



Taking Care of Business

Wisconsin Association of School Business Officials

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Nominations for WASBO Awards Accepted Through Jan. 11

Nominate a peer for one of the WASBO Professional Recognition Awards. The nomination deadline is Jan. 11. You can find more information at WASBO.com/awards.

Four awards will be presented at the WASBO Spring Conference May 11-12 in La Crosse: the Wallace E. Zastrow Award, School Facilities Manager of the Year, Business Services Award, and Safety, Security & Wellness Award.

Two others will be presented at the WASBO Fall Conference Oct. 5-6 in Elkhart Lake: the Tina Hafeman Friend of WASBO Award and the Shining Star Award.

The final two awards are presented at the State Education Convention in Milwaukee: School Business Manager of the Year and New School Business Manager of the Year. The recipients selected earlier this year are being recognized at the upcoming convention next month. Jill Bodwin, Pulaski

Community School District, will receive the School Business Manager of the Year Award at the General Session on Wednesday, Jan. 18. She and the New Business Manager of the Year, Ben Irwin of the Cedarburg School District, will speak during the WASBO Luncheon on Thursday, Jan. 19.

To make a nomination for 2017-18, visit WASBO.com/awards — links are available to each nomination form. Return your form with supporting documentation to the WASBO office, 4797 Hayes Road, Suite 101, Madison, WI 53704. You may also email scanned documents to Kristin Hauser at kristin.hauser@wasbo.com.

WASBO is currently accepting applications for high school student scholarships as well as the Bambi Statz Academic Scholarship for a graduate student working towards certification in school business management. Applications are due Feb. 1. See WASBO.com/scholarships and WASBO.com/statz for details. 🇺🇸

2017-18 WASBO Professional Recognition Program

Nominations accepted through January 11, 2017
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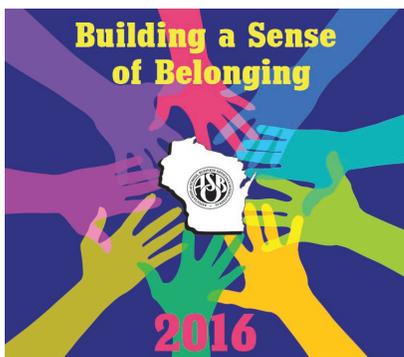
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Editor: Woody Wiedenhoef

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President's Message

Mentorship and Other Thoughts

By Patrick Finnemore, Director of Facilities, Kenosha School District; President, WASBO Board of Directors



Hopefully by now, every WASBO member is aware of the mentorship program in our organization coordinated by Mary Jo Filbrandt. The program has fostered a number of successful mentoring relationships between mentors and protégés. At the October Facilities committee meeting, co-chairs Joe Ledvina from the School District of La Crosse and Dave Hoh from the Oshkosh Area School District, plan on kicking off the Facilities Management Conference next March with a breakout session on mentoring geared toward the buildings and grounds professionals.

It is my opinion that anyone new to being a school district business official can benefit from having a mentor no matter what experiences they may already have. So my first recommendation would be to not let your reservations for seeking help get in the way of gaining insight from a mentor that could help you and the school district that you work for. I have met some people in my time being involved in WASBO that limit their WASBO experience to just attending conferences and sitting in sessions. I think this is typically a result of the person being uncomfortable with opening up to others in general, or not really knowing the best way to get more involved in the organization. I believe that this is a fairly common perspective for buildings and grounds professionals. The mentorship program is an ideal fit for this group of WASBO members.

I was 36 when I joined WASBO a little over 16 years ago. I brought with me some nice credentials and experiences; however, I had little knowledge in the way of school district operations experience. I was lucky in that the person who hired me in Kenosha, Nick Alioto had a variety of school district experiences including serving as a business

manager in some smaller districts where he had to wear the buildings and grounds hat amongst many others. Nick was able to provide me with some very good direction and feedback to get me quickly acclimated to school district operations. He also urged me to get actively involved in WASBO, and through that involvement I met people like Tom Beck from Neenah, Gary Rosploch from Muskego-Norway, Charlie Kramer from Eau Claire, Gary Siegman from Whitefish Bay, and many others who served as informal mentors to me during my first years on the job. It was great having some people to call or email when I was looking for some information or examples, or just someone to talk to.

Working for a school district in Southeastern Wisconsin, I have been able to participate periodically in the Milwaukee Metro Facilities Group. This group of school district facilities professionals has done a great job of providing new colleagues many of the types of things that a mentorship program offers. I know that there are some groups in other parts of the State that do a nice job of this as well. I also know that there are not groups like this everywhere in the State.

Before I leave this subject, I want to say a few words on the benefits of being a mentor. I have had the good fortune of mentoring a number of people in my career, and in all honesty, I think the mentor gets almost as much out of the relationship as the protégé. You are exposed to some new ideas and maybe a different perspective on how to address issues. You also get a chance to reflect on things as you discuss topics, and that may trigger some changes that are long overdue in your own district and department.

It is also a great way to meet new people

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This Holiday - Give Yourself a Present

By Woody Wiedenhoef, Executive Director, WASBO

When I was working as a school Business Manager people would periodically ask when there was a period of "down time" for the position. I usually thought the time for reflection and planning was between Thanksgiving and New Year's. Today, I am not so sure there is a "down time."

This really came home to me this year. The WASBO Board members each contribute two articles a year to the *Taking Care of Business* newsletter. The articles usually are a sharing of their professional expertise and provide "something to consider" in an area of professional development. Three articles this year, one in August by Lori Ames and two this December by Ken Mischler and Greg Gaarder hit on a unique theme. I think of the new theme as a professional/personal balance for one's physical and mental health. Considering the 24/7 life we lead; their advice may not be directly pointed at professional development, but is extremely important in doing the expert professional work we expect of ourselves.

Maybe the answer is that we no longer do our reflection at just a specific time of year because there is no "down"

time. The answer may be to schedule some reflection time every week or day in this 24/7 world. Over the years there have been many mantras set out to take care of stressful lives. "Just work harder" people implored us fifty years ago. Then forty years ago, we needed to "work smarter, not just harder" with PERT charts. Thirty years ago, we were told to add the soft skill of "people relationships" to previous mantras. Twenty years ago, we became "process" driven. The 21st century is supposedly "data" driven. Today we are to put all these mantras to work with "mindfulness". There is nothing wrong with any of these mantras. But I do believe our three WASBO Board members are reminding us that without "life balance" being a function of all these mantras, we can lack sustainability both physically and mentally in our professional and personal lives.

There are a great many resources to help us think about and act on personal sustainability and life balance. I personally go back to some old simple books that are easy reads, but provide some "food for thought." I add this to the thoughts by our WASBO Board members. The books are

"Margin" and "Taking Care of Me." You may want to look at them.

Everyone's life is unique and there are no magic bullets. The WASBO Board members' articles and these books may or may not be what helps you achieve the "balance" you are looking for. But do actively find and use what is helpful for you. This may be about soft skills, but is really needed to improve our expectations for our "hard skills". In addition, I won't stop reflecting during the Holiday season. But, I do believe that acting on personal and professional sustainability needs to also be a regular 24/7 activity for the activity to be meaningful and effective.

With all this said, the WASBO staff extends their best wishes to all WASBO members to have a meaningful and happy holidays this December, remember to give yourself a present. Please have an excellent Holiday Season with family and friends, hopefully you can get some time to reflect and plan in a proactive thoughtful way. Have a sustainable and balanced 2017. 🍷



Holiday  Greetings

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How the Business Office Can Support New Teachers

By Nathan Jaeger, Business Manager, Whitewater Unified School District; WASBO Board of Directors



Supporting and developing new educators is one of the most important responsibilities of administrators. School districts typically have a formal program in place designed to support their new teachers. The program likely involves mentorship and a lot of practical supports related to licensure, evaluation, classroom discipline, curriculum, and other professional development. With the primary focus being on helping teachers be successful in the classroom and improving student achievement, the role of the business office is often minimized or overlooked. However, there are many ways the business office can play a role in welcoming new staff to the district and supporting them as they grow. This can range from helping them understand and complete routine paperwork to more impactful measures like establishing policies, practices, and benefits that will support and assist in retaining teachers beyond their first couple of years.

Below are several short and long term ways the business office can help those new teachers feel welcomed, be successful, and hopefully choose to plant their roots in your district.

First Impression

Make it a point to attend a new teacher meeting to introduce yourself and your business office team. Explain the duties and responsibilities of your office and explain who the point of contact would be for questions related to payroll, benefits, time-off reporting, purchasing or other services. Let them know you are there to support them in doing their job successfully. If it's feasible, meet with each new hire or

at least drop in when they are meeting with the payroll department.

Make Information Available

Having a comprehensive business services website can be very helpful for staff; particularly new hires. It provides a central location for internal and external information related to your department. Consider posting general business office forms and step-by-step tutorials for routine procedures.

The Benefit of Benefits

It's not uncommon for a new teacher to leave their first visit with payroll or HR with a tall stack of papers and a confused look on their face. There is a lot to take in for new hires, many of whom are enrolling in employee benefits on their own for the first time. Provide a checklist or overview of the benefits offered and make sure they have the opportunity to get their questions answered. Another idea is to host a district-wide benefits fair where each of your benefit vendors can set up a booth, hand out information, and answer questions.

Clear Expectations

Make sure your business office has well established and clearly articulated processes for routine procedures like purchasing, time-off reporting, reimbursement requests, and payroll reporting. These are very important tasks for the business office, but are secondary considerations for most employees. These expectations can be outlined in the employee handbook and be more clearly detailed in resources available on your website.

Support Your Mentor Program

Most districts have a mentor program in which a formal mentor is assigned to each new teacher. As a business office, you can make sure these programs are adequately supported when it comes to budget development.

Compensation Model

With many districts developing their own unique compensation models, it is increasingly important to effectively communicate how your district's model is executed. Compensation models are designed to incentivize behavior and shape employees as it relates to professional development, engagement, and/or performance. Helping your teachers understand what success looks like to the district is a win-win. And, for new hires, this will help them envision a professional pathway over the course of their career.

Financial Wellness

Many new teachers enter the workforce with a mountain of student debt and little knowledge about retirement planning. It is good to routinely share information about loan forgiveness programs and offer retirement planning resources to all staff. However, offering a special presentation on each of these topics at one of your new teacher meetings is a great way to support your new educators.

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Take Time for Yourself Every Day

By Greg Gaarder, Business Manager, Tomah Area School District; WASBO Board of Directors



First, I would like to state that I am not an expert on this topic. I only have a unique perspective and a very personal interest on it. But before I get to far into the discussion, I should let you know a little about myself. I have a classic Type A personality. I have embraced it my whole life, to include all the good, the bad and the ugly of it. I also consider myself very active. I have been a runner throughout most of my adult life, save the 40's. I just turned 52 in October. My diet has been less than desirable. I know it's gross and disgusting to most, but I thoroughly enjoyed a good chew of tobacco. I smile infrequently, so much that I now tell people that the smile is implied. (It must be something genetic in me.) My Grandfather died at 50 from a massive heart attack and my two uncles also had heart attacks at or near 50. I knew better, but still kidded myself into thinking that it wouldn't happen to me. On November 14, 2014, however, I was informed differently by a crushing pain to my chest that seemed to come out of no where.

I see so many people not taking time for their personal health and it makes me sad. Most of the time I hear them

say I don't have time or it's too much work. Find something that you like or can tolerate that involves exercise and do it. My number one priority during the day now is to find 45 minutes of time for myself to exercise. It's interesting that when you feel like your life depends on it, how easy it is to find the time.

Maybe I could be one of the lucky ones and not have to worry about my personal health but I tried that already and it didn't work.

My point is simple, genetics play a significant part in our overall health. but so does lifestyle. That's where the "Take Time for Yourself Everyday" comes into play and when I say take time for yourself every day, I mean every day. We are all very busy people and have stressful jobs and we all try to manage it in very different ways. If you're already taking the time for yourself, great, but

if you're not, stop and re-evaluate why you are not taking time for yourself. Taking time for yourself does not have to be painful or leave you hungry. I found out something really interesting while doing my cardio rehabilitation, I lost more weight by walking and watching what I ate then I ever did by skipping a meal or by an intense workout. Short-term losses are never healthy. 🐼

The American Heart Association Recommendations for Overall Cardiovascular Health:

- At least 30 minutes of moderate-intensity aerobic activity at least 5 days per week for a total of 150 OR
- At least 25 minutes of vigorous aerobic activity at least 3 days per week for a total of 75 minutes; or a combination of moderate- and vigorous-intensity aerobic activity
- Moderate- to high-intensity muscle-strengthening activity at least 2 days per week for additional health benefits.

For Lowering Blood Pressure and Cholesterol
An average of 40 minutes of moderate to vigorous-intensity aerobic activity 3 or 4 times per week

How the Business Office Can Support New Teachers

Continued from page 7

Non-Traditional Benefits

Consider benefits that will incentivize your teachers to make your district their home. A residency incentive to help with closing costs on a home is a great benefit with a positive long-term impact. Many districts are building a strategically timed compensation adjustment in their models to retain those great teachers in the three to five year window. Also, some inexpensive benefits like an Employee Assistance Program (EAP) or strong wellness

program can be viewed as valuable benefits that will engage and retain new hires.

The overarching message is to form relationships right away with your new hires. Avoid herding people through an impersonal process of data collection and make it a point to be part of the team welcoming new staff to the district. There are so many ways the business office can help new staff get acclimated and be successful in and out of the classroom. 🐼

Winter Planning for 2017-18

By John Stellmacher, Chief Financial Officer, School District of Harford Jt1; WASBO Board of Directors



As I reflect on my first decade as a business manager, I often smile when I see friends in the Hartford Community ask when the quiet time is for the business office. They know me well and understand that the summer often contains the busiest months as we close the financial year, prepare for the audit, make adjustments for the annual meeting, hire staff, and manage numerous facilities, technology, and food projects. All together this must mean that we get a nice break in the winter months right?

Soon after the adoption of the final tax levy and revised budget for the current financial year, we shift our focus to the upcoming year. Heading into an odd numbered year, the budget is even more challenging as we approach the great unknown of a new State of Wisconsin biennial budget. But fear not, we do have some great tools and data to utilize in our planning thanks to the Department of Public Instruction and a number of service affiliate partners that facilitate the development of a new budget model.

In mentoring newer business managers and new superintendents, the Fall always brings surprises. Perhaps one of the biggest surprises for newer administrators is the July estimate for State Equalization Aid and the October 15th final certification. Open a copy of the Wisconsin Education News from around the state and you'll find numerous articles with school officials commenting that they were surprised by their final aid number. To avoid that surprise you have several tools at your disposal.

First: Understand the variables that go into the calculation of State Equalization Aid. With your final aid being based on the previous year's student count and spring estimate of equalized property valuation you

should be able to make a spring projection of several of the key components in the equalization aid formula. If your fall student count has changed from the previous year you should be able to estimate what change you have in your equalized property valuation per member (student). DPI should be able to provide statewide totals for both student count (membership) and the statewide equalized property valuation. Key in your projections will be the change in your own district as it compares to changes statewide. If your property value per member is increasing faster than the state average per member, you likely will see a negative aid impact.

Second: You should have a baseline estimate of your district's shared costs for the current year as part of your filed DPI Budget Report for the current year. This report is a key component to the July estimate DPI provides for State Equalization Aid. We all make spending adjustments throughout the year so it is crucial to be able to track if your District is spending at a higher, lower, or expected rate during the current year. By looking at your total projected shared costs and dividing that by your 3rd Friday Count (and later 2nd Friday Count), you should be able to estimate your shared costs per member. Remember that for State Equalization Aid purposes Summer School counts as 100% FTE rather than 40% FTE.

Third: Consider the implications for your spending. Are you above the 90% secondary cost ceiling (90 percent of the state average spending per pupil as measured by shared costs which was \$9,539 in 2015-16)? If so, your District will either receive positive tertiary aid or negative tertiary aid (is your property value per member above or below the state average?) Are you

using Fund 73, Fund 41, or Fund 46? Each of these funds will have an impact on your shared costs. The vast majority of Districts exceed the secondary cost ceiling but if you have debt expiring or self-insure for Health Insurance, you could have a year where your costs drop sharply. Are you over-levying in Fund 39 in order to keep your tax levy stable? Do you intend to defease those additional debt service funds or are you holding them for a future year to make a bigger payment?

If you are currently running ahead of budget, consider the impact on your fund balance, but also consider what impact your aid will have if you underspend your budget. Working for a historically fiscally conservative District, I had a recent budget year where our District shared costs per member was projected to finish under the secondary cost ceiling. This meant that we would be giving up aid at 58 cents per dollar (aided at the secondary level) to potentially pick up 14 cents per dollar (aided at the tertiary level) in a future fiscal year. We were able to identify that we were ahead of budget early enough to make a contribution into Fund 46 of \$700,000 and generated \$294,000 in additional State Equalization Aid the following year which helped achieve property tax stability. Conversely, if you are over your initial projected budget, you might consider pushing a Fund 73 or Fund 46 contribution into the following year if making that contribution in the current year would generate additional negative tertiary aid.

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Dawn Laboy - Random Lake	Jill Bodwin - Denmark
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Wisconsin Federal Funding Conference **

Feb 15-16, 2017 - Kalahari Resort & Conference Center, Wisconsin Dells

Facilities Management Conference **

March 7-8, 2017 - Kalahari Resort & Conference Center, Wisconsin Dells

Transportation & Bus Safety Conference

March 8, 2017 - Kalahari Resort & Conference Center, Wisconsin Dells

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March 14, 2017 - Madison Marriott West, Middleton

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March 15-16, 2017 - Madison Marriott West, Middleton

Spring Conference **

May 11-12, 2017 - La Crosse Center, La Crosse

Scholarship Fundraisers

Spring Golf Fundraiser

May 10, 2017 - Cedar Creek & Fox Hollow, La Crosse

Spring Bike Fundraiser

May 10, 2017, TBD

Certified School Risk Managers (CSRM)

Courses **

Fundamentals of Risk Management

Feb 22, 2017 - Holiday Inn, Stevens Point

Handling School Risks

Feb 23, 2017 - Holiday Inn, Stevens Point

Measuring School Risks

Mar 22, 2017 - Holiday Inn, Stevens Point

Funding School Risks

Mar 23, 2017 - Holiday Inn, Stevens Point

Administering School Risks

April 19, 2017 - Holiday Inn, Stevens Point

Bullying Prevention

April 20, 2017 - Holiday Inn, Stevens Point

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Work and Life Balance

By Ken Mischler, Director of Business Services, Manitowoc Public School District; WASBO Board of Directors



I have found a subject where I am very knowledgeable, but I do not practice what I preach. The subject I am talking about is balancing work and life. Wikipedia defines Work-life balance as is a concept including proper prioritizing between “work” (career and ambition) and “lifestyle” (health, pleasure, leisure, family and spiritual development/meditation).

As the Director of Business Services, I do spend a lot of time at work and I assume, so do you. Generally, people spend more time at work than in any other environment in their daily life. It is not unusual to feel over-worked and out-of-balance. People struggle to step away and find time for the activities, people and things that restore peace and balance in life.

I will share some of my thoughts on the subject of work and life balance:

1. Take care of yourself

You need to look out for number one. You cannot accomplish anything if you're unhealthy. Get plenty of rest, exercise and eat properly. You may be able to get away with eating junk food, getting very little exercise, and still function satisfactorily. However, there comes a time when poor life styles will catch-up with individuals. Set aside time each day for an activity that you enjoy, such as walking, running, working out or listening to music. Allow yourself to unwind after a hectic day by reading, meditating or watching a movie.

2. Foster and develop yourself

People who manage work-life balance have developed a strong sense of who they are, their values, and what is important to them. Using this as a guideline for everything they do helps them determine what success means to them. They know what makes them

happy and strive to get more of that in their lives. While their time may be seen by others as being skewed towards either work or life, it is what they consider balanced that works for them.

3. Make time for yourself

Making time for you is probably the hardest thing to do for the typical overworked and overwhelmed person, but it is crucial for lowering stress, increasing happiness and encouraging creativity. Some things to try; read, meditate, walk, write, sketch, exercise or simply sit quietly for a few minutes each day and do absolutely nothing. Remember that a little relaxation goes a long way to life balance.

4. Make time for relationships

One needs to set aside time with your family and friends. Don't just sit in front of the television, have a conversation to help strengthen relationships. You need to pay attention to those you care about. Make a date with your significant other, have lunch with a friend, or play games with your children. Get to know the people around you. They will appreciate it.

5. Prevent being over-worked

People waste time on activities that add no value to work or your life. Scrutinize activities that don't enhance your career or personal life, and minimize the time you spend on them. Certain behaviors make us much less efficient. You may even be able to leave work earlier if you make a conscious effort to limit the time you spend on the web, social media or making personal calls.

6. Turn off and unplug

Turn off your electronic devices and enjoy quality uninterrupted time doing

activities you enjoy. They realize that multitasking is a myth and focus on the task at hand. Having developed the ability to compartmentalize their time, they seek out moments to simply enjoy the experience and savor life. “There are times when you should just shut your phone off and enjoy the moment,” says Robert Brooks, a professor of psychology at Harvard Medical School. Brooks says that phone notifications interrupt your off time and inject an undercurrent of stress in your system. Realize that multitasking is a myth and focus on the task at hand. Seek out moments to simply enjoy the experience and savor life while unplugging.

7. Manage your time

When you plan your day or week, make it a point to schedule time with family and friends, and activities that make you happy. It could be a date night with your significant other or a baseball game with friends. This way you will have something to look forward to and an extra incentive to manage your time well so you don't have to cancel. Balance does not mean stuffing in every activity possible in life. Examine your values and decide what's important to you; then set your limitations. Depending on what stage you're at in life, your focus and energies will be different.

8. Maintain a positive mental attitude

Begin each day with the positive mental attitude of making the best and most of it. It may not always go as planned, which normally it doesn't. However, it can go more smoothly if you put it in perspective. Part of living a well-balanced life is learning how to deal with adversity, unforeseen events and uncertainty. If you practice not letting things get to you, you will learn

to live a balanced life. Enjoy life and don't worry about it. Things will work out.

9. Remember to have fun

Laugh, joke, fool around, and find that sense of humor. Nothing makes the day feel better as fast as a good old-fashioned laugh. Life without fun and games isn't just dull according to experts, it is unhealthy. When you are experiencing playful moments, you are honoring your own need for enjoyment. Fun can inspire you, motivate you, and empower you to change your attitude and perception of yourself. Fun will drive you toward your goals more quickly and give you inspiration, motivation and a sense of well-being along the way.

There is no perfect, one-size fits all, balance you should be striving for. The best work-life balance is different

for each of us because we all have different priorities and different lives.

According to Euripides, an ancient Greek writer, "The best and safest thing is to keep a balance in your life, acknowledge the great powers around us and in us. If you can do that, and live that way, you are really a wise man." Everyone needs more balance and to not let work define who you are. 🐼



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Principal for the Day (And a Little Risk Management)

By Marty Malloy, Account Executive and Director of Education & Government Practice, M3 Insurance



I was invited to take part in the Madison Metropolitan School District's Principal Experience in October. I was paired with M3's neighborhood elementary school, Franklin Elementary. I was already familiar with the school and its awesome principal, Sylla Zarov, through the Foundation for Madison Public School's Adopt-A-School Program. Franklin is M3's adopted school.

I am thankful that being "principal for a day" was only a little over a half-day. I was exhausted by the end of five and half hours. During that time, I got to spend time with a principal, who was not only a principal, but a social worker, lunch room attendant, custodian, teacher, risk manager, and most of all, a friend to all of the students (K4-second grade) that attend Franklin.

My intent was to write this article from the perspective of the principal, as a risk manager. Although I will incorporate risk management, I want to use this article to give kudos to Sylla, and all dedicated and hardworking principals. Below is the story of my day.

I arrived at Franklin at 7:00 a.m., and had the privilege of parking in the space reserved for the principal. Immediately upon my arrival, the first big decision of the day had to be made. It was beginning to rain and we needed to decide whether students would be escorted to the playground, or gym as they arrive. From a risk management perspective this decision is important for several reasons. For student health and safety, it's much better to have the children gather in the gym, if the weather does not allow them to be on the playground. However, playground time allows a group of four through seven year old children to work off excess energy before they go into a

classroom.

At 7:00 a.m. it was raining hard, and the radar indicated it would not be quitting anytime soon, so we set up the gym for student arrival at 7:45 a.m. Guess what? By 7:20 a.m. it stopped raining, and the radar showed the rain was dissipating. We took down the set-up in the gym, and prepared for students to be escorted to the playground upon arrival. As the busses and students arrived Sylla greeted each of the students by name and welcomed them to school for the day.

Our next task was to make sure those children who got breakfast at school were eating and getting ready for the day. Next, we walked the halls to make sure everyone had made it to class. This is no easy task at Franklin. It is an old, multi-story school with maze-like hallways.

This was followed by a second meeting planning for an "intruder in the building" drill the next day. It's a tough thing to plan for, especially in a building housing four through seven year old children. The safety team reviewed the plan for handling an intruder, made some improvements and readied for the drill on the following day.

This was followed by me walking the hall with another teacher as Sylla, her special education lead, and a social worker met to discuss a student issue.

Our next major task was dealing with a student with a behavior issue. This issue was more serious than some of the other issues we had dealt with during the day. Franklin staff had an amazing plan and solution for dealing with a student, who sometimes had too much energy to deal effectively with studies or others.

Our day ended monitoring recess and lunch for all of the grades. Sylla told

me she likes to be with the children on the playground. It helps her to get to know them better, and allows her to see how they interact with each other. It also helps her find out if there are any students who might need extra care or attention that day. Recess duty included interacting with students, teachers, and parent volunteers that had come to help monitor the children at recess, and in the lunch room. During this nearly 90 minute period, I saw Sylla quietly discuss with children how to behave, comfort sad children, help out in the lunchroom when needed, and thank the adult volunteers.

My part of the day ended with the following scene: A kindergarten student had been accidentally pushed down on the playground and was feeling very sad. On his way back into the school, he coaxed a lady bug to walk on his finger. As we entered the school, the ladybug flew away and the student began to sob that he had no friends. Sylla explained to him that everyone at Franklin was his friend and got several other children to help comfort him.

My take away from the day is that the principal truly is the risk manager of the school. Sylla's day was spent primarily concerned about the safety, and welfare of the children of Franklin, and the rest of the Franklin community of teachers, parents and visitors. However, along the way she also truly was a principal, a social worker, a lunch room attendant, a custodian, a teacher, and most of all, a friend to all of the K4 through second graders that attend Franklin. 🐞

If you have questions about this article, contact Marty at marty.malloy@m3ins.com.

ASBO International New Members

September 2016

- **Jo Ann Armstrong**, SD of Beloit, Beloit, WI
- **Keith Brightman**, SD of Menomonee Falls, Menomonee Falls, WI



October 2016

- **Janel DeZarn**, Mayville SD, Mayville, WI
- **Bryan Groshek**, Muskego-Norway SD, Muskego, WI
- **Joanne Long**, CESA 12/NSDT, Ashland, WI
- **Brent Maron**, Beaver Dam USD, Beaver Dam, WI

ASBO International Membership Milestones

November 2016

10 years

- **Jeff Carew**, PMA Financial Network, Inc., Milwaukee, WI
- **Erica Pickett**, Stoughton Area SD, Stoughton, WI

Visit ASBO International's website for more info on earning free months of membership with "Member Get a Member!" and the **article on pages 38-39** on reasons why to join today!

<http://asbointl.org/membership/member-get-a-member>



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This workshop (SCHBUSMG 798 Individual Studies) will be facilitated by Roger Price, Staff Consultant, Wisconsin Association of School Boards. This online course will focus on current issues and provide an opportunity for you and your colleagues to network and discuss ethics, the state budget, the legislative process, and share your analysis of the profession. WASBO conference attendance provides an opportunity to earn hours towards completion of this course.

This is a 3-credit course and is scheduled to begin January 17th and end May 19th. The enrollment deadline is January 15th but we suggest getting started on that process no later than December 30th. 🐼

If you would like more information about enrolling in this course, contact Diane Pertzborn at pertzbod@uww.edu.

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Did I Let Them Know?

Communication with my Subs

By Gary Stanley, K-12 Specialist, DLA Architects, Ltd.



They are only teacher subs, they should have the same common sense that my full time teachers have on safety and security.

But I worry and I wonder if they have the same knowledge as our Full time staff. If we are lucky the PT, Temp, or sub was signed up in the weeks before the start of school. We may or may not have invited them to our inservice to cover all that which is needed to properly manage and teach as a temporary sub. At the inservice program we touched on the importance of “safety and security” these staff need for our District.

At the schools inservice for subs we covered typical drills; bus evacuation and safety, lock down safety, severe weather or tornado drills or any of the others we practice with the full time staff.

A packet of sub information is given to each of these subs. Typically these packets are copied and given to all staff. I sure hope they read all this info. Do they “sign off” that they have read all this info? It may be the ONLY training they receive on these very important matters.

So, in asking around on the topic of safety by subs, I found written sub packets, on-line sub training and even videos as part of a district’s safety measures. The types and depth of

these materials vary across the states.

I’ve found districts which are very pleased with their measures. I also found district staff members who really didn’t care to share their district’s sub training and contact and measures.

Those systems I really thought were POSITIVE, included a sign in and verified completion of the training systems.

Interviews with subs have varied results: “not a very good system,” “yes I was supposed to read this information and I did sign that I did read the materials, but I’m sure it’s the same as I received back in 2010,” and “I work at three district’s this year... it’s hard to keep them all straight.”

District’s must remember, many subs work in multiple districts. It has to be tremendously tough to keep it all straight as a multi-district sub.

As a district we really hope their good sense and judgment is brought to my district daily. This is someone who may only find out they are working at 6am on a given day, and then not work for a month and a half. Continuity of service should help bring the good judgement choices. We may find those who will not be asked to return.

Ask yourself these questions:

1. Do I have a good plan to keep my subs appraised of safety and security issues, both before the start of the school year and after the school year has started?
2. Just who are the district “subs?” Teaching staff, support staff, or how about bus drivers, office staff, and custodial?
3. Are they treated all the same? They really should not be due to their security exposures. You must individualize these plans.
4. If I’m “the person,” which department or person really takes some or all the responsibility? Is it HR, Facilities, or the safety committee in whole? Do I have a substitute as a member of the school safety committee? They will have a different perspective from full time staff members.
5. Finally we must review EACH YEAR of our existing plans. We should set new plan goals to improve the plans and delivery methods and on the way we bring “safety and security” to subs and all our district employees. 🇺🇸

If you have questions about this article, contact Gary at stanley@dla-ltd.com.

“

To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others,

~ Tony Robbins

Winter Planning for 2017-18

Continued from page 10

Every district is unique, but several of our service affiliate partners have excellent budget model tools that can help you determine the best course of action for your District. If you already have a good idea of the impact that year end transactions might have on your aid, those budget models might still be of great value in helping you illustrate the impact on your District for your Superintendent or Board of Education. 🇺🇸

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JANUARY 18-20, 2017

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WASBO Sessions at the State Education Convention

Tuesday, Jan. 17

2-5 PM

School Finance Puzzle Hyatt Regency A

Presenters and attendees will use a hands-on interactive approach to take the confusion out of school finance. Gain a conceptual understanding of the major components of the Wisconsin school finance system. Participants will have an interactive discussion that provides background on constitutional issues, court cases and today's laws. Attendees will become acquainted with the basics of revenue limits, equalization aid, property taxes and referendums - how these components interrelate and how they impact board decision-making. Leave the session with increased confidence in discussing school finance concepts and using this knowledge to help foster an environment of trust in your community for the benefit of students.

Wednesday, Jan. 18

1:30-2:30 PM

SAA Legislative Update 102AB

There is always something going on in the State Capitol that directly impacts school board members and administrators. Learn how the School Administrators Alliance's (SAA) rationale for change and several components of its new proactive approach to advocacy are working. Time will be provided for questions and answers and informal information sharing.

John Forester, School Administrators Alliance

3:30-4:30 PM

Continuity and Succession Planning for School Administrators 201A

In this session, we'll discuss systems that districts can build to prepare for continuity of district operations through turnover. Large and small districts are challenged to sustain programming during transitions of key district leaders, but proactive planning and leadership capacity can prepare for these changes. This work should begin at the board level to solidify the mission and vision of the district to drive the search for new administrators.

Jonathan Mitchell, Saint Francis

Financial Roles and Responsibilities of School Board Members 101A

The school board plays an important role in the oversight of a district's finances. Learn more about the financial roles and responsibilities of school board members, including the relevant state statutes, as well as policy development and budgeting practices and procedures.

Roger Price, WASB

Thursday, Jan. 19

8:45-9:45 AM

Revenue Limits 101A

The school revenue limit is the major base for school funding in Wisconsin. The revenue limit sets the total dollars that can be raised through state equalization aid and local property taxes and is based directly on the number of residents attending a public school from within a school district's boundaries. Learn how the revenue limit is calculated and what variables are included in the calculation beyond student membership. This session will cover every level of experience.

Bruce Anderson, WI DPI

Youth Mental Health Training Needs and Solutions 202C

Learn how your district can provide mental health training, awareness and services through reasonable cost options. One district has sustained a highly utilized, free professional counseling program, the Student and Family Assistance Program. This program/approach supports the access to professional counseling free of charge for any family members living in the household as well as all staff and their families over four years of age. This responsiveness reduces the stigma around mental health and helps an adult support the youth and when referral to treatment is necessary. This panel will inform attendees and provide a forum for questions on this critical area for schools.

Christie Gause-Bemis, WI DPI; Erin Green, Green Schools Network; Gregory Nyen, Waupaca

10:45-11:45 AM

Know the Risk: What to Consider When Transporting Students 103DE

Due to a statewide shortage in qualified bus drivers and stretched local budgets, districts are considering alternative transportation means for after-school activities. The presenter will discuss the different methods of transportation, the risks for districts, and best practice strategies to ensure that districts, students and staff are protected.

Jonathan Mitchell, Saint Francis

Continued on next page

WASBO Sessions at the State Education Convention

Continued from previous page

Equalization Aid101A

State equalization aid makes up one of two major pieces of school funding in Wisconsin. State equalization aid is calculated based on a district's spending, their property tax base, and number of students. If you have questions about your district's equalization aid, this session is for you. The Department of Public Instruction Finance Team will discuss the variables and factors influencing each district's share of equalization aid and what your district can expect in the future based on current law. This session will cover every level of experience.

Bob Soldner, WI DPI

How are Wisconsin School Districts Preparing for Unwanted Threats?202C

More and more schools are being affected by unwanted intruders. No one is exempt. What steps has your school district taken to train your first responders? Panelists will share how they have proactively taken the steps to train their administration, staff and students. ALICE Training provides options and bullying awareness provides prevention so come with your questions. You will leave motivated to implement safety procedures in your district. *Allen Behnke, Howard-Suamico School District; Barbara Dorff, Green Bay Area; Pat Finnemore, Kenosha Unified; Laura Lloyd, Kettle Moraine; Tim Prunty, Antigo; Jamie Soneberg, Kettle Moraine; Dale Zabel, Kettle Moraine*

WASBO Luncheon

Thursday, Jan. 19

12-1:15 PM, Hilton Empire Ballroom

Pre-registration required - \$38

Join the Wisconsin Association of School Business Officials at its annual luncheon. Hear from the 2017 Wisconsin School Business Manager of the Year, Jill Bodwin and the New School Business Manager of the Year, Ben Irwin.

Friday, Jan. 20

9:15-10:15 AM

Assessment of Facilities 103DE

A Comprehensive Facilities Assessment is a step in the planning process which helps school districts and their communities better understand the current state of its facilities and how well these components support educational goals. Specific purposes of a comprehensive facilities assessment should: 1) provide an inspection of all facilities identifying physical and system conditions and deficiencies; 2) evaluate the operation efficiency of the facilities and determine conservation measures; 3) evaluate conditions that are potentially health or safety hazards; 4) evaluate how well facilities are functioning for current and future programs; and 5) identify external considerations that could affect the district ability to provide appropriate facilities. This presentation will discuss the various components of a comprehensive facilities assessment as well as research-based standards to assist in the evaluation of the current use and usefulness of facilities.

Roger Price, WASB

1:45-2:45 PM

Cash Reserve (Fund Balance) and Long-Term Fiscal Health101A

The presenters will explain the importance of fund balance and illuminate criteria for why sustaining a strong fund balance is crucial to the fiscal health of a school district. This session will cover proportionality, the effect of cash reserve on cash flow, and the items of fund balance board policy that should be in place. Board members will improve their understanding of how the overall budget works and the general concepts of fund accounting while gaining the confidence to discuss these concepts with local citizens and state legislators.

Bob Borch, CESA 1; Tom Owens, Stevens Point Area; Debby Schufletowski, Baird Public Finance

Impact of Vouchers and Charters on Wisconsin Public Schools 203DE

Learn about the effects, issues and concerns about school vouchers and charter schools at the local and statewide levels. Information will be shared about specific local school districts as well as statewide information.

Andrew Sarnow, Green Bay Area; Susan Schnorr, Oshkosh Area; Bob Soldner, WI DPI

Legal and Ethical Standards Related to Attendance at the State Education Convention

By Michael Julka, Steven Zach, and Brian Goodman of Boardman & Clark LLP, WASB Legal Counsel

Many school districts will be sending administrators and school board members to Milwaukee to attend the annual WASB/WASDA/WASBO State Education Convention (Convention) in January 2017. Administrators and board members are obligated to comply with the legal and ethical standards established for local public officials that affect their participation in Convention-related events. This Legal Comment will discuss the Open Meetings Law and the Code of Ethics for Local Public Officials as these laws relate to and govern the actions of administrators and board members while in attendance at the Convention.

Open Meetings Law

Convention participants whose districts send more than one board member to the Convention should consider how Wisconsin's Open Meetings Law may impact their ability to participate in Convention-related activities (Wis. Stat. § 19.81 et seq.) The Wisconsin Attorney General has issued a number of opinions that offer Open Meetings Law guidance to board members with regard to their attendance at conferences, workshops, seminars, and conventions, including, but not limited to, the Convention.

The fundamental purpose of the Open Meetings Law is to ensure that the public has access to full and complete information regarding governmental affairs (Wis. Stat. § 19.81(1)). In order to advance this purpose, meetings of state and local governmental bodies, including school boards, must be held in locations reasonably accessible to members of the public and must be open to all citizens at all times unless otherwise expressly provided by law (See, e.g., Office of the Attorney General, Informal Opinion to Clifford Miller (May 25, 1977)). The Wisconsin Supreme Court has held

that a "meeting" of a governmental body, including a school board, occurs whenever: (1) there is a purpose to engage in governmental business, and (2) the number of members present is sufficient to determine the governmental body's course of action (i.e., a quorum, including a walking quorum, negative quorum, etc.) (State ex rel. Newspapers v. Showers, 135 Wis. 2d 77, 97, 398 N.W.2d 154 (1987)).

The Wisconsin Attorney General was asked to issue an opinion as to whether the social nature of many activities offered at the Convention makes attendance at the Convention outside the scope of the Open Meetings Law (Office of the Attorney General, Informal Opinion to Donald MacTaggart (May 25, 1977)). It is well-established that a "social or chance encounter" of members of a governmental body is not a meeting of the body requiring public notice and accessibility pursuant to the Open Meetings Law (Wis. Stat. § 19.82(2); see, also, *Wisconsin School News*: "Meeting or Chance Encounter? The Wisconsin Supreme Court Interprets the Open Meetings Law" (September 1993)). Any presumption that the members are present to engage in governmental business is rebutted when members meet in a social setting or by chance. However, according to the Attorney General, the attendance of board members and administrators at a conference, convention, or seminar, does not constitute a chance encounter because such attendance is pre-planned. Moreover, such attendance is not a purely social gathering because such conferences, conventions, and seminars are designed for board members to discuss issues related to the responsibilities, authority, power, or duties delegated to or vested in the district.

Nevertheless, the Attorney General also concluded that attendance at the Convention did not necessarily constitute a "meeting" of the board. According to the Attorney General, discussions at the Convention generally involve concerns common to all school districts, rather than discussions about a particular district's business. As such, even if the number of board members present is sufficient to determine the board's course of action, the purpose of the gathering is not to engage in the business of the particular district, but rather to take advantage of the Convention-related activities. Therefore, the Attorney General has concluded that attendance of a quorum of a board at the Convention, by itself, does not result in a "meeting" of a governmental body, as defined in the Open Meetings Law.

The Attorney General warned, however, that when a quorum of a board or any committee or subunit of a board is present during the Convention and all related activities, including the ride to and from the Convention, board members must not discuss business specifically related to the district (Office of the Attorney General, Informal Opinion to Beatrice Weiss (January 20, 1981)). Moreover, board members should not formally attempt to convene during any of the Convention-related activities.

In order to avoid the perception that a board is violating the Open Meetings Law, many districts post a notice, in accordance with board policy, that communicates to the community that a certain number of board members and/or other district officials will be attending the Convention. This type of notice should explicitly state that the board will not convene nor conduct any board business during the trip or at the

Continued on next page

Convention.

The Code of Ethics for Local Public Officials

Regardless of the number of board members and/or administrators in attendance at the Convention to represent the district's interests, the Code of Ethics for Local Public Officials should be considered in order to determine how this law may restrict the activities and events in which the board members and/or administrators participate during the trip (Wis. Stat. § 19.59 et seq.)

The Code of Ethics for Local Public Officials prohibits district officials (board members, district administrators, business managers, etc.) from accepting: (a) items or services of substantial value for private benefit, or for the benefit of the official's immediate family or associated organizations, if offered because of one's public position; (b) anything of value that could reasonably be expected to influence the official's vote, official action(s) or judgment; and/or (c) anything of value that could reasonably be considered a reward for official action(s). The Code of Ethics for Local Public Officials is enforced by the Wisconsin Ethics Commission.

The Wisconsin Ethics Commission has opined that an official may attend conventions and participate in convention-related activities, by and large, without violating the Code of Ethics (1992 Wis. Eth. Bd. 31 (November 25, 1992), wherein the Ethics Board concluded that a vendor should not sponsor a river cruise for local public officials if more than an insignificant number of the officials attending are responsible for making or approving purchasing decisions that could involve the vendor's goods. In January 2009, the Government Accountability Board reaffirmed 1992 Wis. Eth. Bd. 31 (November 25, 1992). Subsequently, 2015 Wis. Act 118 § 266(6) provided that all formal ethics opinions issued by the Government

Accountability Board were transferred to the Wisconsin Ethics Commission.)

Specifically, while attending a convention authorized by and on behalf of a district, officials may accept meals, refreshments and the like without charge that are provided, sponsored, and/or sanctioned by the event organizer. According to the Wisconsin Ethics Commission, when a board authorizes the attendance of its officials at the Convention, it is fair to presume that their attendance is in furtherance of a public purpose or benefit and that the board contemplates that they will partake fully in all the Convention has to offer, including forums and receptions that are sponsored by the event organizer. Given this interpretation, as long as the board has authorized attendance at the Convention, those officials in attendance are not required to pay the cost of meals, refreshments and the like offered during the Convention by its organizers, i.e., the Wisconsin Association of School Boards, the Wisconsin Association of School District Administrators, and/or the Wisconsin Association of School Business Officials, in order to comply with the Code of Ethics (1993 Wis. Eth. Bd. 8 (November 3, 1993). In November 2008, the Government Accountability Board reaffirmed 1993 Wis. Eth. Bd. 8 (November 3, 1993), and the opinion has subsequently been transferred to the Wisconsin Ethics Commission).

However, during the Convention, officials must be cautious about accepting food, drinks and/or entertainment, without charge or at less than fair value, that are offered at social events sponsored by entities or organizations other than the event organizers when the entities or organizations may be current or prospective district vendors. According to the Wisconsin Ethics Commission, beer, wine, liquor, meals, buffets, and the like have more than token value, and a purely social event, such as a

hospitality suite, a happy hour, or a dinner, provides a primary benefit to the official, rather than to the district that authorized his or her attendance. District officials responsible for making or approving purchasing decisions for the district should not accept food, drinks and/or entertainment, without charge or at less than fair value, from current or prospective vendors because receipt of such items of value could serve as the basis for an allegation that the items influenced the officials' decisions regarding the purchase of goods or services from the vendor.

Thus, a district official is advised to avoid attending an event that is purely social, sponsored by a current or prospective vendor of the district, and provided to the official without charge or at less than fair value. This is true even if the event is identified in the Convention program or in the Convention materials. That said, the district official may attend such an event and avoid a Code of Ethics violation by paying the vendor the full cost of the meal, refreshments and entertainment offered at the event.

District officials may accept at the Convention educational or informational materials, prizes or other giveaway items for the purpose of conveying the item to the district for the use or benefit of the district. However, if the district official wishes to keep the item for himself or herself, the item must be of nominal or insignificant value, in contrast to an item of merchantable value, in order to remain compliant with the Code of Ethics. The statute does not establish a specific dollar value as a "merchantable" value. The determination of whether an item has more than token or inconsequential value is left to the official's discretion. That said, the Wisconsin Ethics Commission has opined that some tote bags, caps, t-shirts, mugs, pens, rulers, refrigerator magnets, and key chains containing a company logo

Continued from previous page

are likely to be of inconsequential value; while other items, including jackets and watches, are likely to have more than inconsequential value, i.e., merchantable value.

Finally, district policies may address the issue of the receipt of gifts by district officials. Accordingly, before an official accepts a prize or other giveaway item from a vendor exhibiting at the Convention, it is important for the official to review and apply the district's policy on the subject to determine whether he or she may keep the item.

Conclusion

The Convention offers the opportunity for administrators and board members to obtain new information about the latest products, services, and developments in education. However, in doing so, it is important for them to be aware of the rules and requirements of the Open Meetings Law, as well as to understand and recognize how the Code of Ethics for Local Public Officials regulates when they may accept food, drink, or other items of value, without charge or at less than fair value, and when such acceptance will be problematic. Moreover, under no circumstances should receipt of any such items influence the decisions of the district officials. Finally, it is also important for administrators and board members to review board policies for additional, more restrictive rules about Convention attendance and participation, and to direct any additional questions or concerns to the district's legal counsel. 📌

<http://ethics.state.wi.us/forms-publications/Guidelines/701-ec.pdf>

2017-18 WASBO Professional Recognition Program

Nominations accepted through January 11, 2017

WASBO.com/awards



Mentorship and Other Thoughts

Continued from page 3

and improve your own professional network.

If you know of anyone new to the school business management profession, contact Mary Jo Filbrandt or the WABO office for the mentorship program. For a school facilities mentor contact coordinators Joe Ledvina or Dave Hoh (all contact information can be found on page 43). Also, come to the "So You Want to be a Mentor" session at the Facilities Management Conference in March to hear what Joe and Dave have to say.

Just a few other thoughts as the calendar year comes to a close. We sure have had quite a bit of change in our organization this past year. Two staff members left for new opportunities, and we were lucky to add two great additions to the WASBO team. Tina Hafeman came back (did she really ever leave?), and Clare May joined us and both have stepped in and are doing a great job. We have also had some of the largest conference attendances

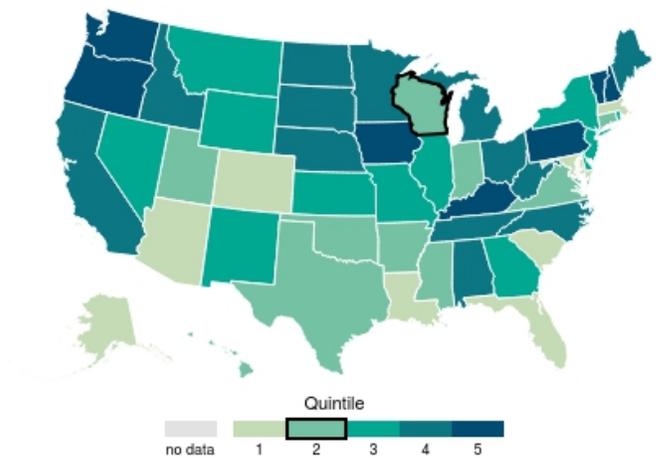
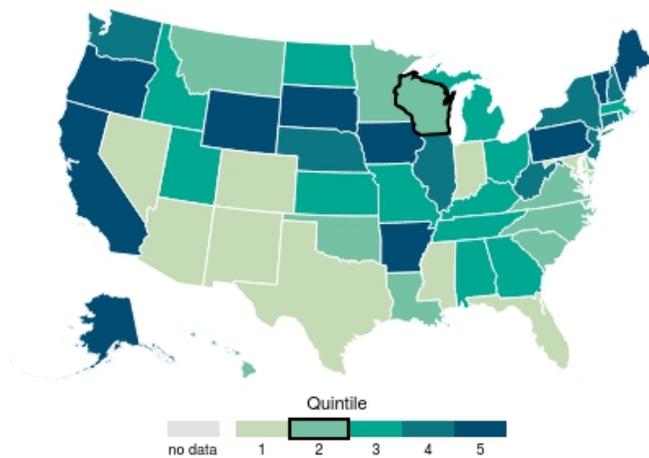
in the organization's history which is a credit to our various committees who put together the conferences and the content as well as to Woody and the rest of the WASBO staff. Our board, benefitting from the efforts of a number of past board members, now operates under a Policy Governance model and we continue to develop practices that support that form of organizational leadership. I look forward to the second half of my year as president and all of the things we are working on including finalizing a succession plan for the Executive Director position, improving the benefits package offerings for the WASBO staff and Bob Avery's run for the ASBO board, amongst others. I wish all of you a happy and safe holidays and hopefully some well-earned rest and quality time with your families and friends. 📌

Wisconsin: Understanding Teacher Shortages

This map highlights a number of key factors that reflect and influence teacher supply and attrition and signal whether states are likely to have an adequate supply of qualified teachers to fill their classrooms. Based on these data - which treat compensation, teacher turnover, working conditions, and qualifications - each state is assigned a "teaching attractiveness rating," indicating how supportive it appears to be of teacher recruitment and retention and a "teacher equity rating", indicating the extent to which students, in particular students of color, are assigned uncertified or inexperienced teachers. Ratings are on a 1-5 scale, with 1 (the lightest color) being the least desirable and 5 (the darkest color) being the most desirable.

Teaching Attractiveness Rating: 2.42

Teacher Equity Rating: 2.3



Indicator	WI	US Average
Compensation Rating	3.5	
Starting Salary	\$33,546	\$36,141
Wage Competitiveness	76	74
Working Conditions Rating	2.4	
Pupil-Teacher Ratio	15 : 1	16 : 1
Classroom Autonomy	82%	77%
Collegiality Within School	38.2%	38%
Testing-Related Job Insecurity	15%	12%
Administrative Support	41%	48%
Teacher Qualifications Rating	2	
% Inexperienced Teachers	15.1%	12.6%
% Uncertified Teachers	1.07%	1.89%
Teacher Turnover Rating	2	
Left Profession	10.5%	7.7%
Left School or Profession	16.2%	14.2%
Plans to Leave Teaching	6.2%	6.6%

Indicator	WI	US Average
Ratio of Uncertified Teachers in High- vs. Low-Minority Schools	5.49 : 1	4.05 : 1
% Uncertified Teachers in Low-Minority Schools	0.53%	0.88%
% Uncertified Teachers in High-Minority Schools	2.9%	3.56%
Ratio of Inexperienced Teachers in High- vs. Low-Minority Schools	1.61 : 1	1.67 : 1
% Inexperienced Teachers in Low-Minority Schools	13.26%	9.9%
% Inexperienced Teachers in High-Minority Schools	21.3%	16.56%
% Teachers of color	4%	18%

The data are drawn from national data sources, representing the most recent data available for analysis. Interpretations of the data should keep in mind that, depending on the specific statistic, these sources are from 2012, 2013, or 2014. Some states may have recently experienced changes in policies or conditions which would change the statistic reported if it were collected today. In addition, in some cases, sample sizes are relatively small. We do not report data for states where the samples are too small to meet NCES guidelines for reporting. Complete notes and source information are available at <http://learningpolicyinstitute.org/understanding-teacher-shortages-notes-sources>.

Definitions and Sources

Teaching Attractiveness Rating: The average quintile rank (1-5) of each indicator in the categories compensation, teacher turnover, working conditions, and teacher qualifications.

Compensation Rating: The average quintile rank (1-5) of starting salary and salary competitiveness.

Starting Salary: Average starting salary in 2013. *Source: NEA Collective Bargaining/Member Advocacy's Teacher Salary Database, based on affiliate reporting as of December 2013, see <http://www.nea.org/home/2012-2013-average-starting-teacher-salary.html>.*

Wage Competitiveness: Estimated annual teacher wage as percentage of estimated annual non-teacher wage, holding constant age, education level, and hours worked. *Source: Baker B., Farrie D., & Sciarra D.G. (2016). Mind the gap: 20 years of progress and retrenchment in school funding and achievement gaps, Table 5. Educational Testing Service: Princeton, NJ. pp. 15.*

Working Conditions Rating: The average quintile rank (1-5) of administrative support, testing-related job insecurity, collegiality, teacher autonomy, and pupil-teacher ratios.

Pupil-Teacher Ratio: Pupil-Teacher Ratio in 2014. *Source: National Center for Education Statistics. (2015). Digest of Education Statistics. Public and private elementary and secondary teachers, enrollment, pupil/teacher ratios, and new teacher hires: Selected years, fall 1955 through fall 2025. Washington, D.C.: U.S. Department of Education.*

Classroom Autonomy: Percentage of teachers who report they have control in their classroom in the following areas of planning and teaching: textbooks and class materials, content and skills to be taught, teaching techniques, evaluating students, discipline, and homework. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Collegiality Within School: Percentage of teachers who strongly agree that there is a great deal of cooperative effort among the staff members. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Testing-Related Job Insecurity: Percentage of teachers who strongly agree that they worry about the security of their job because of the performance of their students or school on state and/or local tests. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Administrative Support: Percentage of teachers who strongly agree that their school administration's behavior toward the staff is supportive and encouraging. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Teacher Qualifications Rating: The average quintile rank (1-5) of uncertified teachers and inexperienced teachers.

% Inexperienced Teachers: Percentage of first- and second-year teachers in 2014. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

% Uncertified Teachers: Percentage of teachers who have not met state certification requirements in 2014, including those teaching while still finishing their preparation, or teaching with an emergency-style credential. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

Teacher Turnover Rating: The average quintile rank (1-5) of plans to leave teaching, left profession, and left school or profession.

Left Profession: Percentage of teachers who left the teaching profession between the 2011-12 school year and the 2012-13 school year, also known as "leavers." *Source: LPI analysis of the Teacher Follow-Up Survey, 2013, from the Schools and Staffing Survey, National Center for Education Statistics.*

Left School or Profession: Percentage of teachers who moved schools or who left the teaching profession between the 2011-12 school year and the 2012-13 school year, also known as "movers and leavers." *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics; Teacher Follow-Up Survey, 2013, from the Schools and Staffing Survey, National Center for Education Statistics.*

Plans to Leave Teaching: Percentage of teachers planning to leave teaching as soon as possible or as soon as a more desirable job opportunity arises. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Ratio of Uncertified Teachers in High- vs. Low-Minority Schools: Percentage of uncertified teachers in high-minority schools / Percentage of uncertified teachers in low-minority schools. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

Teacher Equity Rating: The average quintile rank (1-5) of the ratio of uncertified teachers in high- vs. low-minority schools, the ratio of inexperienced teachers in high- vs. low-minority schools, uncertified teachers in high-minority schools, uncertified teachers in low-minority schools, inexperienced teachers in high-minority schools, and inexperienced teachers in low-minority schools.

% Uncertified Teachers in Low-Minority Schools: Percentage of teachers in low-minority schools who are not certified. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

% Uncertified Teachers in High-Minority Schools: Percentage of teachers in high-minority schools who are not certified. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

Ratio of Inexperienced Teachers in High- vs. Low-Minority Schools: Percentage of inexperienced teachers in high-minority schools / Percentage of inexperienced teachers in low-minority schools. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

% Inexperienced Teachers in Low-Minority Schools: Percentage of first- or second-year teachers in low-minority schools. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

% Inexperienced Teachers in High-Minority Schools: Percentage of first- or second-year teachers in high-minority schools. *Source: LPI analysis of the Civil Rights Data Collection, Public-Use Data File 2013-14, National Center for Education Statistics.*

% Teachers of color: Percentage teachers of color in 2012. *Source: LPI analysis of the Public School Teacher File, 2012, from the Schools and Staffing Survey, National Center for Education Statistics.*

Considerations in Drafting Individual Teacher Contracts

By Richard Verstegen, Boardman & Clark LLP
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Wisconsin law, Wis. Stat. § 118.21, requires school boards to enter into written individual contracts with their teachers. However, Wisconsin law sets few requirements on what must be included in these contracts. As a result, school districts retain a great amount of discretion in how to draft these contracts. A recent Wood County Circuit Court decision discussed the legal ramifications of some common provisions that school districts might include in their individual contracts. This FYI will discuss this recent case and how this case might impact the way that school districts draft their individual contracts with teachers.

Recent Wood County Circuit Court Decision

In *Marks v. Bd. of Educ. of the Wis. Rapids Pub. Sch.*, Case No. 14CV205 (May 3, 2016), Judge Robert Shannon ruled on three important issues

regarding individual contracts. While circuit court decisions are not binding on other courts, the analysis in this decision provides insight on how other judges across the state might analyze similar issues regarding individual contracts.

First, Judge Shannon found no support in the applicable statutory language or case law for reading into individual teacher contracts an implied “for cause” termination standard. Historically, the standard for termination during the term of an individual teacher contract was a matter for collective bargaining. Here, the district and the teachers through their individual teacher contracts established the standard for termination as “non-arbitrary, non-capricious”. Judge Shannon stated that the “non-arbitrary, non-capricious” standard is a readily articulable standard recognized in the law.

Second, the contracts also contained a provision allowing the District, at its discretion, to provide employees with additional benefits and supplemental compensation other than the fixed base wage. The judge found this language permissible. According to the judge, no statute prohibited the board from granting additional benefits and salary to teachers, nor did any statute require the contract to describe such additional benefits and salary in a particular way.

Third, Judge Shannon ruled that the District could provide in the contract that nonrenewals were not subject to the District’s grievance procedure. The contract stated that nonrenewals were subject to the procedure established by Wis. Stat. § 118.22 and not subject to the grievance procedure established under Wis. Stat. § 66.0509(1m) for terminations, discipline, and workplace safety. Judge Shannon concluded that

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Kathy Johnson
Independent Consultant
Risk Management Strategies LLC
kjohnson@rmstrategies.net 608/663-9032



no statute provided evidence that the legislature intended nonrenewals to be subject to the grievance procedure. The nonrenewal statute and the grievance procedure statute address two separate and distinct aspects of the employment relationship between school boards and teachers. Therefore, the individual teacher contracts did not unlawfully exclude nonrenewals from the grievance procedure. [NOTE: There is no requirement to have a standard at all for nonrenewal].

Prior Brown County Circuit Court Decision

In 2014, a Brown County Circuit Court judge issued a decision regarding individual teacher contracts. *Schneider v. Howard Suamico Sch. Dist.*, Case No. 2013-CV-397 (Brown Cnty. Cir. Ct. Jan. 22, 2014). Just as in the recent Marks case, the Brown County Circuit Court judge in *Schneider* ruled that an individual contract could include a standard for termination, and that standard does not have to be “for cause.” Additionally, the judge ruled that a contract complied with Wis. Stat. § 118.21 by providing only a base wage for a set number of days of employment. Review our March 2014 Individual Teacher Contracts FYI

newsletter summarizing the *Schneider* case: <http://www.boardmanclark.com/march-fyi>

The two cases come to notably different conclusions regarding whether nonrenewals are subject to the statutory grievance process under Wis. Stat. § 66.0509(1m). In *Schneider*, the judge ruled that certain nonrenewals might constitute discipline, which would then be subject to the grievance procedure. Relying upon a rationale used by the Wisconsin Court of Appeals in deciding an earlier case involving the statutory grievance procedure, the judge looked at a dictionary definition of discipline that equated discipline to punishment. Some nonrenewals, such as those for poor performance, could constitute punishment. Therefore, the judge ruled that the District could not categorically exclude all nonrenewals from the grievance procedure. However, nonrenewals for non-disciplinary reasons, such as those for financial considerations or decreased enrollment, might still be excludable from the grievance procedure. The Marks decision, by contrast, stated that all nonrenewals could be excluded from the grievance process.

Conclusion

Based on these two decisions, Districts may wish to review their individual teacher contracts to ensure that they provide sufficient flexibility to the district and comply with the law. Districts do not have to have teacher contracts that are identical. Contracts can be individualized with specific provisions applicable only to the specific teacher. Districts should consult with legal counsel over how best to integrate the two circuit court decisions. Districts that have not yet issued teacher contracts to returning teachers or new hires may be able to enter into contracts with those teachers that include language based on these decisions. Districts that have already issued contracts for the school year should consider whether to modify their individual teacher contracts for the 2017-18 school year.



Inquiries about the article can be made to Richard at 608.286.7233 rverstegen@boardmanclark.com

The WASBO Board Wants You!

Now is the time to consider running as a candidate for the board of directors of your organization. Over the next several months, the Nominating Committee will be recruiting individuals to put themselves forward as leaders for WASBO. If you are interested in running for the board next spring, please contact the Nominating Committee Chair Mary Ellen Van Valin (vanvalinm@milton.k12.wi.us).

If you are curious what the commitment requires, please contact any current or past board members about their experiences. The board of directors meets five times a year - September, December, February, April and June. If you want to give back to WASBO, but don't feel that you're ready to take on a leadership role, there are 19 committees that you could consider joining.

Hear from John Gahan on page 38 as to why you should join today!

Contact WASBO at 608.249.8588 to learn more about joining a committee.



Midwest Facility Masters Conference

More than 380 attendees utilized this year's theme, *Lead by Example*, to discover opportunities to bring back to their districts at this year's Midwest Facility Masters Conference at the Kalahari Resort and Conference Center in Wisconsin Dells Nov. 7-8. Attendees were given opportunities to network with 120 exhibitors in the extended exhibit hall, gain knowledge on SchoolDude products while visiting the Learning Lab, and attend concurrent sessions that covered a wide array of subject matter.

Steve Ford (right) started the conference on Monday morning with a session on his life in the White House, Hollywood and the challenges brought with being in the spotlight. The audience was then sent on their way to 60 concurrent sessions offered throughout the conference.



In addition to continuing education credits towards Certified Plant Manager (CPE), Certified Plant Maintenance Manager (CPMM) and Certified Plant Supervisor (CPS) designations through the Association for Facilities Engineering, attendees had the opportunity to complete Module 1 of the WASBO Facilities Manager Certification Program.

The second day of the conference began with a panel of school district personnel to discuss how Wisconsin schools are preparing for unwanted threats. Additional concurrent sessions were also offered before everyone made their way home.



Exhibitors and attendees raised \$2,760 for next year's attendee scholarships by participating in the exhibit hall raffle. The \$2,465 raised last year was put towards five attendee scholarships.

Focus on Energy generously sponsored nine additional scholarships this year, allowing 14 scholarship recipients to attend the conference for the first time. Each recipient received \$500 to cover registration and travel to the conference. The 14 attendee scholarship recipients were Heather Aune, Director of Business Services, ISD #199, MN; Paul Chase, Head Custodian, SD of Whitefish Bay, WI; Lynette Edwards, Business Manager, Clintonville SD, WI; David Farwell, Facility Services Coordinator, Marshall Public SD, WI; Rodger Ford, Building Engineer, Community High SD #218, IL; Jason Green, Custodial Supervisor, Hartford Union High SD, WI; Derek Hillard, Lead Maintenance, Antioch SD #34, IL; Ken Kandler, Building Custodian II, Oshkosh Area

SD, WI; Jonathan Mitchell, Business Manager, St. Francis SD, WI; Don Olszewski, Facility Manager, Cudahy SD, WI; Marcus Sabo, Head Custodian, SD #23 – Prospect Heights, IL; Marc Tabor, Director of Maintenance, Ottawa Elementary Schools #141, IL; Amy Vesperman, Superintendent, Albany SD, WI; Victor Voight III, Director of Building and Grounds, Freedom Area SD, WI.

Networking opportunities were abundant at this year's conference, starting with a Welcome Reception on Sunday Evening where repeat attendees could connect with colleagues they met at previous conferences and meet new ones. Attendees were able to visit the exhibit hall to network with both peers and exhibitors during lunch on Monday, as well as after sessions concluded. Later in the evening attendees came together for the Tailgate Social, sponsored by SchoolDude.com, Stalker Flooring and Performance Services. While networking with attendees from Illinois, Iowa, Minnesota, Missouri and Wisconsin, colleagues were

able to take part in a friendly game of corn hole, watch Monday night football and enjoy beverages and snacks.



Above: Attendees enjoyed networking Monday evening.

Right: Networking participants had a chance to win theme baskets donated by the various state co-hosts.



A record number of exhibitors participated in the exhibit show.

This conference is hosted by Wisconsin ASBO and SchoolDude.com in partnership with Illinois ASBO, Iowa ASBO, Minnesota ASBO, Minnesota Educational Facilities Management Professionals (MASMS) and our newest partner organization, Missouri School Plant Managers Association (MSPMA). The Midwest Facility Masters Conference would not be possible without the help of more than 105 presenters, the support of our sponsors and the dedication of the planning committee members. Thank you to all those who helped make this year's conference another successful professional development opportunity for all attendees, including our sponsors who can be found on page 34.

Planning for the 2017 Midwest Facility Masters Conference began as soon as the last concurrent session ended with a wrap-up meeting. If you would like to be part of the planning committee, please contact Kaitlyn Peters at kaitlyn.peters@wasbo.com. If you are interested in presenting at next year's conference Oct. 30-31, 2017 at the Kalahari Resort and Conference Center, watch for the Call for Presentations to open **Feb. 15 - March 31, 2017**. Mark your calendar and plan to join us for the 2017 Midwest Facility Masters Conference. 🇺🇸



Left: A young Jeff Knodl and President Gerald Ford



Right: WASBO member Jeff Knodl got to share a memorable moment with keynote Steve Ford.



The picture of me caddying for Gerald Ford was June 1979. I was 16 years old at the time, the picture appeared on the front page of the Milwaukee Journal Sports page the day after event. I also had the opportunity to meet with the Secret Service prior to event, and was in one of the vehicles of the motorcade. What a day it was.

- Jeff Knodl



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WASBO/WASPA School Personnel Academy



Once again, WASBO collaborated with WASPA to host the 2016 School Personnel Academy – *On the Horizon: Preparing for the Future* – held at the Madison Marriott West on Dec. 7-8. Sessions focused on various areas of the Affordable Care Act, wellness plans, and staff compensation. Participants attended a keynote on what the new presidency holds for employee benefits, as well as a number of concurrent sessions. WASBO and WASPA commend the planning committee on their work in providing another successful conference. Special thanks are due also to the sponsors listed at right. If you would like to participate on next year’s planning committee, contact Kaitlyn Peters at kaitlyn.peters@wasbo.com. Mark your calendar and plan to join us on Dec. 6-7, 2017. 🐾

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As part of the Year of Success Program, attendees joined WASBO and DPI for Winter at a Glance on Dec. 6 at the Madison Marriott West. This one-day conference provided both those new to the profession and seasoned business managers with areas of focus for the business office during the winter months. Presenters received high marks for information provided which ranged from the Revenue Limit and Equalization Aid to Fees and an Overview of Employee Benefits.

If you know of someone new to the business office, including district administrators, be sure to let them know about the Year of Success Program. Learn more at <http://www.wasbo.com/success>. The next offering of sessions in the Year of Success Program is scheduled at the Wisconsin Federal Funding Conference Feb. 15-16 at the Kalahari in Wisconsin Dells.

WASBO thanks PMA Financial Network, Inc./Forecast5 Analytics, Key Benefit Concepts, and CTS Group for sponsoring the conference as well as Focus on Energy for sponsoring the Year of Success program. 🐾

Citizens Pass Numerous Referenda to Support Their Local Schools



By Tom McCarthy, DPI Communications Director, WI Dept. of Public Instruction

“Yesterday, people in communities across Wisconsin voted to increase funding to educate kids,” said State Superintendent Tony Evers. “Their support for schools spanned areas that voted for both political parties. Put simply, people have come to expect that kids have access to a quality education and they are willing to pay for it — that’s a good thing.”

Since the start of 2012, more than half of public school districts (242) have passed referenda to exceed state imposed revenue controls. That total includes districts that have improved or upgraded facilities and those that have asked to spend more than what the state allows to provide opportunities for students. So far in 2016, 154 questions have been posed by 111 districts at a success rate of 79.22 percent. This year, a record high in operating referenda questions have already passed (63) at a record rate of passage (81.69%).

“While passage of a local referenda is a cause for celebration, we still have many students in districts that have not found success at the ballot box,” Evers said. “We cannot ignore that fact and its impact on the quality of our state school system. New revenue authority for districts to spend on the education of our kids would go a long way in alleviating that problem.”

More information about school referenda is available on Department of Public Instruction School Financial Services Referendum Information page. This news release is available electronically at http://dpi.wi.gov/sites/default/files/news-release/dpinr2016_112.pdf.

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REFERENDA RESULTS

NOVEMBER 8, 2016



SUMMARY

On November 8th, 47 Wisconsin school districts chose to go to referendum. Of the referenda questions 82% passed.

November 2016 Referendum Breakdown:

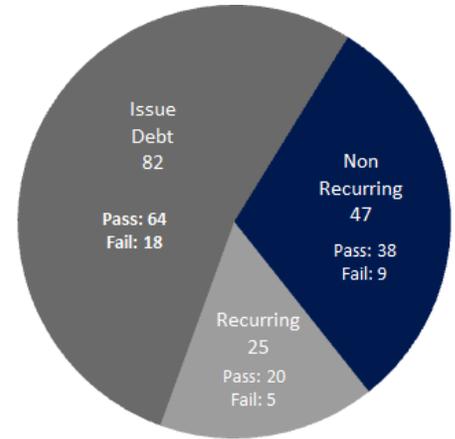
- 42 questions asking residents to issue debt totaling \$1,139,735,000.
- 14 questions asking residents to exceed the revenue limit on a non-recurring basis in an amount totaling \$157,955,000.
- 11 questions asking residents to exceed the revenue limit on a recurring basis in an amount up to \$40,259,000 per year.

Results:

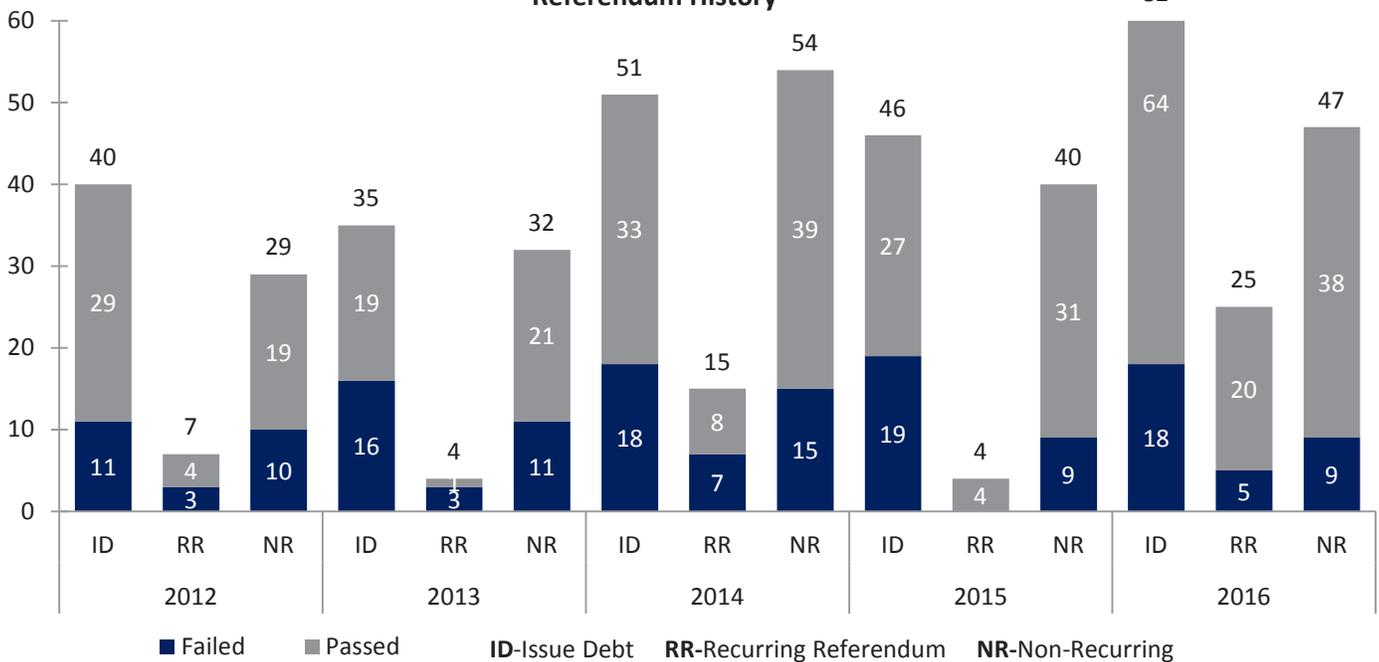
42 school districts celebrated success:

- 34 Debt questions passed totaling \$803,835,000.
- 11 Non-recurring questions passed totaling \$143,230,000.
- 10 Recurring questions passed totaling \$40,086,000.

2016 Referendum Breakdown



Referendum History



HISTORY

UPCOMING REGULAR ELECTION DATES¹

	2017		2018		2019	
	Primary	General	Primary	General	Primary	General
Spring	02/21/2017	04/04/2017	02/20/2018	04/03/2018	02/19/2019	04/02/2019
Fall	No Fall Elections		08/14/2018	11/06/2018	No Fall Elections	

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 Michel Clark - Lisa Voisin

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School Business Solutions Team
 Debby Schufletowski

Marleen Clark - Karen Dvornik - Diane Pertzborn

SchoolBusinessSolutions@rwbaird.com

¹The governing board required to file adopted referendum ballot resolutions with their municipal clerks at least 70 days prior to the election date indicating the amount and purpose.
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Supreme Court to Hear Open Meetings Case & WERC Announces Revised CPI-U



By Doug Witte, Boardman & Clark LLP

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The Wisconsin Supreme Court has agreed to hear a case involving the question of “Whether a formal committee, created by school district officials, pursuant to school district policies, in order to carry out school district functions, is a ‘governmental body’ subject to the Open Meetings Act.” This case will be of great interest to school districts as it will be one of the first court cases specifically addressing this issue. There are a handful of Attorney General Opinions and letters addressing aspects of when a “committee” meets the definition of a “governmental body” within the Open Meetings Law. Those Attorney General Opinions, while useful, still leave a number of situations unresolved and are only considered persuasive authority and not binding on courts. The Court’s decision in this matter, which is a review of an unpublished Court of Appeals case, will likely provide additional guidance to school districts.

In this case, a parent complained about the content of reading materials for a course his freshman daughter was taking in the Appleton School District. He specifically requested that the district provide an alternative course, rather than a review of the existing course materials. In response to his request, the district superintendent directed two administrators, who were responsible for the planning, selection, revision, and implementation of curriculum within the district, to respond to the parent’s request.

The two administrators ultimately decided to conduct a review of the existing books in the class the student was in to determine whether different books, as opposed to an entirely new course, would resolve the parent’s concern. They formed

a “Communication Arts 1 Materials Review Committee” (“Review Committee”) to conduct the evaluation. During the course of the review, they expanded the Review Committee’s duties to include a full review of the course materials because the materials had not been reviewed for eight years.

The administrators developed the procedures utilized for the Review Committee’s evaluation of the course materials by using a modified version of a process described in a Board Rule and the Assessment, Curriculum, and Instruction Department Handbook. The Review Committee was not created based on any specific provision of the Board Rule or Handbook, and the Board never took formal action to approve or direct the Review Committee’s creation or the processes of the Review Committee.

The Review Committee had seventeen members and held nine meetings between October 2011 and March 2012. The parent asked to attend the Review Committee meetings, but he was told they were closed to the public. The administrators acknowledged that one reason they wanted the meetings closed was to prevent parents from attending and publicizing statements made by Review Committee members about particular books. The administration explained that this parent had previously publicized teachers’ statements made in a standard Review Committee meeting, and the teachers did not want that to occur again.

The Review Committee read approximately 93 fiction books and recommended a list of 23 books to the Board’s Programs and Service Committee. In April 2012, the Programs and Service Committee adopted the recommended reading list

as proposed, and the Board adopted that proposed list later that month.

The Review Committee meetings remained closed, and no public meeting notices were posted. The parent filed a complaint with the District Attorney who refused to prosecute. A private action was brought in circuit court alleging the Review Committee was a governmental body, which violated the Open Meetings Law by failing to give notice of the meetings and excluding the public. The circuit court held that the Review Committee was not a “governmental body” subject to the Open Meetings Law. The Court of Appeals affirmed that decision. The Court of Appeals determined that the precise issue in this case was whether the Review Committee was “created by” a “rule or order” within the meaning of the Open Meetings Law. The Court of Appeals focused on one particular Attorney General letter which attempted to provide guidance on this issue. The Court of Appeals noted that particular Attorney General letter described two scenarios with different results: 1.) If a school board had in fact given a superintendent a directive to make a recommendation to it, which directive the superintendent then delegated to the management team, then the Open Meetings Law would apply. 2.) If the management team had developed recommendations on its own initiative to submit to the board, then the Open Meetings Law would not apply.

In this case, the Court of Appeals held that because there was no established district procedure for requesting an alternative course or responding to the specific request the parent made in this instance, the Board Rule and Handbook did not determine how the Review Committee should proceed. Rather, the superintendent directed

the administrators to respond to the parent’s request and was not further involved in the development of any process. The Court of Appeals found the administrators decided on their own initiative to create the Review Committee and then subsequently expanded the scope of the Review Committee’s work to include a review of the existing course materials and make a recommendation to the Board. As a result, the Court held the Review Committee was not a “governmental body” subject to the Open Meetings Law.

In their briefs to the Court of Appeals, the parties noted the difficulty was trying to draw the line between when meetings of administrators, professionals and staff were just part of the ordinary day-to-day business of a school as opposed to when such meetings might be construed as being a meeting of a “governmental body.” The district, in its argument to the Court, noted that, if the Open Meetings Law was interpreted as broadly as the parent was suggesting in this case, the number of meetings that would be required to be subject to the Open Meetings Law in not only this district but in all school districts across the state would be endless. Districts would be forced to notice and open to the public any employee or departmental meetings not only related to curriculum but in other areas such as building repairs, insurance, sanitary facilities, school hours, continuity of educational programing, and providing court mandated services. The district suggested such a broad interpretation would result in inefficiencies and handcuff superintendents and others from effectively running the school.

The parent had also raised an issue before the Court of Appeals as to whether, because the Review Committee was created by a “high ranking administrator,” that it constituted a “governmental body.” The Court of Appeals ruled the parent had forfeited that argument because it had not raised it at the circuit court level. The parent has renewed that argument in his brief to the Supreme

Court. Whether the Supreme Court will address that argument and, if so, what affect it might have on the case also remains to be seen. The Attorney General has held in some circumstances that a directive from a high-ranking official creating a body and assigning it duties is a “rule or order” sufficient to bring the committee within the meaning of “governmental body” under the Open Meetings Law. In this case, an assistant superintendent was the person who formed the committee in response to the superintendent’s directive to respond to the parent’s complaint.

It will be interesting to see where the Supreme Court draws the line in these situations. Oral argument has not yet been scheduled, but a decision should be issued before next summer.

CPI-U REVISED for Bargaining Agreements Beginning January 1, 2017

On November 4, 2016, the Wisconsin Employment Relations Commission (WERC) published a revision to the Department of Revenue’s calculation of the applicable CPI-U. This is a result of the Bureau of Labor Statistics (BLS) releasing four months of revisions due to an error it reported in October and described as a problem in the “indexes for prescription drugs... published for May 2016 through August 2016, which affected the U.S. All items index.”

After reviewing all of the previously published rates, the only one affected by the revised BLS index is the one calculated for collective bargaining agreements with a beginning date of January 1, 2017. When originally reported, the cap was .68%. It has now been reduced to .67%.

If you are still bargaining to reach an agreement effective January 1, 2017, use the new CPI-U data. If the parties to such an agreement have previously settled for a stated base wage increase above .67%, they may wish to consult an attorney or the WERC to determine the potential impact. This does not impact most school

district bargaining since the July 1, 2016, CPI-U remains unchanged, and the July 1, 2017, CPI-U will not be calculated until approximately January 19, 2017, when the December CPI-U data is expected to be released.

The relevant portion of the WERC’s table is reproduced below:

Beginning date of one year collective bargaining agreement	Applicable CPI-U as determined by WI Department of Revenue
April 1, 2017	0.93%
March 1, 2017	0.80%
February 1, 2017	0.73%
January 1, 2017	0.67%*
January 1, 2017	0.68%

The Wisconsin Department of Revenue (DOR) has advised the Wisconsin Employment Relations Commission (WERC) that the CPI-U increase applicable to one year collective bargaining agreements with a term beginning on the following dates is as noted in the corresponding column in the chart above. 📌

Inquiries about this article can be made to Doug at 608.283.7529 or dwitte@bardmanclark.com

Broaden the Scope of Your Leadership Influence

By John Gahan, Assistant Superintendent / CFO Pewaukee School District



On a daily, and sometimes hourly basis, we are asked to provide leadership in our districts. Many of these decisions we are asked to make as educational leaders can have a profound influence on the culture and direction of our organizations for years to come. The more we can do as leaders to sharpen those decision-making skills, through every available opportunity, the greater value we can bring to our organizations over the long-term. Service on the WASBO Board of Directors is a great opportunity for enhancement of these skills.

My service on the Board over the past decade has provided me with the opportunity to learn from some of the best in the field in the State of Wisconsin. As a leader, I was able to observe many leadership styles and apply their knowledge and expertise in my district. The diversity of the membership of the Board allowed me to better understand the dynamics faced by districts all over the state.

One of the greatest rewards was to be part of a truly mission-driven organization. Having the opportunity to participate at the ground level of decision-making and develop a strategic plan that is truly rooted in our mission. We strive as an association to provide meaningful professional development opportunities to members, facilitate opportunities to build professional connections through networking and building members capacity to

advocate on behalf of all students in the state has been truly rewarding. Seeing the efforts of the incredible staff we employ in the WASBO Office and understanding their passion for excellence and success of the association affirms that I made the right decision to serve on the Board.

So what is holding you back? We have all heard that professional development is one of the most important aspects for the growth of an organization. Often times it is also one of the areas that garners the least attention for leaders who are in the daily problem solving mode. Committing the time to serve on the WASBO Board will be one of the most rewarding and beneficial professional development opportunities you could have in your career. Service will benefit you as a leader. The learning you will experience and the connections you create are beneficial regardless of what phase of your career you are currently at.

So now is the time for action! As a co-chair of the Nominating Committee I encourage you to take on this new challenge and get involved at the next level. If you have questions about what it will take to become a member of the WASBO Board there are resources available on the website or you could just call the helpful WASBO Office Staff. 🇺🇸

Join ASBO International Today!

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



For WASBO members that did not renew their ASBO International dues when you re-upped with WASBO in the summer, now is the time to do so. If you've never been an ASBO International member, I recommend that you consider it now. Be a member for a year and check out all that ASBO has to offer. ASBO dues are paid on the calendar year, so 2017 ASBO membership is about to start and now is the time to join!

There are a number of reasons to consider joining ASBO, many of which Woody and I talked about in the August edition of this newsletter:

- School Business Affairs - The

monthly magazine of ASBO International. Each issue focuses on a specific area/topic of interest for school business officials.

- "School Business Daily News" - daily school news from across the country, especially about things that are happening in Washington which will impact schools locally.

- Global School Network - like our Peer-to-Peer network, GSN allows ASBO members to communicate directly with one another asking questions - and providing information - about things that impact our daily

work.

- Executive Leadership Forum and Eagle Institute - two outstanding leadership development conferences that provide outstanding professional development for school business officials.

- Annual Meeting & Exposition - the ASBO annual conference for all members, with outstanding speakers for the keynotes, breakout sessions presented by colleagues from across the country, Canada, and beyond, as well as free pre-conference workshops that dive deeper on key topics.

- Legislative Affairs Committee - ASBO

What Could Your District Do with \$3,000?

“I want students to know that if they can dream up an idea, they can accomplish anything with hard work,” said Anneke Thompson, a teacher for Burlington School District and a 2016 Forward Together Award winner. “Teaching children how to overcome barriers and stick with something for a long period of time and to realize their potential is a life lesson that Techno Dragons Designs will offer.”

Thompson won a \$3,000 Forward Together Award from WEA Trust earlier this year. The grant was used to purchase a 3D printer and filament rolls for their school club, Techno Dragon Designs. With these new materials, students will create products to be sold in the school store, which will make the program self-sustaining. Thompson was one of three Forward Together Award winners in 2016. The next WEA Trust Forward Together Award is right around the corner! Applications will be accepted from January 1-31, 2017 online at WeaTrust.com/Award. Recognize your colleagues for their vision and drive by jumpstarting their passion projects.



As part of the 4th Annual Forward Together Award, WEA Trust will give three Wisconsin school districts \$3,000 grants to support school projects. To enter, visit the WEA Trust exhibit booth at the State Education Convention or go to WeaTrust.com/Award.



Join ASBO International Today!

Continued from previous page

is expanding its voice in Washington DC, with the US Department of Education. Much as WASBO's voice is getting stronger and more respected in Madison, ASBO's voice in DC is on the same path - to become the voice on school business matters legislators and bureaucrats can rely on to provide accurate and objective information.

- Certificate of Excellence in Financial Reporting and Meritorious Budget Award programs identify the best practices in these areas and provide critical feedback to submitting districts on their processes in order to strengthen their reporting.
- Networking opportunities - meet and develop friendships with colleagues from across the globe. I have had the opportunity to get to know people from Iowa, Illinois, Alabama, Oregon, Oklahoma, New York, New Jersey, California, England, Canada, South Africa, and Australia.

There is also a WASBO reason to join ASBO this year. And, yes, I know I am not completely objective on this issue.

Last year, the WASBO Board of Directors endorsed my candidacy for the ASBO International board. WASBO, as an organization, has committed to having a voice at the table in ASBO and has run several candidates since 2000. Roger Price (Madison) in 2000; Erin Green (Greendale) in 2005 for the board & 2008 for President-Elect; Tom Wohlleber (Middleton) in 2012 and now my candidacy. I look forward to representing WASBO and you at ASBO International.

I need your support in this election. And the strongest support you can provide is through your vote. But you have to be a member of ASBO International to do so. So yes, there is a bit of self-interest in my promoting membership in ASBO. But I believe in the benefits of the international association.

The cost of membership in ASBO is the same as it is for WASBO this year - \$225. I hope you consider joining, especially if your contract includes membership in a national association

as a benefit for your position. But don't do it for me. Do it for you! Because ASBO is worth it!

For more information about the benefits of ASBO International membership, please see <http://asbointl.org/asbo/media/documents/membership/MemberBenefitsGuide.pdf>. You can join online at <http://asbointl.org/membership/join>, or through the WASBO offices.

Best wishes this holiday season! And thank you for your support!



ACA Review: Determining Employee Status

By: Karen Breitnauer, Senior Compliance Attorney, M3 Insurance



A national group, the Association of School Business Officials (ASBO), has been working with the Internal Revenue Service (IRS) on an ongoing basis to reduce, simplify, clarify and streamline Affordable Care Act (ACA) compliance requirements for school districts. Recently, IRS auditors in several states have indicated that several school districts are misclassifying employees as contractors for ACA purposes, who in fact should be considered short-term employees.

The issue at hand: Employee or Contractor

Applicable large employers (ALE) are faced with the reality of complying with employer shared responsibility rules included in the Affordable Care Act (ACA). In order to comply with the ACA rules, ALEs must understand what it means to make an offer of minimum essential coverage (MEC) under an eligible employer-sponsored health plan to their full-time employees. School districts may have many unique circumstances when it comes to ACA compliance and full-time employee status. Such unique circumstances include: substitute teachers, coaches, ticket takers, aides and others. When districts categorize these employees for ACA purposes, they should keep two important concepts in mind: contracted staff versus employee/employment categories.

How to Determine Status

To determine an individual's status as an "employee", final regulations have focused on applying the "common law" standard. The determination can be complicated in many cases. Where the ACA's employer shared responsibility rules are concerned, the answer to this question tells us which entity must make the requisite offer of coverage when assessing exposure for penalties.

The Common Law Employer Test

When it comes to non-traditional staffing issues, the question of who is a common law employer/employee is, at first glance, difficult to answer. For purposes of the federal tax code and ERISA, employers have historically been required to distinguish between workers who are their common law employee and those who are not. The determination of common law status is based on a multi-factor test established by the Internal Revenue Service to determine which employer has "primary direction and control" of an employee. A series of factors are applied based on the unique facts and circumstances of the situation, but those factors generally fall into three broad categories regarding whether the entity exercises: (1) behavioral control; (2) financial control; and (3) legal control.

The final regulations do not directly address when and how the common law test will apply with regard to temporary or unique employment situations. So, it remains to be seen just how vigorously the Internal Revenue Service (IRS) intends to apply the test, which is by no means a black-and-white indicator. School districts that routinely provide contracts for certain positions may want to consider such personnel as employees for ACA purposes, as the common law test would be easy to satisfy in most cases.

ACA Employment Categories

It is all about keeping it simple! The ACA, with limited exceptions, does not go into great detail when categorizing employees. Terms such as "limited term employee", "temporary employee" and "substitute teacher" are not included in the regulations. Rather, employers are required to consider employees as fitting into one of four categories at the time of hire: full-time (FT), part-time (PT), variable hour or seasonal. And, in terms of identifying

FT status in an ongoing employment situation, the rules require only that the employer determine if the employee works 30 or more hours per week based on one of two methods: the monthly measurement method or the look back measurement method.

Many school districts consider anyone on the current payroll as an "employee", thereby eliminating the need for the "common law" test. In essence, the employer considers all payroll participants as employees and should apply the selected measurement method to the employee's hours to determine FT status, without regard to contract terms or length of service. If anyone is employed per the payroll records at the start of the measurement period (for the look back measurement method) or the start of the month (for the monthly measurement method), they should be measured and treated accordingly.

New hires for purposes of the look back measurement method should be categorized as FT, PT, variable hour or seasonal at the time of hire. Circumstances of each of these employees may be different. For instance, a coach hired to work one season (i.e., basketball) could be categorized as a seasonal employee and put into an initial measurement period while a person hired as a long term FT substitute would have to be categorized as FT employee and offered coverage within the first three months or per the employer's eligibility requirements.

Key Takeaway:

Many organizations are lobbying the federal government to simplify the implementation of the Affordable Care Act. However until the federal government issues rules dictating

changes, organizations should continue to comply with the law as it currently stands. Currently the common law standard is the rule for determining employee status, and organizations should approach the standard with caution, as to minimize risk of penalty exposure. Please also note that the identification process of an individual as an employee may have ramifications beyond the ACA, for example worker's compensation, fair labor standards act application, unemployment compensation and contractual issues to name a few. It should also be noted that the tests to determine whether an individual is an employee vary from area

to area, for example the test for being an employee under Wisconsin's Worker's Compensation Law is separate and distinct from the ACA, IRS and Department of Labor Tests. Please work with your legal counsel, tax professionals and/or insurance experts to help you determine the right approach for your organization. 📌

If you have questions about this article, contact Karen at karen.breitnauer@m3ins.com

Service Affiliate Checklist



- Make sure your membership is up to date for 2016-17.
- Sponsorship Opportunities - contact Clare at clare.may@wasbo.com:
 - Wisconsin Federal Funding Conference
 - Facilities Management Conference
 - Accounting Conference
 - Transportation & Bus Safety Conference
- *Taking Care of Business* Articles due Jan. 15 for February issue - send to clare.may@wasbo.com.
- Advertise in *Taking Care of Business* - contact Clare at clare.may@wasbo.com.
- Update your profile and communication preferences at WASBO.com.
- Join a WASBO Committee.

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Welcome New Members • October-November 2016

District Professional Members

- **William Eberle**, Lead Custodian, Kettle Moraine SD
- **Dawn Foeller**, Director of Business Services, United SD of De Pere
- **Colleen Grovesteen**, Administrative Assistant, Tomah Area SD
- **Rachelle Hady**, Director of Benefits, Madison Metropolitan SD
- **Tom Hintze**, Facility Foreman, SD of Menomonee Falls
- **Lindsay Joerns**, Director of Business Services, Elcho SD
- **Tina Kimball**, Payroll Clerk, Lac du Flambeau Public School
- **Mike Kozlosky**, Head Custodian, Muskego-Norway SD
- **Wendy LaPointe**, Accounting Specialist, SD of Milton
- **Cynthia Leiler**, HR, SD of Menomonee Falls
- **Michael Mandli**, Custodial Maintenance, Muskego-Norway SD
- **Javier Martinez**, Maintenance, Ashwaubenon SD
- **Kaitlin Miller**, Accountant, Racine Unified SD
- **Carmen O'Brien**, Business Manager, SD of Manawa
- **Tiffany Pakulski**, Business Director, SD of Laona
- **Jackson Parker**, Account of Special Education Department, Racine Unified SD
- **Wayde Pollock**, Director of Finance, CESA #4
- **Jennifer Sellhausen**, Manager of Business Services, North Lake SD
- **Harvey Simdon**, Assistant Director of Buildings & Grounds, Lake Mills Area SD
- **Samantha Tillman**, Custodian 2, Shorewood SD
- **Wayne Vorwerk**, Maintenance Department Manager, Concordia University
- **Jackie Wagner**, Business Office Manager, Shorewood SD

Correction

In the Oct. 2016 issue of *Taking Care of Business*, we published an article titled "Building Kindness in Communities with Buddy Benches." At the end of the article, we printed the incorrect email for James Scherrer. If you wish to contact James, please do so at jim@scherrerconstruction.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 Wiedenhoft at woody.wiedenhoft@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. 📞

Service Affiliate Members

- **Edward Dorff**, Executive Director, Wisconsin School Safety Coordinators Association (WSSCA)
- **Charlie Gary**, Sales Engineer, McCotter Energy Systems
- **Jessica Hartje**, Sales Manager, Custofam Corporation
- **Aaron Mayhall**, Business Development Representative, Modern Maintenance Building Services
- **Derek Peterson**, Business Insurance Agent, The Insurance Center
- **Colin Watson**, Sales Consultant, Allegion

Member Moves and Retirements

On the Move

- **Kathryn Burr**, from Business Manager, SD of Manawa, to unknown
- **Colleen Callahan**, from Bookkeeper, Rosholt SD, to unknown
- **Steve Cianciolo**, from District Operations Manager, Muskego-Norway SD, to Head of District Maintenance & Grounds, Muskego-Norway SD
- **Bryan Groshek**, from District Operations Manager, Muskego-Norway SD, to Supervisor of Buildings and Grounds, Mukwonago Area SD
- **Jacob Holtz**, from Business Manager, Central/Westosha UHS, to Business Manager, Sturgeon Bay SD
- **James Constant DeLain**, from Manager of Facilities Maintenance & Safety/Security, to unknown
- **Michele Eilbes**, from Accounting/Payroll Coordinator, Hartford Union HSD, to Business Manager, Campbellsport SD
- **Mike Williamson**, from Director of Business Services, Hartford Union HSD, to Business Manager, Whitnall SD
- **Tammy Koenig**, from Payroll and Benefits Manager, Shorewood SD, to HR, Payroll and Benefits Coordinator, Grafton SD
- **Curt Wiebelhaus**, from Supervisor of Buildings and Grounds, Mukwonago Area SD, to Director of Construction, Mukwonago Area SD

Retirements

- **Doug Johnson**, Business Manager, Whitnall SD
- **Thomas Olsen**, Business Manager, Sturgeon Bay SD

The Wisconsin Bike Fed in partnership with the Wisconsin Department of Transportation offers a Free 45-minute class for bus drivers. The presentation focuses on the most common errors that result in pedestrian and bicyclist injuries and fatalities. Bicycle and pedestrian laws will be reviewed with a discussion of the most important driving behaviors that will help prevent tragedies.

Contact Carolyn Dvorak to schedule a free class at Carolyn.dvorak@wisconsinbikefed.org.



Stay Connected



Interim Assignments

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

Mentorship Program

New professionals are entering the field regularly. If you know of someone new in your region who could use the help of a mentor, contact WASBO's Mentor Coordinator, Mary Jo Filbrandt, at maryjo.filbrandt@wasbo.com. For a school facilities mentor, contact Joe Ledvina at jledvina@lacrossesd.org or Dave Hoh at david.hoh@oshkosh.k12.wi.us.

Share Your Expertise

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 Clare May, clare.may@wasbo.com.

Is your WASBO membership
up to date?

Log in at WASBO.com

Check your profile and update your communication preferences!

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Upcoming Events - WASBO.com

Professional Development

WASB-WASDA-WASBO State Education Convention

Jan 17-20, 2017 - Wisconsin Center,

Milwaukee (Viterbo Credit)

Wisconsin Federal Funding Conference

Feb 15-16, 2017 - Kalahari Resort &

Conference Center, WI Dells (Viterbo Credit)

Facilities Management Conference

March 7-8, 2017 - Kalahari Resort &

Conference Center, WI Dells (Viterbo Credit)

Transportation & Bus Safety Conference

March 8, 2017 - Kalahari Resort &

Conference Center, WI Dells

WASBO Purchasing Card User Group

March 14, 2017 - Madison Marriott West

Accounting Conference

March 15-16, 2017 - Madison Marriott

West

Scholarship Fundraisers

Spring Golf Fundraiser

May 10, 2017 - Cedar Creek and Fox

Hollow

Spring Bike Fundraiser

May 10, 2017 - TBD

Certified School Risk Managers (CSRM)

Courses (Viterbo Credit) - 2017 classes in

Stevens Point

Fundamentals of Risk Management

Feb 22, 2017

Handling School Risks

Feb 23, 2017

Measuring School Risks

March 22, 2017

Funding School Risks

March 23, 2017

Administering School Risks

April 19, 2017

Bullying Prevention

April 20, 2017

Buildings & Grounds Group Meetings

Coulee Region - First Thursday of the month.

Meetings start at 10 am.

Milwaukee Metropolitan- Meetings are the third

Thursday of the month.

Committee Meetings

Accounting Committee

Meeting at 8:30 am, Fond du Lac, Oct 26

Safety & Risk Management

All meetings at 11:45 am, WASBO Offices

in Madison unless otherwise noted. Jan

10, 2017; April 4, 2017; Aug 1, 2017

School Facilities

All meetings at 9:30 am, WASBO Offices in

Madison unless otherwise noted. Jan 10,

2017; April 4, 2017; Aug 1, 2017

Spring Conference

Meetings at 2 pm by conference call

unless otherwise indicated. Dec. 16; Jan

19, 2017 (TBD during Joint Convention);

Feb 24, 2017; March 14, 2017 (6:30 pm

during Accounting Conference)

Regionals

Check WASBO.com for details.

Bay Area/Northeast - Meetings start at 9 am.

Feb 10, 2017, Oshkosh; April 7, 2017,

Kimberly; May 19, 2017; Manitowoc

Madison Area - Meetings start at 9 am at

Stoughton Area School District.

Northwest - Meetings start at 10 am at

Lehman's Supper Club in Rice Lake. Feb

1, 2017; April 5, 2017

Southeast - Meetings at 1 pm.

Jan 13, 2017, Greendale; Feb 10, 2017,

Hartland-Lakeside; April 21, 2017,

Northland Pines

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. Jan 5, 2017, Feb 2, 2017, March

2, 2017. April 6, 2017, May 4, 2017

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

Feb 24, 2017, Wausau; March 3, 2017,

Merrill; April 21, 2017, Northland Pines;

Aug 18, 2017, Antigo