



Taking Care of Business

Wisconsin Association of School Business Officials

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 20, Number 3 - June 2016

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Janice DeMeuse Receives Wallace E. Zastrow Award

Janice DeMeuse, Director of Business Services for Fox Point-Bayside School District, was presented the Wallace E. Zastrow Award on May 27 during the WASBO Spring Conference.

Janice began her educational career in 1977 as a bookkeeper for the Southern Door County School District. Since then, she has worked for rural, urban and suburban districts ranging in size from 420 to 12,000 students. Janice shared, "While I started as a bookkeeper, I recognized my passion for this business and finally found myself completing a bachelor's degree in business administration and a master's degree in school business as well as 18 graduate credits post-masters."

Janice has given her time and talent to WASBO at the local, regional, state, and national level. She served on the WASBO Board and is a past president. She also was a leader for the Bay Area Regional and past chair of the WASBO Member Resources committee, which explored and implemented a program of making a repository of documents utilized by business officials across the nation available through Pennsylvania ASBO. The WASBO contributions and use of this resource were the highest of any state in the nation during that time. She has earned designations of Registered School Business Administrator and



Janice DeMeuse accepts the Zastrow Award from Chad Trowbridge of WISC (right) and WASBO President Bob Avery (left).

Certified Administrator of School Finance and Operations.

Having worked her way to the achievement of school business management certification in the state of Wisconsin, Janice helped Wisconsin emerge as a leader in the licensure of School Business Officials and has been a strong supporter of the SFO program offered through ASBO International. She was a beta tester helping to set the norms for the program and helped author the study guide. She has presented several study group workshops at the state level, presented the program at the ASBO AM&E, and, most recently, participated in the assessment of the learning objectives and questions as part the review

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

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

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Editor: Woody Wiedenhoef

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President's Message

Reaching Out – Pulling Together

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



Wow, has this year flown past. It has been an honor and privilege to serve as the WASBO President for the past 12 months. Thank you for the opportunity and the support! I am particularly humbled by the generous words from our new President, Pat Finnemore, at the Spring Conference and your response to them.

This has been an amazing year on the WASBO Board, having accomplished a lot. The Board went through a process to implement policy governance and to amend the Association's constitution. But these accomplishments could not have been possible only by the work of previous boards and past presidents, nor without the input and support of the Constitution Committee. In particular, I want to thank Janice DeMeuse, Lynn Knight, John Gahan, Bob Borch, Tom Owens, and Phil Frei for their leadership and support on this work.

As John said last year in this column, "The greatest strength of this association is the willingness of its members to step forward and serve our WASBO community." That was the central thrust of my theme for this year – "Reaching Out – Pulling Together." We continue to do so. The number of members who serve on committees and the board, or as regional chairs; act as a mentor for a new colleague; present or volunteer at conferences; donate to the scholarship fund; participate on the peer to peer forum; and otherwise give back are too many to count. Thank you all for what you do day in and day out for WASBO on top of what you do for your districts. YOU are what makes WASBO great!

With that said, if you haven't participated in the past, I encourage you to consider joining a committee and lending your voice and perspective to what it is we do

here at WASBO. C'mon! Reach Out. Pull Together. We need you.

As Past-President, I look forward to supporting Pat during his year and welcome new board members Greg Gaarder, John Stellmacher, and Bob Tess. I look forward to observing your participation on the Board and learning from you. Welcome back to the Board, Nate Jaeger and Kent Ellickson! You two have been valuable members of the team and I'm glad you are returning to serve again. And congratulations to the new President-Elect, Jason Demerath. You will make an excellent president in 2017-18, Jason!

I also want to thank you, the membership, for taking the time to respond to, and provide input on, the membership survey conducted last fall. We had a response rate of 51% among active members (437 of 857). That is an **outstanding** response rate to a membership survey. As Pat explained in his Strategic Plan Update during the business meeting at the spring conference, he is using these results with the Board to develop the strategic plan for WASBO for the coming year(s). Thanks to the Member Resources Committee (co-chairs: Lynn Knight and Andy Weiland) for developing the survey and the Professional Development Committee (chair: Jason Demerath) for working with Member Resources to analyze the results. And thank you to John Gahan and his staff in Pewaukee for crunching the data for these committees.

Thank you for your time and service, Kathy Davis, Jim Beckman and John Gahan. Your insights, perspective and contributions to the WASBO Board were invaluable and helped the organization on its path of continuous improvement. John, as Past President, was especially important to me

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Reflections and Thanks

By Woody Wiedenhoef, Executive Director, WASBO



Congratulations to our new WASBO Board Members, Nathan Jaeger, John Stellmacher, Bob Tess and Greg Gaarder and President-Elect, Jason Demerath who were announced by the Nominations Committee during the WASBO business meeting on May 27, 2016. Kent Ellickson will complete Jim Beckmann's term due to Jim's change in membership status to Service Affiliate. At the spring meeting, we also recognized the outgoing Board Members, Jim Beckmann, Kathy Davis, and John Gahan for their service to WASBO. Please express your appreciation to all WASBO Board members for providing extraordinary leadership and strategic thinking in serving the wishes of WASBO members.

The Spring Conference Planning Committee again provided an excellent learning and networking opportunity for WASBO members this May. Kathy Davis Co-Chaired the committee along with John Sackett. Please extend a thank you to them for their diligent and thoughtful work. We look forward to next year's Spring Conference in La Crosse, May 11-12, 2017. Kathy Davis will again be chairing the Spring Conference committee's work. John Sackett will be stepping down after this year and we need to thank him for his years of service to WASBO. Mike Koltes is the new co-chair for the committee.

Bob Avery's theme for the 2015-16 year is Reaching Out, Pulling Together. That is exactly what has happened. WASBO members reach out to help each other throughout the year in a proactive way and WASBO's success is because members volunteer to help each other. Thank you to WASBO members for volunteering their most valuable resources – time and talents

– in so many ways. And thank you Bob for your attentive leadership as President of WASBO.

Because of WASBO members' work, we have enjoyed excellent professional development and networking for members throughout the year. Although, at times, it seems like an uphill battle, our advocacy for students has been beneficial. All one has to do is think what the legislators would have done if our voices had not been present. Our next step is to get ready for the 2016-17 school year. The first thing I must ask for are personal e-mails of WASBO professional members because certain legislative communications should not be going through school e-mails. You can add your personal email address by logging into your profile on WASBO.com. For instructions, visit WASBO.com/ preferences.

Overall, WASBO is strong in leadership and professionalism on the Board, committees, volunteers and staff. Financially, the organization is sound. But we still move forward with improved changes. We have grown again in membership and attendees at conferences. The financial books will not be closed for a while, but it is apparent that WASBO is in the "black" again this year.

A year ago, the Board announced it would be surveying the membership for guidance on needed strategic direction for the next several years. Thank you to members for filling out the survey. Over 50% of WASBO members responded, which is a fantastic response rate for surveys. Today we see the fruits of this excellent advice and have a new strategic set of initiatives that will help WASBO members serve children in the future. A year from now we will be

able to report to the membership our progress in fulfilling these initiatives. The membership survey led to nine common themes which the WASBO Board prioritized and combined into four specific areas which will be used for development of specific SMART goals. They are:

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

You can find the outcomes of the Membership Survey on the WASBO website (WASBO.com) on the rotating banner image labeled "survey results."

On a personal note, I want to thank our talented staff, Jeanne, Deb, Áine, Kristin and Kaitlyn for their excellent professional work with the WASBO members. We are very fortunate to have these capable and dedicated people serving us.

On another personal note, this is a message filled with mixed emotions for WASBO staff and for Deb Saeger. Deb was offered an opportunity that is simply too exciting for her to decline. She is now the Accounting and Administration Coordinator with the Forest Stewards Guild, a national not-for-profit that is focused on sustainable forestry. As one would expect, Deb carefully and thoughtfully

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The SAA Wants You to Consider What?



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

During the WASBO Spring Conference, WASBO Executive Director Woody Wiedenhoft and I requested that all WASBO members supply WASBO with a personal email address. In the past few weeks numerous WASBO members have provided that information to WASBO. Nonetheless, it is clear that many questions remain for WASBO members. That is why I will again attempt to explain why your personal email address is so important to the SAA/WASBO political objectives.

The stakes in the 2016 elections are enormous. Given the Governor's strong desire to maximize property tax relief, prospects for significant increases



in school revenue caps look uncertain at best. The advocates for school privatization in Wisconsin, bankrolled by

out-of-state billionaires, will be looking to further their extreme legislative agenda. After the elections, the battle for limited budget funds will be fierce.

To meet these challenges, we must help elect "friends of public education" by financially supporting their campaigns through the SAA PAC. If we don't help them, our political adversaries are more than willing to write the big checks. Contributions through the SAA PAC also help to strengthen our relationships with legislators in key positions to affect education policy in Wisconsin.

I can envision many of you reading this and thinking "Okay, I understand the importance of the SAA's efforts to raise member contributions and use those funds to help elect pro-public education candidates. But why do you need my personal email to do it?"

Because campaign finance auditors with the Wisconsin Government Accountability Board (GAB) have advised us we should not solicit SAA

members for PAC contributions or inform SAA members about important candidate fundraisers or other political events through school email addresses.

So, there it is in a nutshell. Collecting member personal email addresses is critical for the SAA to help elect friends of public education, and, by extension, to advocate effectively on behalf of the children we serve. So, please consider going into your profile on the WASBO website and adding your personal email. Instructions are available at WASBO.com/preferences. You can also simply call the WASBO office at (608) 249-8588 for assistance.

If your policy is to never divulge your personal email, you can always create a new email address devoted to SAA communication and similar activities.

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

Mark Your Calendar!

WASBO Fall Conference

Oct. 6-7, 2016

The Osthoff Resort, Elkhart Lake

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ASBO International Membership Milestones

April 2016

30 Years

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

15 Years

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

May 2016

30 Years

- **Susan Schnorr**, Oshkosh Area SD, Oshkosh, WI

15 Years

- **Cynthia Reilly**, Wautoma Area SD, Wautoma, WI



Reaching Out - Pulling Together

Continued from page 3

this year and I am personally grateful that I could turn to him for support. I tip my hat to the three of you.

I would be remiss if I didn't thank the WASBO staff. They are incredible individuals who also make an awesome team! Their dedication to supporting what we do as an organization brings it all together. Woody, Jeanne, Áine, Kristin, and Kaitlyn, you are the best! And Deb, thank you for the last seven years of your life. You are incredibly special and we will miss you. Best wishes to you at the Forest Stewards Guild. They are extremely lucky to have you.

Finally, I want to encourage you to reach out to new business managers, bookkeepers, and superintendents in your area. They will need your support. Tell them about WASBO. Let them know about the regional meetings. Share with them information about the mentorship program. Forward the link for the Year of Success program and encourage them to register. The August conference, along with the mentorship kick-off is designed for newbies to be able to at least hit the ground walking, if not running.

Thank you again for a memorable year! I appreciate your support. Have a fantastic summer! See you in October in Elkhart Lake for the Fall Conference, if not before. 🇺🇸

Reflections and Thanks

Continued from page 5

weighed her options. Deb enjoyed the WASBO office team and members, but sustainability, in Deb's words, "is in her wheelhouse." Deb noted, "It has been a wonderful experience to play a role in such a vibrant organization with amazingly dedicated members, and to have witnessed WASBO's extraordinary growth over the last seven years."

Deb's last full-time day was June 10, 2016. She is committed to assist in the transition beyond that time because her new position is 75% time initially. She wants a smooth transition for WASBO and will help us in that process as time will best allow. She also will help us get through the 2015-16 audit. Deb will be keeping her WASBO email address for the foreseeable future in case you would like to send her best wishes. Thank you, Deb, for the opportunity to work with you. 🇺🇸

Janice DeMeuse Receives Wallace E. Zastrow Award

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process of the certification.

Janice's nominations cited her people skills as well as her technical skills, along with her ability to present complex school financial information in an understandable way. She helped pass a referendum in her district in April 2015 and has saved the district significant funds by advocating for changes. 🇺🇸

ASBO International Meeting Dates

2016 Annual Meeting & Expo

Sept. 23-26, 2016 - Phoenix, AZ

2017 Annual Meeting & Expo

Sept. 22-25, 2017 - Denver, CO

2018 Annual Meeting & Expo

Sept. 21-24, 2018 - Kissimmee, FL

2019 Annual Meeting & Expo

Oct. 25-28, 2019 - National Harbor, MD

2020 Annual Meeting & Expo

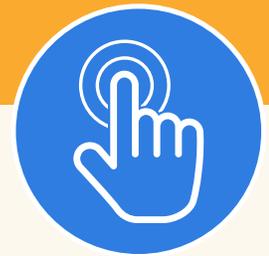
Oct. 2-5, 2020 - Nashville, TN

asbointl.org/meetings/annual-meeting-expo





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Walking in on a Resolution: Solving the Long-Term Care Insurance Problem

By Kent Ellickson, WASBO Director; Director of Finance and Business Services,
School District of Onalaska



Last July 1, I found myself in a new position in a new district. As those of you who have changed districts understand, there are the usual things that come with switching districts such as a new superintendent, school board, administrative team, district office, community, and much more. There are almost always one or two extra items requiring the attention and resources of the incoming business administrator. One of these such items in this change was finishing the transition in delivery of a long-term-care (LTC) insurance option to active employees and retirees.

My new district, like others in Wisconsin, had been offering a group LTC plan. The annual premiums, which were paid at 80 or 100 percent depending on employee group, were increasing at a trend rate approaching 10 percent. For active employees, the District's premium expense was just over \$400,000 annually. With limited revenue from state and local sources, these increases were not sustainable.

Beyond sustaining the plan, there were many challenges with the group long-term care plan:

- There were different opinions amongst active employees and retirees regarding the value of the benefit.
- The carrier required 100 percent participation in the plan by eligible employees of all of the participating active employee groups.
- Community members questioned why the district would offer such a benefit that was not typical of other employers.
- New rules disallowed lifetime cap on the benefit.

- Freezing the district premium contribution for active employees would eventually result in the district contributing less than the required 50 percent of the premium.
- Various retirees had agreements stating the district would offer, and in some cases fund, long-term premiums until the retiree was Medicare eligible. Discontinuing the existing group plan cut off access to these retirees. This was by far the greatest challenge to overcome.

My predecessor, along with the superintendent, school board, insurance consultant, current carrier and attorney, spent many months putting together the solution and working towards the solution and implementation, which is where we are currently in the process.

The solution consists of several parts that modified the district LTC program:

- The district will no longer financially support the current LTC group plan for active employees.
- The district will offer a voluntary LTC plan for those active employees and retirees formerly enrolled in the group plan.
- Current participants can maintain coverage in the group plan by either paying the conversion rate or through an accelerated paid-up. Or they can apply to enroll in the voluntary plan.
- In addition to providing the retirees with access to a LTC plan, the district will "buy out" the retirees with commitment from the district to fund LTC premiums. Retirees will be able use the buyout to access

either the former plan through conversion or the accelerated paid up feature—or they can select to apply to the new voluntary plan.

Our consultant wanted me to point out that the solution outlined here may not work for every district. He does not advise making this kind of voluntary offering for any school districts with less than 200 employees. Depending on the insurance company and group size, they need to get 10 submitted applications for a simplified underwriting offer.

While the process is not fully implemented, I would be remiss for not commenting on "how" this was put together.

Staff and retirees' opinions on the program were solicited through surveys. The surveys were structured so the district could learn about differences in opinions between the various types of groups of employees and retirees.

The district continually maintained as much transparency about the issue as possible through communication. The communication included meetings with various employee and retiree groups, email, and letters. It is obvious to me that the various employees and retirees understand the need for the change even though they may personally have differing opinions on the value of the LTC.

I would highly recommend districts considering this approach to work slowly with great amounts of collaboration between the business office, superintendent, insurance carriers, attorney, and insurance consultant in putting together a solution that works for the district. 🐾



Alliance for Excellence in School Budgeting

By Jason P. Demerath, SFO, CSRM, WASBO President Elect; Director of Business Services, School District of Fort Atkinson

Some of you may have already seen information floating around through ASBO about a group of school districts looking at a different budgeting model. The School District of Fort Atkinson joined the Alliance for Excellence in School Budgeting (“The Alliance”) last summer. This group of districts throughout the nation is pulled together by the Government Finance Officers Association (GFOA) and is focused on developing best practices in school district budgeting.

This program uses the Smarter School Spending model (<http://smarterschoolspending.org/home>) as a framework, and then layers on top of that framework some best practices from across the country. The school districts involved in “The Alliance” are on the front end of trying to pull it all together into something that can be shared nationally as a best practices model in school district budgeting regardless of what state you may be located in.

Most budget models are prescriptive in trying to get to a balanced budget using their tricks of the trade. This model is different in that it does not prescribe what a district should do to balance its budget, rather it provides a “Road Map” of questions to ask and decisions to make using data to determine what is best for your particular district. Along the way, the model provides tools for evaluation and inclusion of particular stakeholders to ensure the best information is being compiled to make the decisions about where to focus our limited resources.

Here in Fort Atkinson our journey started in the summer of 2015. After

One other item of note regarding this model is that it is not just for us finance geeks to work through to come up with numbers or various cuts that balance the budget. One of the cornerstones of this model is that the academic side is involved just as much.

doing some online research for school budgeting models, I came across the Smarter School Spending model and the Alliance for Excellence in School Budgeting (<http://www.gfoa.org/guide-gfoa-s-alliance-excellence-school-budgeting>). After reviewing it, I made contact with the GFOA to get some more details to see what it entailed and learn more about it. We came to the conclusion that the philosophy of this model and the work that the GFOA was doing was perfectly in line with our local philosophy. From there, we tossed our hat in the ring to be considered for “The Alliance” and were happy to join the group in late summer.

In September 2015, we were invited to Chicago as part of “The Alliance” to meet with all of the other districts in the group over the course of two days. This conference provided training on the model, solicited our feedback on improvements and our needs and provided for connections to other districts working to implement the model. We ended up coming away with a small cohort within “The Alliance” of similar sized districts from other states.

It was amazing how eerily similar their situations were to ours even though they were located in various states across the country. This provided for a great learning and networking opportunity moving forward as we work to implement this model further.

One other item of note regarding this model is that it is not just for us finance geeks to work through to come up with numbers or various cuts that balance the budget. One of the cornerstones of this model is that the academic side is involved just as much. So, in our visit to Chicago, not only did I attend, but I brought along my District Administrator and Director of Curriculum & Instruction. This model fuses the finance decisions with the academic impact to ensure the highest Academic Return on Investment (AROI) and has the academic data driving the financial decisions, as opposed to the opposite.

In this first year, we took baby steps into this process. Our first step was to shuffle the management of the building funds to the most effective manager for those funds. In the past there was a straight allocation per student for each building. The principal was then in charge of purchasing everything from toilet paper to textbooks. In this first year, we removed the funds for custodial supplies and maintenance from the principal’s purview and now have the Buildings & Grounds Director taking care of all purchasing.

We also removed all funds for technology from each building’s budget and placed the oversight of those funds with the Technology Director. In the past each building would just

purchase a few devices here and there as possible, but under this model bulk purchases at discounted prices focused on equity across the buildings can be accomplished.

The same goes for security. Some buildings have security cameras while others did not. It was all based on principal preference in the past. Now, these funds will be focused across the buildings on a certain level of equity, allowing for large systems to be purchased for smaller schools where they didn't have the funds available to make these purchases in the past.

All of these changes were made without cutting the budget; rather it was a more strategic use of the current resources. These were the first steps taken in this first year utilizing the underlying philosophy of the model. We will continue to expand and implement the overall model. In fact, we will likely never be done implementing it, as it is meant to be an ongoing process of

evaluation and redirection of available funds to the most effective programs utilizing the most efficient means possible.

I currently have a weekly meeting focused just on this model with the District Administrator, Director of Curriculum & Instruction, and the Director of Special Ed & Pupil Services. For the first time the academic and finance sides of the house are coming together and working to focus our very limited funds for the maximum academic return.

As Fort Atkinson travels on this journey I am sure I will be sharing our story through presentations, at various meetings or even through casual conversations. In the meantime, please check out the websites listed in this article to get a flavor for the philosophy behind this exciting program focused on best practices in our profession. 🇺🇸

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~ Kofi Annan



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2016 Facilities Manager Certification Recipients

The 2016 recipients of the WASBO Facilities Manager Certification were recognized May 27 during the Spring WASBO business meeting. Presenting their certificates were WASBO President Elect Patrick Finnemore and Dale Zabel, committee member, WASBO Facilities Committee



A group of recipients gathers after receiving their certificates May 27.

- **Edwin Allison**, Director of Buildings & Grounds, Wisconsin Rapids Public Schools
- **Todd Barkow**, Buildings & Grounds Supervisor, School District of Athens
- **Brian Chase**, Energy Manager, School District of Whitefish Bay
- **Ryan Fornal**, Systems/Operations Supervisor, Racine Unified School District
- **Bill Foust**, Director of Buildings & Grounds, McFarland School District
- **Doug Franzen**, Facilities Director, Kewaskum School District
- **Mark Garski**, Lead Maintenance Technician, School District of South Milwaukee
- **Tim Gorecki**, Operations Supervisor, Muskego-Norway School District
- **Bryan Groshek**, District Operations Supervisor, Muskego-Norway School District

- **Steve Guthrie**, Facilities & Operations Supervisor, Port Washington-Saukville School District
- **Joe Haselman**, Lead Maintenance Mechanic, School District of New Richmond
- **Dan Hornickel**, Head Custodian, DeForest Area School District
- **Brian Johnson**, Maintenance, Baraboo School District
- **Jay Kurzynski**, Custodial Supervisor, Tomorrow River School District
- **Ken Lesperance**, Maintenance, School District of Marinette
- **Jeff Lund**, Director of Buildings & Grounds, Safety Coordinator, Parkview School District
- **Bobby Matherly**, Facility Maintenance Supervisor, School District of Superior
- **Constance Miller**, Head Custodian/Maintenance, Watertown Unified School District
- **Russell Montgomery**, Facilities Superintendent, City of Waupaca
- **Ryan Mundt**, Maintenance Supervisor, Jefferson County
- **Melissa Nettesheim**, Assistant Manager of Buildings & Grounds, Wauwatosa School District
- **Don Olszewski**, Head Groundskeeper, Oak Creek-Franklin Joint School District
- **Joseph Sargent**, Engineer Services Coordinator, Appleton Area School District
- **Michael Schneider**, Maintenance Supervisor, University School of Milwaukee
- **Kevin Schwinn**, Maintenance Supervisor, Beaver Dam Unified School District
- **Dennis Wesenberg**, Supervisor of Buildings & Grounds, School District of Omro

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What's New in the Facilities Manager Certification Program

By Patrick Finnemore, WASBO President Elect; Director of Facilities, Kenosha Unified School District



Back in the spring of 2003, a group of 15 people started working on what would eventually become the WASBO Facilities Manager Certification Program. After a year of hard work, the program was unveiled at the 2004 WASBO Facilities Conference to a fairly large group of school district personnel eager to learn more about their profession. The majority of those WASBO members who developed the program have since retired, but there are a few of us still in the business including Joe Bellomo from Waunakee, Bill Eberhardt from Middleton-Cross Plains, Bill Freeman of EMC, Jodi Traas of Aegis, and myself. The program and individual sessions have been tweaked over the years to stay current with the times, but for the most part, the core of the program hasn't changed all that much.

This past year, our Facilities Committee co-chairs Joe Ledvina from La Crosse and Ed Butzen from Green Bay recruited a group of volunteers to meet a handful of times to review the seven core modules of the program and determine which sessions needed to be revised and which sessions needed to be replaced. The revisions range from the relatively minor to almost a complete re-write of the materials. In addition, about a half dozen sessions were eliminated and replaced with topics more relevant to today's school needs. In addition to Joe, Ed, and myself, the group that performed this review included Jim Beckmann of Performance Services/Glendale-River Hills, Dale Zabel of Kettle Moraine, John Stangler of Pewaukee, Dave Hoh of Oshkosh, and Jeremiah Johnson of Muskego-Norway. Our group also identified people to take responsibility for working on the changes and new sessions. There are approximately two

dozen members involved in writing one or more of the new or modified sessions.

The revised curriculum will take effect starting at this year's Fall Conference; however a few of the sessions offered at the Spring Conference and the Custodial Conferences this summer will have already been updated in time for those conferences. Here are a couple examples of the new sessions being developed and what they have replaced:

- In Module 2, a new session on energy accounting/education is replacing two sessions that were titled Understanding Your Utility Bills Parts 1 and 2 for Systems HVAC and Electrical.
- A new session titled Injury Avoidance and Worker's Compensation is being added to Module 3, the health, safety and environmental module. In addition, the introductory/basic sessions on Asbestos, Integrated Pest Management and Indoor Air Quality are being eliminated, and we will only offer the advanced sessions for these three topics.
- A new session on natural and synthetic turf is being added to Module 4 for maintenance and operations.
- A new session on how to measure success in the facilities area is being added to Module 6, Employee Relations and Interaction with the Public, based on the popularity of a presentation developed by John Stangler and Jeremiah Johnson. In addition, a new session on leadership and leadership styles is being developed by Jim Beckmann and Joe Ledvina based in part on

presentations that both of them have created and presented at recent conferences.

The overall number of credits necessary to obtain the certification will remain at 32. WASBO members already in the program will not have to retake a new session that is replacing one of the old sessions. We will track completion for those participants based on whether they completed each module regardless of whether the module was under the old format or the new format. Anyone starting the program from this fall forward will be completely under the new format. If anyone has questions about where they stand in regards to completion of the program they should contact Kaitlyn Hafeman in the WASBO office at kaitlyn.hafeman@wasbo.com.

When we first began working on the development of the Facilities Manager Certification Program we really didn't know how the program would evolve over time. We were only focused on identifying the appropriate topics and developing sessions so that we could launch the program. Over the past dozen years, a number of changes have been made, some have stuck such as combining sessions into Modules and offering complete Modules at conferences, others were short-lived. This current effort to upgrade the program is long overdue and will help position the program to better serve our membership. If you have any questions or would like to get involved, please feel free to contact me at 262-359-7757 or at pfinnemo@kUSD.edu. 🇺🇸

President Elect and New Directors on the WASBO Board of Directors

Results of the 2016 WASBO Board elections were announced during the WASBO business meeting on Friday, May 27 during the Spring Conference at the

Kalahari Resort & Conference Center in Wisconsin Dells. The new members were welcomed to the current board's June meeting and will take office on July 1, 2016.

Jason Demerath

Director of Business Services, School District of Fort Atkinson
President-Elect



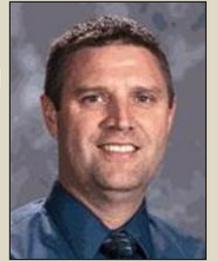
Nathan Jaeger

Director of Business Services, Whitewater Unified School District
Director (Two-year term)



Greg Gaarder

Business Manager, Tomah Area School District
Director (Three-year term)



John Stellmacher

Director of Business Services, School District of Hartford Jt #1
Director (Three-year term)



Bob Tess

Chief Finance and Business Services Officer, Wausau School District
Director (Three-year term)



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- Handling School Risks • Sept. 21, 2016
- Measuring School Risks • Oct. 19, 2016
- Funding School Risks • Oct. 20, 2016
- Administering School Risks • Nov. 9, 2016

CSRM/CISR Update Credit – anyone may attend; cost \$185

- Workers' Compensation • Dec. 6, 2016, Madison Marriott West, Middleton

Register at WASBO.com/riskmanagement

2016 Certified School Risk Managers (CSRM) Designees

New Certified School Risk Managers designees were recognized during the Spring WASBO business meeting on May 27. The designees received their certificates from Merrilee Streetman, Business Development Director, The National Alliance for Insurance Education & Research; Jodi Traas, MS, CSRM, and Joe Bellomo, CSRM, co-chairs of the WASBO Safety & Risk Management Committee.



Some of the new CSRM designees show their certificates after receiving them May 27.

- **Kerrie R. Ackerson**, CSRM, Contract Manager, CESA #10
- **Topher Adams**, CSRM, Director of Business Services, Campbellsport School District
- **Sandra J. Anderson**, CSRM, Senior Commercial Account Manager, Central Insurance Agency, LLC
- **Rebecca L. Behrens**, CSRM, Account Manager, Church Mutual Insurance Company
- **David J. Betz**, CSRM, Director of Business Services, Wilmot Union High School District
- **Patrick M. Blackaller**, CSRM, Business Manager, Rice Lake Area School District
- **Bradley R. Boll**, CSRM, Director of Business Services, School District of Beloit Turner
- **Jeanne T. Butzek**, CSRM, Executive Assistant, Middleton-Cross Plains Area School District
- **Jill M. Collins**, CSRM, Director of Business Services, School District of Black River Falls
- **Karen A. Dvornik**, CSRM, Director of Business Services, Cedarburg School District
- **Lynette K. Edwards**, CSRM, Business Manager, Clintonville School District
- **Michael A. Fischer**, CSRM, Finance Manager, West Bend School District
- **Lowell E. Fromm**, CSRM, Building & Grounds Supervisor, Sparta Area School District
- **Joel H. Green**, CSRM, HR Director, Whitnall School District
- **Nathan D. Jaeger**, CSRM, Business Manager, Whitewater Unified School District
- **Dawn M. Laboy**, CSRM, Business Manager, Random Lake and Howards Grove School Districts
- **Cheryl Ann Richards**, CSRM, Business Manager, Richards Insurance Agency
- **Joyce Smalley**, CSRM, Finance Manager, School District of La Crosse
- **Jodi Diane Smeiska**, CSRM, Director of Buildings & Grounds, Brown Deer School District
- **Margaret M. Smith**, CSRM, Business Manager, Northland Pines School District
- **Timothy J. Staver**, CSRM, Senior Loss Control Consultant, United Heartland
- **Joseph A. Sykora**, CSRM, Controller, School District of Waukesha
- **Aly Tress**, CSRM, Human Resources/Office Manager, CESA #8
- **Diane L. Wittman**, CSRM, Auxiliary Services Specialist, Appleton Area School District

“ I know where I’m going and I know the trust, and I don’t have to be what you want me to be. I’m free to be what I want.”

~ Muhammad Ali

What to do with Outdated, Unused Pesticides

From School IPM 2020, IPM Institute of North America

School districts frequently struggle with how to discard unused, no longer needed pesticides and lab chemicals. Budget constraints can delay proper disposal, and uninformed administration and staff are sometimes unaware of old pesticides and lab chemicals accumulations in schools resulting in hazards. “As chemicals age, they can breakdown into other substances that can be more dangerous than the original, parent chemical,” explained Mark Shour, Iowa State University Extension.

The Situation

All pesticides should be stored safely and according to the label found on the container. This includes storing the pesticide upright, in the original container, in a cool dry place away from food and out of children’s reach.

Problems can occur when pesticides and lab chemicals are discovered years after they were originally purchased.

They may no longer be legal to use, perhaps having left the market due to toxicity, persistence or other concerns, and often cannot be returned to the vendor. Disposal can be prohibitively expensive.

On the Front Line

Tony Pierce is a former high school and middle school science teacher who now works in the Compliance and Enforcement Section of the Hazardous Waste Program for the Missouri Department of Natural Resources. He reports that the most common problem he sees is ignorance. “Few know chemicals are hiding until someone retires and they open the cabinets. This is a common problem in schools. Teachers hoard and don’t communicate what they have, then they retire/leave and the stockpile has to be sorted. If there is better communication throughout the school, some items may not even be wastes-



they can be used by other classes/ departments,” said Pierce. Educating teachers individually emphasizes the importance of compliance and gives teachers the opportunity for professional responsibility.

Other common locations for old pesticides include horticulture or agriculture programs, and unused pesticide storages, e.g., storage

Continued on page 42

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Custodial & Maintenance Conferences

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

July 27, 2016 - Menasha High School, Menasha

Mentorship Program Orientation

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

New School Administrators & Support Staff Conference **

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

Fall Conference **

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

Midwest Facility Masters Conference **

Nov 7-8, 2016 - Kalahari Resort & Conference Center, Wisconsin Dells

SFO Study Group

Dec 6, 2016 - Madison Marriott West, Middleton

Winter at a Glance

Dec 6, 2016 - Madison Marriott West, Middleton

School Personnel Academy **

Dec 7-8, 2016 - Madison Marriott West, Middleton

Scholarship Fundraisers

Fall Golf Fundraiser

Oct 5, 2016 - Autumn Ridge, Valders

Fall Bike Fundraiser

Oct 5, 2016 - Old Plank Road Trail

Certified School Risk Managers (CSRM)

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Fundamentals of Risk Management

Sept 20, 2016 - WI School Leadership Center, Madison

Handling School Risks

Sept 21, 2016 - WI School Leadership Center, Madison

Measuring School Risks

Oct 19, 2016 - WI School Leadership Center, Madison

Funding School Risks

Oct 20, 2016 - WI School Leadership Center, Madison

Administering School Risks

Nov 9, 2016 - WI School Leadership Center, Madison

Workers' Compensation

Dec 6, 2016 - Madison Marriott West, Middleton

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The Impact of School Buildings on Student Health and Performance: Recent and Planned Research



By Erin Green, Senior Educational Consultant, Performance Services

Educators today are broadly familiar with past studies addressing the connection between indoor environmental quality in their schools and student achievement. The factors that contribute to student success are varied and complex, so it's admittedly difficult to measure the impact of any one variable.

Fortunately, recent and planned research regarding the built environment is now exploring larger questions and seeking more definitive answers about how these varied environmental factors—together and independently—influence student performance.

I currently have the privilege of serving on the board of directors for the Green Schools National Network. Our vision at the Green Schools Network is that every student will have the opportunity to learn and grow in a green and sustainable school.

I became interested in this field while leading my former district, Greendale Schools, to a national Green Ribbon Award and two Environmental Protection Agency (EPA) Awards. I saw firsthand how providing a healthy indoor learning environment, as well as outdoor “place-based” areas such as school gardens and forests, can enhance student attention and learning. I witnessed how integrating sustainability topics into the curriculum can increase student curiosity and engagement. For example, our school gardens were utilized by art classes, English classes, science classes, special education students, the lunch program, summer school gardening classes and student clubs.

As part of my role with the Green Schools Network, I had the pleasure of

attending the Green Schools National Conference in Pittsburgh in March 2016. The sessions at the conference resonated with content that support the idea for green, healthy, and properly operating building systems and their associated impact on occupant performance.

One important session was conducted by representatives from The Harvard T.H. Chan School of Public Health. They are actively researching the connection among a variety of factors that impact student health and cognitive performance with one factor being the impact of the built environment, including: thermal comfort, indoor air quality (IAQ), lighting, noise, and internal design elements.

The Harvard session, presented by Erika Eitland, a Harvard doctoral student and researcher, revisited a 2012 research report on this topic. Erika shared with the session participants the McGraw Hill Research Foundation report authored by the University of California, Berkley with the Center for Green Schools/U.S. Green Building Council and McGraw Hill Construction. This 2012 report, *The Impact of School Buildings on Student Health and Performance*, does a superb job of defining and segmenting the varied aspects that impact student performance.

Various metrics were studied such as respiratory illness, school attendance, sick leave, pro-social or aggressive behavior, blood pressure, heart rate, headache, hearing tests, vocal symptoms, fatigue, physical activity, focus, alertness, error rate, speed and accuracy, concentration, reading speed, boredom, reading comprehension, coping with ADD, test scores and writing and reading

tests. These metrics were then studied in relation to thermal comfort, IAQ, lighting, noise and internal design elements.

The Harvard team—building on this report—has offered an understandable framework in order to illustrate the interrelationship of the contributing factors of a successful student. Harvard researchers intend to examine each factor independently, including the impact of the built environment and ask key research questions.

In 2016, the researchers will be asking three important questions that directly impact the learning environment in school construction projects (see diagram at right):

1. When prioritization is necessary, which building components can be expected to have larger impacts on student health?
2. What are the impacts of high-performance school buildings, above and beyond an adequate (and potentially new) school building?
3. How do high-performance design features interact with each other? Relationships such as those between daylighting and acoustical design are understood less in terms of how they interact than in isolation.

As part of embarking on this 2016 endeavor, new research findings will also be examined. The variety of research conducted in recent years has discovered the following:

- An increase of 50-370% of respiratory illness in spaces with low ventilation rates (Lawrence Berkeley Labs, 2016)
- Faster and more accurate



responses to a cognitive function test at high ventilation rates (Bako-Biro, 2012)

- Schools with balanced mechanical ventilation had lower CO₂ concentrations and significantly higher test scores than schools with only natural ventilation (Toftum et al, 2015)
- Students exposed to the noisiest HVAC systems underperformed on achievement tests relative to those with quiet systems (Jaramillo 2013)
- Access to daylighting or proper lighting levels had positive influence on educational outcomes (Thombs, RP 2015)

The Harvard researchers will explore this topic, including recent case studies, and plan to provide a report late 2016. I look forward to the research findings and will follow up to this article when available. As educators, we would do well to pay attention to this evolving research. Getting new findings into the hands of school administrators and school boards should be a priority—what

school board or superintendent is not looking for every advantage to close achievement gaps?

In my view, the work at my company positively impacts the built environment in K-12 schools. The definition of quality as it pertains to school building projects and the impact on the learning environment can and should include measurable results. 📊

Erin is a past president of ASBO International and WSSCA. She joined Performance Services

in June 2015, bringing with her 35 years of school business management experience. Erin served at the Ethan Allen School from 1977- 1997, Palmyra-Eagle Schools from 1997-2001 and most recently at Greendale School District, a top 10 school district in Wisconsin from 2001 to June 2015. While at Greendale, Erin grew the school's fund balance from 4 to 25 percent and oversaw a 10 percent growth in enrollment of both resident and non-resident students. She has served as a school leader and key influencer for three successful community referendums totaling more than \$20 million. Erin currently serves as Treasurer for the Green Schools Network non-profit organization.

Green Schools National Network connects K-12 teachers, administrators, leaders and professionals with evidence-based resources and tools to maximize financial and natural resources; improve the health and well-being of staff and students; and prepare student with the knowledge and skills for a sustainable future. To join GSNN: <https://greenschoolsnationalnetwork.org/gsnns-new-membership-program>.

Additional Reading

The Impact of School Buildings on Student Health and Performance

<https://www.mhfi.com/about/Global-Institute/white-papers/Impact-of-School-Buildings.html>

The importance of school buildings has been recognized as a fundamental element of society since the beginnings of America and beyond. Today, roughly a quarter of our nation's population, including our youngest citizens, spends the majority of their days in school buildings. As a result, schools have become a contentious and heavily scrutinized part of civil society. And yet, many of our nation's schools are in disrepair, with systems in need of repair or replacement. But with state and local funding budgets growing increasingly limited, funding allocation for school construction and renovation needs to be carefully weighed. It is important to ensure that investments are going toward efforts that can best foster healthier buildings and environments.

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EEOC Finalizes Workplace Wellness Program Rules

By Matthew Flanary and Brett Schnepfer, Buelow Vetter Buikema Olson & Vliet



Matthew Flanary



Brett Schnepfer

On May 16, 2016, the U.S. Equal Employment Opportunity Commission (“EEOC”) released two final rules concerning the use of workplace wellness program. For the most part, these final rules are in line with the two sets of proposed rules issued last year and you can read more about those proposed rules in this Legal Update dated May 2016.

While the final rules provide some useful guidance regarding the percentage or amount of employer wellness incentives, they also reflect the EEOC’s general refusal to accept many common wellness practices that involve medical tests or analysis.

Employers should also remember that the EEOC only oversees certain federal laws. These new rules specifically address the application of the Americans with Disabilities Act (the “ADA”) and the Genetic Information Nondiscrimination Act (“GINA”) to workplace wellness programs. Wellness programs are also subject to other restrictions and regulations under a variety of other federal laws.

The final rules apply beginning on the first day of the plan year that starts on or after January 1, 2017.

Incentives

The final rules continue to allow employer incentives, but limit the maximum incentive to 30% of the cost of self-only coverage. The limit applies to both financial and in-kind incentives. The final GINA rules also clarify that the 30% limit applies to an employee and spouse individually.

Example: Assume that an employer offers a family plan that costs \$14,000 and a self-only plan that costs \$6,000. If that employer offers

incentives to both the employee and spouse for participating in a wellness program, then the incentives cannot exceed \$1,800 for the employee and \$1,800 for the spouse. As this example demonstrates, the 30% limit on incentives is determined solely by the cost of single coverage, even if the employee and spouse are enrolled in a family plan.

Notably, the EEOC did not harmonize its regulations regarding incentives with the Affordable Care Act’s (“ACA”) regulations on smoking cessation incentives. Under ACA rules, an employer can offer an incentive of up to 50% of the cost of self-only coverage in connection with a smoking cessation program. Applying the EEOC’s regulations, however, the incentive would be capped at 30% if the smoking cessation program requires a medical examination, such as a biometric screening or other medical procedure to test for the presence of tobacco. The 30% limit would not apply to a program that merely asks employees whether or not they use tobacco. As a result, employers will have to carefully consider the design of a wellness program that incorporates a smoking cessation incentive.

Medical Tests/Inquiries

In a series of court cases, the EEOC has challenged several common welfare plan designs by arguing that those programs violate the ADA because they involve disability-related inquiries or require medical examinations. You can read more about these court cases and the EEOC’s attacks on workplace wellness programs in our prior Legal Updates: August 2014; October 2014; and January 2016. (See <http://www.buelowvetter.com/news-events.html>.)

Although courts have rejected the EEOC’s position, the final regulations show that the EEOC has no intention of changing its position any time soon.

Confidentiality

The final regulations require that participants be provided with a notice that informs the participant of the information that will be collected, how it will be used, and how it will be protected. The EEOC’s model notice is available at <http://1.usa.gov/28M5koX>. Additionally, the regulations specify that employers may only receive the medical information or history of a participant in aggregate form in a manner that does not disclose, or is not reasonably likely to disclose, the identity of the participant, except as is necessary to administer the terms of the health plan.

Tax Treatment of Certain Wellness Incentives

In addition to the EEOC, the IRS also recently addressed the tax implications of certain wellness incentives. Specifically, the IRS released a Chief Counsel Memorandum that discussed the tax treatment of a cash reward provided to wellness program participants and the treatment of premium reimbursements provided to wellness program participants. The IRS confirmed that a cash reward provided to an employee is includable in the employee’s gross income and subject to employment taxes. Similarly, reimbursing employees for premium payments that were made on a pre-tax basis through a salary reduction under a cafeteria plan is included in an employee’s gross income and the amount reimbursed is subject to employment taxes. Though the Chief Counsel Memorandum is not binding, it

is at least an indication of how the IRS views some wellness incentives.

In the Chief Counsel Memorandum, the IRS specifically addressed the following issues:

1. May an employer exclude from an employee's income under section 105 or section 106 cash rewards paid to an employee for participating in a wellness program?
2. May an employer exclude from an employee's income under section 105 or section 106 reimbursements of premiums for participating in a wellness program if the premiums for the wellness program were originally made by salary reduction through a section 125 cafeteria plan?

The IRS answered both questions in the negative. Regarding the first question, the IRS concluded that cash rewards or other benefits that do not qualify as medical care are included in the employee's gross income, unless the benefit provided is de minimis.

However, the IRS underscored that a cash payment is generally not excludable as a de minimis benefit. As an example, the IRS Chief Counsel Memorandum provides that cash benefits such as paying or reimbursing gym membership fees would be income to the employee, but providing a t-shirt would be a de minimis benefit.

As for the second question, the IRS stated that the reimbursement of pre-tax premium payments made to the wellness program are includable in the employee's gross income. While the Chief Counsel Memorandum addressed premium payments for wellness programs, the same rationale could be applied to reimbursements for pre-tax premium payments to an employer's group health plan through a salary reduction under a cafeteria plan, which means that those reimbursements would likewise be included in the employee's gross income and subject to employment taxes.

As the Chief Counsel Memorandum indicates, wellness program incentives

will often be subject to taxation. The Chief Counsel Memorandum also highlights that wellness programs and the benefits and incentives offered under those programs are subject to a myriad of different laws and regulations, in addition to HIPAA, GINA, and the ADA. 🇺🇸

If you have questions about this article or your own wellness program, please contact Matthew Flanary at mflanary@buelowvetter.com or (262) 364-0253, or Brett Schnepfer at bschnepfer@buelowvetter.com or (262) 364-0262.

This Legal Update is intended to provide information only on general compliance issues and should not be construed as legal advice. Please consult an attorney if you have any questions concerning the information discussed in this Legal Update.

In order to comply with Treasury Circular 230, we are required to inform you that any advice that we provide in this Legal Update concerning federal tax issues is not intended or written to be used, and cannot be used, to avoid federal tax penalties, or to promote, market, or recommend to another person any tax advice addressed herein.

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WASBO Foundation \$4,000 Matching Scholarship

Morgan Pettit, Merrill Area Public Schools

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Morgan is her class president and is active in the National Honor Society, Octagon Club, FFA, Earth Club, and sports. She has tutored students in science and math and works with students in her district's Big Brothers Big Sisters program. She plans to pursue a degree in biology at UW-Madison.



WASBO Foundation Facilities Management Conference / Joel Konze Memorial \$4,000 Matching Scholarship

Jackson Traas, Appleton Area School District

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Jackson dedicated himself to AP classes, Key Club, the school newspaper, debate, Link Crew, math team, DECA, and National Honor Society, along with tennis, curling, and soccer, all while maintaining a 4.0 GPA. He will attend the University of Minnesota – Twin Cities to study chemical engineering.



WASBO Foundation \$3,000 Matching Scholarship

Katelynn Mischler, Manitowoc Public School District

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Katelynn was involved in the National Honor Society, student senate, link crew, boomerang and Key Club, as well as volleyball, track, dance and tennis – and she maintained a 4.0 GPA. She plans to attend the University of Minnesota-Twin Cities, majoring in chemical engineering.



WASBO Foundation \$3,000 Matching President's Scholarship

Presented in honor of WASBO President Bob Avery

Jennifer Swan, Beaver Dam Unified School District

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Jennifer has been active in the Beaver Dam FFA for 4 years, and is the current president. She shows beef steers at the Dodge County Fair and is active in the FFA chapter livestock judging team, Junior Livestock Show, and the International Livestock Show. She participated in the Washington, DC, Leadership Conference and the national and state FFA conventions. She is a member of the Honor Society, has competed in career development events, and participated in speaking contests, FFA basketball, Varsity basketball, and track. Jennifer will study elementary education at Marian University.



WASBO Foundation \$2,000 Matching Scholarship

Emma Kloes, School District of New London

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Emma is class salutatorian, and participated on her school basketball team. She is a member of the Spanish Honors Society, National Honor Society, and other social clubs. She has served her community with over 550 volunteer hours. Emma plans to double major in biology and Spanish at UW-Madison, with her focus on pre-med.



School Business Manager of the Year Award \$1,500 Scholarship

Presented in honor of 2016 School Business Manager of the Year Erik Kass

Daniel Smerz, School District of Elmbrook

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Daniel is involved with Boy Scouts, National Honor Society, Spanish Honor Society, community service, high school tutoring, Future Business Leaders of America, DECA, Key Club and Link Crew. He is active in both track and baseball. He is a Martin Luther King Jr. Student of Services and Leadership nominee, on the Principal's Honor Roll and received an AP Scholar Award. Daniel plans to study business at Marquette University.



WASBO Foundation \$1,500 Matching Scholarship

Nicole Moehn, Chilton Public Schools

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Nicole is one of her school's possible valedictorians, and is involved in Math Team, Future Business Leaders of America, and 4-H. Her most powerful high school experience was working as counselor at the Wisconsin Operation Military Kids Summer Camp. Nicole's experiences working as a camp counselor, coupled with her love of science, has contributed to her plan to study Biochemistry and Pre-Pharmacy or Pre-Medicine at the UW-Madison, with a goal of becoming a pediatric pharmacist or pediatrician.



Wallace E. Zastrow Award \$1,500 Scholarship

Presented in honor of 2016 Zastrow Award Recipient Janice DeMeuse

Benjamin Hayes, Nicolet Unified High School District

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Ben has participated in many activities including National Honor Society, Community Service Club, Model UN, variety soccer, JV baseball, Spanish Club, rugby, and debate. He has taken multiple AP classes and was accepted into several competitive engineering programs. He will attend UW-Madison this fall.



WASBO Foundation Dr. Bambi Statz Academic \$1,000 Scholarship

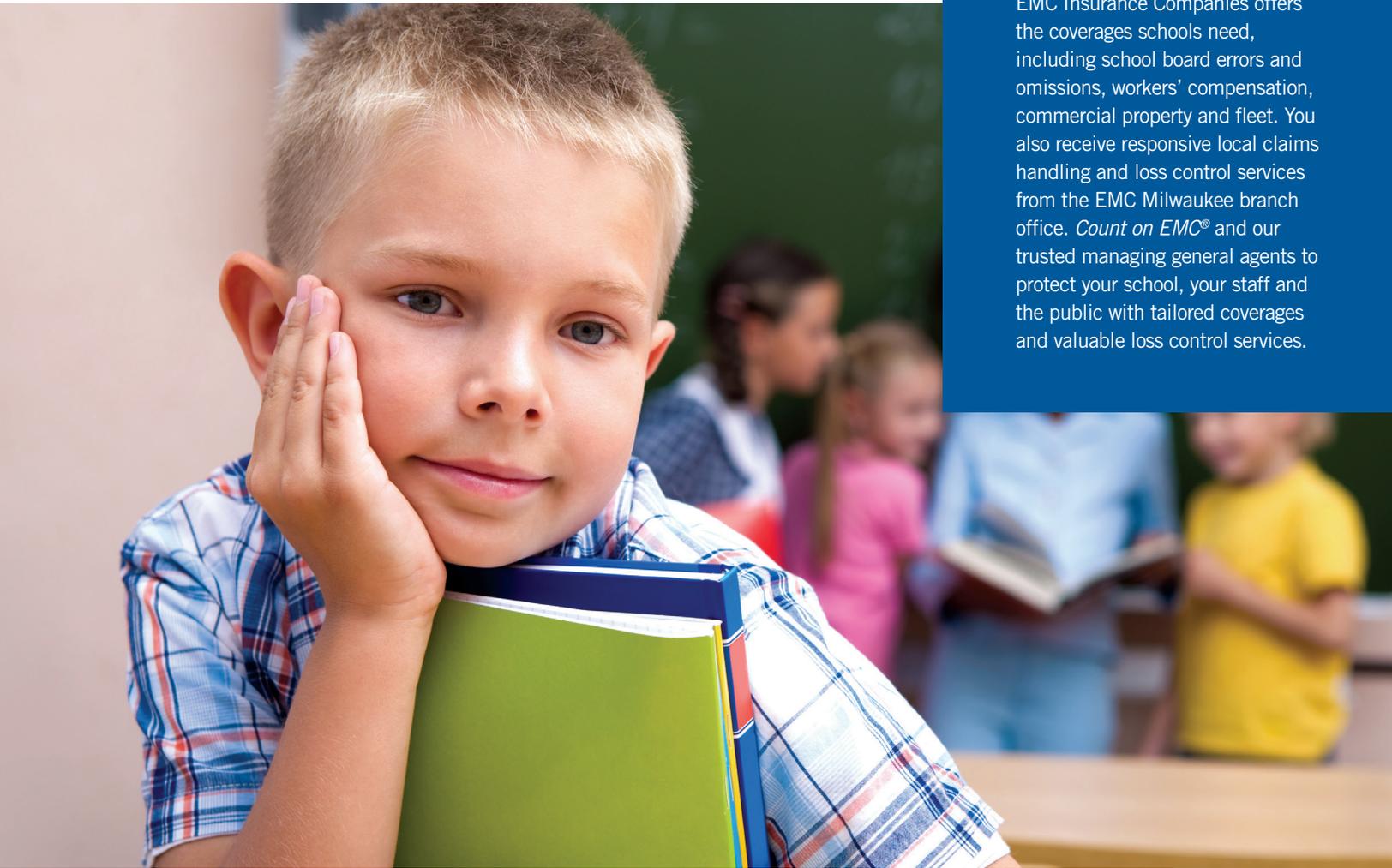
Sherri MacGregor, Arrowhead Union High School District, UW-Whitewater Student

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Sherri is in her sixth year as Payroll/Accountant with Arrowhead UHS District. She previously worked as an accountant in the private sector. She is pursuing a Master of Science in Education degree in school business management at UW-Whitewater and will obtain her O8 license as well.





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Honoring Excellence in Wisconsin's School Business Officials



Tina Hafeman Friend of WASBO Award Chris Valenti, Viterbo University

The recipient of the 2016 Tina Hafeman Friend of WASBO Award is Chris Valenti, Off-Campus Coordinator with Viterbo University.

During the 2003-04 school year, when a comprehensive project was undertaken by the Department of Public Instruction to revamp Wisconsin's licensure procedures and requirements, Chris stepped forward. WASBO — along with WASDA, AWSA and WCASS — was looking for a way to grandfather and grant relicensing to school administrators for those not wishing to opt for the proposed new licensure requirements specified in PI34.

Through the initial process, Chris understood that school business managers have a wide range of stewardship responsibilities to perform in their school districts. New regulations, laws, products, and services come online with increasing intensity. Borrowing and investing, school construction and facility operations, human resources, the Affordable Care Act, pesticide management, food service, transportation, technology—and the list goes on and on, requiring that school business officials know a great deal about a lot of things. Timely seminars and conferences

WASBO President Bob Avery (left) presents the Tina Hafeman Friend of WASBO Award to Chris Valenti.



conducted by expert faculty are the prime source of a WASBO member's professional development.

While WASBO could provide these timely professional development opportunities for its members we needed a partner. Viterbo University with Chris Valenti's leadership worked with WASBO to convert professional growth activities at conferences to university graduate credits, giving WASBO members the opportunity to renew their license while attending WASBO conferences and workshops. This was a tremendous breakthrough for WASBO members, ensuring they have the most relevant information for their jobs while receiving license renewal.



ASBO International Pinnacle Award Amy Kohl, Greenfield School District

Amy Kohl, Director of Business Services for the School District of Greenfield, was recognized at the Spring Conference for her 2015 Pinnacle of Excellence Award. Greenfield was the recipient of the 2015 Business Services Award. Both awards spotlighted the district's Senior Tax Exempt Program (S.T.E.P.).

RIGHT: Brian Kirkwood of Virco, Inc., sponsor of the Pinnacle Award, presents the award to Amy Kohl.



School Facilities Manager of the Year Jeremiah Johnson, Muskego-Norway School District



The recipient of the 2016 School Facilities Manager of the Year Award is Jeremiah Johnson from the Muskego-Norway School District. The award is co-sponsored by Stalker Sports Floors and SchoolDude.com.



Jeremiah was highly praised by his colleagues for his awareness of school safety, which has led to bi-weekly and monthly safety walks, coupled with school audit checklists. The district was able to lower its Insurance Mod Rating, saving tens of thousands of dollars annually. He has also led energy conservation efforts, saving millions over the past nine years.

Jeremiah has earned the WASBO Facilities Manager Certification and is a regular presenter at WASBO conferences. He is active in multiple professional organizations and has secured certification around Human Resources in order to more dynamically interact with district staff.



Steve Stalker, Stalker Sports Floors, (left) presents the Facilities Manager of the Year Award to Jeremiah Johnson.

Safety, Security & Wellness Award School District of Marinette



The 2016 Safety, Security & Wellness Award was presented to the School District of Marinette for its program of Mental Wellness in School for Staff and Students. The award is sponsored by M3 Insurance.

Like many other communities, Marinette serves a population that includes socio-economically disadvantaged families, some with mental health or substance abuse issues. The school district has partnered with local counseling agencies to provide services to students during the school day, and has offered staff development along with opportunities to enhance wellness.



Brian Walters (left) accepts the Safety, Security & Wellness Award from Marty Malloy, M3 Insurance, on behalf of the School District of Marinette.

Business Services Award Necedah Area School District



The 2016 Business Services Award was presented to Necedah Area School District, for its innovative use of Google Drive and Groups. The award is sponsored by Baird Public Finance. Business Manager Collette Schultz accepted the award on behalf of the district.

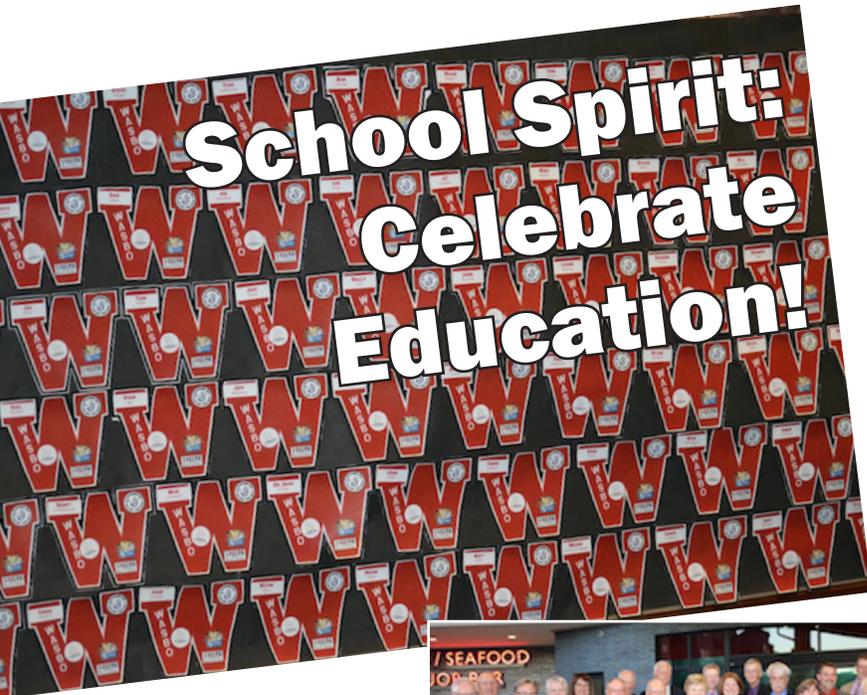
The Wisconsin Valley Regional needed a collaborative tool or process to summarize answers and questions between monthly meetings. Collette selected Google Drive and Groups as tools for sharing this information. Now, nearly 50 users are accessing these tools.



Collete Schultz (left) accepts the Business Services Award from Lisa Voisin, Baird Public Finance, on behalf of Necedah Area School District.

WASBO Spring Conference

May 26-27, Kalahari, Wisconsin Dells



The WASBO Spring Conference took place the week before Memorial Day in Wisconsin Dells. Over 260 attendees and 130 exhibitors gathered for professional development, exhibits, networking, award presentations, and the bi-annual WASBO business meeting. New this year was a Learning Lab where attendees could receive expert assistance with Excel or Google Sheets, or work with specialists from Skyward, PMA/Forecast5 and Baird Public Finance. The 3rd annual spring blood drive saved 87 lives. Next year's Spring Conference will take place May 11-12 at the La Crosse Center in La Crosse.



President's Recognition Dinner, May 24



Spring Conference co-chairs John Sackett and Kathy Davis.



Golf & Bike Scholarship Fundraisers, May 25





Keynote speaker Art Harrington

**Sessions,
May 26-27**



Exhibits, May 26



2015-16 WASBO President Bob Avery (left) passes the gavel to Patrick Finnemore.



LEFT: The Silent Auction & Raffle raised \$7,943 for WASBO involvement in ASBO International.

RIGHT: Jennifer Bolton Carls, ASBO International Vice President, exchanged state shirts with WASBO President Bob Avery.



Chris Valenti, Tina Hafeman Friend of WASBO Award recipient, with Karen Sandblom.



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Departments Issue Joint Guidance on Transgender Students

By Gary Ruesch and Alana Leffler, Attorneys, Buelow Vetter Buikema Olson & Vliet



On May 13, 2016, the U.S. Department of Education's Office for Civil Rights and the U.S. Department of Justice's Civil Rights Division issued a joint guidance document regarding transgender students. The guidance, which is not in the form of a regulation but rather a Dear Colleague Letter, states, "The Departments interpret Title IX to require that when a student or the student's parent or guardian, as appropriate, notifies the school administration that the student will assert a gender identity that differs from previous representations or records, the school will begin treating the student consistent with the student's gender identity. Under Title IX, there is no medical diagnosis or treatment requirement that students must meet as a prerequisite to being treated consistent with their gender identity."

Regarding restrooms and locker rooms, the guidance states, "A school may provide separate facilities on the basis of sex, but must allow transgender students access to such facilities consistent with their gender identity. A school may not require transgender students to use facilities inconsistent with their gender identity or to use individual-user facilities when other students are not required to do so. A school may, however, make individual-user options available to all students who voluntarily seek additional privacy."

The legal landscape surrounding the rights of transgender students is becoming increasingly complex, and, at times, contradictory. Although the Department of Education's and Department of Justice's position on Title IX's application to transgender students is clear, it does not constitute binding authority. In the meantime, there is pending litigation around the

The legal landscape surrounding the rights of transgender students is becoming increasingly complex, and, at times, contradictory. Although the Department of Education's and Department of Justice's position on Title IX's application to transgender students is clear, it does not constitute binding authority.

country which will also require the federal courts to weigh in on this issue, and interpretations of the various courts may or may not be consistent with the Departments' interpretation.

In particular, there have been new developments in *G.G. v. Gloucester County School Board*. As was discussed in our previous Legal Update, a three-judge panel of the Court of Appeals for the Fourth Circuit recently reversed a lower court's dismissal of a transgender student's Title IX claim, concluding that the lower court did not give the appropriate deference to the Department of Education's interpretation of the Title IX regulations. Shortly after the Fourth Circuit's decision was issued, the Defendant School Board petitioned for en banc review, so that all of the judges on the Fourth Circuit could participate, rather than just a three-judge panel. The Fourth Circuit denied the petition for en banc review. The Defendant School Board also made a motion to stay the ruling of the three-judge panel while it prepared its appeal to the U.S. Supreme Court. That motion was also denied.

Also on the heels of the Fourth Circuit's decision in the Gloucester case, a group of students and parents in Palatine, Illinois filed a civil rights action in federal court to invalidate a resolution agreement reached between the Township High School District and the Office for Civil Rights (OCR). The Palatine case involved a transgender girl's access to locker room facilities in school. After OCR decided that the district violated Title IX by denying the student access to the locker rooms designated for female students, the district and OCR entered into a resolution agreement. The agreement provided that the district would give the student access to the locker room facilities designated for female students. It further provided that the district would take steps to protect the privacy of its students by installing and maintaining sufficient privacy curtains (private changing stations) within the girls' locker rooms to accommodate any student who wished to be assured of privacy while changing.

In the lawsuit seeking to invalidate the Palatine agreement, the plaintiffs claim that the privacy rights of the other students in the locker room are not protected by the agreed upon measures, and that the agreement violates Title IX, the Administrative Procedure Act, the students' fundamental rights to privacy, the Illinois and Federal Religious Freedom Restoration Acts, and the First Amendment Free Exercise of Religion Clause. Because this case is in the 7th Circuit, a decision by the Federal Appeals Court would ultimately govern Wisconsin school districts.

In addition, North Carolina and the Department of Justice are currently engaged in litigation over state legislation which prohibits individuals from using a bathroom that does not

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Department of Labor Issues Final Regulations Regarding FLSA Exemptions

By Douglas E. Witte and Richard F. Verstegen, Boardman & Clark LLP

In May 2016, the Department of Labor (Department) published a final rule to update regulations (final regulations) under the Fair Labor Standards Act (FLSA). The final regulations will take effect on December 1, 2016. Because of this impending deadline, school districts will want to take immediate action to comply with the final regulations. This article will briefly summarize the changes to the FLSA regulations made by the final rule and discuss the impact on school positions.

Background / Current Regulations

The FLSA is a federal law that sets minimum wage, overtime, equal pay, recordkeeping, and child labor standards for employees who are covered by the Act. State and local governments, including school districts, must comply fully with the FLSA. Employees who are covered by the Act fall into two categories: non-exempt and exempt. Non-exempt employees are subject to all of the FLSA requirements. Exempt employees are generally not subject to the minimum wage and overtime provisions, but are still subject to the other FLSA requirements. It is the employer's burden to prove that an employee is exempt.

Exemptions are identified by different categories, including bona fide executive, administrative, academic administrative, professional, and computer employees. The FLSA regulations define the requirements for each of these exemptions. Each exemption generally includes three basic requirements: (1) a salary basis requirement; (2) a salary level requirement; and (3) a primary duty requirement.

- **Salary Basis.** An employee must be paid on a salary, rather than an

hourly, basis. In other words, each pay period, the employee must regularly receive a predetermined amount constituting all or part of his or her compensation, without regard to the quality or quantity of the work performed. Some exempt employees (administrative, professional, and computer) may also be paid on a fee basis.

- **Salary Level.** An employee must earn a minimum weekly salary. Under the current rules, the minimum salary requirement is generally \$455 per week (equivalent to \$23,660 annually).
- **Primary Duty.** An employee's primary duty must be the performance of exempt work. Although an exempt employee may perform some nonexempt duties, the primary duty of the employee must be exempt in nature. Employees who spend more than 50 percent of their work time on nonexempt duties may still have exempt work as their primary duty. Each exemption identifies the duties that an employee must perform to meet that exemption.

Below is a brief summary of each of the exemptions and the positions within school district that generally fall within these exemptions.

- **Executive Employees.** These employees generally include those who engage in the management of the district or a department within the district, which generally involves oversight of employees and control over the work involved. Employees who may qualify in a school district include the supervisor of buildings and grounds, transportation director, and food service program director.
- **Administrative Employees.** These employees are generally those who engage in running or servicing



Doug Witte

Richard Verstegen

the district or a department within the district. Administrative duties include work in such areas as finance, accounting, budgeting, procurement, safety and health, personnel management, human resources, labor relations, computer network, and similar activities. Employees who may qualify in a school district setting include the human resource director or business director.

- **Administrative Employees (academic administrative).** Administrative employees also include those in educational establishments. These employees are generally those who perform work related to the academic operations and functions in a school, rather than administration along the lines of general business operations. Such employees include the superintendent; any assistants responsible for administration of such matters as curriculum and other aspects of the teaching program; the principal and any vice-principals; academic counselors; and other employees with similar responsibilities. As explained below, such employees also have a separate salary level component.
- **Professional Employees.** Professional employees are generally those who are engaged in work that requires knowledge of an advanced type in science or learning acquired by a prolonged course of specialized instruction. Employees who may qualify in a school district setting include a school nurse or physical therapist.
- **Professional employees (teachers).** Teachers are professional employees but are covered under

a separate regulatory section. Such employees are those who are engaged in teaching, tutoring, instructing, or lecturing in the activity of imparting knowledge and who are employed and engaged in the activity as a teacher in an educational establishment by which the employee is employed. The salary level and salary basis requirements do not apply to teachers.

- **Computer Employees.** Computer systems analysts, computer programmers, software engineers or other similarly skilled workers in the computer field are eligible for exemption as professionals. Computer employees may also be paid on an hourly basis of not less than \$27.63 per hour.

The current regulations also contain a relaxed duties test for certain “highly compensated” employees who receive total annual compensation of \$100,000 or more and are paid at least \$455 per week.

Final Regulations

In 2014, President Obama issued an Executive Order directing the Secretary of Labor to “update and modernize” the overtime exemption rules under the FLSA. In 2015, the Department issued proposed regulations based on this directive, and the proposed regulations resulted in about 270,000 comments. Based on these comments, the Department has now issued its final regulations. The final regulations include the changes below.

Changes to Salary Amounts. The final regulations significantly increase the salary threshold for applicable exemptions. The final regulations set the minimum salary level for applicable exemptions at the 40th percentile of weekly earnings for full-time salaried employees in the lowest wage Census Region (currently the South), which is equal to \$913 per week (\$47,476 for a full-year worker).

Updates to Amounts Every Three Years. The final regulations also do not identify a specific amount that would

remain stable over time. Instead, the final regulations establish a mechanism for automatically updating the salary and compensation levels every three years to maintain the levels at the applicable percentile. Future automatic updates to these thresholds will occur beginning on January 1, 2020.

Highly Compensated Employees.

The final regulations also raise the compensation requirement needed to qualify for the highly compensated employee exemption. To meet this exemption, an employee must receive total annual compensation of at least the annualized earnings amount of the 90th percentile of full-time nonhourly workers nationally, or \$134,004 annually. This amount will also be updated every three years, beginning January 1, 2020.

Changes Related to Nondiscretionary Bonuses.

The final regulations also made an important change related to non-discretionary bonuses and the inclusion of such bonuses within the calculation of weekly salary. In particular, the final regulations now specifically permit school districts to count nondiscretionary bonuses, incentives, and commissions toward up to ten percent of the required salary level. However, school districts must pay those amounts on a quarterly or more frequent basis. The final regulations also allow districts to make a “catch-up” payment at the end of each quarter in order for employees to meet the salary level test.

Certain Salary Provisions Did Not Change.

A few important things did not change under the final regulations with respect to salary basis and salary level:

- The teacher exemption is still not subject to any salary level or salary basis requirement under the FLSA.
- Computer employees may still be paid on an hourly basis at a rate of not less than \$27.63 per hour.
- Academic administrative employees still permits such individuals to be paid “on a salary basis which is at least equal to the entrance salary

for teachers in the educational establishment” where the administrator is employed.

- Some exemptions may also continue to be paid on a fee basis.

No Changes to Provisions Related to Type and Amount of Exempt Duties.

Prior to the final regulations being released, many observers believed that the final regulations would tighten the rules regarding which “duties” an exempt employee may undertake. Some observers believed the FLSA rules would be reworked to require that a certain percentage of an employee’s time be spent on exempt tasks. In the end, however, the Department decided not to make any specific changes in the final regulations to revise the duties test at this time. There have been indications, however, that the duties test may be revised in a future round of rulemaking.

Impact of the Final Regulations on District Positions

Within these final changes, many districts have had questions as to the impact on certain positions. Below is a discussion on different school positions.

- **Teachers.** As mentioned above, the final regulations did not change the law with respect to one aspect of the professional exemption related to teachers; that is, the teacher exemption is not subject to the “salary basis” or “salary level” requirements that apply to other professional employees. Accordingly, consistent with the current law, a teacher in the district who meets the duties requirements related to the teacher exemption will be considered exempt, regardless of the amount that the teacher is paid. Thus, the final regulations do not change any approach related to full-time, part-time, substitute, and temporary teachers in the district.
- **Coaches.** The final regulations also likely do not impact the district’s approach to coaches in the district. In general, employees who only

Continued on next page

Department of Labor Issues Final Regulations Regarding FLSA Exemptions

Continued from previous page

coach in school districts will likely continue to not meet any exemption under the FLSA, based solely on their duties as coaches in the district. However, if a part-time coach is also a full-time teacher in the district, the coach will likely continue to be considered exempt in his or her capacity as a coach, considering the totality of his or her employment (full-time teacher / part-time coach) in the district. As a result, it continues to be advisable for districts to continue to carefully consider its hiring and payment practices related to coaches in the district.

- **Academic Administrators.** Under the academic administrative exemption, the final regulations raised the amount of the salary level requirement. However, as mentioned above, the final regulations did not impact a separate salary level provision that only applies to academic administrators. Specifically, academic administrators may still meet the salary level requirement if they are paid “on a salary basis which is at least equal to the entrance salary for teachers in the educational establishment” where the administrator is employed. As a result, if an academic administrator’s salary is at least equal to the entrance salary for teachers at the district, there is likely no need for a salary adjustment for that administrator.
- **Computer Employees.** The computer employee exemption also changed with respect to the specific salary level. However, as mentioned above, the law did not change a provision allowing computer employees to meet the salary level requirement if they are paid at a rate of not less than \$27.63 per hour. Therefore, any computer employee who met this hourly requirement under the current law will also meet this requirement under the final regulations.

- **Directors / Managers.** The category of “director” or “manager” may be the category of employee within the school district that is most affected by the final regulations. Such positions may include Director of Food Services, Director of Building and Grounds, Business Services Manager, or Human Resource Manager. Although the duties required to meet these positions have not changed, the amount that must be paid to these positions has changed, and therefore, districts will need to pay close attention to ensure that these positions are adjusted appropriately.

Common Questions

- *What if the employee works less than 12 months?* The salary requirement is looked at on a weekly or monthly basis, so only the weeks worked must meet the salary level requirement.
- *What if the employee works less than 12 months but wants their salary paid out over 12 months and the result would be the weekly salary would then be less than the required minimum?* The Department has stated such arrangements are acceptable, and employers only need to meet the salary amounts for the time actually worked.
- *What if the employee works part time (30 hours per week)?* The weekly salary requirement must still be met – it is not pro-rated.
- *What if the district pays on a basis other than weekly?* Employers can pay weekly, bi-weekly, semi-monthly or monthly and just adjust the amounts accordingly so that the weekly equivalent of \$913 is paid.

Considerations for School Districts

Again, the final regulations take effect on December 1, 2016. Until then, the current regulations will remain in place. The time period between now and December 1 gives

districts an opportunity to address any positions that may be impacted by the final regulations (in particular, those positions that may not meet the new salary level requirements). One approach would certainly be for districts to increase the salary for that employee. However, another approach could be to reclassify the employee as nonexempt and pay overtime for any hours worked over forty in a work week. Previously exempt employees will need to be instructed and trained about their recordkeeping obligations and tracking their hours worked. Districts may also then decide to limit the hours of these reclassified nonexempt employees to avoid having to pay overtime.

It is advisable to identify now any impact that the regulations may have on certain positions and the potential impact of future budgeting or hiring. School district officials should also review any handbook provisions, policies, collective bargaining agreement provisions, and contracts that may be impacted by these regulatory changes, and they should also consider any relevant state law and its impact.

Conclusion

The changes to the regulations are important. However, the Department did not impact the primary duty tests for these exemptions, which would have made things even more challenging for district officials. Considering the current political climate, which includes a U.S. Presidential election in November, there could be legal challenges to these regulatory changes. However, for now, the changes will be the law in December 2016, so school districts must take action and decide how to address these changes and seek legal counsel as necessary. 📌

Inquiries about the article can be made to Doug at (608) 283-7529 (dwitte@boardmanclark.com) or Rick at (608) 286-7233 (rverstegen@boardmanclark.com). Reprinted with the permission of Boardman & Clark LLP.



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- being 18 years old and having 10 Secret Service agents as constant companions
- his father's pardon of President Nixon to help put an end to the infamous Watergate affair
- two assassination attempts on his father's life
- his mother's bouts with alcoholism and breast cancer

Steve is also an accomplished actor, having appeared in more than 30 feature films — including *Black Hawk Down*, *Heat*, and *When Harry Met Sally*.



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Bending the Trend Line – Reducing Health Care Costs

Partnership between school district and health insurer saves \$3.3 million



By Thomas R. Owens, PhD, SFO, Director of Business Services, Stevens Point Area School District

As school districts continue to grapple with tight budgets, one of the big line items they focus on to better manage money is the cost of providing health insurance coverage. The key challenge is assuring adequate access to quality medical care for employees within available funds. Each school district must carefully weigh how well its health insurance provider balances cost with the health care needs of employees and their dependents.

When our school district faced a 10 percent health insurance premium hike in 2013, we looked for opportunities to make a long-term impact on escalating health care costs. The school district and its insurance carrier developed and implemented a partnership in order to engage and raise active employee wellness, approach health insurance costs differently, and develop an ongoing systemic and systematic plan for both. The original Proposal ran for three years from 2013-14 to 2015-16. Goals were established to positively impact active employee health and wellness by their direct involvement, and the Proposal built a stronger partnership that resulted in reducing health care costs over time without eliminating services or quality. Both organizations developed incentives to help active employees improve health and wellness.

Our goal wasn't simply to switch health insurance plans or companies or transfer costs to our employees. Rather, we sought a new way to reduce health care costs while assuring quality coverage for our plan members.

The school district consists of nine

elementary schools, two junior high schools, one senior high school, as well as several specialized schools and a 4K program, and it covers employees, spouses and retirees under its health insurance plan.

New partnership emphasizes health and wellness

The district administrator and I approached the not-for-profit health insurance company to form a unique partnership that could “bend the health care cost trend line.” Serving businesses and school districts for more than 40 years, our health insurance plan partner knew that a focus on health and wellness would be the key to reducing costs.

The Director of Business Sales at our insurance plan partner, stated, “Healthier employees help bring down health plan costs. Therefore, we wanted to encourage health plan members to participate in wellness programs, and we provided the resources and tools to facilitate this initiative.”

As part of the approach, the district and its insurance plan partner used incentives for motivating employees to make lifestyle changes. In particular, the school offered to waive \$600 from the employee's health insurance premium costs if he or she participated in a confidential personal health assessment program.

Our insurance plan partner added, “These assessments are important because when we identify individuals with health risk factors, we can help ensure they receive the resources and support they need to effectively manage their health. With our

assistance, employees established individual health improvement targets.”

Shopping for cost-effective medical services

In year two of the partnership, we added a unique feature to our health plan – a price shopping tool called Smart Cost Advisor. Designed to educate employees about health care costs, this price shopping service allows employees to compare costs for medical procedures among different medical providers. We paired this with 10 “shoppable” medical services, such as a colonoscopy and MRI, to encourage employees or family members to compare provider costs and choose a more cost-effective provider to perform the service.

The objective of introducing Smart Cost Advisor and the 10 shoppable services was to make employees aware of the variance in medical costs between providers, with the expectation that, over time, employees would gain comfort in checking prices and make cost-effective choices.

Premiums decrease

With over a ninety percent participation rate in our wellness program, we've enjoyed great success in getting employees to embrace the district's new health and wellness model. As a result, we saw a manageable health insurance premium increase of only 2.5* percent in our first year, in lieu of the projected 10 percent increase, for a savings of \$1 million.

In the second year of our partnership, we enjoyed an even more dramatic savings from working with our insurance plan partner. Instead of an

anticipated 16 percent increase in health insurance premiums, we were able to reduce the overall increase to just 5.5* percent, saving \$2.3 million on our health plan.

By abandoning the conventional thinking and refuting the traditional model of addressing rising health care costs, the school district did bend the health care cost trend line while simultaneously improving employee health. The health insurance partnership we developed allowed us to better manage our health insurance premiums, saving millions of dollars. *These numbers do not include ACA fees which amounted to 1 percent for 2013-14 and 2 percent for 2014-15.

Project Innovation

The creativity encompassing how to deliver various aspects of a school district health care plan is what made this partnership approach so innovative. Both parties, the school district and the insurance provider, had to be fully committed to the partnership and to the goal of bending the health care cost trend line downward. It seemed the cost trend line was annually rising and that the usual approaches of cost shifting to staff or plan degradation created the result, while initial cost was reduced the slope of the trend line remained unimpeded.

This innovative approach combined wellness in a way that involved nearly all employees and provided them with immediate reward for their participation. In the time that passed, the creative ideas integral to the plan brought costs down, reduced premiums, and seemed to foster a healthier staff.

Project Replicable by Any School District

Any school district that can find a willing health insurance provider with whom to partner can replicate what we have done. Our partner could certainly serve school districts in the areas for which they are licensed. They could also share their expertise with other providers in the nation to help answer those provider-type questions needing resolution prior to establishing partnerships with other school districts.

Measurable Examples of Improvements and Savings

Measurable examples abound in this partnership. Staff wellness participation in the 90+ percent range itself is stellar. It is my understanding that this is the highest rate of participation in Wisconsin experienced by our insurance plan partner. Prior to establishing this creative approach, the district's wellness participation was in the low to mid-teens.

Loss ratios on claims vs premiums have dropped from over 100% to under 89%. Our health provider has shown us data supporting savings of over \$3.3 million during the first three years of operation. In early April, I received our renewal for the 2016-17 school year. Our Health Assessments and Biometric Screenings participation rate, part of the wellness component, was 92.6% and our loss ratio was less than 89%. Based on the staff's performance under the plan our premium was to go down 0.5%. However, because the Affordable Care Act (ACA) forces a 1.3% fee increase on us, our net increase next year is 0.8%. The formula increase of the renewal without the partnership would have been 4.2%.

We are succeeding at bending the health care cost trend line. 📈

If you have questions about this article, contact Tom at towens@pointsschools.net.

Departments Issue Joint Guidance on Transgender Students

Continued from page 33

correspond to their biological sex.

While these cases work their way through the courts, school districts should carefully review the joint guidance issued by the Department of Education and Department of Justice, as well as their existing facilities. They should also review their current school board policies to determine how they apply to transgender and gender nonconforming students. Finally, school districts should also consider developing guidelines or procedures that will govern issues relating to transgender and gender nonconforming students, such as access to locker rooms, restrooms, and the impact of any existing Section 504 or IDEA status. 📌

If you have questions about this legal update or would like assistance reviewing or drafting policies or procedures, please contact Gary Ruesch at gruesch@buelowvetter.com or (262) 364-0263 or Alana Leffler at aleffler@buelowvetter.com or (262) 364-0267.



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dvanspankeren@CESA6.org, (920) 236-0518

Tools for New Business Staff — and Teams!



YEAR of SUCCESS

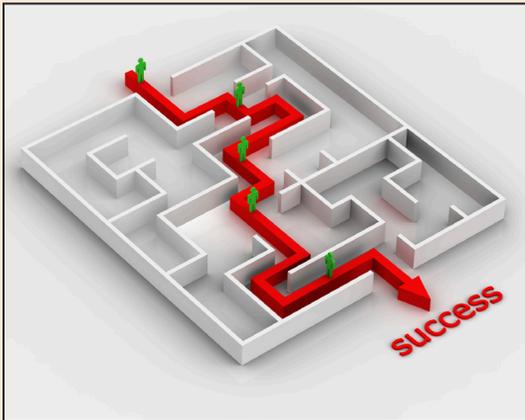
Starts this August

WASBO's Year of Success is a **six-conference package** designed to offer new business managers, bookkeepers, and district administrators with the **timely knowledge** they need to **succeed** in a typical school business office year.

The WASBO Year of Success Program offers a substantial savings — approximately 25% — over individual conference registrations. The program includes full registration to six WASBO conferences which contain material specific to new business office staff:

- New School Administrators & Support Staff Conference • Aug 17-18, 2016
- Fall Conference • Oct 6-7, 2016
- School Business Management: Winter at a Glance • Dec 6, 2016
- Wisconsin Federal Funding Conference • Feb 15-16, 2017
- Accounting Conference • March 15-16, 2017
- Spring Conference • May 11-12, 2017

WASBO.com/Success



NEW School Administrators & Support Staff Conference

Coming to Madison August 17-18

If you are a **new business official, superintendent or business staff person** in your district, the WASBO New School Administrators (business manager or superintendent) & Support Staff Conference on August 17-18 in Madison should be on your calendar.

Solidify your knowledge and your team. While this conference is for new school district administrators, school business officials, and business support staff who are responsible for tasks related to school finances, veteran personnel can benefit as well. Viterbo University graduate credit is available.

Register NOW at WASBO.com/NewAdmin



Mentorship

Annual Training for Mentors & Protégés

WASBO offers a Mentorship Program which fulfills the **PI34** requirement for **formal mentoring** for licensed (08) school business officials. Mentorship is open to all WASBO members.

The annual Mentorship Program Orientation will take place on Aug. 16 in Madison. Explore the benefits of mentorship and the best practices for establishing a professional mentoring relationship.

Sign up for as a Protégé or Mentor at WASBO.com/NewAdmin.

WASBO.com/Mentorship

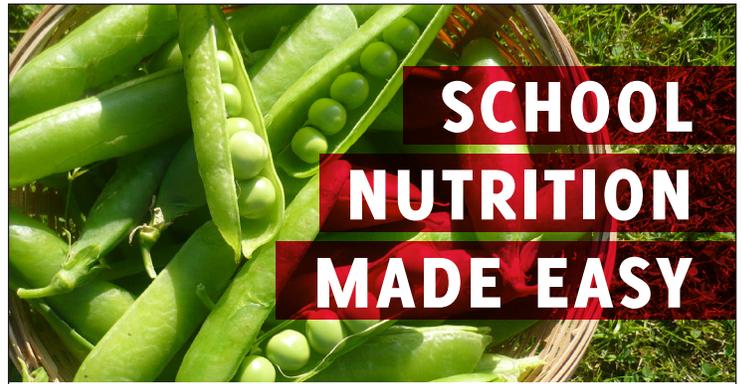


School districts can get more control of expenses with a self-funded group health plan from WPS Health Insurance.

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MAKING THE GRADE

DODGEVILLE SCHOOL DISTRICT

"We were very fortunate to pass a large referendum in the Dodgeville School District. **With the help of Miron's pre-referendum services, we were able to engage our communities in a conversation lasting several months.** These professional efforts helped our community understand the needs we were facing and helped us learn more about the many perspectives and facets of our community."

Jeff Jacobson
District Administrator, Dodgeville School District



Building Excellence

What New EPA Ozone Limits and ASHRAE 62.1 Mean for Your Facility

By Ben Klawitter, Certified Air filter Specialist, Filtration Systems Inc.



Recently, the EPA lowered the admissible limits of ground-level ozone exposure as part of the National Ambient Air Quality Standards (NAAQS). The old standard was 0.075ppm over 8 hours, this was lowered to 0.070ppm over 8-hours. This may seem like a small, almost insignificant change—after all it is only 5 parts per BILLION lower. However, in an article written by MinnPost last year the Communications Director for the American Lung Association Bob Moffit said that Minnesota hovers around 0.067ppm ozone concentration already.

What this means is on those hot summer days when ground-level ozone production is accelerated it wouldn't take much for the outside air pulled into a building to rise above the 0.070ppm threshold. Another consideration is when we then recirculate that air per ASHRAE 62.1 standards the ozone levels in a building increases dramatically. A study done by Drexel University in 19 buildings spread throughout the US showed that when using ventilation

rates at levels of ASHRAE 62.1 ozone within the building can more than double the ambient concentration.

Couple these facts with the increased advertising of air quality monitoring by the government you have building occupants/tenants that are more aware and concerned about air quality. Inexpensive devices like the Atomotube are now available and interface with smartphones, allowing people to check air quality in real-time. This creates an interesting position for the facility engineers that maintain HVAC systems and the air filters that go into these systems. An understanding of molecular filtration will be growing in importance as more of the occupants in your buildings will be requesting removal of molecular pollutants like Ozone, Nitrogen Dioxide, Sulfur Dioxide, and other molecular pollutants.

Traditional air filters do nothing to address these molecular pollutants, even if you are using high-efficiency filters (MERV-13 or higher). Unfortunately even most "charcoal"

and carbon filters that claim to remove these pollutants do so poorly and won't accomplish noticeable increased IAQ—especially if you have occupants using air quality monitoring devices.

To make things even more complicated, the Indoor Environment Research Group tested five leading portable/room air cleaners and found that three of the five generated more pollutants than they removed from the air. This is all because the testing that charcoal/carbon filters and air cleaners undergo before being offered for sale do not at all replicate real world environments. As a clean air advocate, I find this to be incredibly frustrating as I see organizations and individuals spending a lot of money on things that do not work and create no tangible increase in IAQ; and in some cases are making IAQ worse on the lies of faulty technology and poor testing that give these technologies cover from scrutiny. 🐼

If you have questions about this article, contact Ben at ben@fsmn.com.

What to do with Outdated, Unused Pesticides

Continued from page 18

rooms or cabinets neglected when an in-house structural or grounds pest management program becomes outsourced.

Management

Three types of pesticide wastes may require proper disposal: unused pesticides in original containers, leftover pesticide mixtures in application equipment or other containers and empty pesticide containers. The first step is to read the label if still attached to the container and readable for disposal instructions.

Keep in mind that state and local laws may be more restrictive than the label, and old labels may not represent the latest science in terms of safe disposal. You should never pour pesticides down the drain, on the ground or in a storm sewer.

"Sometimes the original product's container has rusted, been torn or otherwise unsound, spilling contents in the area it is stored," says Shour. You will need to contact your state clean sweep coordinator to learn how to safely dispose of these containers. See more at epa.gov/pesticides.

When transporting pesticides, keep an

emergency spill kit on hand including gloves, cat litter or other absorbent material, goggles and coveralls. Be sure to inspect containers thoroughly before loading them into your vehicle. It is best to use a vehicle that has a separate area to store the chemicals, such as a pickup truck.

When rinsing out empty pesticide containers, always wear protective clothing and use the triple-rinsing process. Puncture holes in the containers to make sure they will not be used again. Contact your state environmental agency to find out if the pesticide container can be recycled. 🐼

MAKE THE MOST OF YOUR WASBO MEMBERSHIP: GET INVOLVED!



Dear WASBO Members:
One of the best decisions I made when I started working for my school district was joining and becoming active in WASBO. Being a WASBO member has many benefits, but becoming active as a committee member, presenter and board member has increased those benefits many times over for me and they can for you too.

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

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

Through service, you will make many great connections with colleagues from across the state and it will enhance your growth as a professional. By sharing your expertise, you will be serving your peers and helping them become better professionals.

I know that everyone is busy and is pulled in many different directions, so the thought of volunteering even more of your time to WASBO may seem like an unnecessary time commitment. I can guarantee you that it will be time well spent, and that you will get more out of the experience than you could have ever imagined.

*Patrick Finnemore
WASBO President, 2016-17*

Available Committees:

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

COMMITTEE PARTICIPATION

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

CONFERENCE PRESENTATIONS

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

Selection criteria includes, but is not limited to:

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

PROFESSIONAL ARTICLES

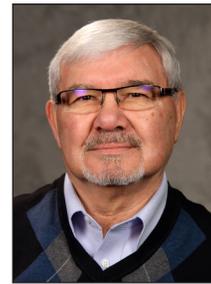
We also look for members to submit articles for our newsletter, Taking Care of Business. Learn more at WASBO.com/newsletter.

Go to WASBO.com or call 608.249.8588 to maximize your membership through participation!

Strengths Based Leadership - Great Leaders, Teams and Why People Follow

Authored by Tom Rath and Barry Conchie

Review by Orvin R. Clark, EdD, RSBA



Editor's note: Orv Clark passed away May 16 after having been diagnosed with pulmonary fibrosis approximately a year ago. WASBO has appreciated his many contributions to the association. His obituary is on the following page, and his final book review is below.

Strengths Based Leadership- Great Leaders, Teams and Why People Follow by the authors Tom Rath and Barry Conchie. Tom Rath has written two #1 international best sellers: First, *How Full is Your Bucket?* Second, *StrengthsFinder 2.0*. Mr. Rath has been with Gallup for 14 years and currently leads Gallup's workplace research and leadership consulting worldwide. Barry Conchie, renowned Leadership Consultant, an expert in executive assessment, team diagnostics, and succession planning joined Gallup in 2002.

Donald O. Clifton, PhD (1924-2003) was honored in 2002 by American Psychological Association Presidential Commendation as the Father of Strength Based Psychology. Dr. Clifton was the creator of the Clifton StrengthFinder.

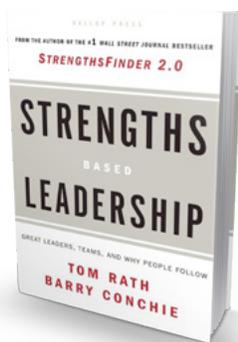
Strength Based Leadership is 256 pages in length, divided into three parts with an additional section on resources. Part One: Investing in Your Strengths, Part Two: Maximizing Your Team, Part Three: Understanding Why People Follow and Additional Resources: Taking StrengthFinder, Leading with Your Strengths - Guide to the 34 Themes and the Research.

Introduction: "The well-rounded leadership approach inadvertently breeds mediocrity" – WOW!

Why?

Gallup Research – Three Key findings

1. The most effective leaders are always investing in strengths.
2. The most effective leaders surround themselves with the right people and then maximize their team.
3. The most effective leaders understand their followers' needs.



Investing In Your Strengths

- What great leaders have in common is that each truly knows his or her strengths-and can call on the right strength at the right time.
 - This explains why there is no definitive list of characteristics that describes all leaders.
- If you focus on peoples' weaknesses, they lose confidence.
 - Studies revealed that people experience significant gain in self-confidence after learning more about their strengths.
 - Awareness of their strengths build self-confidence at a young age may reap a cumulative advantage that continues to grow over a lifetime.
- If each person capitalizes on this "cumulative advantage", it is likely to create more rapid individual and organizational growth.

Maximizing Your Team

- What makes a great leadership team?
- The Four Domains of Leadership Strength
 1. Executing
 2. Influencing
 3. Relationship Building
 4. Strategic Thinking

Examples of Different Styles of Leadership

Wendy Kopp, Founder and CEO, Teach For America

- Top 5 Strengths (Executing Themes)
 1. Achiever
 2. Competition
 3. Responsibility
 4. Relator
 5. Strategic

Simon Cooper, President, The Ritz-Carlton

- Top 5 Strengths (Influencing Themes)
 1. Maximizer
 2. Woo
 3. Arranger
 4. Activator
 5. Significance

Mervyn Davies, Chairman, Standard Chartered Bank

- Top 5 Strengths (Relationship Building Theme)
 1. Achiever
 2. Futuristic
 3. Positivity
 4. Relator
 5. Learner

Brad Anderson, Chief Executive Officer, Best Buy

- Top 5 Strengths (Strategic Thinking Theme)
 1. Context
 2. Ideation

3. Input
4. Learner
5. Connectedness

Collective Talent of a Team

- Conflict doesn't destroy strong teams because their focus is on results.
- Strong teams prioritize what's best for the organization and then move forward.
- Members of strong teams are as committed to their personal lives as they are to their work.
- Strong teams embrace diversity to balance the strengths in different leadership dimensions.
- Strong teams are magnets for talent.

Understanding Why People Follow

- If you want to lead, it is critical to know what the people around you need and expect from you.
- Gallup conducted a formal study in 2005-2008.
- Many of the "usual suspects" like purpose, wisdom, humor and humility were nowhere near the top of the list.
- Followers have a very clear picture of what they want and need from the most influential leaders:
 - Trust
 - Compassion
 - Stability
 - Hope

Additional Resources

- Use Clifton StrengthFinder as an assessment tool.
- This book has a section on the 34 Strength Finder Themes.
- Each Theme describes how to: Build Trust, Show Compassion, Provide Stability and Create Hope.

If you want to know your leadership strengths, buy the book *Strengths Based Leadership*, read about each of the four domains and 34 themes, and take the Clifton Strengthfinder assessment.

You may surprise yourself! 🧠

Orvin R. Clark, Past WASBO President, 1940-2016

Orvin Randolph Clark, EdD, born Dec. 26, 1940 to Carver Clark and Alice Rosen in Ashland, Wis. passed away May 16, 2016 at his residence in Bayfield, Wis.

Orv's career consisted of 49 years in education as a school business manager, assistant superintendent (business and administration in Wisconsin and Illinois), a professor of educational leadership, and educational administration. He had a Bachelors from University of Wisconsin-Superior, Masters from University of Wisconsin-Milwaukee, and a Doctorate from Northern Illinois University. He was the past president of the Milwaukee Area Association of School Business Officials and the Wisconsin Association of School Business Officials. His scholarly activities included numerous articles, presentations on School Business Affairs, and published approximately 55 book reviews on motivation and leadership. He served as an international Association of School Business Officials Meritorious Budget Award Reviewer and Committee Chair.

He was inducted into the Superior Hall of Fame as a member of the 1958 Superior Central High School

State Championship football team and as an individual for amateur and collegiate boxer 132-135 lbs. He was a three time Hibbing Regional Champion (1958, 1959 & 1961), a 1961 Upper Midwest Champion and Tournament of Contenders Champion, and Best Contender and Outstanding Freshman boxer in 1960 at the University of Wisconsin.

Orv was a strong advocate of his alma mater Superior Central High School. He was an Executive Director of the Class of 1959 Educational Foundation, Co-Chair of the All School Class Reunion 2004, Chair of four Class of 1959 Reunions, and Chair of three Phi Sigma Epsilon Reunions.

He served on many committees and councils including Chair of the Graduate Council, Faculty Senate and Institutional Review Board, and a number of Search and Screen Personnel Committees. He also served as a member of the UW-Superior Foundation for nine years and member of the UW-Superior Hall of Fame committee for seven years. Upon his retirement from UW-Superior, he was awarded the status of Professor Emeritus.

Orv was a very dedicated father and grandfather. He is survived by his daughter Christine (David) Kruk of Woodstock, Ill.; son Randy (Becky) Clark of Stafford, Virginia; grandchildren, Devin (Kerry Boshers) Dickey, Ali Clark, Megan Clark, Tommy Kruk, and Taylor Clark; brother James (Nancy) Clark; sister-in-law Cheryl Clark; special friend, Patricia Anderson; many nieces, nephews, grandnieces, and grandnephews.

He was preceded in death by his identical twin, Orville Carver Clark who passed in 1999; siblings Marge Majetich and Carla Williams; parents Carver Randolph Clark and Alice Marie Rosen Clark.

The celebration of his life will be held Wednesday, July 6, at 4 PM at the Civic Center in Billings Park, Superior, WI.

Memorial contributions may be made to the UW-Superior Phi Sigma Epsilon Scholarship Fund, UW-Superior Central High School Scholarship.

The Roberts Funeral Home in Ashland is assisting the family with arrangements. A guestbook and online condolences are available at bratleyfamilyfuneralhomes.com. 🧠

Welcome New Members • April - May 2016

District Professional Members

- **Sherry Billings**, Accounting Specialist, Waupun Area School District
 - **Edward Blake**, Supervisor of Custodial Operations, Arrowhead Union High School District
 - **Randy Brinkmann**, CFO, St. Anthony School - Milwaukee
 - **Crystal Brown**, Administrative Assistant to Business Manager, Boscobel Area Schools
 - **Kristoffer Brown**, Director of Technology, Platteville School District
 - **Paul Chase**, School District of Whitefish Bay
 - **Diane Contrucci**, Purchasing, School District of Elmbrook
 - **Carol Cota**, Accountant, School District of Cudahy
 - **Diane Dannenberg**, Business Manager Assistant, Mauston School District
 - **Aaron Engel**, District Administrator, Gale-Etrick-Trempeleau School District
 - **John Kiefer**, Controller, CESA #6
 - **Mark Logan**, Business Manager, Southern Door County School District
 - **David Mand**, Building & Grounds Director, School District of North Fond du Lac
 - **Dale Peterson**, Custodian, Tomorrow River School District
 - **Jennifer Post**, Business Manager, Rosendale-Brandon School District
 - **Brenda Rowland**, Business Office Manager, Shorewood School District
 - **Michael Thomley**, District Administrator, School District of Prairie Farm
 - **Paul Vogel**, Building Maintenance 2, Jefferson County
- **Bradley Lehman**, Sales & Marketing Administrator, Fearings Audio-Visual-Security
 - **Stavroula Marcell**, Marketing & Creative Director, REALiving
 - **Cindy Mikolajczyk**, RAS
 - **Jeff Miller**, General Manager, JMB & Associates, LLC
 - **Alex Petrovic**, District Manager, Edwards - EST
 - **Kyle Redjinski**, Professional Supply, Inc.
 - **Debby Richardson**, Educator Alliance Specialist, Horace Mann Companies (The)
 - **Dan Schaefer**, Account Executive, Johnson Controls, Inc.
 - **Sheila Stuyvenberg**, SVP Commercial Products/Treasury Management, Hometown Bank
 - **Marla Tangen**, Foster, Jacobs & Johnson, Inc.
 - **Mary Ann Thaman**, Underwriting Manager, Liberty Mutual Insurance
 - **Jill Urdahl**, President/Consulting Actuary, Hildi Inc.
 - **Chad Van Handel**, Vice President, First Business Bank - Northeast
 - **Amy Vracar**, Partnerships Manager, TeacherMatch
 - **Craig Wallace**, Regional Sales Manager, Tornado
 - **John Wicker**, RSD, Employee Benefits Corporation
 - **Tammy Wilkinson**, Business Development, SERVPRO of Madison
 - **Dale Zank**, Business Development, MEP Associates, LLC

Service Affiliate Members

- **Jake Andrist**, Inside Sales Director, The Retrofit Companies
- **Roxanne Carlson**, Milliken
- **Jody Dubuque**, Health Solutions Sales Executive, Humana
- **David Furmanski**, Director of Business Development, CBIZ Valuation Group, LLC
- **Brett Geboy**, North Central Insulation
- **Chad Grindle**, Section Manager, Farnsworth Group, Inc.
- **Joseph Hockers**, Relationship Manager-Government Banking Group, Associated Bank
- **Todd Hoffmaster**, CEO, AkitaBox
- **Erika Kamrowski**, Marketing Manager, The Insurance Center, Inc.
- **Kate Karre**, HR Administrator, Johnson Block & Company, Inc.
- **Mark Kirbach**, K-Purchase Specialist, K-Purchase
- **Lucas Kramer**, Quality Roofing Inc

Student Members

- **Anthony Klein**

Member Moves and Retirements

On the Move

- **Pam Jaenke**, from Kimberly Area SD, to Supervisor of Accounting, Neenah Joint SD
- **Jerold Zamzow**, from Maintenance & Operations Supervisor, Neenah Joint SD, to Director of Facilities Management, Winneconne Community SD
- **Janelle Marotz**, from Assistant Superintendent of Business Services, SD of Beloit, to Business Manager, Denmark SD
- **Jill Bodwin**, from Business Manager, Denmark SD, to Pulaski Community SD

Retirements

- **Art Beaulieu**, Director of Business Services, Platteville Schools
- **Pam Kercheval**, Pulaski Community School District
- **Roger Rozek**, Director of Facility Management and Safety Coordinator, Winneconne SD



Stay Connected



Mentorship Program Orientation

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

Interim Assignments

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

Network by Participating on a WASBO Committee

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

Submit a Newsletter Article

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

Keep us Posted!

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

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

Renew your membership for 2016-17!
Log in at WASBO.com,
check your profile and
update your communication preferences!



WASBO Foundation Custodial & Maintenance Conferences

Remaining dates for Summer 2016:

July 13, 2016

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

July 27, 2016

- Menasha High School, Menasha (Module 4 offered)

Conference Tracks

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

Keynote speakers:

Ted Hayes, M3 Insurance (DC Everest, Menasha)
and **Jessica Schroeder**, Community Insurance Corp. (Sparta)

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budget and send your
entire team.

Why Attend?

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

Exhibit and Sponsorship Opportunities

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

Register today at WASBO.com/custodial • 608.249.8588



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MADISON WI
PERMIT NO 801

Upcoming Events - WASBO.com

Professional Development

Custodial & Maintenance Conferences
July 13 - Sparta High School, Sparta and
DC Everest High School, Weston
July 27 - Menasha High School, Menasha
Mentorship Program Orientation
Aug 16 - Holiday Inn Madison at the
American Center, Madison
New School Administrators & Support Staff
Conference
Aug 17-18 - Holiday Inn Madison at the
American Center, Madison
Fall Conference (Modules 6 & 7)
Oct 6-7 - The Osthoff Resort, Elkhart Lake
Midwest Facility Masters (Module 1)
Nov 7-8 - Kalahari, WI Dells
Winter at a Glance
Dec 6 - Madison Marriott West, Middleton
SFO Study Group
Dec 6 - Madison Marriott West, Middleton
WASBO-WASPA School Personnel Academy
Dec 7-8 - Madison Marriott West,
Middleton

Scholarship Fundraisers

Fall Golf Fundraiser
Oct 5 - Autumn Ridge, Elkhart Lake
Fall Bike Fundraiser
Oct 5 - Old Plank Road Trail
Upcoming Facilities Certification Modules
Module 1 - Custodial Conference, July
13, Sparta; Midwest Facility Masters
Conference, Nov 7-8
Module 6 - Custodial Conference, July 13, DC
Everest
Module 4 - Custodial Conference, July 27,
Menasha
Modules 6 & 7 - Fall Conference, Oct 6-7,
Elkhart Lake
Buildings & Grounds Group Meetings
Coulee Region - First Thursdays, 10 AM.
Milwaukee Metropolitan- Third Thursdays.

Certified School Risk Managers (CSRSM)

Courses (Viterbo Credit) - all courses in
Madison unless otherwise indicated
Fundamentals of Risk Management - Sept 20
Handling School Risks - Sept 21
Measuring School Risks - Oct 19
Funding School Risks - Oct 20
Administering School Risks - Nov 9
Workers Compensation (update credit) - Dec
6, Madison Marriott West, Middleton
Committee Meetings
Midwest Facility Masters Conference
Aug 4, 10 AM, conference call
Safety & Risk Management
All meetings at 11:45 AM; WASBO Offices
in Madison. Aug 9; Oct 11; Jan 10, 2017;
April 7, 2017; Aug 1, 2017
School Facilities
All meetings at 9:30 AM, WASBO Offices
in Madison. Aug 9; Oct 11; Jan 10, 2017;
April 7, 2017; Aug 1, 2017
WASBO-WASPA School Personnel
June 27, 11 AM, WASBO Offices

Spring Conference

July 8, 9 AM, La Crosse
Transportation
July 28, 9 AM, WASBO Offices, Madison
Regionals
Check WASBO.com for details.
Bay Area/Northeast - Meetings start at 11
AM. Sept 16; Dec 9; Feb 10, 2017; April 7,
2017; May 19, 2017
Madison Area - Meetings start at 9 AM at
Stoughton Area School District. TBD
Northwest - Meetings start at 10 AM at
Lehman's Supper Club in Rice Lake
Southeast - Meetings at 1 PM. Sept 9; Nov
11; Dec 9; Jan 13, 2017; Feb 10, 2017;
April 7, 2017
Southwest - Meetings start at 12:30 PM at
CESA 3. TBD
West Central - Meetings from 10 AM - 1 PM
at Sparta Area SD Admin & Education
Center. TBD
WI Valley - Coffee at 9 AM; Meeting at 9:30
AM. Aug 19, Merrill