.

Review your 403(b) program's administrative procedures. Identify those areas (such as eligibility, hardships, transfers, loans, and qualified domestic relations orders), which will need to adapt to the new IRS rules.

You may also want to review the hours worked by your part-time employees and substitute teachers. If they are expected to work at least 1,000 hours within the coming 12 months, remind them that they too can participate in the 403(b) program.

Other Considerations

Employer compliance and record keeping will be more demanding under the proposed 403(b) regulation changes. Increased scrutiny and auditing of plans are likely. Employers must be prepared to approve providers and coronate contributions, distributions, loans, and transfer requests to plan compliance. As the plan sponsor, the school district will need to either assume the plan administration functions or contract it out to a third party.

Although 2008 is still more than a year away, now is the time to start planning. While some see the new regulations as an additional burden, others are welcoming the opportunity to streamline and improve their 403(b) program – reduce fees and enhance services.

Retirement Plan Advisors (RPA) is a federally registered investment advisor specializing in providing plan design and support, onsite enrollment services and investment advice to public sector retirement plans. For more information on how RPA can help your school district comply with the new regulations, please contact:

*Dan Dodd, State Director
3618 Ridge Drive Suite# 1
Janesville, WI 54538
(866) 669-9500
ddodd@retirementplanadvisors.com*

Welcome New Members



- **Daniel Bielinski**, Sales Representative, Sonitrol Corporation
- **Nancy Burns**, Superintendent, West Salem School District
- **Dan Dodd**, State Director, Retirement Plan Advisors
- **Bill Foster**, President, School Perceptions LLC
- **Paul Gilkerson**, Associate, Business Development, Gallagher Benefit Services
- **George Glad**, Sales Engineer, Environmental Systems, Inc.
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- **Ruthann Kosma**, Sales Director, GCA Services Group
- **Jon Novak**, Business Manager, Iola-Scandinavia Schools
- **Erica Pickett**, Director of Business Services, Stoughton Area School District
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WASBO Taking Care of Business Seminar

Nearly 90 attendees heard about where education is headed in Wisconsin at the annual Taking Care of Business Seminar on November 15th. The day was kicked off with a panel discussion with panelists Julie Underwood, Dean of the School of Education at UW-Madison, Luther Olsen, WI State Senator, Dan Burkhalter, Executive Director of WEAC, John Ashley, Executive Director of WASB and Tom Beattie, Executive Director of AWSA.



John Musso, Executive Director of ASBO International, shared his insights about the politics of Washington. He concluded his presentation with the following message...



Clockwise - John Forester, SAA, Todd Berry, WISTAX, and Gary Ruesch, Quarles & Brady, LLP provided break out sessions.



*"Never speculate when you can ask."
David Master*



The afternoon concluded with Goldmine Sessions that were very well received. The only complaints - too many topics and not enough time!

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WASBO/WASPA School Personnel Academy

Dealing with Difficult Employees

This joint offering was filled with discussion as participants reviewed case studies of difficult employees. Expertise was



provided by Jon Anderson, LaFollette, Godfrey & Kahn, sc, Mary Gerbig, Davis & Kuelthau, s.c., Valley Elliehausen, West Bend SD,



John Hedstrom, WASPA Executive Director and Whitefish Bay SD, Steve Johnson, Janesville SD, Vickie Laughren, DeForest SD and Jason

Olson, Verona SD. A special thank you to Jason for putting together a superb program.



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Lifelong Protection for HVAC Closed Water Systems: Prevent Corrosion, Scaling and Fouling for Under a Dollar a Day

Periodic water analysis and preventive action are essential to the longevity of heated, chilled and steam loops. A protective monitoring program, which holds corrosion, scaling and fouling at negligible levels, may be implemented for less than \$1 per day of system operation.

Closed Water Systems Provide Indoor Climate Control

Most commercial and public buildings are heated and cooled by closed water systems, or loops. Closed water loops are so-called because a body of water is retained and continuously pumped through a looping network of sealed pipes. Heated loops circulate hot water or steam; chilled loops circulate cold water or glycol.

Trouble is Often Out-of-Sight & Out-of-Mind

The inside of boilers and pipes are permanently hidden from view. Circulating water is the only part of the interior that is easily accessible. Over time, with exposure to heat, make-up water and aspirated air, circulating water undergoes invisible chemical changes, and destructive processes ensue. Corrosion, scaling and fouling may proceed unabated, until systems rupture and fail. Signs of impending trouble are:



- Treatment, if used, is added on a time-schedule
- Corrosion rates not being measured
- System water not routinely tested
- Cloudy, off-color, odiferous water

- High conductivity, low pH
- Seal failures

All types of closed water loops require water-side management. According to both the Army Corps of Engineers and the Hartford Steam Boiler Inspection and Insurance Company, one of the two major causes of system failure is poor or non-existent water-side management.^{1,2}

Protection Is a Process, Not a Product

There are basic disadvantages in trying to buy protection in the form of brand-name water treatments. First, companies that sell water treatment are not reliable sources of objective water treatment

A complete protective monitoring program costs less per year than ten gallons of brand-name water treatment.

advice. Their focus is product sales, not system science. Second, recommendations are frequently dispensed by chemical salespeople, which often have little knowledge of water chemistry and limited technical training. They are not professionally responsible for the long-term welfare of the system. Third, brand-name water treatments are unnecessarily expensive. Most products are priced at over \$20 per gallon³, but contain less than \$2-worth of active ingredients.⁴

Protective Monitoring is Crucial to System Dependability & Longevity

Protective monitoring is a best-practices program⁵ of

Continued on page 32

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Lifelong Protection for HVAC Closed Water Systems

Continued from page 30

periodic water analysis and timely, preventive action. Its objective is to maintain water chemistries in the safe zones established by ASHRAE⁵, thereby keeping destructive processes in check. Corrosion, scaling and fouling are held at negligible levels for less than \$1 per day of system operation.⁶

A water sample is drawn each quarter during the period of system operation. The necessary parameters are measured, and results are compared with safe-zone standards. Action is taken to adjust system chemistry, if required.

Chilled Loop Safe Zones

Opacity/Color: clear/yellow or pink

pH: 9-10

Sulfite: 30-50 ppm

Sarcosinate: 200-300 ppm

Conductivity: <500 µmhos

Freeze Point: <winter lows °F

Heated Loop Safe Zones

Opacity/Color: clear/colorless

pH: 9-10

Sulfite: 30-50 ppm

Sarcosinate: 200-300 ppm

Conductivity: <500 µmhos

Steam Loop Safe Zones

Opacity/Color: clear/colorless

Boiler pH: 10-12

Condensate pH: 8-9

Boiler Sulfite: 30-50 ppm

Boiler Conductivity: <4000 µmhos

Condensate Conductivity: <50 µmhos

Parameters & Preventive Action

Opacity/Color: an indication of corrosion products, organic matter and particulates present.

If outside zone: No action required; correcting other parameters corrects this one.

pH: a measure of acidic or basic conditions; values in the safe zone inhibit acidic (etching) corrosion.

If outside zone (heated/chilled loops): Add 10 ounces *Dipotassium Phosphate* for every 1000 gallons of system capacity.

If outside zone (steam loops): No action required; correcting other parameters corrects this one.

Sulfite: A measure of *Sulfite* in ppm; values in the safe zone inhibit oxidative (rusting) corrosion.

If outside zone: Add 14 ounces *Sodium Sulfite* for every 1000 gallons of system capacity.

Sarcosinate: A measure of *Sarcosinate* in ppm; values in the safe zone inhibit bi-metal (galvanic) corrosion.

If outside zone: Add 8 ounces of *Sodium Lauroyl Sarcosinate* for every 1000 gallons of system capacity.

Conductivity: A measure of dissolved inorganic salts in µmhos; values in the safe zone inhibit bi-metal corrosion.

If outside zone: Flush system/blow down boiler until value is in safe zone.

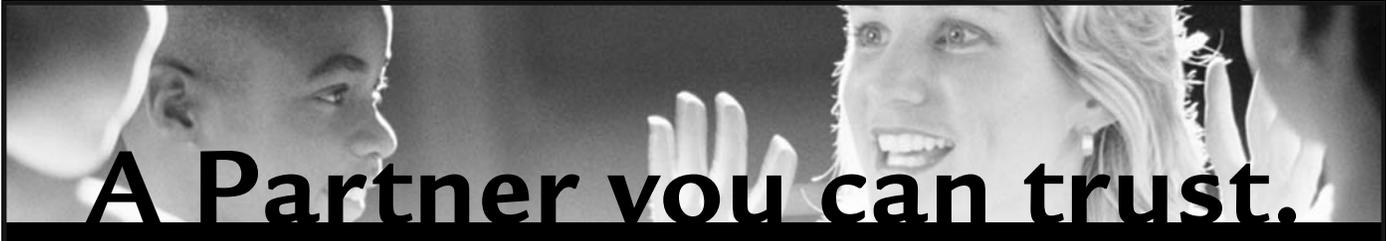
Freeze Point: Temperature at which a fluid freezes in °F; values in the safe zone prevent freezing.

If outside zone: Increase glycol concentration until value is in safe zone.

Hardness: A measure of calcium carbonate in ppm; values in the safe zone prevent scaling.

If outside zone: Make necessary adjustments to softener until value is in safe zone.

Continued on page 33



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Lifelong Protection for HVAC Closed Water Systems

Continued from page 32

Three proven, easy-to-use treatment chemicals are employed in their undiluted, powdered forms. Dipotassium phosphate (pH-buffer), sodium lauroyl sarcosinate (film-former) and sodium sulfite (oxygen-scavenger) are administered individually and by the ounce, making water treatment the least expensive part of protective monitoring. Chemical expenses are included in the \$1 per day cost of the program.⁶

Sodium nitrite, a popular ingredient in brand-name water treatments, is not used for several reasons. First, nitrite is an environmental toxin. Second, at levels above target concentrations, it hardens rubber gaskets and forms abrasive crystals at evaporation sites, wearing seals and valves. At levels below target concentrations, it accelerates corrosion rates, making it worse than having no treatment. Third, nitrite is a ready source of food for the microbes that cause fouling.⁵

How to Begin

Protective monitoring may be contracted to qualified professionals, or performed in-house, using existing personnel. *Closed System Protection: A Handbook for Plant Managers and Facilities Engineers* is a free, ten-page volume designed to help school districts make the transition to protective monitoring. It provides information on HVAC laboratories offering qualified programs, and comprehensive do-it-yourself instructions. Visit <http://www.closedsystemlabs.com> to download a copy.



About the Author

Katie Place is an HVAC chemist who provides guidance to those responsible for the water-side management of closed systems. She owns Closed System Labs in Madison, Wisconsin.

References

- ¹ U.S. Army Corps of Engineers Installation Support Division
Boiler Water Treatment: Lessons Learned (Public Works Technical Bulletin # 420-49-21), November 1999
- ² Hartford Steam Boiler Inspection and Insurance Company
Maintenance and Water Treatment for Your Low-pressure Boiler (DOC #442), January 2003
- ³ Cannon Water Technology
CS523 = \$21.80/gallon (contains 1.6 pounds of sodium nitrite and sodium borate)
- ⁴ Univar USA
Sodium nitrite = \$0.93/pound, sodium borate = \$0.48/pound
- ⁵ ASHRAE Journal
Water Treatment in Closed Water Systems, Darrell Hartwick, February 2001
- ⁶ Richard Kunz, Chemist, Ltd.
Maintaining Engineered Water Chemistries Assures Long Closed Loop Life, Richard Kunz, November 2005

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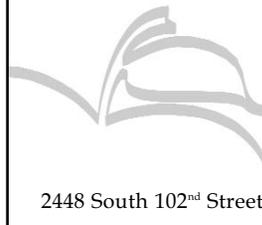
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"A mere work ethic isn't enough. A hardened criminal may exhibit an excellent work ethic. What is needed is a work ethic conditioned by ethics in work."
M.P. Bhattathiri

Short Shots



Networking Opportunity!

Erin Green is bringing us together for the FIRST ANNUAL WASBO SKI TRIP! Bring yourselves, your skis, snowshoes, snowboards up to the U.P! Erin Green will be at the Porkies Feb 22, 23, 24, 25th, the legendary snow capital of the Midwest with a 700-foot vertical mountain overlooking Lake Superior. The Porkies is under new management, with many new runs, and offers two for one lift tickets this winter, making the cost about \$18/day! Also offered is outstanding cross-country skiing, through the tall virgin hemlock forests. If you snowmobile, bring that along too! There are many excellent trails at your door! To find it, head straight north until you hit Lake Superior (or take hwy 51 north). To sign on, make your own reservations for lodging. Suggested is the RAINBOW, a well-managed, remodeled small establishment near the hill, in Silver City, Michigan. Rates are reasonable, hot tub center, some have kitchens. The kitchenette suites are great. Let Erin know if you plan to come! Rainbow: www.rainbowlodging.com

SAA Legislative Council - The SAA Legislative Committee will be forwarding their proposals to the Boards of the four administrative associations for final action by the end of January. These decisions will become our lobbying agenda for the next legislative session. The topics the Committee will review for action are Revenue Limits, QEO, State Funding for transportation, special education, district control of Federal Funds, and bilingual/bicultural aid. In addition, health insurance will be a major topic. John Forester leads the charge for us in the lobbying area, but he will also need your help. Please respond when he makes that call or sends the e-mail. The powerful relationship with our elected officials will be the relationship you build with your representatives.

WASBO Regionals are meeting monthly on exciting new topics! Check www.wasbo.com for meeting dates and locations.

- Employee Trust Funds (ETF) representative, Joan Steele, informed the Southwest regional about the state health plan. Dan Dodd, Retirement Plan Advisors presented information about the new

403 (b) regulations.

- The Wisconsin Valley Regional discussed phone systems, copy machines, early retirement plans, security measures and boiler inspections.
- West Central Regional discussed various health care options that might be available to school districts. In addition, they have started a discussion about updating our guidance for records retention. This could possibly be a joint venture between WASBO and the DPI.
- The Southeast Regional reviewed a remote deposit product and discussed health risk assessments, consumer driven health plans and wellness programming.
- The Northeast Regional discussed options with several companies pertaining to replacing the OPEB liability with a more optimistic set of liabilities using Act 99.
- The Madison Area Regional reviewed and provided input on the WASBO web site.

Tidbits Learned at the Regionals

- There was a retirement gathering for Bob Buchholtz at Champ's in Brookfield. Bob has been a mentor for many of us years. We wish you a healthy and enjoyable retirement.
- Kathy Guralski and Lori Ames at the DPI have created a series of media-site web casts on special education.
- The Transfer of Service Revenue Limit Exemption deadline is months away, but work on this task can start today. The DPI will have an online report by next year.
- The DPI will have an on line FTE report for equalization aid membership by early spring.

Mark Your Calendar for these Future Seminars

WASB-WASDA-WASBO 86th State Education Convention, January 17-19, 2007, Midwest Airlines Center, Milwaukee

WASBO Facilities Management Conference, February 27-28, 2007, Kalahari Resort & Conference Center, Wisconsin Dells

WASBO Transportation & Bus Safety Workshop, February 28, 2007, Kalahari Resort & Conference Center, Wisconsin Dells

WASBO Accounting Seminar, March 21-22, 2007, Chula Vista Resort & Conference Center, Wisconsin Dells

WASBO Foundation Spring Conference & Exhibits, May 15-18, 2007, La Crosse

Custodial & Maintenance Summer Conference, June 20, 2007, DC Everest & Watertown

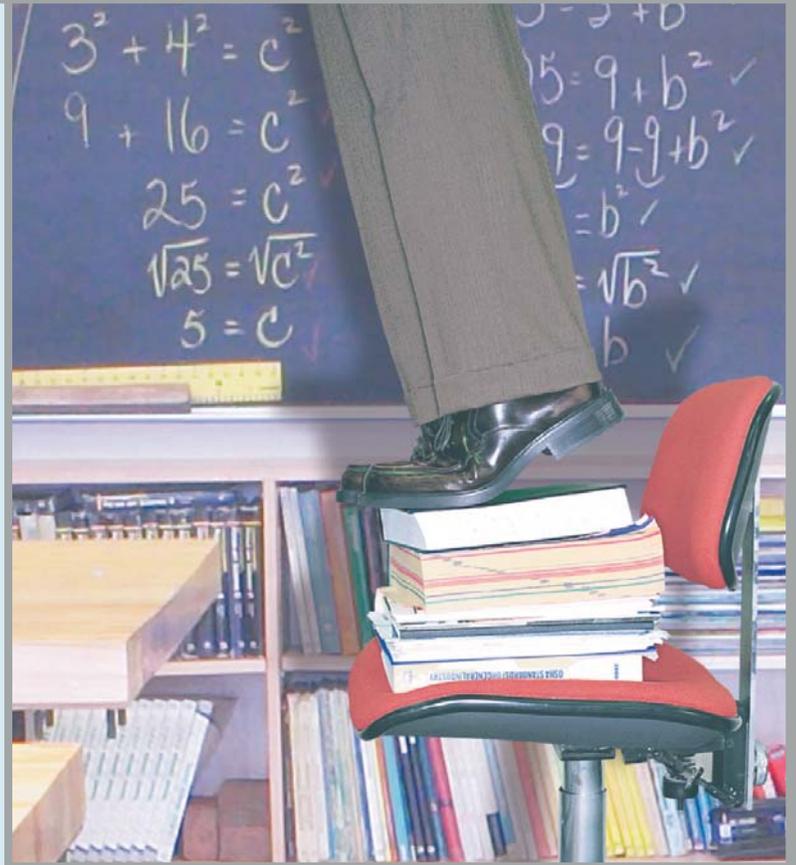
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WASBO Calendar

Professional Development

January 17-19, 2007

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“Promote your team with the same level of enthusiasm that you would promote yourself.”

Andrew Edelman

Business Meetings

January 18, 2007 - Milwaukee
May 18, 2007 - La Crosse

Regionals

Each Regional Representative, meeting locations & directions are available at www.wasbo.com if predetermined.

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

Dec. 15, 2006 Howard-Suamico
March 16, 2007 Ashwaubenon
June 21, 2007 Seymour

Madison Area

Dec. 15, 2006 Monona Grove
Feb. 16, 2007 Middleton-Cross Plains
March 16, 2007 Monona Grove
April 20, 2007 Middleton-Cross Plains

Northeast

Feb. 9, 2007 Fond du Lac
April 13, 2007 Manitowoc
June 21, 2007 Seymour

Northwest - Meetings are usually held at

Lehman's Supper Club in Rice Lake
Dec. 13, 2006
Feb. 14, 2007
March 14, 2007
April 11, 2007
May 9, 2007

Southeast - Meetings are from 9:45-11:30 am with lunch following.

Dec. 8, 2006 Whitnall
Feb. 9, 2007 Glendale
April 20, 2007 Hamilton

Southwest - All meetings will be held at the CESA #3 office in Fennimore.

Dec. 20, 2006 - 12:30-3:30 p.m.
Feb. 21, 2007 - 12:30-3:30 p.m.
April TBA (Same date as DPI Spring Finance Workshop - 1:00-4:00 p.m.)



Go to www.wasbo.com and click on "Calendar" for updated meeting information, to register or get directions.

West Central - Meetings are held from 10 am - 1 pm at the Sparta Area School District Administration & Education Center, 201 E. Franklin St., Sparta

Dec. 7, 2006, Feb. 1, 2007, March 8, 2007
April 5, 2007, June 7, 2007

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

Dec. 8, 2006 Merrill
Feb. 2, 2007 D.C. Everest
March 16, 2007 Auburndale
April 20, 2007 Wausau

Committee Meetings

Safety Committee

March 7 (1:30 p.m.) - Madison, WASBO

School Facilities Committee

TBD

Service Affiliate Committee

Jan. 16 (10:30 a.m.) - Milwaukee, MAC

Spring Conference Committee

Jan. 19 (8:00 a.m.) - Milwaukee, Hilton

Transportation Committee

Dec. 14 (9:00 a.m.) - Madison, WASBO

Board of Directors Meetings

December 13, 2006 - Madison

January 17, 2007 - Milwaukee

February 22, 2007 - Stevens Point

March 20, 2007 - Wisconsin Dells

April 19, 2007 - Madison

May 15, 2007 - La Crosse (if needed)

June 15, 2007 - Madison



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