



# 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 Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 14, Number 1 - January 2010



Mary Jo Filbrandt with WASBO Executive Director Woody Wiedenhoeft and WASBO President Keith Lucius

## WASBO Honors Mary Jo Filbrandt as 2010 School Business Official of the Year and Bob Borch as 2010 Shining Star



Bob Borch with award sponsors Julie Ebert and Mike Roshar, Quarles & Brady, and WASBO President Keith Lucius

Mary Jo Filbrandt, Director of Business Services for the Unified School District of Antigo, has been selected as WASBO's 2010 School Business Official of the Year. This award is made possible by the generous sponsorship of Hutchinson, Shockey, Erley & Co. The selection is based on the candidate's demonstrated implementation of innovative programs and practices, professional service for enhancement of student learning, serving as an instructor or mentor for their colleagues, and service in local community activities. Contributions to the profession of School Business Management, both locally and to their colleagues in the State, are also considered.

Mary Jo's District Administrator, Roxann Bornemann, nominated her with these comments. "Mary Jo is and always has been a rock solid, steady and focused school business official who maintains the fiscal assets of the district with responsibility, accountability and based on an ethical standard no one can match. Mary Jo has spoken...always with a focus on what is best for our students. Mary Jo has led the district through extraordinary financial times, including the building of a new high school, a new Community Aquatic Center, two successful referendums, as well as directing the ongoing financial management of a school system committed to excellence on a very tight budget. Mary Jo is humble, unassuming and always focused on what is best for the Antigo School District."

Bob Borch is the WASBO 2010 Shining Star. The Shining Star Award, sponsored by Quarles & Brady, recognizes commitment and excellence in service to WASBO through committee and Board service, special projects and filling leadership roles.

Bob has excelled since 1978 as a school business leader in various school districts and as an active member of WASBO. "Over the years Bob has continued to share his talents with WASBO," said Wendy Brockert in his nomination papers.

Bob has been an instructor at numerous WASBO Conferences. He continues to be a valuable faculty member at our seminars, conferences and workshops and a faculty member for Cardinal Stritch University. He is presently the Chair of the WASBO Constitution Committee and a representative on the School Finance Network.

He has represented WASBO on numerous task force committees for the Wisconsin Department of Instruction, Wisconsin Legislative committees, the Wisconsin Governor's office, the International Association of School Business Officials and other organizations advocating for appropriate school finance solutions. A short list of examples are that Bob Co-Chaired the School Administrators Alliance School Finance Team, participated on the Fair Aid Coalition, held a seat on the Wisconsin School Finance Adequacy Initiative and the State of Wisconsin Finance Task Force and was an influential member of the 2009 International ASBO Economic Summit.

Bob was a WASBO Board member for seven years and is the only person to have

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Editor: Woody Wiedenhoeff



# President's Message

## WASBO Board Update

### *Meeting the Challenge Together*

It was great to see so many WASBO friends at the Joint Convention. If you were unable to attend, you missed a great conference. Specifically, I felt the daily keynote speakers were outstanding. Personally, they were effective in encouraging me to think about how school districts need to change to better serve students. In case you haven't noticed, kids today are very different from just 10 years ago, and we need to change the way we do business in order to serve them. As business officials we need to be an integral part of planning the schools of tomorrow.

Okay, I will get off the soapbox and talk about what is happening on the WASBO Board. The WASBO Board had a meeting on December 16, 2009. We continue to move forward working on strategic issues and also spent time working on the 2010-11 WASBO budget.

The strategic focus of the December meeting was to continue working on potential WASBO certification program offerings and to work on budget development for 2010-11. As a reminder, at the November Board meeting, the Board identified areas where WASBO could provide certification programs that are beneficial to our members and school districts. Our thought is that certification programs will not replace the 08 license. Instead, WASBO would provide programming to business office staff who may not be interested in pursuing the 08 license and provide more detail on topics for licensed business managers and superintendents. We all agree that the 08 business manager license is the cornerstone of the successful business manager.

The Board members' first task was to consolidate the large list of potential programs into a manageable number. Next we talked about where to start. We



Keith Lucius  
WASBO President

decided that we needed to start with one or two new programs because we did not want to spread our resources too thin. The Board then discussed how to get a program started. It was determined that it was not the role of the board to develop programs. Instead, the Board should identify resources to do these types of projects. This could be accomplished by an existing committee or by establishing a new committee. The Board is looking at starting a new committee to work on creating a program and talking with an existing committee to see if they would be willing to look into a certification program as part of their current process. I am not mentioning the areas that we are considering because I don't know if the key people in those areas have been contacted yet. I will be communicating more detail on these areas, along with how you can get involved, in future articles.

Next, the Board worked on the 2010-11 WASBO budget. Wendy Brockert will give WASBO members the details of the budget at the Business Meeting during the Spring Conference in May. I do want to mention that Wendy and the WASBO staff have done an outstanding job restructuring the WASBO accounting structure to make it more understandable for the Board and all WASBO members.

That covers the strategic items on the agenda. As always, if you have ideas or concerns with anything that the Board is working on, please feel free to share them with me at [klucius@ashwaubnenon.k12.wi.us](mailto:klucius@ashwaubnenon.k12.wi.us).





Woody Wiedenhoeff  
WASBO  
Executive Director

# Exec's Reflections

## Showing a Little "Attitude"

This issue of *Taking Care of Business* features our candidates for the WASBO Board of Directors. Candidates have written about their background

and their interest in becoming a Director or Treasurer on the WASBO Board. The following are quotes from each of these articles. WASBO members can be proud that we have such capable and caring members who wish to participate. I think you will find the "attitude" shown as self-evident.

"I continue to be excited and challenged by what we do as business officials. We are not the focal point – student learning is the artwork. We provide the picture frame and the matting. Without us, the art doesn't have a way to hang on the wall."

"If it were not for all the support functions we provide, little education could take place in our school buildings. There would not be clean, safe and healthy environments equipped with tools teachers need."

"I believe in the WASBO mission and vision. There are two specific ways that I feel I can support the mission and

vision – through service and by giving back."

"I want to continue to give back to the organization and its members."

"...having the knowledge that I am a child advocate makes me feel wonderful that I am part of the educational process.... I have the opportunity to feel like I am part of doing something worthwhile..."

"I believe we have a great opportunity to demonstrate the value that public education brings to the state."

"Schools and education are facing some challenging times ahead, and I hope to be part of the solution."

"I appreciate and care for everyone I work for or with which helps me build effective relationships."

"We offer enlightened leadership that can provide a better future for our students and community...by focusing on the greater good of our stakeholders, we create a sustainable environment for all."

As our membership grows, it has become more difficult for us to know each other on a personal basis. You will find our candidates lead not only interesting

professional lives, but they also have wide and varied backgrounds.

Our membership is humble and modest in talking about themselves, so this writing task was difficult for the candidates. Their dedication to the WASBO mission, vision and tradition of sharing and caring is unquestioned. They all offer both professional and personal attributes that will help grow the strength of our educational system and WASBO. We are fortunate to be surrounded by colleagues of such caliber. Please take time to thank all of them for being willing to serve.

The "attitude" that shows so clearly in the above quotes, demonstrates that WASBO and the future of public education are safe. We will be voting online in April. Please honor all of our candidates and the election process by casting your votes.

We are proud of our candidates!



**Online voting will take place April 1-30. Please take the opportunity to vote for two Board Director positions and one Board Treasurer position. You will be notified by email when voting opens.**



### WASBO FOUNDATION - Ehlers Academic Scholarship



Application Deadline  
March 1, 2010

WASBO is pleased to partner with Ehlers in offering this \$1,000 scholarship opportunity for a WASBO member who is currently working toward a degree and certification in school business management in Wisconsin. The scholarship is fully funded by Ehlers. You can apply annually, however preference will be given to those who have not previously been given a scholarship.

**Application Guidelines**

- Scholarship Goal** - To provide an academic scholarship in the amount of \$1,000 to a WASBO member seeking his/her School Business Manager Certification.
- Eligibility** - Must be enrolled in an accredited university graduate program in Wisconsin leading toward initial O8 Certification.
- Application Process** - Contact the WASBO office at 608-249-8588 for an application.
- Selection Process** - Preference will be given to first time applicants. Preference will be given to candidates currently working in a Wisconsin School District.

Bob Borch has generously donated a portion of his Shining Star Award to this scholarship so an additional \$375 will be awarded this year.



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## Mary Jo Filbrandt - WASBO's 2010 School Business Official of the Year

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David Carlson, Director of the DPI School Financial Services Team, notes, "...Mary Jo has worked with her school community to minimize the impact on student learning which is really the "bottom line" to me."

Brian Prunty, President of CoVantage Credit Union says, "...Mary Jo is a progressive thinker who is not afraid to try new ways to benefit the school and greater community." Brian Prunty cites two examples. "Mary Jo's role in establishing the school district foundation and its positive role for youth athletics (both at school and the community), and the construction of a community aquatic center are nothing short of remarkable." In addition, "Mary Jo (helped) school district personnel to embrace Health Savings Accounts as a way to control health insurance costs."

John Nedden, Head Negotiator for the Antigo Education Association said the following about the Health Savings Account. "I believe the foresight of

Ms. Filbrandt in developing the Health Insurance Committee has been an innovative step in meeting our district's needs."

The community accolades go on. Paul Payant, President of the Red Robin Scholarship Foundation notes, "... Ms. Filbrandt was the driving force behind the need for a foundation in our school district. Ms. Filbrandt initiated the program, found the funding and also coordinates all applications for projects that are awarded grants through the foundation." There are many innovative programs, such as machine shop students manufacturing parts that are used by local businesses and the "History Alive" program. Suzanne Bahar, President of Habitat for Humanity of Langlade County, commented that "Mary Jo was instrumental in implementing the Habitat for Humanity (projects) involving the Antigo High School House Building class... accessing \$20,000 worth of building

materials for the project from Wausau Homes, Inc."

The Antigo community worked for years to build an aquatic center. Matthew Shinnors of the Clara R. McKenna Aquatic Board notes, "Mary Jo played a major role in the eventual success of these efforts. As I look back at the history of this endeavor, I realize that a wide swath of our community was instrumental in its success but that a few individuals were at the heart of the success. Mary Jo is definitely counted among them." The aquatic center was built five years ago using only community donations.

Roxann Bornemann's final comment sums up Mary Jo's life. "Mary Jo positively impacts each student, staff and family member she works with because she combines professional expertise with the gift of personally caring." WASBO is proud of you Mary Jo. Congratulations, Mary Jo!

## Bob Borch - WASBO's 2010 Shining Star

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served as the WASBO President for two years. He has received the Business Services Award and the distinguished Zastrow Award.

Bob's dedication and work is clearly focused. Bob has shared with us on numerous occasions "We are here for the kids. We have numerous challenges, but we are really here to serve our children." Wendy Brockert noted in Bob's nomination, "I have much respect for Bob and the leadership he has provided to WASBO. He is an excellent role model for our members. I appreciate Bob's willingness to continue in leadership positions. Bob is truly deserving of the 2010 WASBO Shining Star Award." Congratulations Bob!



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# Meet the Director Candidates for the WASBO Board of Directors



**Bob Avery**

Hello, my name is Bob Avery and I am presenting myself for your consideration as a candidate for the WASBO Board of

Directors. I am writing you today to explain who I am and why I am running for the board. Presently, I am the Director of Business Services and Operations for the School District of Somerset in the NW regional. Prior to heading north, I served the Stoughton, Sun Prairie and Wisconsin Heights school districts in the Madison area in various capacities.

I have been a member of WASBO since 2000 and have worked in managerial positions in public education since 1997, when I was hired by the Stoughton Area School District as coordinator for its in-house transportation department. While in Stoughton, my supervisor encouraged me to explore expanding my role in schools by returning to grad school and pursuing a degree in school business management. In 2002 I took his advice and enrolled at Whitewater. At the same time, an opening in the business office in Sun Prairie became available and I was hired as the Business Services Manager. This, to me, was a great opportunity to get hands on experience in the office while also pursuing the academic aspect of my professional education. Prior to this, my degrees were in the liberal arts and my experience was managing operations, so the chance to work in the accounting, budgeting, and purchasing functions was invaluable.

In 2005, I was hired as the business manager in Wisconsin Heights. It was

time to “sail my own boat.” Being the business manager in a district with rapidly declining enrollment (average of 5%) and two failed referendums was challenging, frustrating, invigorating, and enlightening. I got to work with a lot of great people and gained experience that would be hard to duplicate. Today I work in a district that is in many ways at the other end of the spectrum. Somerset has been blessed with growing enrollments and our biggest concern is space, not cuts. My experience, then, is varied and widespread. I believe this range will make me a better Board member, if elected.

I am happily married to Carol, an accountant by training, who is the executive director of a non-profit organization that serves adults with disabilities in the Madison area, and have three wonderful children. Carol has been, and continues to be, incredibly supportive of my professional life, including when I started at Whitewater when our youngest was only nine months old and now with me working 250 miles from home. Whitney is a graduate of Minnesota and is starting her own children’s drama school; Ryan is a sophomore at Concordia-WI (Mequon) and wants to become a special education teacher; and Olivia is in 3rd grade exploring her interests in dance, music, theater, and horses. When I am not in the office, my time is dedicated to my family, especially since I am 3½ hours away from home during the week. I do try to carve out some time for myself to ride my bike, read, and keep up on current events, the Badgers and the Packers.

I am running for the board because I believe in the WASBO Mission

“to provide professional growth opportunities for its members, provide a network of support for its members, to work for adequate funding, and to advocate for educational opportunities for children in the State of Wisconsin.” There are two specific ways that I feel I can support that mission – through service and by giving back.

I believe that an organization is only as strong as its membership (and WASBO is an incredibly strong organization!) and that committing to an organization also means serving the organization. In the past I have been on the Transportation Committee (and chaired it for a while) and on the Fall Conference Planning Committee. I also am a member of the “School Finance Puzzle” planning committee and was one of the presenters at this January’s Joint Convention. Through these efforts, I have worked to support professional growth opportunities for the membership. Now, I’d like to continue this work as a member of the Board, providing my perspective and effort as WASBO moves into the second decade of the 21st Century (gosh, how time flies!). There are many challenges ahead in the field of school business management in the coming years and I promise to work hard to serve WASBO and promote the WASBO Mission.

Secondly, I have benefitted greatly from the expertise, experience, insights, and wisdom of many colleagues and mentors in this field, the WASBO “network of support.” (Special thanks to Doug Linse, Jim Harlan, Phil Frei, Tom Wohlleber, Diane Pertzborn, Bambi Statz, Steve Summers, and Woody Wiedenhoef for all your support and guidance over the years!) I have received from others and believe now

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# Meet the Director Candidates for the WASBO Board of Directors

I can start giving back, being a source of support for my colleagues. This, I believe, is vital to WASBO, to give back to colleagues, other members, and to incoming professionals. It is why I (and many of you) agreed to take on interns. It is why I am running for the board. There are many challenges ahead to school business officials in the coming years and I promise to work hard to serve WASBOnians.

Working as a member of the board, I would support efforts by our organization and through the SAA to work for adequate school funding and to advocate for public education and the children we serve here in Wisconsin. To that end I support the efforts of the School Finance Network and of John Forester, and as board member would advocate these positions in Madison as called upon.

Now you know a little more about me and why I am throwing my hat into the ring this year for the WASBO board. I hope that you consider me as one of your next board members when you vote this spring. I know that there are many extremely well qualified candidates and know that we will be well served regardless of who is elected. Thank you for your time and consideration.

***“Never before has man had such a great capacity to control his own environment, to end hunger, poverty and disease, to banish illiteracy and human misery. We have the power to make the best generation of mankind in the history of the world.”***

**President John F. Kennedy**



## **Jill Collins**

Hi, my name is Jill Collins and I am a candidate for the WASBO Board of Directors. I am currently the Director of

Business Services for the School District of Black River Falls and have just completed my eleventh year working as a school business manager.

My professional career has come full circle. I began working for the School District of Black River Falls fifteen years ago as their head bookkeeper and continued in that capacity for the next four years. With a bachelor's degree in business administration, I realized that perhaps I missed my calling as I wanted to be a key part of the bigger picture and help make a difference in educating children. I looked at the prospect of returning to college for a second degree in teaching high school math. However, I soon took the smart advice of my then supervisor, Ted Kozlowski, to pursue my masters in school business management. I started the program at UW-Whitewater in the fall of 1998 never realizing what kind of journey would soon follow.

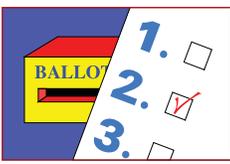
After moving to the southeast part of the state to work at Wilmot Union High School in my first business manager position in 1999, I soon realized that being closer to home was a priority for both me and my husband. We had a two year old daughter and our son was on the way. Our family ties in Black River Falls were strong and we needed to be closer to them for many reasons. I was fortunate to be hired by the Wisconsin Rapids Public Schools as the Director of Business Services in January of

2000. I had planned to stay there for quite some time, however, sooner than I had expected, the business manager position at Black River Falls opened up that fall. It was the opportunity that I had someday hoped for, but I had not expected to return back home so soon. I have been in Black River Falls ever since and thoroughly enjoy all of the challenges the District has to offer. From human resources to transportation and purchasing to buildings and grounds, no two days are ever the same. This is the very reason that I love being a school business official in medium size district like Black River Falls.

I have been very active in WASBO throughout the years. I have served on the Accounting Committee and the Fall Conference Planning Committee. In the past few years, I have co-chaired the Fall Conference Planning Committee and have served the West Central Wisconsin School Business Officials as the facilitator for our region. I thoroughly enjoy working with so many great people in our profession and networking with them has been the key to my successes. Without the knowledge of others who have forged the road before me, many of the challenges that I face would seem insurmountable. That is one of the largest benefits that I have reaped from WASBO and I want to continue to give back to the organization and its members. Being a director on the WASBO board would provide me with that opportunity.

I have recently been approved as an instructor for the new School Business Administration program at Viterbo University in LaCrosse, WI. I am excited about this opportunity as it will also be a vehicle for me to continue

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# Meet the Director Candidates for the WASBO Board of Directors

to improve professionally, challenge myself personally and allow me to share the things I've learned with the newest of our potential members while training them to be great leaders. I am very community-minded and have volunteered on many boards locally. I currently serve as the treasurer for the Black River Youth Hockey board and help lead the executive board in developing and carrying out the vision for the organization.

Serving on the WASBO board is the next logical step in my professional journey. I'd like to thank the Nominating Committee for considering me and hope that you will too when you vote for the WASBO Board of Directors this spring.



**Gail Haack**

When Tom Wohlleber called and left me a voicemail before the holidays to see if I would consider

running for the WASBO Board of Directors, I hesitated to return his call. As a relative newcomer to WASBO, I felt at first that I was not qualified to take on this responsibility. There are so many of you who have much more knowledge and years of experience than me regarding school finance and leadership that I felt inadequate to even think about running. Then I received an email from Sue Schnorr asking if I had thought about running for the WASBO Board. My response to Sue was, "are you and Tom conspiring to get me to run?" After some internal mental fighting and reflecting on some of my strengths from my current and past work experiences, I thought maybe I do have some leadership knowledge

to share and most importantly I could learn from my peers. With that said, I will share some information about myself with you.

My name is Gail Haack, and I am the Business Manager for the Algoma School District. I have been married to my husband John for 35 years, and we have three adult children – Jason, Amy and Jodi. I came to the District in 2001 as the Administrative Assistant to the Superintendent and became the Business Manager in May 2005. I received my Masters of Art in Education from Silver Lake College, Manitowoc, which gave me my 08 License in 2004. Before coming to the District I worked at a local bank for 23 years. I started as a teller, went through most of the departments, and ended my career as the Compliance Officer and Marketing Coordinator.

As the business manager in a small school district, I wear many hats. I arrive early and leave late many days; however having the knowledge that I am a child advocate makes me feel wonderful that I am part of the educational process. In what other profession can you walk down the hall and have a first grader excited about showing you a project that they have just completed? Rewards are evident throughout the schools and especially in the classrooms. I am so happy that toward the end of my career I have the opportunity to feel like I am part of doing something worthwhile and yes, there are some of those hair pulling days, but seeing the innocent, excited smile of that first grader overwhelmingly eliminates the memory of the other experiences.

When I am not working I volunteer within my community. Over the years

I have been a parish council member, treasurer for the Athletic Booster Club and Home-School Association, Youth Center Sunday night volunteer, Chamber of Commerce Board member and treasurer, Violence Intervention Helpline volunteer, and have provided financial guardianship for a developmentally disabled couple. I help at many of the community events throughout the year but my biggest local commitment is being chair of the Algoma Area Education Foundation Golf Outing. Tuesday, July 27th will be our 8th annual event if anyone is interested in participating!

As a WASBO member I have been involved with several committees and am currently the Bay Area Regional Representative. As an ASBO member I am the Membership Ambassador for Wisconsin. When I am not working or volunteering I enjoy spending time with my family, shopping, weekends and vacations with special friends, reading, listening to music and I especially enjoy meeting and getting to know new people including some great WASBO members.

In summary, I feel both a little overwhelmed and excited to have been asked to run for a seat on the WASBO Board of Directors. Since becoming a member I have been in awe of the Executive Leadership Team and membership that has so openly given me support and a ton of help when I took over as Business Manager in the Algoma School District. No matter who I asked for help, and believe me I have asked many, they were always willing to provide me with information and/or lead me to a reliable source. What a great organization that I have the privilege to be a member and now hope you give

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# Meet the Director Candidates for the WASBO Board of Directors

me the opportunity to share with you my experiences and knowledge that have come from all of you plus a few life lessons from my current and previous work experience. I would be honored to take on a leadership role in such a GREAT organization.



**John Stellmacher**  
Hello WASBO!

Thank you for this opportunity to express my interest in running for the WASBO Board of Directors. We have reached a critical juncture for funding Wisconsin public schools and strong and deliberate leadership is needed from WASBO in the debate on how we can best close the operational structural deficit in operating our school districts. We have a great organization and I seek to be part of the team that brings about a solution.

I plan to be part of an unprecedented effort to educate the public about the financial shortfalls currently facing our schools. Through working with the WASB, WASDA, AWSA, and School Administrators Alliance we have begun a push for transparency on tax bills with regards to the School Tax Levy Credit and First Dollar Credit, and I believe we can build on this momentum that many of our educational organizational partners have begun. In stressful economic times, the public needs more than ever to feel that their tax dollars are being spent and invested wisely, and I believe we have a great opportunity to demonstrate the value that public education brings to the state, not only in fiscal accountability and efficiency, but also for the long term economic viability of our communities.

I realize this will be an uphill battle, but it can be accomplished if we build the right bridges in our communities. Public policy and legislative battles are too often waged on “10 second answers” or “sound bytes”, and we can’t win in this medium. Educating on the funding model for public education is far less catchy than “no new taxes” or “cut baby cut”, but I feel that many of the most fiscally conservative members of our communities will stand with us if we can highlight exactly what we need (balancing new revenues and expenses) and show that we’ve made every effort to control our new expenses through best practices.

Some of the most rewarding conversations I’ve had the past few months have been with small business owners in Barron who are almost always universally opposed to tax cuts. Having a real and open discussion with them on everything from working capital (fund balance) to having a workable business model, has provided some new ideas on how to garner support from stakeholders that understand the importance of having vibrant schools.

We even had a visit recently from one of the leaders of the “Citizens Against Raising Taxes”. She spent a full two days in our board room reviewing line by line the budget trying to find things to highlight in her new “letter to the editor”. Despite nearly 20 hours of work, she wasn’t able to find anything major to take offense with and her letter the following month in the paper wasn’t even directed at public education.

Finally, we are doing great things in the Northwest Region of the State, collaborating on collective bargaining with our bargaining units and engaging in a tremendous amount of data

sharing. Despite the disadvantages written into law by the Governor this past year, I feel that we are well positioned to hold serve on the district side of negotiations as a result of this collaboration. I would seek to expand on this through our WASBO Electronic Resource Center and provide secure and user-friendly resources for our members, Superintendents, and school board negotiating teams to use.

Thanks for your consideration and I ask for your support on the ballot this spring!



**Dave Van Spankeren**  
Hello, my name is Dave Van Spankeren and I am a candidate for the WASBO Board of Directors. I am

currently the Executive Director of Finance and Operations for CESA 6 in Oshkosh. Building a family with my wife Mary (3rd grade teacher in Omro) has been of great importance in my life. Our children include Emily (17) and Ryan (15) and our Yorkie, Sam. It is amazing how God has prepared my life to now provide educational and business leadership for CESA 6 and the many school districts that we service.

I grew up in Green Bay in a family of eight. My father taught me at an early age of the value of hard work. I remember going with him on his sales route to different restaurants throughout Northeastern Wisconsin. This helped motivate me to buy an early morning newspaper route at age thirteen. I would wake up every morning at 5:00 am to roll up the Green Bay News Chronicle and wrap it up in a rubber band. The route usually took about 45 minutes. After school was the time

*Continued on page 13*

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# Meet the Director Candidates for the WASBO Board of Directors

to collect the rewards (pay). I would stop at each customer's house once a week to collect \$0.75. After paying for the newspapers, I probably made \$15 dollars a week. I saved most of the money that was earned but I also gave myself a weekly treat of a sub sandwich and cherry Isee from Kmart. I bought that first car when I turned sixteen. It was a 1972 Chevelle for \$600 with the rusted out back quarter panels. Oh I miss that car.

All of my jobs throughout high school and college prepared me for becoming a school business manager. Being a student custodian for Edison Middle School in Green Bay, custodian at East Town Mall and maintenance at the YMCA, all have helped me to understand and relate with the maintenance personnel in WASBO and the Omro School District. My strong understanding of food service came from working with my father in the restaurant business. The greatest mentoring I received was from being in Junior Achievement for four years during high school. That is when local businesses such as James River Paper, HC Prange's Department Store, American Can and Fort Howard Paper would send their office staff to help high school students run a start up company. We would elect officers, sell stock, manufacture a product, sell it and return dividends. WOW! This was very cool. I loved the business model and it agreed with me. I was the President for two Junior Achievement companies and once the Vice President of Finance. I was also awarded a scholarship to the Dale Carnegie Effective Speaking and Human Relations course at age seventeen with doctors, dentists, business executives and politicians.

I took the long route through college working full time and taking classes part time in accounting. I was privileged to serve the Omro School District as their Business Manager for ten years. Many changes occurred in those ten years including six failed referendums before finally passing the big one for a new elementary school and high school additions. During my years in Omro, I served on the local Chamber of Commerce as a board member and President. Building relationships in the community was great fun especially at the big concert during Oktoberfest.

While in Omro, I joined the NEWASBO group in the Fox Valley. What a great group of professionals and friends. Every WASBO member I have ever spoken with has taught me something about our roles in serving and educating students. The friendships that have been created in our WASBO family are strong. Who else can understand our frustrations with the revenue limit, increased accountability to the federal government, QEO, and summer floor stripping and waxing.

The great thing about working for CESA 6 as a Business Manager is helping Educators, Superintendents, Building & Grounds Supervisors, Bookkeepers and Business Managers throughout the State of Wisconsin. I still do the WUFAR accounting codes, project grants and bid out the parking lot repairs. The cool part is helping fill in as a district Business Manager or train a new district Bookkeeper. I enjoy visiting the districts and meeting the school boards with our CESA 6 statewide services.

Schools and education are facing some challenging times ahead, and I hope to be part of the solution. I would be honored to serve you as a member

of the WASBO Board of Directors and help prepare our organization for the ever changing world.



**Brian Walters**

Dear Nominating Committee:

I would like to take this opportunity to express my interest in running for WASBO Director.

I have been involved with education since the day I graduated from UW-Whitewater with a BSE in Business Education. My first job was as a business education teacher at Preble High School and Lombardi Middle School in Green Bay. I immediately went back to school to obtain my master's degree. While beginning my teaching career and coaching baseball I enrolled in UW-Whitewater's School Business Management program. Just prior to finishing my program I was hired by the School District of Westfield as its business manager and have been working there ever since. In this position I am either directly involved in or directly supervise all financial aspects of the school district. I also oversee the food service, buildings and grounds, and transportation departments. In addition, I am regularly involved in curricular, staff, and long-range planning.

I am running for WASBO Director to add an additional perspective and lend my vision to further develop WASBO as an amazing organization. I realize many in the profession of school business management do not come from the teaching field and I feel I can add something in that manner also. I appreciate and care for everyone I work for or with, which helps me build effective relationships which aids me

*Continued on page 14*



# Meet the Director Candidates for the WASBO Board of Directors

every day in what I do on the job with my colleagues. Finally, I am active in professional development and am a lifelong learner who is constantly looking for ways to improve the way schools do business.

I appreciate the opportunity to run for WASBO Director. Thank you for your time and consideration.



## Betty Zimdars

Hello, I am Betty Zimdars and I am a candidate for the WASBO Board. I am currently the Business Manager for the Howard-Suamico School District. This is my 22nd year with the Howard-Suamico School District which serves 5,600 students. I have worked a total of 29 years in education with previous positions at C.E.S.A. #7 and the Wabeno School District. I feel privileged to be able to contribute to the education of children through leadership of the operational end of the business.

I was born and raised on a small farm in Gillett, Wisconsin. I graduated from Gillett High School and then moved to Nashville, Tennessee—a small town girl wanted to see the world. It was quite an experience, but I missed my family and friends and moved back to Wisconsin. I began my career in school business at the Wabeno School District. A very wonderful and patient superintendent, Joe Innis, taught me about school finance and budgeting. At that time, computers were just coming into the education arena for accounting (I know it makes me sound old!). Anyway, the wonderful people at C.E.S.A. #7, Shirley Libel and Ivan Scott, taught me how to set up a computer system, transfer all

accounting records, and run a payroll. The staff at Wabeno never knew how frightened I was that they wouldn't be receiving a paycheck on our new, sophisticated system. I should never have worried as Shirley and Ivan taught me well.

The computer intrigued me and my love for accounting set the stage for my very long journey in acquiring my master's degree. I began attending classes at NWTC, transferred credits to Silver Lake College and graduated with a degree in Public Service Administration. Like most business managers, I then graduated from Bambi Statz's program at Whitewater. My dear family has supported me through this long educational journey for which I am grateful. My dear, sweet husband has done the laundry for so many years that after I finally graduated, he just continued doing it.

I believe in the value that a school business manager can provide to the educational environment. We offer enlightened leadership that can provide a better future for our students and our community. The core values and principles that have guided me are imbedded in "doing the right things for the right reasons". As school business managers we face many economic and political challenges that require hard decisions. By focusing on the greater good of our stakeholders, we create a sustainable environment for all.

Over the past few years, I have become more involved in the WASBO organization serving on the Accounting Committee and assisting with writing the new "Budget Cycle" book. It has been a pleasure serving on these committees and working with many highly skilled business professionals. I look forward

to opportunities to continue to serve and give back to the organization.

My husband, John, and I have two children. John is general manager/owner of Ingenuity Industries. You can find us at our cottage in Townsend most weekends. We love to fish, pontoon and raft in the summer and snowshoe in the winter. Our oldest son, Jason, lives in Colorado with his fiancée, Kate. We love to raft the Colorado River and spend time with them. Our youngest son, Lance, lives in Green Bay and snowboards for fun and loves to visit the cottage, enjoying summer and winter activities.

Meet the Treasurer Candidates for the WASBO Board of Directors on page 17.

*"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."*

Margaret Mead

*"Service to others is the payment you make for your space here on earth."*

Mohammed Ali



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

# BOOK REVIEW

The Five Dysfunctions of a Team *Patrick Lencioni, Author*

Review by Orvin R. Clark, EdD, RSBA

*The Five Dysfunctions of a Team;* is written by Patrick Lencioni. Patrick is also the author

of the best-selling books *The Five Temptations of a CEO* and *The Four Obsessions of an Extraordinary Executive*. In addition, Patrick consults and speaks on topics relating to leadership, teamwork, management and organization development. He currently serves on the National Board of directors for the Make-A-Wish Foundation of America. He is also the president of The Table Group, a San Francisco Bay Area management consulting firm that specializes in executive team development and organizational health. The Table Group offers professional services in the following areas: Executive Team Workshops, Consulting Services, On-line Assessments, and Speaking Services.

*The Five Dysfunctions of a Team* is 220 pages in length, divided into two parts (chapters) and eight sections. The book begins with a story written in the context of a realistic but fictional organization. In order to apply the material used in the fable, a brief section following the story outlines the five dysfunctions in detail. The competitive advantage is not finance, strategy, or technology; it is teamwork that remains the ultimate because it is so powerful and so rare. Patrick Lencioni stated that a founder of a company that grew to a billion dollars in annual revenue once told him "If you could get all the people in an organization rowing in the same direction, you could dominate any industry, in any market

against any competition, at any time." For all the attention that teamwork has received over the years from scholars, coaches, teachers, and the media, teamwork is as elusive as it has ever been within most organizations. "The fact remains that teams, because they are made up of imperfect human beings, are inherently dysfunctional." But that is not to say that teamwork is doomed. Building a strong team is both possible and simple. Like so many other aspects of life, teamwork comes down to mastering a set of behaviors that are theoretically uncomplicated but extremely difficult to put into practice on a daily basis. Organizations fail to achieve teamwork because they unknowingly fall prey to five natural but dangerous pitfalls, which Lencioni calls the five dysfunctions of a team. These dysfunctions can be mistakenly interpreted as five distinct issues that can be addressed in isolation of the others. But in reality they form an interrelated model, making susceptibility to even one of them potentially destructive for the success of a team.

The model is:

- Absence of Trust
- Fear of Conflict
- Lack of Commitment
- Avoidance of Accountability
- Inattention of Results

**Absence of Trust** – The first dysfunction is the Absence of Trust among team members. Essentially, this stems from their unwillingness to be vulnerable within the group. Team members who are not genuinely open with one another about their mistakes and weaknesses make it impossible to build a foundation for trust.

**Fear of Conflict** – this failure to build

trust is damaging because it sets the tone for the second dysfunction: Fear of Conflict. Teams that lack trust are incapable of engaging in unfiltered and passionate debate of ideas. Instead they resort to veiled discussions and guarded comments.

**Lack of Commitment** – A lack of healthy conflict is a problem because it ensures the third dysfunction of a team; Lack of Commitment. Without having aired their opinions in the course of passionate and open debate, team members rarely, if ever, buy in and commit to decisions, though they may feign agreement during meetings.

**Avoidance of Accountability** - Because of this lack of commitment and buy-in, team members develop an Avoidance of Accountability, the fourth dysfunction. Without committing to a clear plan of action, even the most focused and driven people often hesitate to call their peers on actions and behaviors that seem counterproductive to the good of the team.

**Inattention of Results** – Failure to hold one another accountable creates an environment where the fifth dysfunction can thrive. Inattention of Results occurs when team members put their individual needs (such as ego, career development, or recognition) or even the needs of their divisions above the collective goals of the team.

Patrick Lencioni made the following suggestions for overcoming team dysfunctions:

### Members of Trusting Teams:

- Admit weaknesses and mistakes
- Ask for help
- Accept questions and input about their areas of responsibility

*Continued on page 31*



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# Meet the Treasurer Candidates for the WASBO Board of Directors



## Larry Dalton

2009 was a big year for our family – my oldest daughter got married, my son is solidly launched in an engineering career,

and my youngest daughter started college.

In 2009, I was asked (along with Holmen's Jay Clark) to help Viterbo University design a graduate program for school business managers leading to an "08" license. I have agreed to be an instructor in the program.

And as 2009 closed, I knew my term as a WASBO director was coming to an end, and I decided that, should it be your pleasure, I would be honored to serve as an officer.

My wife and I came to northern Wisconsin (Three Lakes) in 1982 from a beach town just north of San Diego. I had been in the music business (a bass player) since graduating from Michigan State University in 1971, and was ready for a career change. We were thinking of starting a family, and thought it would be better to be near our families in the Midwest. I worked briefly as a handyman at a greenhouse, a newspaper "stringer", a technical writer, and a field hand at a cranberry marsh.

When the aide position at Northland Pines Middle School opened up, I applied and, to my good fortune, was hired. As I settled into the culture of public education, I was moved by the sense of mission that was shared by the great teachers I worked with, and decided I wanted to be a part of this.

I had taken some business courses at

the tech school when an accounting position at the Northland Pines district office opened up, and I was fortunate to be selected. After a few years of working six feet from the business manager's desk, I had seen what he did and thought I would like to do that, too. I entered the UW-Superior grad program, because it offered night and weekend classes within driving distance.

After getting my "08" license, I served as Business Manager at the Ladysmith-Hawkins School District for 6 years. And now I am in my 14th year as Director of Finance at the School District of Onalaska.

We have settled into our river and bluffland community – I have served as president of the Onalaska Area Business Association, and also of our church. I am a part of a bicycle advocacy group, and my wife and I are part of a sailing club based on Lake Onalaska.

When we came to Onalaska, there was not an active regional in the Western part of the state. Having been part of the Northwest regional, I wanted the same networking opportunities to continue. Several of us re-started the West Central School Business Official group, for which I served as the contact person for 10 years. I am a WASBO representative (along with Woody Wiedenhoeff) working with DPI on an update of the Wisconsin School District Records Retention Schedule.

Having been in the school business for 28 years, I continue to be excited and challenged by what we do as business officials. We are not the focal point – student learning is the artwork. We provide the picture frame and the matting. Without us, the art doesn't

have a way to hang on the wall.

We are in a challenging time for public education – our resources at risk, and our goals for student learning higher than ever. The political and financial landscape changes each year. WASBO is our home base where we return for our learning, for our networking, and for a statewide voice. And yet WASBO is in transformation – becoming an ever more vital tool for us to employ in our role of supporting student achievement. I would be honored to help lead WASBO forward.



## Janice DeMeuse

My name is Janice DeMeuse and I am a candidate for WASBO Treasurer. I am the Business Manager for the Luxemburg

Casco School District. We are located 15 miles northeast of Green Bay and serve 1925 students. I began my school career as the Bookkeeper/Office Manager for Southern Door County Schools nearly 33 years ago and have worked for the school districts of DePere and Appleton. You would think after being in school for that many years, they would finally give me a passing grade so I could graduate. ☐

I have been a member of WASBO for ten years and on the Board of Directors for the last three years. I serve on the Accounting Committee, have presented at the accounting workshop and have been the Board Liaison while serving on the Board. I am a member of a subcommittee of the Accounting Committee that is in the final stages of re-write of the School Budgeting Cycle book for WASB. I chair of the Board Member Resources Goal Action Team



# Meet the Treasurer Candidates for the WASBO Board of Directors

and promote the Electronic Resource Center (ERC) to anyone who will listen to me. I am an ASBO member, a Certificate of Excellence in Financial Reporting reviewer and also serve on the Human Resources standing committee.

I believe it is critical for anyone working in the school business arena to be a part of WASBO. Regional meetings are a good way to meet your neighbors and share problems and/or solutions. WASBO workshops provide a wealth of practical knowledge to take home and put to work right away. The ERC is in the building stages of being a library for documents we all need to do our jobs on a day-to-day basis. The Career Center is another service WASBO provides to support the membership. WASBO members advocate with our legislators to improve districts' resources. The organization's members are working to achieve the vision to be "the most influential organization on significant Wisconsin school business management issues." I am always amazed at the time, effort and dedication of WASBO members. Our jobs are not 9-5 and yet many members find ways to contribute to the organization in so many ways.

Future business managers will face the same challenges that have been roadblocks in the past. We will always have to deal with uncertain funding and public scrutiny of what we do. One way WASBO can provide the support to meet these challenges is to continue our embrace of a membership with diverse backgrounds and specialties.

As more and more members of our profession reach retirement age and school districts that currently do not have business managers realize the necessity of the position in their districts, demand for well-trained individuals will increase. Universities can give students the tools they need to perform the job but I believe it is the duty of those of us currently in the business to pass on the "art" of school business management. Likewise these new business managers have enthusiasm and technical skills to share. WASBO can be the vehicle to blend these ingredients together to create a vital, healthy organization that is better able to meet the differing needs of those at different stages of their careers.

Outsiders do not see the influence business managers have on students'

education and many do not perceive us as advocates for children. If it were not for all the support functions we provide, little education could take place in our school buildings. They would not be clean, safe and healthy environments equipped with tools teachers need.

These last two paragraphs are reiterated from what I wrote when I was first running for a director position on the Board. These three years on the Board have served to reinforce and strengthen my opinion. I hope to bring that passion for education and for this organization to the leadership role of Treasurer.

In conclusion, I feel WASBO is a very unique organization among educational entities. We are supportive of our peers and willing to share our creative solutions to problems. We are open to differing roles and opinions. We provide the foundation upon which schools across the state function. If I am elected to serve as Treasurer, I will do my best to share my zeal for education and for this organization in a positive, constructive way.

Thank you for your consideration of my nomination.



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# Legislative Update

## Green Cleaning Bill Advances in Amended Form

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



John Forester  
SAA Director of  
Government Relations

The Assembly Committee on Natural Resources recommended adoption of Assembly Bill

578 (the so-called Green Cleaning Bill) as amended on an 8-7 vote on Wednesday January 27th. In the end, the School Administrators Alliance (SAA) changed its original opposition to support after negotiating several significant changes to the bill with the bill's author, Representative Cory Mason (D-Racine).

In its original form, among other things, AB 578 required the Department of Health Services (DHS) to promulgate rules requiring the use of so called green cleaning products and cleaning systems in buildings owned by the state of Wisconsin, technical colleges, private schools, school districts and other units of local government. The bill also required DHS to consult with the Council on Healthy and Environmentally Sensitive Cleaning, created by the bill, in promulgating the rules. Finally, the bill prescribed numerous requirements that DHS must include in the rules.

The SAA and its members have long supported efforts to address indoor environmental quality concerns in school buildings. In response to the introduction of AB 578, the SAA convened a committee of school facilities directors to review the bill and provide analysis. The committee raised the following major concerns about the bill:

- The composition of the council should include more expertise including a school facilities director.
- There are no green disinfectants, sanitizers or other antimicrobial products.
- The bill would impose a significant fiscal burden with the required purchases of green cleaning products and green cleaning equipment.

The SAA negotiated the following major concessions to the bill:

- The SAA will have three seats on the council – a principal, a district administrator and a member of WASBO.
- The initial requirement to use approved products is extended

to July 2012, one-year after the effective date of the bill.

- Products purchased before the effective date are “grandfathered”.
- Cleaning equipment purchased before the effective date of the rule is also “grandfathered”.
- The initial requirement to use an approved cleaning system is backed up to 2014.
- And finally, there will be no inspections, fees or penalties for noncompliance.

AB 578 now moves on to the full Assembly for consideration. If approved by the Assembly, it then moves on to the Senate. Passage in both houses and the approval of Governor Doyle is not assured.

If you should have any questions regarding the SAA's position on AB 578, please call me at (608) 242-1370. Thanks for listening and, as always, thank you for your efforts on behalf of Wisconsin school children. For up-to-date reports on legislative activities, please visit the SAA's website at [www.wsaa.org](http://www.wsaa.org).

### THANK YOU!

WASBO would like to thank the entire WASBO Facilities Committee for providing in depth advice and feedback to John Forester about the impact of AB 578 on school districts. We would like to specifically thank:

Jim Beckmann (Glendale-River Hills), Ed Butzen (Green Bay), Bob Darm (Madison), Patrick Finnemore (Kenosha), Dave Hoh (Kimberly), Charlie Kramer (Eau Claire), Doug Pearson (Madison), Gary Rosploch (Muskego-Norway), Dale Zabel (Kettle Moraine)



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Jeanne Stahl  
WASBO Director

# Director's Corner

## The Natives are Grazing

By Jeanne Stahl, Business Manager, Hayward Community School District

In the November/December issue of *District Administration*, a term caught my eye: digital

natives. As I read the article about educating digital natives, it made me wonder how I would be classified since the first generation of "Digital Natives", according to this article, are those people born after 1980.

Even though I am obviously not a digital native, I do know how to Google, so I searched "digital natives" and found an article that had been written in 2003 in *The Technology Source: Digital Natives, Digital Immigrants: Some Thoughts from the Generation Gap* by Timothy VanSlyke. In his article, he comments on a two-part series entitled "Digital Immigrants, Digital Natives," by Marc Prensky, in which Prensky uses an analogy of native speakers and immigrants to describe the generation gap separating the "digital natives" from the "digital immigrants". His analogy does not mean that all is lost for communicating with those that are deemed to be digital immigrants. Just like someone moving to or visiting with someone from another country, it is up to the individual to assimilate and some people do that better than others.

Van Slyke states that according to Prensky, digital natives are used to receiving information really fast. They like to parallel process and multitask. They prefer their graphics before their text rather than the opposite. They prefer random access (like hypertext). They function best when networked. They thrive on instant gratification and frequent rewards. They prefer games to "serious" work. (2001a, p. 1)

In contrast, he states Prensky believes those not born in the digital world reveal their non-native status through a "digital immigrant accent" that manifests itself in a number of ways—printing out a digital document to edit it rather than editing it online, for example (Prensky, 2001a, p. 4). I guess that is why I love taking my iPod along filled with all of my CDs so that I don't have to anticipate what music I will be in the mood to listen to when traveling, but am torn between taking along an electronic stack of books instead of the paperback versions where I can actually feel and turn the pages.

VanSlyke does not agree with Prensky that digital natives are incapable of learning from or communicating with the digital immigrants even if their thought patterns are different. He also points out that the technologies used to support communication via discussion forums and mailing lists are not "flashy" or "fast-paced" and yet they are effective and that the digital native generation can and will join in.

John Palfrey, author of *Born Digital, Understanding the First Generation of Digital Natives*, feels that there are three stages the digital native goes through. He describes the first stage as "grazing," which is similar to skimming headlines, using vehicles such as RSS feed and Facebook. The next stage he likens to reading the newspaper article rather than just skimming the headline, where the native does a "deep dive" by clicking on a hypertext link, hearing a podcast, or seeing what their friends think. Keeping this in mind, I realize I will need to continue to understand the digital native and ensure that my methods of communicating keep up as more of these digital natives become

consumers of our information. Maybe I should do a survey to see how many readers didn't get to the bottom of this article just because they are digital natives and didn't want to go beyond grazing!

### References

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*"One is not born into the world to do everything but to do something."*

Henry David Thoreau

*"Without community service, we would not have a strong quality of life. It's important to the person who serves as well as the recipient. It's the way in which we ourselves grow and develop."*

Dr. Dorothy I. Height,  
President and CEO of the  
NCNW



# ASBO Update

## President's Message

By Erin Green, Director of Business Services, Greendale School District



Erin Green  
President  
ASBO International

As 2010 dawns in the Great State of Wisconsin there are many uncertainties facing us. What will happen after the federal stimulus is gone? How will

negotiations unfold in the post QEO world? How will we start curbing the relentless growth of health care costs and OPEB retirement costs which are overwhelming education budgets? How can we begin transforming our districts in the global society we find ourselves in given the fiscal limitations?

These times, more than ever, require staying connected to your colleagues. WASBO and ASBO continue to be unusual and remarkable organizations in which we are firmly connected to our colleagues, sharing ideas and knowledge without reservation.

### On Tap for ASBO:

- The new and improved Executive Leadership Forum takes place Feb 4-6, 2010 in Orlando, Florida utilizing the top notch resources of the Disney Institute. Hot topics at the Forum include Disney's Approach to Quality Service, Performance Management for the Public Sector, From Managing Conflict to Leading Change, and Communicating When Concern is High and Trust is Low. 275 ASBO members from across the US and Canada and the UK are registered to attend.
- A national credentialing program will become a reality this year, under the leadership of ASBO's Certification Commission and our own Dr. Bambi Statz. Brian Adesso from the Manawa School

District worked on the Job Task Analysis and Diane Pertzborn will work on the task force to develop the questions to be used on the exam. This credential will overlay states' programs that may require a license or certification, and will be voluntary. It will help insure that business officials are qualified across the country, provide for a portable credential for colleagues looking to change jobs across the country, and will provide the recognition competent business officials deserve. Look for information later this year.

- For those doing long-term planning, the sites of ASBO's upcoming conferences are:

2010	Orlando, FL
2011	Seattle, WA
2012	Phoenix, AZ
2013	Boston, MA

- Plan now to attend ASBO's 100th anniversary at the Annual Meeting & Exhibits. The conference will be held September 24-27, 2010 in Orlando, at Disney's Coronado Springs Resort in the Animal Kingdom. This meeting will honor ASBO's first 100 years and will position us for the future. The opening mixer will provide an International experience as it takes place in Epcot. As ASBO President, I will have the honor of presiding over the conference and events. Rooms are reasonably priced at approximately \$150 per night, making attendance family friendly as well. The conference format has been shortened, knowing that most of us cannot take so many days out of the office. This is our "year" Wisconsin, and

I hope to see you there! Airfares are very reasonable at this time, so book it now! I see rates of \$168 roundtrip from Milwaukee available right now.

- AS part of ASBO's Centennial Celebration, ASBO is offering a Special Introductory Centennial Membership for only \$100. This is a perfect opportunity to try the benefits of ASBO membership! ASBO continues to enhance ways to share information and best practices. These include the PASBO ERC (Pennsylvania Electronic Resource Center), webinars to keep you up-to-date on the Federal stimulus and other current issues, *School Business Daily*, delivered to your email to update you on school business news across the country, *School Business Affairs*, ASBO Radio, and award programs that recognize the professional that you are.

As I have continually told you, Wisconsin school business officials are some of the most competent and qualified practitioners in the country (and world). We are the only state I am aware of that requires a Masters Degree in School Business Management to obtain our required state certification. I invite you to become active in ASBO (and of course WASBO!) by joining committees, writing articles or presenting to your colleagues in an area of interest. There is no better way to learn than to make a presentation write an article, or join a committee. Wisconsin appreciates the work of WASBO members serving on ASBO committees, including Bambi Statz, Brian Adesso, Janice DeMeuse, Diane Pertzborn, Patrick Finnemore, Roger Dickson and Tom Wohlleber.



## Budget Awards Are Not One-Size-Fits-All

ASBO understands that budgets for school districts are unique financial documents. After all, you're developing students, not widgets.

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There's still time to apply! Budgets are due 90 days after legal approval. For an extension or more information contact Michelle Williams, Professional Development Coordinator, 866/682-2729, x7067 or [williamsmd@asbointl.org](mailto:williamsmd@asbointl.org)

Wisconsin ASBO Members who received the ASBO Meritorious Budget Award for Fiscal Year End 2008-09  
D.C. Everest Area School District and Howard-Suamico School District



## Association of School Business Officials International

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P 866/682-2729  
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[www.asbointl.org](http://www.asbointl.org)

### Dear School Business Professional,

This school year hasn't been an easy one. And it really hasn't been easy for someone like you who manages the budget. You stand on a national stage of accountability, charged with ensuring every student receives a quality education—with fewer available resources.

But the Association of School Business Officials International (ASBO) can bring some light to your day. In honor of our Centennial Celebration, we have a present for you: a Special Introductory Centennial Membership for only \$100.

For the cost of 35 reams of paper, a new reception chair, or one-half day's salary for a school librarian, we will bring you the resources to support those who depend on you, cost-cutting tips to help keep your district financially sound, and a network of more than 5,000 of your colleagues who understand your pressures and can offer support. Here's how we'll help for only 50 cents a school day:

- **Information straight to your desk.** ASBO's "on demand" member benefits, like ASBO Radio and the Live Learning Center, cover the issues on all of our minds, from recovery planning to the future of education.
- **Career advancement through premier professional development.** ASBO's professional development programs help you add continuing education credits to your resume and stay on top of the latest trends.
- **Increased credibility through recognition programs.** Create a budget that your stakeholders will champion and put your district on the map for its excellence.

Join for your district—to lead your team, to support your students. To take advantage of this special offer, complete the enclosed form. Visit [www.asbointl.org](http://www.asbointl.org) for the full list of resources.

Less stress, new ideas, and a better future for your students await.

Sincerely,

Erin K. Green, MBA, RSBA  
ASBO International President  
Director of Business Services  
Greendale School District (WI)

"ASBO International is a business manager's best friend—even more so, given the tough economic climate we all find ourselves in."

Virgil D. Harden, RSBA  
Director of Business  
Grand Island Public Schools (NE)

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# Credit Card Acceptance and Compliance: K-12

By Richard Drake, K-12 Merchant Account Specialist, Fifth Third Processing Solutions LLC

Many schools throughout the country are setting up online payment portals so that parents can pay school fees and load lunch accounts. This eliminates checks and cash that can get lost on the way to school, plus it's a great convenience for your parents too. However, with online payments comes new regulations and PCI DSS Compliance, which all school districts must follow and adhere to.

## What is PCI DSS Compliance?

PCI DSS (Payment Card Industry Data Security Standard) Compliance is a set of rules designed to "protect cardholder data". In other words, when you process a credit card, it is your school district's responsibility to ensure that the card information does not fall into the wrong hands.

*Note:* If using a Certified PCI Compliant online payment vendor, whereas the credit card data does not touch the school's servers, then the school would be considered "Out of Scope" and some PCI Compliance requirements may not apply to the school, however the payment vendor must **always** adhere to PCI DSS rules.

## Can I charge a Convenience Fee?

Many schools are taking advantage of new rules that allow you to charge a convenience fee. Visa has the strictest rules and therefore to charge a convenience fee you must:

1. Charge the same **flat dollar amount** whether the transaction is \$1 or over \$100.
2. Charge the convenience fee in a single transaction along with the actual amount.
3. Not charge the convenience fee if a card holder is paying in person.
4. Charge the same fee for all other methods of payment (ACH etc)

unless an alternate payment channel is used for each.

## Does my School need a Merchant Account?

Yes, you may not share a merchant account with another school district or a common merchant account provided by a third party online payment provider which is shared with other school districts.

## PCI DSS steps for Compliance

View the 12 requirements at: [https://www.pcisecuritystandards.org/security\\_standards/pci\\_dss.shtml](https://www.pcisecuritystandards.org/security_standards/pci_dss.shtml).

When using an online payment vendor, the school should periodically validate the vendor's PCI Compliance status listed at: <https://usa.visa.com/download/merchants/cisp-list-of-pcidss-compliant-service-providers.pdf>

## Am I affected? I only use a terminal.

Yes! Any entity that processes credit cards must always be PCI Compliant.

## Why does it seem so expensive to process credit cards?

A number of factors go into the costs of processing credit cards. These include, but are not limited to: Interchange Fees, Dues, Assessments, Acquirer Profit and Risk.

Interchange Fees, Dues and Assessments typically make up over 90% of the cost of processing credit cards. These fees are set by the card brands (Visa, MasterCard, Discover and American Express) and are paid on your behalf by all processors.

*Note:* Experience has also shown that your school district will have higher usage of your online payment gateway if you do not charge a convenience fee. By reducing the manual processing of more checks and cash your district's

savings may offset credit card fees.

In addition, by choosing to absorb the fees (i.e. not charge convenience fees) you may qualify for lower processing costs.

## Other Fees – What are these?

Some other fees that you might see: ACH or batch fee, annual fee, PCI compliance fee, breach assistance fee, administration fee, statement fee. If you have processed for over 12 months, go ahead and call your processor and ask them to review your rates and fees.

## Summary

If you see anything that you don't understand, call and question your processor!

*Richard Drake is a K-12 Merchant Account Specialist with Fifth Third Processing Solutions LLC, the nation's 4<sup>th</sup> largest U.S. credit card processor.*

*Richard can be reached at 513-534-8670 or email [richard.drake@53.com](mailto:richard.drake@53.com).*



*"We make a living by what we do, but we make a life by what we give."*

**Winston Churchill**

# Utility costs are on the rise!

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Eleanor Roosevelt

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Ted Hayes

# What Does Lockdown Actually Mean?

By Ted Hayes, CSP, MSE, Senior Risk Manager, M3 Insurance Solutions for Business

Submitted by the WASBO Safety Committee

Last year's school shooting tragedy at Virginia Tech dramatically emphasized the

importance of developing an effective lockdown program. Lockdown of school buildings during a violent incident saves lives; immediate lockdown and barricading of doors saves more lives.

The chance of having an active shooter or a violent incident in your school which would require lockdown is quite low. But if a violent incident takes place in your school, your entire staff needs to know what to do immediately.

## Definition of Lockdown

If there is a potentially dangerous situation taking place in or around your school, an armed intruder, an active shooter, or any ongoing threat of injury or death, lock it down, right now.

The goal of a lockdown is to isolate the intruder, whether it is in the hallway or completely out of your school (lockout). Do not give the intruder the opportunity to enter your school or move freely from room to room and have easy access to students/staff. Lockdown and wait for the police.

## Law Enforcement Response

Take a moment to put yourself in the responding police officer's shoes. In a crisis situation, there will be immediate response from law enforcement. Upon entering the school, any individual in the hallways is a potential suspect. Proper lockdown procedures can minimize this exposure.

Now consider a school where no lockdown procedures exist. Upon responding, the police officer may walk into hundreds of frantic students and

staff - every one of them a concern. Just imagine the carnage that would take place if the intruder had such easy access to your students and staff.

## Practice Rapid Response Lockdown

Simply discussing your lockdown procedures during a teacher in-service or 'walking' through the procedure is not enough. Lockdown practice must be full force, rapid response - teachers must learn to 'act not react' when a lockdown has been initiated. Valuable time is often wasted when a teacher feels the need to confirm that the lockdown is indeed real. When the lockdown code is initiated - rapid response is needed. Safely behind a locked classroom door is where a teacher can determine if the lockdown is real.

Teachers need to be visual and verbal in their actions to their students in the classroom once the lockdown begins. Secure students in your classroom, then visually sweep the hallway and gather any students not secured in a classroom. It's important for staff to understand that they may need to get physical when implementing the lockdown. A student walking down the hallway may hesitate or disregard a teacher's request to get in to a classroom. Time is of the essence - grab that student by the arm and pull them in the classroom.

## Classroom Concerns

Should blinds/shades be closed in the classroom? There is the opinion that blinds/shades should not be closed; this may be your only contact (visual) with the outside world. Your local police department needs every advantage - don't cut them off from visual communication.

Consider placing a brightly colored

clipboard and a wax pencil in every classroom. When in lockdown, the teacher can use the clipboard/wax pencil to communicate messages; when held up against the window, communication can be maintained with law enforcement outside of the school building.

A teacher initiating the lockdown must be calm yet decisive with his/her actions. In a crisis situation, students may regress into childlike behaviors - in stress, children regress. Students will more readily follow a teacher's visual signals rather than their audible commands - its human nature. If the teacher becomes frantic and begins screaming wildly, you can expect the students to do the same. If the teacher's actions portray calmness, the chance of their audible commands being followed increase significantly.

Once the lockdown procedure is initiated, the classroom door is secured and barricaded. During the review of your lockdown procedures, identify those objects in each classroom - a desk, a cabinet, a bookshelf, etc., which will be used to barricade the door. Make sure these objects are sturdy enough to block the entrance of an intruder, yet are easily maneuverable by students and staff.

Place the students in the safest area of the room, away from doors and windows and out of the direct site of the intruder. Shut off the lights. Remember, the hallway lights will probably remain on - the teacher should be able to see out of the classroom door (if unbarricaded), and the intruder probably cannot see in. No one is to leave the room, not even to use the restroom.

Develop an "all clear" code. Do not use

*Continued on page 26*

## What Does Lockdown Actually Mean?

Continued from page 25

something as simple as having a staff member knock on your door, stating it is all clear and you can come out. You never know, this could be a dangerous trap set by an intruder. Rather, consider developing a verbal code with law enforcement or an all clear card that can be slid under the door.

### Lockdown Tips

- Develop/practice your lockdown procedure
- Develop a PA message/bell code using words to identify a high risk event, i.e.: "paging Mrs. Lockman" or simply "we are in lockdown"
- Students must be instructed to go to the nearest classroom. Repeat the code at intervals of 15 seconds.
- Calmly inform students as to what is happening - they may panic if they don't know.
- Always have a contingency plan, never "lock" yourself into one plan.

- Secure the classroom doors. Staff will gather any students in the hallway prior to securing their door. Barricade the doors if possible.
- Turn off the lights, seat students on the floor in the safest area of the room, away from doors/windows.
- If teachers and their class are in transition in the hallway, they will enter the nearest classroom.
- Take attendance.
- Do not call the office for general information.
- Call the office only with vital information, such as reporting the number and severity of injuries. Never identify your room number unless asked to do so.
- No restroom breaks allowed.
- Do not allow the use of a radio/TV within the classroom.
- Do not use cell phones - history shows that these calls may be

aired live on TV and intruders may find where you are.

- Be patient as possible. Law enforcement should be equipped with master keys to unlock classroom doors when it is safe.
- Staff should never make the determination it is safe and they can exit the classroom.

Remember, in an intense crisis situation such as an active shooter, classrooms may be locked down for hours before the school can be cleared by law enforcement. Patience and strictly following your school's rapid response lockdown procedures will save lives.

For more information on school safety and insurance programs, contact Ted Hayes at [ted.hayes@m3ins.com](mailto:ted.hayes@m3ins.com) or (715) 849-9400 (5117)



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# Expanding Your Sphere of Influence in the School District:

## The “A’s” for Becoming an Outstanding School Business Official!

By Mark Towers

You must focus on not simply being valuable to your school district. You must focus on being absolutely essential! This can be accomplished by expanding your sphere of influence. Here are the “A’s” for having maximum impact as an outstanding school business person:

### **Awareness**

Position yourself as the seer and not the seen—the watcher and not the watched. Choose your words carefully by asking yourself this question before you speak: “Is it really necessary that I say this now?” You will notice that what you do not say, is often a payoff for all involved in the dialogue. Heed the words of that wise author, Anonymous. He/she once said, “Be profound, be funny or be quiet.” By behaving this way, you will become known as a fantastic conversationalist!

### **Accountability**

Take one hundred percent accountability and responsibility for your reality, your happiness and your future. As Steve Toltz once said, “The great thing about blame is that she goes wherever you send her, no questions asked.” Don’t fall into this trap. Continually upgrade the only three tools in your personal tool kit—your talent, your motivation and your self-talk.

### **Attitude**

A positive attitude is not enough. You must possess a powerful attitude. A powerful attitude means you are not intimidated by others and can be “aggressively friendly” when you need to be. It also means that being competent and courteous are not enough. You must exude compassion for others by consistently focusing on their needs and not yours.

### **Authenticity**

Being authentic means being genuine, being real. You bring two key items to work each day—your character and your competence. If you are ever put in a position where you must choose one over the other, choose character. Your authentic character enables others to trust you and where there is trust, there exists positive influence. As Oscar Wilde remarked, “Be who you are—everyone else is taken.” In a school district, all personnel and students need to see you as a radically transparent role model.

### **Advocacy**

Being an advocate for others means not only seeing their goodness and uniqueness, but touting it, too. Mark Twain once said, “I could live for two months on a good compliment.” Heighten your awareness and look for

opportunities to deliver a spoken or hand-written compliment. All people (no matter their rank, age or any other characteristic) want to be encouraged, recognized and nurtured. Being an advocate for others pays nothing but extremely high dividends. Get to know as many folks as possible in your school arena and don’t ever miss a chance to deliver the kind word!

### **Action**

Abraham Lincoln spent seventy-five percent of his time out of his office. He actively cultivated relationships with others. His life was often filled with loneliness and weariness, but he knew the key to success was about living the values of a BLT—a Believable, Likeable and Trusted™ leader. So it is with you. Manage change with the unchanging values of a BLT leader. By doing so, you will not be valuable in your school district—you will be absolutely essential!

Copyright by Mark “Tenacious” Towers  
Phone: 817 421-4744

## **Wisconsin Records Retention Schedule**

In August 2009, the Public Records Retention Board approved the updated Wisconsin Records Retention Schedule for Schools. It was discovered in October by DPI legal counsel that there were discrepancies between the DPI publication Student Records and Confidentiality and the Wisconsin Records Retention Schedule for Schools. Those issues should be resolved by DPI attorneys in time to re-present the Wisconsin Records Retention Schedule to the Public Records Board for their second approval on May 17, 2010. Larry Dalton and Guy Leavitt are working with school business officials in providing additional input to the DPI as needed. We are thankful that Larry, Guy and their committee have been patient and willing to bring this project to a conclusion on May 17, 2010.



# Making the Most of Your Resources Using Your Cash-flow Analysis to Monitor Your District's Budget Throughout the Year

By Debby Schuffletowski, Robert W. Baird & Co.

Debby Schuffletowski

Everyone wants to make the most of their time and resources. One of the most efficient ways to stay on top of your district's financial needs is by expanding the use of your annual cash-flow analysis.

Your cash-flow analysis estimates each month's total receipts and expenditures to establish if and how much funding your district will need to meet your cash flow needs. Consider using this analysis throughout the year to monitor your budget-to-actual situation.

Here's how to make the most of your cash-flow analysis:

- Add columns to include actual spending/receipts
- Establish a report run from your financial software that is in the same format as your analysis
- Compare your actual spending to your cash-flow analysis
- Create a running total of over-/under-spending in each area and analyze the discrepancy

## Important questions

- Did you budget a lane advancement where a staff member never moved?
- Did an individual move to single benefits rather than the family benefits budgeted? Do you need these dollars elsewhere?
- Are your investment earnings significantly under budget because of a change in economic conditions?
- Have you had any emergency expenses or repairs to make (a boiler, for instance)? Where will you make up the shortfall?

Monitoring your cash-flow analysis in this way will put the answer at your fingertips the next time someone asks, "Do we have the money for this?" In addition, identifying potential shortfalls/surpluses early on allows you to adjust spending, and can put your district in a better position in May and June, when "spend-downs" typically occur.

Expand the use of the analysis further by using this as a baseline for next year's cash flow analysis.

For more information contact  
Debby Schuffletowski  
715-877-1772

[bairdpublicfinance@rwbaird.com](mailto:bairdpublicfinance@rwbaird.com)

*"Snowflakes melt alone - but together they can be traffic stoppers!"*

*Teamwork allows common people to attain uncommon results.*

*Some people want it to happen, some wish it to happen, others make it happen.*

*Volunteers aren't paid, not because they are worthless, but because they are priceless."*

Anonymous



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## Example Salary budget-to-actual comparison

Fund 10	FY budget	July			August			September			FY Balance
		Cash flow	Actual	Bal	Cash flow	Actual	Bal	Cash flow	Actual	Bal	
100s	\$3,849,898	\$73,225	\$60,840	\$12,385	\$180,152	\$189,105	-\$8,953	\$310,847	\$316,429	-\$5,582	-\$2,150
200s	\$2,743,841	\$74,467	\$60,616	\$13,851	\$145,239	\$134,698	\$10,541	\$227,272	\$222,752	\$4,520	\$28,913
<b>% spent</b>		<b>1.84%</b>			<b>6.75%</b>			<b>14.93%</b>			
<b>Fund 27</b>											
100s	\$575,127	\$2,320	\$2,780	-\$460	\$24,388	\$24,174	\$214	\$48,344	\$45,721	\$2,623	\$2,377
200s	\$291,167	\$943	\$1,063	-\$120	\$12,597	\$12,481	\$116	\$24,264	\$23,733	\$531	\$526
<b>% spent</b>		<b>0.44%</b>			<b>4.67%</b>			<b>12.69%</b>			



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### GREEN YOUR SCHOOL

Driven by high-energy costs, global warming and community awareness, all organizations including schools are struggling with the same question: "how can we be greener?" Kim enthusiastically teaches the what, why, who and how of greening any organization and specifically public education. She goes far beyond the old environmental compliance game and delves deeply into how to green the holy trinity of any organization: the building, the operation and the product. She provides tips to selling the concept inside the organization up and down the ranks. And she will also give the secret to success for selling outside the organization to parents, vendors and the public. You will learn the 5 most common pitfalls of greening to avoid and get a lesson in practical ways to jump-start your greening process. Kim will prove that being green is practical, possible and cost-effective.

- I. What is green and how does it relate to k-12 public schools?
- II. Who is green? – The new green psychographic
- III. Why green, why now? Resource boundaries + a growing population = a shrinking planet
- IV. How to green – Describing the 3 areas of greening: Facility, Operation, & Product. Giving specific examples of initiatives that have worked in other school systems such as addressing toxicity and kids, diesel school bus changes, recycling opportunities, green playground equipment, local and organic food service, paperless opportunities for administration and available tools.
- V. Communicating green up and down the ranks on the inside
- VI. Communicating green externally with parents and the community
- VII. Greening pitfalls to avoid
- VIII. Tips to get you started (or keep you going)



#### Kim Carlson

For over 25 years, Kim has been a high profile socially responsible business leader and eco-preneur. She is founder and owner of 5 companies that use earth-friendliness as their driving force. She was a pioneer in the green housing movement in the early 90's and since has consulted corporations, universities, governments and consumer groups. In early 2009, Adams Media published her book, "**Green Your Work**".

In addition to Kim's business success, she finds the time to connect with over 50 million consumers annually on the topic of green living and working. Kim can be seen and heard as a frequent eco-expert, The EarthSmart Consumer, on the Minneapolis affiliate of NBC television and on many national talk radio and network television shows. She hosted a weekly national radio show, *Living the Green Life*, and she writes for many national magazines and blogs including Minneapolis StarTribune *Footprint* blog, the Sierra Club *Climate Crossroads* blog, *TheDailyGreen.com* and *StartGreen.com* in Los Angeles. Her byline as a guest writer can also be found at the Los Angeles Times, San Francisco Chronicle,

The Atlanta Constitution, Better Homes and Gardens, and Real Simple Magazine--to name a few. Kim is currently working on a children's book series, "**The Green Adventures of EarthSmarty Pants**", along with a corresponding line of green consumer products for babies, kids and their parents.

### PLANT THE SEEDS OF KNOWLEDGE WITH THESE SESSIONS

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- Custodial Supervision and Evaluation
- Custodial Product and Equipment Selection
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- Importance of WASBO Facilities Manager Certification Program
- 10 Things Your Employees can do to Help Save Benefit Dollars
- How ARRA Dollars Have Helped and What is Still Available
- Managed Print Services
- Service Affiliate Member panel Discussion
- Trends in School Lunch Environment
- A 403(b) Wellness Check
- Do's and Don'ts of Under-levying Your Revenue Limit
- How's your Fiscal Transparency?
- Banking 201 – Intermediate Solutions Municipal Banking
- Business Manager's Guide to Construction
- State Budget Update by John Forester
- Good to Great for American Schools
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| ♦ <i>Facilities Management Conference</i>               | <i>Wisconsin Dells</i> | <i>March 9-10, 2010</i>   |
| ♦ <i>Transportation &amp; Bus Safety Workshop</i>       | <i>Wisconsin Dells</i> | <i>March 10, 2010</i>     |
| ♦ <i>Accounting Seminar</i>                             | <i>Wisconsin Dells</i> | <i>March 24-25, 2010</i>  |

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1. Complete the Seminar Coupon Order Form below or go to [www.wasbo.com](http://www.wasbo.com) and click on the Purchase Seminar Coupons link on the home page, enter the requested information and submit.
2. Paper or on-line orders submitted with payment will be processed and WASBO will mail the coupons to you in the shortest time possible, not to exceed one week. Coupons will not be mailed until payment is received, therefore school districts paying by PO that require an invoice should allow time for processing. The WASBO office will preprint your name, the school district name, and the date of purchase. The coupons will also be numbered.
3. When registering online for a WASBO seminar or workshop, indicate you wish to use coupons to pay for the registration. **SELECT THE INVOICE ME OPTION AT THE END OF THE REGISTRATION.** On the coupon please fill out the attendee's name and the name of the seminar. Mail the original coupon to WASBO to have it credited to the seminar invoice. The coupon cannot be used in place of completing the on-line registration.
4. Coupons can **ONLY** be transferred between individuals at the same school district.
5. Coupons are valid only for the above noted seminars and dates. No coupons can be used after June 30, 2010, the end of WASBO's fiscal year. No refunds will be given for unused coupons by a school entity.
6. If you do not cancel prior to one week before the seminar, the coupon will be considered used and void.
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**WASBO Seminar Coupon Order Form**

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## Book Review - The Five Dysfunctions of a Team

Continued from page 15

- Give one another the benefit of the doubt before arriving at a negative conclusion
- Take risks in offering feedback and assistance
- Appreciate and tap into one another's skills and experiences
- Focus time and energy on important issues, not politics
- Offer and accept apologies without hesitation
- Look forward to meetings and other opportunities to work as a group

### Teams that Engage in Conflict:

- Have lively, interesting meetings
- Extract and exploit the ideas of all team members
- Solve real problems quickly
- Minimize politics
- Put the critical topics on the table for discussion

### A Team that Commits:

- Creates clarity around directions and priorities
- Aligns the entire team around

common objectives

- Develops an ability to learn from mistakes
- Takes advantage of opportunities
- Moves forward without hesitation
- Changes direction without hesitation

### A Team that holds one another Accountable:

- Ensures that poor performers feel pressure to improve
- Identifies potential problems quickly by questioning one another's approaches without hesitation
- Establishes respect among team members who are held to the same high standards
- Avoids excessive bureaucracy around performance management and corrective action

### A Team that focuses on corrective Results:

- Retains achievement oriented employees
- Minimizes individualistic behavior

- Enjoys success and suffers failure acutely
- Benefits from individuals who subjugate their own goals/interest for the good of the team
- Avoids distractions

### Role of the Leader:

- Demonstrates vulnerability first
- Doesn't use manipulation
- Promotes healthy conflict
- Demonstrates restraint when conflict is engaged
- Pushes the group for closure around issues and adherence to schedules
- Create a culture of accountability
- Sets the tone to focus on results

*The Five Dysfunctions of a Team* is a thought provoking and insightful guide on how to build and manage successful teams. This book is a "must read" for the leader that acknowledges that no one makes progress, much less succeeds, alone.

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# ReadyWisconsin Helps You Get Your Employees and Students' Families Prepared for Emergencies

By Susan Burleigh, Preparedness Coordinator, Wisconsin Emergency Management  
Submitted by the WASBO Safety Committee



If an emergency strikes your neighborhood, will your employees and students be available for school? Communities across the country have found that absenteeism has been most pronounced among those employees who have failed to make plans for their families to respond to emergency situations.

You can increase your organization's capacity to operate during and following a disaster by asking your employees and students' families to get prepared. In addition to the checklists, forms and disaster information available from **ReadyWisconsin**, residents can use interactive online tools to generate their plans.

Please tell your families about these resources and encourage them to be ready.

- **ReadyWisconsin**  
<http://ReadyWisconsin.wi.gov>
- **ReadyAmerica**  
<http://ready.adcouncil.org/beprepared/fep/index.jsp>

### Free Brandable Materials

A unique feature of **ReadyWisconsin** is the wide array of free outreach materials that can be customized and branded for use by any governmental entity, volunteer organization or emergency preparedness stakeholder.

Items like the following can be used, customized and branded to any organization or any individual and new materials are continually being developed:

- Pre-produced television and radio messages addressing dozens of

themed preparedness issues

- Brochures
- Posters
- Checklists & templates
- Hazard and need-specific handouts
- PowerPoint presentations
- Children's materials

Preview them at:

<http://readywisconsin.wi.gov/ReadyWI/default.asp>

[http://readywisconsin.wi.gov/ReadyWI/Resources/Manager\\_Resources.asp](http://readywisconsin.wi.gov/ReadyWI/Resources/Manager_Resources.asp)

For daily preparedness messages and valuable links to additional resources, we invite you to follow us on:

Facebook:

<http://www.facebook.com/ReadyWisconsin?ref=ts>

Twitter:

[http://twitter.com/WI\\_EOC](http://twitter.com/WI_EOC)

YouTube:

<http://www.youtube.com/readywis>

For additional information, a presentation or help with customizing materials, contact Susan Burleigh at **ReadyWisconsin**: [susan.burleigh@wisconsin.gov](mailto:susan.burleigh@wisconsin.gov), 608-242-3324.



## 12TH ANNUAL WASBO FACILITIES MANAGEMENT CONFERENCE



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## Welcome New Members

- **John Bosman**, Business Development, Camosy Construction
- **Amy Cote**, Safety Consultant, A & A Fire and Security, Inc.
- **David Gerberding**
- **Pam Harrington**, Director of Business and Finance, Wilmar Public Schools
- **Randy Johnson**, Facility Manager, School District of Reedsburg
- **Brad Juedes**
- **Jeff Klaisner**, Superintendent, Swallow
- **Robert McClyman**, Board Member, School District of Wisconsin Dells
- **Michael McManus**, Executive Director, Wisconsin School Bus Association
- **Tom Mitchell**, Regional Vice President, Dynamic Sports Construction, Inc.
- **Chris Nelson**, District Administrator, New Holstein
- **Jacquelynn Schreiber**, District Bookkeeper, School District of Abbotsford
- **Dan Storch**, Systems Analyst, Appleton Area School District
- **Paul Vance**, Director of Human Resources, Oak Creek Franklin
- **Fred Weissenburger**, Executive Director of Human Resources, Eau Claire

### ASBO 20 Year Anniversary in January 2010

- **Jon R. Novak**, Iola-Scandinavia SD, Iola, WI
- **William Trewyn**, Elkhorn Area SD, Elkhorn, WI



### Say "Yes" to Dual Benefits

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

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



Association of School Business Officials International

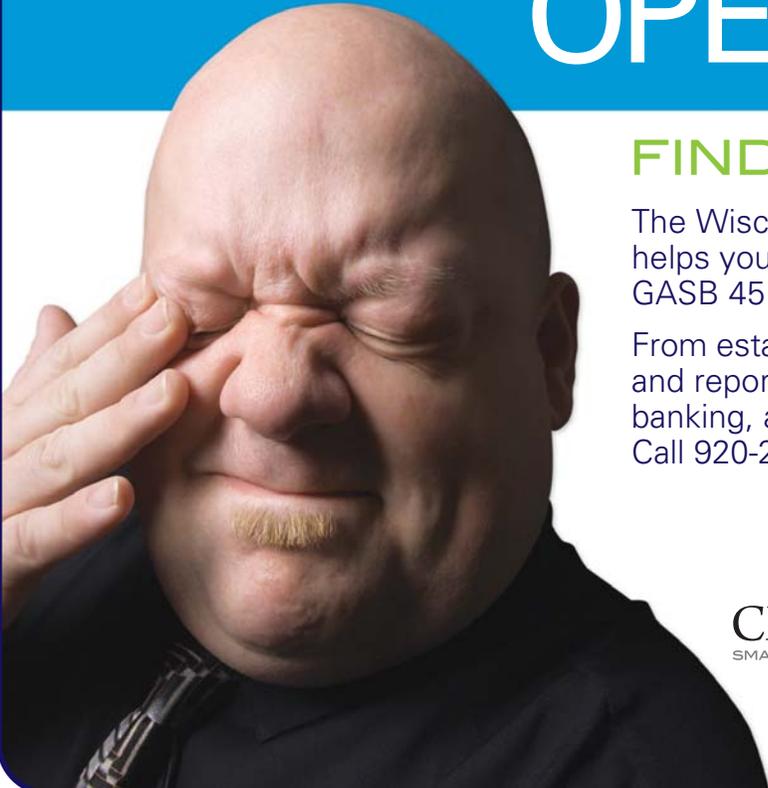
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## Get Connected with WASBO

As a WASBO Service Affiliate you have several opportunities to connect with the key people responsible for the finance and operations of Wisconsin's K12 School Districts.

**Sponsorship** – As a sponsor at one of WASBO's several professional development seminars and conferences you can network, attend sessions and enhance attendees' learning opportunities. Sponsorships include ads in conference programs, prominent signage at the conference and recognition in the WASBO newsletter, Taking Care of Business. To learn more about sponsorship contact the WASBO office at 608.249.8588. To register as an exhibitor or an attendee at any of these conferences watch the WASBO website at [www.WASBO.com](http://www.WASBO.com).

### Upcoming Sponsorship Opportunities:

#### March 9-10, 2010 - WASBO Facilities Management Conference

Kalahari Resort & Conference Center, Wisconsin Dells

This conference had nearly 200 attendees and 75 exhibitors in March of 2009. Attendees are primarily Facilities Directors with some Business Managers. Opportunities include sponsorship of breaks, breakfasts and lunches, social networking and conference materials (flash drives and handouts). Exhibitor registration will be available in January.

#### March 10, 2010 - WASBO Transportation & Bus Safety Workshop

Kalahari Resort & Conference Center, Wisconsin Dells

This seminar had about 50 attendees in 2009. Attendees are primarily Transportation Directors with some Business Managers. This seminar runs concurrently with the Facilities Management Conference. Opportunities include sponsorship of breakfast and breaks.

#### March 24-25, 2010 - WASBO Accounting Seminar

Chula Vista Resort & Conference Center, Wisconsin Dells

This seminar had attendance of 379 in 2009. Attendees primarily included Business Managers, District Administrators and Bookkeepers. Opportunities include sponsorship of breakfasts, breaks, lunches, and conference materials (flash drives and handouts).

#### May 25-28, 2010 - WASBO Spring Conference & Exhibits

Kalahari Resort & Conference Center, Wisconsin Dells

This conference had approximately 250 attendees and 120 exhibitors in Green Bay in 2009.

A Scholarship Golf Outing is also part of this conference. Sponsorship opportunities include conference meals, social networking, conference materials (flash drives), golf holes, beverage carts, lunch on the course, silent auction donations, golfer and conference giveaways and drawing and attendance prizes.

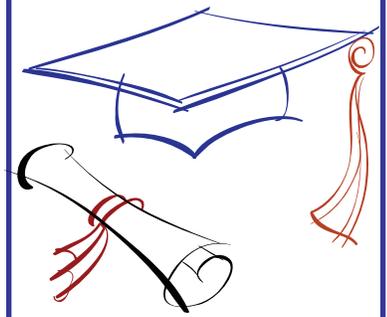
**Advertising** – WASBO's newsletter, Taking Care of Business, is published bi-monthly in both hard copy and electronically. Ads can be printed in color or black and white. The newsletter circulates to about 1,200 WASBO members. Rates and publication dates can be found on the WASBO website at [www.WASBO.com](http://www.WASBO.com) or you may contact Jeanne Deimund for more information at [Deimund@wasbo.com](mailto:Deimund@wasbo.com).

**Articles** – We are always seeking educational articles for the WASBO newsletter. To submit an article for consideration please send it to Woody Wiedenhoef at [wwiedenhoef@wasbo.com](mailto:wwiedenhoef@wasbo.com).

**Presentations** – Planning Committees for each conference consider potential sessions from all WASBO members. If you are interested in making a presentation please submit your presentation to the WASBO office at [Deimund@wasbo.com](mailto:Deimund@wasbo.com). Sessions will be forwarded to the appropriate planning committee for consideration. All presentations must be informational and educational. Marketing presentations will not be considered.

We appreciate the partnership of our Service Affiliate Members. It is with your support that we are able to offer timely and quality professional development opportunities to our members. It is our goal to provide the tools our members need to do their jobs and benefit the education of Wisconsin's children. Your support also provides over \$17,000 in student scholarships, professional recognition to outstanding school business officials and professional development grants to members in need. In these tight fiscal times, our members appreciate your support more than ever.

**Please contact the WASBO Office with any questions at 608.249.8588.**



### WASBO FOUNDATION 2010 MATCHING SCHOLARSHIPS

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*"How can we expect our children to know and experience the joy of giving unless we teach them that the greater pleasure in life lies in the art of giving rather than receiving."*

James Cash Penny

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# WASBO in Action at the State Education Convention

January 19-22, 2010



Fourteen tables were hosted by WASBO facilitators at this year's School Finance Puzzle Pre-conference session. (Left) WASBO presenters included Bambi Statz, Bob Avery, Karen Kucharz-Robbe, Andy Weiland and Bob Borch. (Below) Some of our facilitators are pictured here - Betty Zimdars, Andy Sarnow and John Stellmacher. There was plenty of time for in depth discussion and interaction.



Funds raised at our Spring Conference through the Walk for Kids support the student music performances at the general sessions. Pictured here are the Eau Claire Memorial High School Jazz 1 and The Dynamics from Somerset High School. Pictured below are Mary Jo Filbrandt and WASBO President Keith Lucius as Mary Jo receives the School Business Official of the Year Award. Mary Jo posed for pictures with State Superintendent Tony Evers. WASBO President Keith Lucius presided over the Friday's general session where he introduced Governor Jim Doyle and 9/11 Firefighter and Battalion Commander Richard Picciotto.



(Left) Janet Rosseter and Bambi Statz presented the session "Levy Credits: How are they Affecting Your Local Tax Levy?" to a packed room. Pat Finnemore and Troy Miller presented "School Buildings and Grounds Requirements and Funding". (Below) At WASBO's Business Meeting Wendy Brockert presented the Treasurer's Report, Tom Wohlleber announced the candidates for the Board of Directors, and award winners, Mary Jo Filbrandt and Bob Borch, shared what winning these awards meant to them. Mary Jo is pictured with award sponsors Jim Miller and Kevin Mullen of Hutchinson, Shockey, Erley & Co.





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**David Carlson** is retiring from the DPI. WASBO gives David Carlson our best wishes upon his retirement on March 12th. As all WASBO members know, David Carlson made significant positive changes during his tenure as Director of the School Financial Services Team. As David refers to his team, they are all number one picks. David provided the leadership in selecting that team and exemplifying behaviors of respect and collaboration. David's career was always about "what is best for our children". WASBO members will want to let David know how much we appreciate his service and how much he will be missed.

**Race To The Top** - An increase of \$1.35 billion for Race to the Top competitive grants is being requested for the 2011 Federal Budget. That money would go to states willing to write competitive grants that were not awarded money in the first round of competitive grants. In addition, local school districts also would be allowed to apply. Secretary of Education Arnie Duncan also will be asking for six percent increases in other parts of the Educational Budget.

**Involved** - WASBO gets things done through the work of our committees, regionals and individual members. Please consider enhancing your own professional development by joining a WASBO committee, participating in regional meetings or working on a project. If you would like to participate in some aspect of WASBO work, call the WASBO office at 608-249-8588.

**Facilities Committee** - A number of WASBO members will be appointed to the task force required by Act 96 (Indoor Environmental Quality Task Force). In addition, Facility Directors have been active in improving the proposed green cleaning legislation. The Facilities Committee will start planning the Annual

Midwest Facility Masters Conference in a few weeks. Think about joining this active and influential group.

**Accounting Committee** - The Accounting Committee is working with WASB to finish the final drafts of the "Budget Cycle" book for School Board members and School Administrators. It is possible this will develop into professional development sessions for Board members and School Administrators. In addition, there may be a book for Board members written at the "policy level" and another written for administrators with more management detail. The Accounting Committee is continuing to work with the DPI to provide the most efficient process for meeting the new ARRA reporting requirements going back to the 2008-09 school year. Their assistance is greatly appreciated by WASBO members and DPI personnel.

**Professional Improvement Committee** - WASBO has received a Title II grant to improve the WASBO Mentorship Program. This will result in a re-writing of the curriculum for training mentors, addressing the PI 34 process for new Business Officials and providing for an improved induction program. This will involve retraining our present mentors and expanding the number of mentors. Stay tuned for information on the mentor training process over the next several months. This service will be extremely helpful for new Business Officials that are coming into our profession.

**Growth** - Attendance at seminars and conferences continues to grow. The WASBO Board has decided to continue providing a free one-year WASBO membership for people who attend a conference or seminar for the first time and have not previously been a WASBO member. Please help WASBO's new members to feel welcome.

**Dues** - Please pay your dues online, if you have not done so for the 2009-10 membership year. Affiniscape is our software for the web site and member data management. This past year we upgraded to "Members 360" which allows members to log in and view current registrations, membership information and open invoices. To be greener and save staff resources, we have gone to all online registration. This includes paying membership dues online without receiving an invoice in the mail. Please check to see if your dues are up-to-date. Thank you for being patient with the new procedure and please call the office if you need assistance.



## WASBO TRANSPORTATION & BUS SAFETY WORKSHOP



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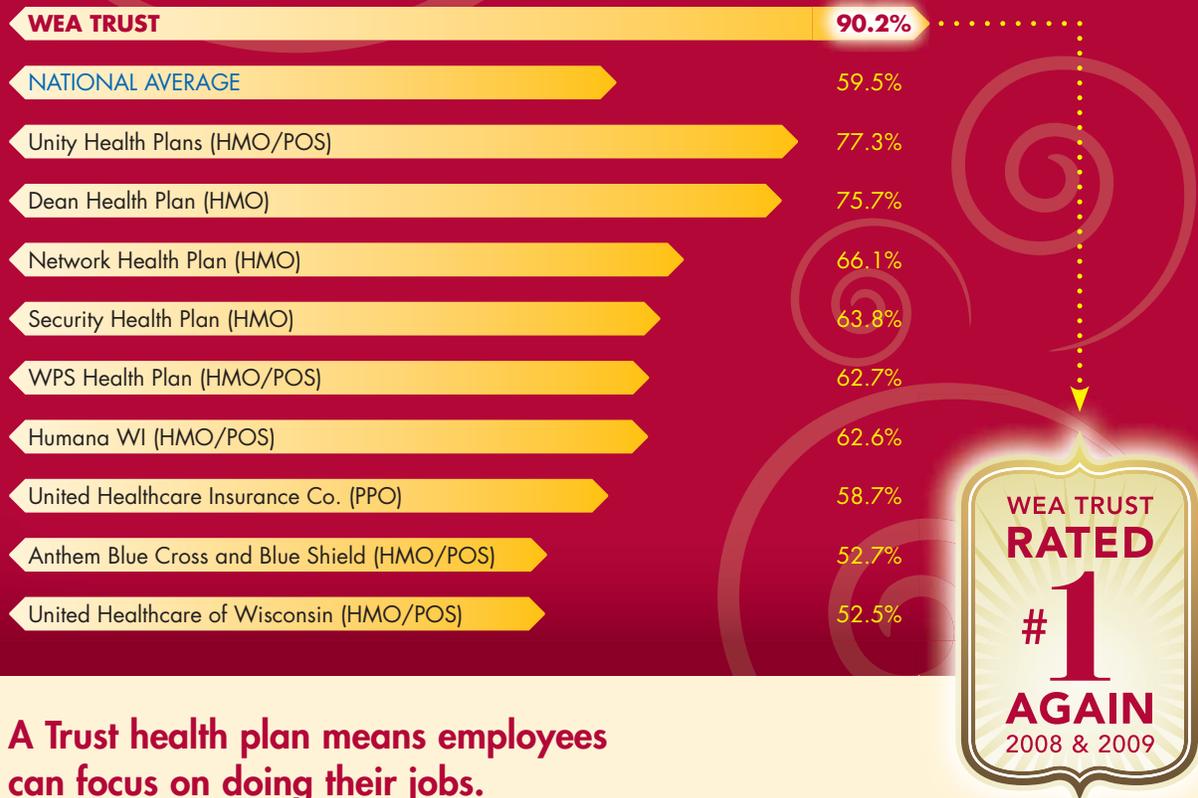
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# WASBO Calendar

Professional Development  
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March 9-10, 2010

**WASBO Facilities Management Conference**  
Kalahari Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

March 10, 2010

**WASBO Transportation & Bus Safety Workshop**  
Kalahari Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

March 24-25, 2010

**WASBO Accounting Seminar**  
Chula Vista Resort & Conference Center, WI Dells  
(Viterbo Credit Offered)

May 25-28, 2010

**WASBO Spring Conference & Exhibits**  
Kalahari Resort & Conference Center, Wisconsin Dells  
(Viterbo Credit Offered)

June 23, 2010

**WASBO Custodial & Maintenance Conference**  
Wausau East High School

July 14, 2010

**WASBO Custodial & Maintenance Conference**  
Nature Hill Intermediate School, Oconomowoc

September 24-27, 2010

**ASBO International's 96th Annual Meeting and Exhibits**  
Disney's Coronado Springs, Lake Buena Vista, FL  
(Viterbo Credit Offered)

October 20, 2010

**WASBO Foundation Scholarship Golf Outing**  
Autumn Ridge Golf Course, Valders

October 21-22, 2010

**WASBO Fall Conference**  
Osthoff Resort & Conference Center, Elkhart Lake  
(Viterbo Credit Offered)

November 11-12, 2010

**Midwest Facility Masters Conference**  
Glacier Canyon Lodge at the Wilderness, WI Dells

## Regionals

Each Regional Representative, meeting locations & directions are available at [www.WASBO.com](http://www.WASBO.com) if predetermined.

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

February 12, 2010 DePere - with Legislators  
(Joint Meeting with Northeast Regional)  
May 14, 2010 Kewaunee (Tentative)

**Madison Area**

Meetings will be held the first Friday of the month and begin at 9:00 a.m.  
February 5, 2010 Sun Prairie  
March 5, 2010 DeForest  
April 2, 2010 Sun Prairie

**Northeast**

February 12 - Joint Meeting with BAMBAs - De Pere School District  
April 9 - Fond Du Lac School District Office  
May 14 - Manitowoc School District Office

**Northwest** - Meetings are usually held the 2nd

Wednesday of month beginning at 10 a.m. except July, August and January at Lehman's Supper Club in Rice Lake. Dates may be subject to change.  
February 3, 2010, March 3, 2010  
April 7, 2010, June 2, 2010

**Southeast** - Meetings are from 9:45-11:30 am with

lunch following.

February 12, 2010 - Arrowhead  
April 16, 2010 - Hamilton-Sussex

**Southwest** - All meetings will be held at the

CESA #3 office in Fennimore at 12:30 p.m..  
February 17, 2010  
April 21, 2010

**West Central** - Meetings are held the first Thursday

of the month except July & August from 10 am - 1 pm at the Sparta Area SD Administration & Education Center, 201 E. Franklin St., Sparta  
February 4, 2010, March 4, 2010  
April 1, 2010, May 6, 2010  
June 3, 2010



Go to [www.WASBO.com](http://www.WASBO.com) and click on "Calendar" for updated meeting information, to register or get directions.

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

February 12, 2010 D.C. Everest  
New Laws Seminar  
March 12, 2010 Auberndale/Stratford  
April 9, 2010 Medford  
August 20, 2010 Antigo

## Committee Meetings

**School Facilities Committee** (Meetings held at the WASBO Office, Madison at 9:30 a.m.)

April 13, 2010, August 3, 2010  
October 12, 2010

**Midwest Facility Masters Conference**

**Planning Committee**

February 18, 2010, 2:00 pm, WASBO Office

**Safety Committee**

March 17, 2010, 1:30 pm, WASBO Office

**Fall Conference Committee**

February 9, 2010, 10:00 a.m. WASBO Office

**Professional Improvement Committee**

February 11, 2010, 9:30 am, WASBO Office

**Spring Conference Committee**

March 23, 2010, 6:30 pm, Wisconsin Dells

## Board of Directors Meetings

February 17, 2010 - Madison, WASBO Office

April 21, 2010 - Chippewa Falls SD

June 16, 2010 - Nekoosa SD

## Business Meetings

May 28, 2010 - WI Dells, Spring Conference



**Go Green with WASBO**  
Carpool to your next  
conference or meeting.