



Taking Care of Business

Wisconsin Association of School Business Officials

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Jill Bodwin, Ben Irwin Recognized as Award Winners

Jill Bodwin, Director of Business Services, Pulaski Community School District and Ben Irwin, Director of Business Services, Cedarburg School District were honored by WASBO during the State Education Convention in Milwaukee.

Jill was named School Business Manager of the Year during her time as Business Manager at the Denmark School District. She worked in the Denmark School District for four years and previously worked as Director of Head Start for CESA 7, Coordinator of Financial



Jill Bodwin

Services in the Sheboygan School District, and as the Business Manager in the Mishicot School District.

Jill was instrumental in assisting the Denmark School District in passing a referendum to “exceed the revenue cap” starting with the 2014-15 school year. Jill also played a significant role in aiding school board members to make financial decisions, both short and long

term, in selling the Denmark School District’s bus fleet and transportation services.



Ben Irwin

Ben was named New School Business Manager of the Year for his work as Business Manager for the Parkview School District. He worked in the

Parkview School District for four years as a Business Manager while also attaining his Certified Administrator of School Finance and Operations (SFO) certification.

Ben was noted as being “instrumental in bringing financial stability to [our] district,” which included oversight of a 17-million-dollar building referendum to consolidate buildings in the district for a centralized campus.

Jill was recognized during the State Education Convention’s Wednesday General Session Jan. 18 in Milwaukee. Jill and Ben addressed the WASBO membership during the WASBO Luncheon on Thursday, Jan. 19. 🇺🇸

See more about the State Education Convention on page 31.

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

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

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Editor: Woody Wiedenhoef

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President's Message

What Will Be Your Legacy?

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



The final keynote speaker at the state education convention was a high school STEM teacher from Phoenix, Arizona named Fredi Lajvardi. One of the roles of the WASBO president is to serve as the master of ceremonies for the final general session at the convention which is only about 90 minutes long, but the majority of the session is the final keynote presentation. I wasn't all that excited when I saw that the speaker was going to be a high school STEM teacher because I thought it would be a pretty dry presentation and one that I wouldn't personally take much away from. To introduce himself to the audience, Fredi showed us the movie preview for one of the movies made about him and his students. Like most movie previews, it was eye catching and with George Lopez playing Fredi, there were some funny one-liners in the clip. My interest was piqued.

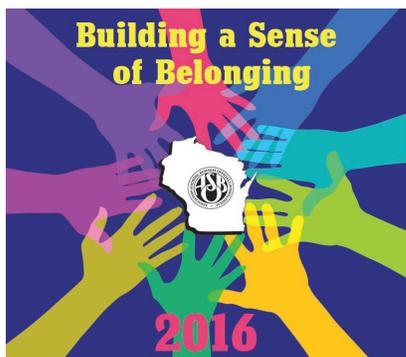
Fredi had a very unassuming method of delivery with some good self-deprecating humor and entertaining stories about how his students became STEM stars on the national education scene. As he proceeded to tell his story about making tech ed. fun for high school students at Carl Hayden High School in Phoenix, he mentioned that the third movie (this time IMAX is producing one) about him and his students would be released this summer. It's a pretty safe bet that none of us will have a movie made about our lives, let alone three. However, it isn't the movies that will be the legacy of this rather unassuming high school tech teacher, it is the lives of the students that he has impacted. He showed a clip of the documentary made about his students and at the end of the clip there was a picture of about a dozen former students. The accomplishments of those former students was impressive, and most had a direct

relation to the robotics team they were a part of back in high school.

Most of us do not work daily with students in our positions as school business officials, so our potential legacy may be a little different than Fredi's. Your legacy may be positioning your district with long-term financial stability, constructing new schools that will serve students for over 100 years, developing partnerships with organizations that provide opportunities for students that they otherwise would not have had, procuring technology that allows students to learn so they can succeed in today's environment, amongst many others.

All of these forms of service are important and will most likely cement your legacy in your community, but I think it's important that we also find opportunities to directly impact the lives of individual students. I work in a district with over 22,000 students; there is no way that I will meet, let alone know or work with all of our students individually. However, I try to find ways that I can work with some of the students directly. It's not all that hard to do, and I think that is the case for anyone working in a school district. Examples might be hiring high school students to work as interns in your department and then helping them with career interests, mentoring at risk students at one of your schools, organizing and leading service learning projects, or coaching an athletic team. The reward of directly working with students is energizing and I think it can provide a personalized motivation to excel in our jobs to provide the best service possible to our districts and communities.

Continued on page 23



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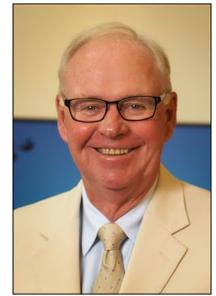
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You Can't Celebrate the Future if you Don't Recognize the Past

By Woody Wiedenhoef, Executive Director, WASBO



It is a great time for WASBO members to celebrate. Jill Bodwin, Director of Business Services at Pulaski Community School District celebrated being announced as Business Manager of the Year and Ben Irwin, Director of Business Services at Cedarburg School District celebrated being announced as the New Business Manager of the Year. Both Jill and Ben are active WASBO members in committee work and Regional meetings, helping to provide professional development for their fellow WASBO members. Congratulations Jill and Ben!

WASBO Strategic Planning and Professional growth means WASBO must continually search out ways to better serve members. The Accounting Committee and Regionals have actively been discussing how to better serve members in new ways as it pertains to best practices in payroll and bookkeeping. With the help of several WASBO members and CESA 9, we will have our first payroll and bookkeeping seminar on April 4 in Wausau. The intent is to serve members in smaller school districts, but could easily be good information for anyone working in the daily activities of bookkeeping and payroll. It is our hope that we will be able to move this type of seminar around the state to address specific issues of bookkeepers and payroll professionals being able to attend. We also hope to better provide networking for these bookkeepers and payroll clerks for additional mentorship and local sustainability.

We celebrate the advocacy efforts of all WASBO members, specifically the members of the WASBO SAA Committee and the SAA Legislative

committee. Please see the WASBO and SAA Legislative Agenda on pages 7 and 9 in an article provided by John Forester. The projected state budget for education as announced by the Governor aligns with the SAA Legislative Agenda. We celebrate that this year's proposal by the Governor is better than the last several years.

And we need to celebrate the WASBO culture of members serving fellow members. In this issue, you will find four articles from our WASBO members that are willing to volunteer their time to help govern on the WASBO Board. Cathy Cramer, Kent Ellickson, Todd Hajewski and Tim Erickson have been active in both WASBO and ASBO and wish to continue giving back to their fellow WASBO members. Please read their comments and when possible, thank them for their efforts and willingness to serve.

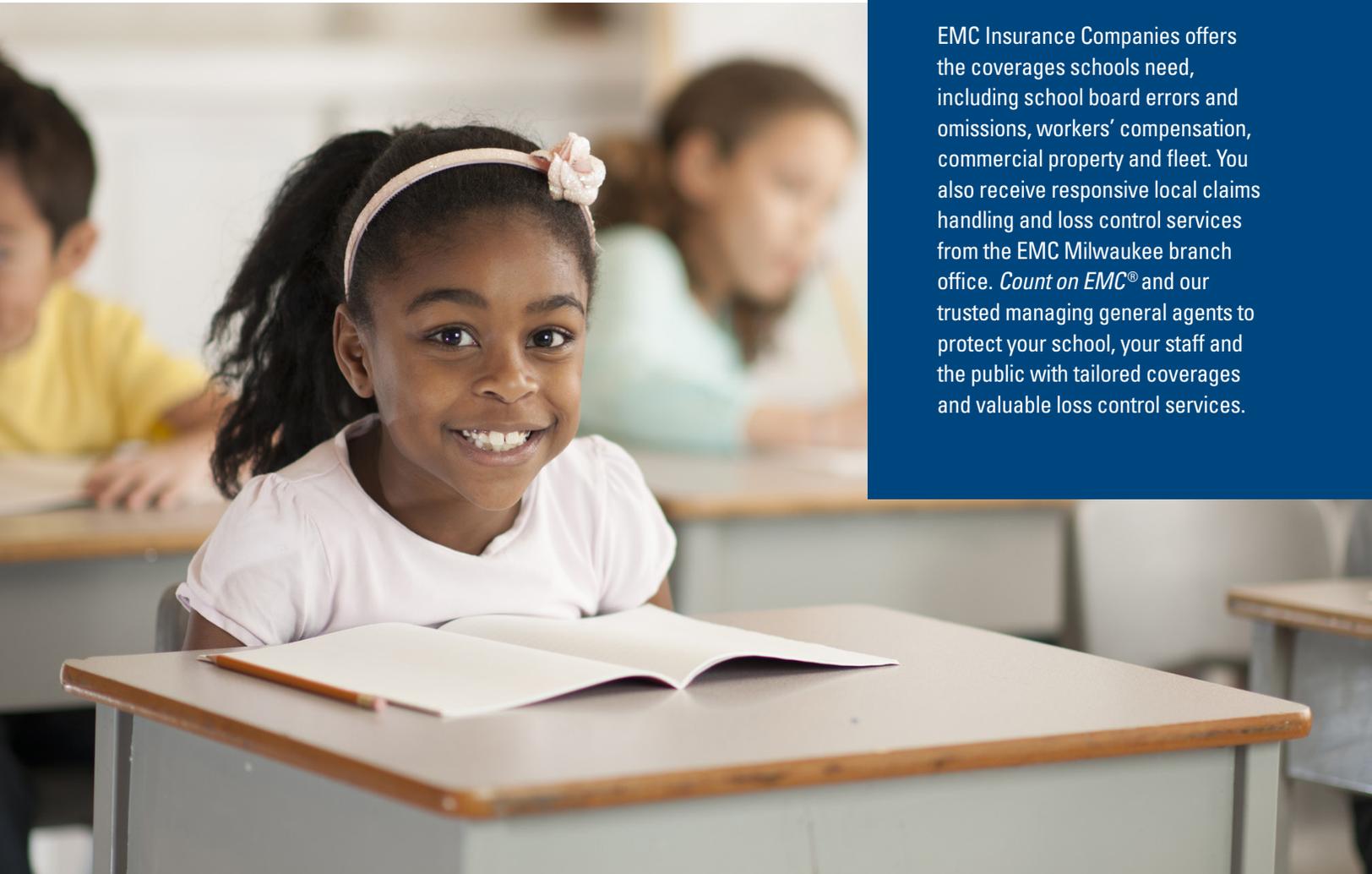
WASBO has a wide range of conferences coming up in February, March, April, and May. I am confident the curriculum prepared by these conference committees is again excellent in providing professional development for WASBO members. In fact, the exhibit space for the Facilities Management Conference and Spring Conference are already sold out with long waiting lists. We can celebrate these professional development activities, but I need to point out a special note about our Spring Conference. WASBO will be celebrating our 70th Anniversary this year. This says volumes about WASBO's continuing and sustainable success as members work with fellow members in the areas of professional development, networking, and educational advocacy. We look forward to our 70th

Anniversary Celebration. Sustainability is about celebrating our past so we can appreciate how we celebrate our opportunities in the future.

Last, but certainly not least, I celebrate that we have such a professional WASBO staff. Jeanne, Tina, Kristin, Kaitlyn and Clare provide us all with a special culture of service and professionalism. 🐦

“Remember the moments of the past. Look forward to the promise of the future. But most of all, celebrate the present, for it is precious.”

~ unknown



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2017-19 SAA Legislative Agenda

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



The SAA released its 2017-19 Legislative Agenda to the membership on December 28, 2016. Since that time there have been numerous developments impacting the state budget process including:

- State revenues are projecting higher than anticipated with the Legislative Fiscal Bureau estimating about \$2 billion in available new revenue over the 2017-19 biennium;
- Governor Walker and Speaker Vos continue to publicly support additional revenues for Wisconsin public schools; and
- Governor Walker plans to introduce his 2017-19 state budget on February 8th.

In light of these developments, we wanted to make sure that all WASBO members have the SAA's Legislative Agenda to use as the basis of your state budget advocacy efforts.

Please find the 2017-19 SAA Legislative Agenda reprinted below:

2017-19 Legislative Agenda

The SAA believes that comprehensive education reforms in Wisconsin should emulate the evidence-based best practices of the states and nations that have significantly raised academic performance and closed achievement gaps. In pursuit of this objective, the SAA offers the following legislative priorities:

School Revenue Limits

Increase the annual per pupil adjustment under revenue limits by \$200 per pupil in each year of the 2017-19 biennium, and by the annual percentage increase in inflation

thereafter. Couple the revenue limit increases with corresponding increases in general school aid.

Low Revenue Ceiling

Increase the low revenue ceiling from the current \$9,100 per pupil to \$9,500 in 2017-18, and \$9,900 in 2018-19.

School Mental Health

Too many Wisconsin school children have unmet mental health needs leading to negative consequences for those children, their families, their schools and their communities. To help address the systemic shortcomings in how we provide mental health services to our children, the SAA supports:

- Creation of a School-Linked Mental Health Grant Program, modeled after a successful Minnesota initiative, to provide funding for start-up, services for uninsured kids, and coordination between schools, counties and mental health providers.
- Increase Medicaid payment rates for individual and group therapy.
- Increase financial support for staff training in mental health.
- Create a new categorical aid program to provide incentives for school districts to expand services provided by school social workers.

Expanded Summer Learning

Research shows that high-quality summer learning programs boost student achievement and can end the summer slide, while helping to close achievement gaps. With targeted increases in funding and more local control to innovate, Wisconsin should see more positive results. To this end,

the SAA supports:

- Allowing school districts to count summer school students at 1.0 full-time equivalent (FTE) for revenue limit and state aid purposes.
- Increase funding for summer school transportation.

Special Education Categorical Appropriation

The SAA supports increasing the current level of state categorical aid funding for special education to reimburse at least 30% of aidable costs.

High Cost Special Education

The SAA supports increasing the current level of state categorical aid funding for high cost special education to fully reimburse districts for costs exceeding \$30,000 for any individual student.

Transportation Aid

The SAA supports increasing the current level of state categorical aid funding for school transportation by 10% in each year of the biennium. The SAA also supports providing districts which transport students the greatest distance proportionally greater aid, using the current method of distribution.

Continued on page 9

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ASBO International New Members

December 2016

- **Daniel Dommek**, Special Projects, SD of New Berlin, New Berlin



ASBO International Membership Milestones

January 2017

15 Years

- **Henry Ehrsam**, National Insurance Services, Brookfield
- **Patsy Darnick**, CESA 7, Green Bay

5 Years

- **Arba LeClair**, Gibraltar Area SD, Fish Creek
- **Maria Putzer, SFO**, SD of North Fond Du Lac, North Fond Du Lac

February 2017

30 Years

- **Mary Jo Filbrandt**, Antigo
- **Timothy Yeadon, CPA**, Marion School District, Marion

10 Years

- **Brian Adesso, CSR**, Menasha Joint SD, Menasha

5 Years

- **Emily Koczela**, Messmer Catholic Schools, Milwaukee

2017-19 SAA Legislative Agenda

Continued from page 7

High Cost Transportation Aid

The SAA supports increasing the current level of state categorical aid funding for high cost transportation to fully fund the prior year's eligible claims under the program. Also, create a second tier of support for districts with per-pupil transportation costs between 125 percent and 150 percent of the state average.

Sparsity Aid

The SAA supports increasing the current level of state categorical aid funding to fully fund the eligible claims under the program.

Educator Preparation, Recruitment & Retention

The SAA supports the work of the commission created by the State Superintendent to focus on recruitment/

retention of quality teacher and administrator candidates and to conduct a review of educator preparation programs and make recommendations for how best to prepare and support educators. The SAA also supports the following recommendations to tackle troubling educator shortages in the short-term:

- Allow districts significant flexibility in hiring retired educators to fill key positions.
- Maximize district flexibility in utilizing the current pool of licensed educators.
- Encourage greater use of paid "interns".
- Streamline the license reciprocity process.

School Start Date

Repeal the school start date law. 🗳️

ASBO INTERNATIONAL MEETING DATES

2017 Annual Meeting & Expo

Sept. 22-25, 2017 - Denver, CO

2018 Annual Meeting & Expo

Sept. 21-24, 2018 - Kissimmee, FL



2019 Annual Meeting & Expo

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

2020 Annual Meeting & Expo

Oct. 2-5, 2020 - Nashville, TN



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The Weather Outside is Frightful: Navigating Through Weather-Related School Closures

By WASBO Director Robert Tess, Chief Finance and Business Services Officer, Wausau School District



Already this school year, Wisconsin schools have had to deal with weather related closings for cold temps, snow accumulation, and ice storms. In the Wausau School District, we have encountered all of these and applied our early release, late start, and full cancellation procedures with half of January remaining.

The decision to not hold class for students as a result of inclement weather seems to never be an easy one and often times feels like the wrong decision was made following almost certain criticism to some degree. You are caught between pleasing the “walk-to-school-five-miles-each-way” crowd and the “you-are-not-taking-our-children’s-safety-seriously” faction. With the growing popularity of social media, this criticism flows with even less restraint. Parents of school-age children will certainly understand both of these points of view. To say that inclement weather generally inconveniences people is stating the obvious; relative to school closings, inclement weather days are certainly an inconvenience both on the day of the cancellation as well as the potential for make-up days cutting into family vacations. And, of course, asking someone else’s children to brave the elements on a bus, slippery sidewalk, or driving themselves should always be central to any decision and evokes parental protective instincts that are not to be taken lightly. The correct answer and the only defensible strategy to follow is keeping student safety as the priority while gathering and using as much intelligence as possible to make consistent, quick, and informed decisions. Furthermore, the District must commit to and agree that parents may have an opinion on school closing that differs from that of the District and they should be given

the choice to impose a self-declared inclement weather absence for their child.

“The only defensible strategy to follow is keeping student safety as the priority while gathering and using as much intelligence as possible to make consistent, quick, and informed decisions.”

Knowing all districts will eventually need to make a decision to bring students in later than usual, dismiss early, cancel evening activities, or call off school completely, there are many things that can be done to improve the likelihood of making the right decision, communicating that decision, and having it be well received by the community. Being prepared is essential; procedures that are developed well in advance are the best defense against how quickly most school cancellation events develop. Since key decision makers will have limited time to react, and everyone wants consistency, the investment in planning and communication that is done with as many stakeholders as practical in September will pay dividends in January and February. In our District this planning is coordinated by the Business Department with input from internal stakeholders including our Board, Superintendent, Communications Coordinator, Director of Buildings and Grounds, Pupil Services Director, Transportation Liaison, principals, and busing contractor. External stakeholders are also very valuable in the development of procedures including private schools, townships, City Public Works Department, local respected meteorologists, County Highway Department, Sheriff’s Department, other school districts, and media. The final result of this work is an inclement weather procedural manual that

represents what steps will be followed by who in a variety of weather related events that may cause cancellation. It is critical that this manual is distributed to all administrators as well as other key personnel with selected excerpts distributed to parents and community members via newsletters and other various means.

The procedural manual should include coverage of a variety of potential situations including cancellation of the entire school day, late start to a school day, early dismissal, cancelling half-day programs, after school events, and inclement weather normal school day preparedness as well as all of these situations affecting only some of your schools. Within each of these situations the personnel responsible for making the final decision including at least three levels of redundancy should be identified. Once the decision is made to cancel school, it is important to have predetermined communication plans in place that get to as many stakeholders as possible as quickly as possible, and are easily implemented, as time is always of the essence. You may want to consider a mass notification system such as School Messenger to help in this regard.

The procedure manual should be available to all who may need it in paper form as well as cloud-based electronic form as you will need to locate it quickly in many cases. Preload multiple phone numbers for all contacts that you may need to reach, into your contact list on your cell phone.

Continued on page 14

Is Your District Planning to Conduct an RFP for Business Insurance in 2017?



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- RFP document that is updated to reflect all carriers' current coverages
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- No-cost option if District only wants proposal from risk management co-op, WERMC

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The Roles and Responsibilities of the Business Office have Changed

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



I was thinking today about many things that are happening in the Business Office. I and others had long days at work last week and that is not unusual. The Business Office is very busy. As many know, the school business office requires a vast amount of specialized knowledge. This is required in order to carry out the many functions that are required to perform their jobs and responsibilities. How have the roles and responsibilities changed over the years?

I thought the only way to understand some of the changes over the years, was to review a past reference. So, I pulled out my old School Business Administration textbook by Guilbert C. Hentschke. The copyright date of the textbook was 1986. The chapters were titled as follows:

1. Toward a Comparative Perspective
2. Fiscal Systems
3. Human Resources Systems
4. Logistical Systems
5. Information Systems
6. Conclusion

I was curious to know how things changed. At first glance, not bad. How does the information from School Business Administration compare with the “Roles and Responsibilities of the School District Business Office” document on the WASBO website? The major categories of the Roles and Responsibilities document developed in 2011 are as follows:

1. Accounting and Reporting
2. Auditing
3. Budget and Financial Planning
4. Cash Management
5. Debt Management
6. Facility Construction and Management
7. General Management

8. Human Resource Management
9. Information Technology and Data Management
10. Payroll Management
11. Purchasing and Accounts Payable Management
12. Risk Management
13. Other Related Services

The roles and responsibilities of the school business office differs at every district. However, there are similarities between districts. Generally, the size of the district does not seem to matter in the roles and responsibilities. Some of the categories are always going to be a function of the Business Office. Chapters titled “Fiscal System” deal with audits, budgeting, financial planning, accounting, and debt service. “Human Resources System” which cover employee pay, personnel records, salary and benefits. After all, the business office needs good financial procedures and controls to properly use local, state and federal money. However, I feel that a number of job functions have changed over the years.

As you can see, the categories have been expanded and grown. There was computer technology in business offices way back in 1986, but it was limited. The business manager I replaced in 1992, did not have a computer on his desk. We had a main frame computer that was located in a special climate controlled room. The superintendent asked me when I was hired in Manitowoc, what I needed to do my job. My response was a computer. Back then, the Business Office staff (except the business manager), had the small all in one 9” screen Macintosh computers. I wanted to be different and I got a 13” screen and a PC. Why? The spreadsheet software on the Macs was not very

good for viewing spreadsheets or the school accounting software.

Is the Roles and Responsibilities of the School District Business Office document up to date? Not necessarily. Some of the Roles and Responsibilities that could be added or revised include the following:

- develop spreadsheets
- advocacy
- learn and use accounting systems
- expanded role in referendums
- manage self-insured health and dental plans
- the move from ISES to WISEdata reporting
- paper reporting to online WISEgrant
- reporting of enrollment
- assist in the development of alternative compensation plans for all staff

This is only a partial list of roles and responsibilities that could be added to or revised in the document.

No place in the Roles and Responsibilities document is the word advocacy, yet that is a role that WASBO feels very strongly about. The Business Office needs to provide advocacy for the school district funding. This was unheard of prior to now. To maintain long term financial stability, there needs to be money coming from different governmental sources. It is a responsibility to advocate for the public school district to help provide adequate funding for district schools.

Continued on next page

The Roles and Responsibilities of the Business Office Have Changed

Continued from previous page

In addition, the Business Office is now more involved in assisting in the dissemination of information to the public on long-term borrowing referendums, facility referendums, and recurring and non-recurring referendums. The Business Office has a critical role in showing the district's side of the story and why the referendum is needed. The public schools, with the help of the business office, have an obligation to operate efficiently and effectively to educate children.

The school business office requires a vast amount of specialized knowledge in order to carry out the many functions that are required to perform their

duties. It is the Business Office's responsibility to maintain fiscal accountability to the public. Whereas, the building administrators are less concerned about the financial aspect of the district and more concerned about the achievement of students. How do they carry out the numerous functions? Two of the main qualities of a good Business Office is perseverance and competence. I know that the MPSD business office staff takes pride in their roles and responsibilities because they are essential to success of the school district. We must bang our drum loudly and share our story. 🇺🇸

“The essence of education is not to transfer knowledge; it is to guide the learning process, to put responsibility for study in the student's own hands...and place people on their own path of discovery and invention.”

~ Tsunesaburo Makiguchi

The Weather Outside is Frightful

Continued from page 11

Review this procedural manual with all administrators as early as September so any questions or coordination issues may be worked out before nasty weather is likely. Keep in mind that inclement weather causing school closings can happen any month of the year.

Following each event that leads to a cancellation of school, a thorough review should be conducted including identification of areas for improvement. Accurate records should be kept including temperatures and snowfall on days in which school was held as well as cancellation days. Follow up with media whenever an opportunity presents itself to convey the message to the public that safety of students, parents and staff is a top priority and all decisions are made with that in mind.

Influencing Mother Nature may be impossible but we do have control over how we react and hopefully these are some suggestions that might help. 🇺🇸

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Barbara Salatto
Member Since 1989
Associate Superintendent for
Management Services
Patchogue, New York

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 Margo Smith - Northland Pines
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Meet the Candidates for the WASBO Board of Directors

Tim Erickson

Financial Services
Director, Hudson
School District

*Director Candidate
(Three-year term)*



Greetings! I would appreciate your consideration as a director candidate. The main reason I am running is to give back to this profession and the WASBO organization that has so solidly supported me during my career in school business. I know it sounds cliché, but I really feel an obligation to give back, so when I was approached to consider running, it was easy to say yes. It has been over a decade since I came to Hudson, but I clearly remember how various WASBO members reached out to me, took time to answer my questions and provided much needed and wanted advice when I started here. The knowledge I have gained from attending WASBO conferences has been invaluable. As I reflected on attending my first WASBO meeting for new business managers, what became immediately apparent to me was the quality of WASBO and its members who presented on the various topics. I feel the same about WASBO today as I did back then; the organization and its members continue to impress.

Professionally, I have served the Hudson School District and its 5,600 students for the past 10 years leading the Financial Services Department as its Director. It has been a great district to work for with many rewards and challenges that make no two days the same. Prior to Hudson, I worked for a school district in Minnesota as its Business Services Director for 6 years. Previous to working in public education, I worked in county government and a large regional CPA firm. I am a CPA, CGMA and have my OS license. I have served on various

non-profit boards from small to large as a director and officer. I am involved in our District's mentor program and currently mentor a 6-year old student. Being a mentor has truly brought perspective as to why I chose this profession.

Personally, I was born and raised in Minnesota and have lived in Wisconsin for the past 23 years and, yes, I do like the Pack! My family at home consists of my wife, Kris, as well as one dog and one cat. We are now empty nesters and could not be more proud of our daughter, Sarah. Kris and I have been together for over 30 years. Beyond work I have many interests including hiking, hunting, snowmobiling, boating, reading and spending time with family. Growing up, my parents always stressed the importance of education. My dad taught at the high school level and both my parents were the first in their families to attend college.

School business is beyond the numbers and operational aspects of running a school district. Of course, these are important, but just as important is cultivating relationships with all the various stakeholders in a school community including students, employee groups, parents, taxpayers and school board members, to name a few. As we all know, these stakeholders can have opposing needs and concerns. I have always strived to understand each group's needs and concerns to create a win-win environment. I will carry this same commitment as I serve on the board if fortunate enough to be elected.

Last, but not least, please join me in thanking current and previous WASBO board members along with Woody and his staff for the tremendous work they do to make WASBO the premiere organization it is! 🐾

Todd Hajewski

Director of Business
Services, Greendale
School District

*Director Candidate
(Three-year term)*



Hello WASBO colleagues. I am very excited to be a candidate for the WASBO Board of Directors. I am currently the Director of Business Services for the Greendale School District in southeastern Wisconsin. I am fortunate to work in the community in which I reside and the district where my children attend school.

I attended my first WASBO conference while I was still working in the private sector and had yet to enroll in a School Business Management program. A mentor of mine had introduced me to the career and ever since that conference I knew what I wanted to do. I have attended many conferences since that first one. I am currently a participant on the Fall Conference Planning Committee and have been a speaker at multiple conferences.

I have also been involved with ASBO for the past few years. I was fortunate to be chosen as an Emerging School Business Leaders Scholarship winner in 2015 and then was asked to be a mentor for the same group last year. I was also a co-presenter at the 2016 Annual Meeting. I find ASBO to be an extremely valuable resource and would like to connect more WASBO members with the benefits that ASBO provides.

Growing up I thought many times about becoming a teacher. At the same time, I always had a fondness for numbers and business. This profession allows me to combine those interests and helps me indirectly educate young minds while using my business strengths. I am a firm believer that in our roles we need to be visible in our schools and not just tied

Upcoming WASBO Events

Professional Development

Facilities Management Conference **

March 7-8, 2017 - Kalahari Resort & Conference Center, Wisconsin Dells (Module 2)

Transportation & Bus Safety Conference

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

p-Card Users Group

March 14, 2017 - Madison Marriott West, Middleton

Accounting Conference **

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

Spring Conference **

May 11-12, 2017 - La Crosse Center, La Crosse (Module 3)

Custodial & Maintenance Conferences

June 21, Waunakee High School, Waunakee (Module 4)

July 12, Logan High School, La Crosse (Module 6)

July 19, University School of Milwaukee, Milwaukee (Module 1)

July 26, Amherst High School, Tomorrow River (Module 2)

Scholarship Fundraisers

Spring Golf Fundraiser

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

Spring Bike Fundraiser

May 10, 2017, Great River Trail

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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to our desks. I try to visit each of our schools regularly to find out how our office can support the teachers and other staff that directly educate our students. As something that is unique to school business officials, I will occasionally fill in for our elementary principals when they are out of the building. This is great experience for me to see firsthand why we do what we do.

If I am elected to the WASBO Board, I would look forward to giving back to an organization that has given so much to me. I would like to focus on continuing to offer informative and unique professional development to those that regularly attend WASBO events. I would also like to work on ways to connect WASBO with those business office and operations staff members that currently do not take advantage of our organization. Finally, I believe we are at a point where we need to work on recruiting new talent to our great profession.

Thank you very much for your consideration for my candidacy for the WASBO Board of Directors. 🐾

“

Leaders become great, not because of their power, but because of their ability to empower others.

~ John Maxwell

Online Voting April 1-30.

Learn more information about the candidates in the April issue of Taking Care of Business. You will vote for one President-elect and 2-three year directors.

Watch your email for more information regarding online voting.

Meet the Candidates for WASBO President-Elect

Cathy Cramer

Chief Financial Officer, Seton Catholic Schools

President-Elect Candidate



Hello, Fellow WASBO Members – As I complete my term on the Board of Directors, I am asking for your consideration to allow me to continue supporting WASBO in a leadership role as your president-elect. I am committed to supporting WASBO’s mission to “provide professional development, to foster a network of support and to advocate for funding that ensures outstanding educational opportunities for all children in Wisconsin.”

I have had the privilege of working in several school business positions over the past 28 years—in small and large suburban as well as urban settings—each with different leadership and governance styles, challenges and opportunities. These opportunities have included involvement in several referendum elections, one to meet operational needs as a result of declining enrollment and several to address facility needs to meet growing student enrollment; overseeing construction projects; working through the legislative process for an exemption to the revenue limit; implementing new financial and HR systems; revising attendance boundaries; and working with financial forecast models and budgetary planning processes that required staff reductions. Regardless of the setting, the expectations were the same: to manage the required business operations of the organization, while maximizing the resources available to meet the educational goals and needs of the students and communities served.

Without the support of WASBO, I wouldn’t have been able to meet

these expectations. There were always business officials willing to provide their valuable time to share their knowledge and best practices—through phone calls and e-mails, their attendance at regional meetings, their committee involvement, or their willingness to plan and present at a conference. To me, this is the real value of our organization to not only each other, but also to the schools we support. It clearly represents WASBO’s mission in action.

In spite of the many challenges education is facing, WASBO’s commitment to provide the professional development to those managing the “business side” of schools to assure the success of all students remains constant. I would like to provide the leadership required to support this commitment while keeping in mind the diversity of the communities, locations, and positions all of our members represent.

I have been married to my husband, David, for over 30 years. We have two children, who have both graduated from college: Angela, who lives in San Diego and Alex, a recent UW graduate working in Milwaukee. While family will always be my number one priority, nearly “empty nesting” provides me with time I haven’t always had to devote to greater participation in WASBO.

It would be an honor to continue to serve WASBO as a leader on your Board. I would do so with a willingness to understand, consider and respect all points of view to ensure the recommended actions best meet our mission and vision. 🐾

Kent Ellickson

Director of Finance and Business Services

President-Elect Candidate



Thank you for taking the time to review the candidate biographies. I am pleased to step forward with my candidacy for WASBO President-Elect. The WASBO organization has been a very important part of my professional life since becoming a school business manager in 2001. Each of our recent WASBO presidents has discussed the importance of giving back to the organization and pointed out that as we do so, we get something in return. This certainly has been my experience with WASBO. I am thankful a colleague gently encouraged my increased involvement with WASBO early on in my career. Because of the tremendous growth of WASBO to over 1,300 members from a variety of positions and locations, we need to continue to evolve through increased involvement in the organization, including its diverse committees.

Over the years I have enjoyed participating in WASBO through a variety of ways. Currently, I am serving a “fourth” consecutive year on the board as I am filling a special one-year appointment consecutive to completion of a “regular” three-year term. These years have gone fast and the reward from participation has been way more than I ever imagined. I encourage those who have been actively involved in WASBO to consider taking that next step and run for the Board sometime in the future.

This winter I am looking forward to participating in the ASBO Executive Leadership Forum with other members of the current Board. My previous involvement in WASBO includes

completing the training and serving as a mentor in the WASBO mentorship program, serving as a WASBO representative on the Joint Convention Committee, volunteering to present on school finance at a WASB New School Board Member workshop, serving on the WASBO Scholarship Committee, and serving as an Investing in Wisconsin Schools facilitator.

One specific activity that helped me appreciate the character and collaboration of our organization was involvement in the School Finance Puzzle during its first years. I was proud to work with fellow WASBO members, DPI staff, UW-Whitewater personnel, and WASBO staff in the earliest years of the School Finance Puzzle half-day workshop at the Joint Convention. They made it fun to co-chair this initiative each year as we worked together to review and evaluate the previous year's presentation, update it, make preparations for organization of the current year's session, and interact with the attendees at the convention.

Currently I am in my second year in the School District of Onalaska serving as

the Director of Finance. I appreciate working in a district with both the board and administration embracing and functioning as a true Professional Learning Community. Just prior to Onalaska I was the Director of Business Services in the Sparta Area School District for 10 years.

My earliest years as a school business administrator were in Southern Wisconsin. Before moving "back home" to Western Wisconsin, I worked in the school districts of Cambridge, Deerfield, and Clinton. Initially the Cambridge and Deerfield positions were combined through a cooperative agreement between the districts. I was fortunate to be offered the opportunity to be the first school business manager in the Clinton Community School District as my first business manager position.

Prior to serving as a school business manager, I was a business education teacher for more than 10 years in the School District of Lodi. As a business teacher, I experienced the elementary through high school teaching experience—with an added bonus of teaching adult evening classes for

Madison Area Technical College. This was an excellent foundation for an embedded permanent reminder about the purpose of our work as school business officials.

The current board has been devoted to improving the organization through transitioning to policy governance and maintaining a commitment to long-range strategic planning. I look forward to an opportunity to help the board continue to move in the same direction as the organization strives to meet the professional needs of our colleagues. It has been an honor to serve with my peers on the board. 🇺🇸



WASBO Foundation Spring Conference & Exhibits

May 11-12, 2017

La Crosse Center, La Crosse, WI

- Welcome Reception, May 9
- Scholarship Golf Outing & Bike Ride, May 10
- Exhibits, May 11 (*exhibit show sold out, sponsorships available*)
- Conference Sessions, May 11-12
- President's Recognition Dinner and WASBO 70th Anniversary Celebration, May 11

Visit WASBO.com/spring for:

- Session Details • Hotel Accommodations • Conference Fees
- Online Registration • Networking Activities • Scholarship Fundraiser Golf & Bike Outings • Silent Auction & Raffle benefitting WASBO Member Participation in ASBO International

Who Should Attend? Business Managers, Bookkeepers, Facility Directors & Personnel, Transportation Directors, Finance Directors, Human Resource Directors, District Administrators

**Attendee registration
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WASBO.com/spring

Large Event Security Controls

By WASBO Director Ted Hayes, Senior Risk Manager, M3 Insurance



Athletic events, theatrical performances, and graduation ceremonies are great opportunities for your students to showcase their skills and for non-students to be actively involved in your school. Unfortunately, large events such as these could easily become a nightmare if a violent incident were to occur. It is critical that your school district develop controls to ensure the safety and security of everyone at the event.

Develop a set of rules relating to acceptable and unacceptable student and spectator behavior. Students may refrain from certain behaviors if the rules are clearly spelled out to them. An appropriate time to instruct your students on behavioral rules is long before the event takes place.

Instruct students at the beginning of the school year (during an all school assembly), as to what types of behavior are acceptable and unacceptable at school events. Don't forget to mention the consequences of inappropriate behavior. Have students and their parents sign a copy of your 'expected behavior contract' with your school.

Provide mailings and community announcements that stress your student behavior policy. Remind parents that they are responsible and possibly liable for the behavior and actions of their children at school sponsored events.

Long before an event takes place, instruct students how they can identify supervisors and where the supervisors will be located. During the event, announce to everyone where supervisors are located.

Ensure your supervision is appropriate for the event taking place. Remember, there is no magical number or ratio

of supervisors to spectators and students. A high school football game should have high school level supervisors. Students are less likely to act up if there is a definite relationship between the students and the supervisors.

There is no such thing as having too many supervisors at an event. The number of supervisors needed for an event depends on a number of factors: the age/nature of the spectators, the number of spectators at the event, the size of the facility, etc.

Dress your supervisors in easily identifiable attire — brightly colored wind breakers, vests, or armbands.

Understand the occupancy limits for your facilities, auditoriums, cafeterias, bleachers, etc. More importantly, ensure these occupancy limits are never exceeded.

Always maintain clear walkways, aisles, and exit doors. Your supervision must be mobile and able to move freely among the spectators.

Instruct your supervisors to supervise the spectators, not watch the event. This means supervisors must face the audience, not the event.

Post supervisors at the event entrances. Supervisors may be able to screen certain individuals based on their dress or behavior.

Especially at an event held indoors, post supervisors at your event's light switches/controls. A person with bad intentions could easily cause chaos if the lights were turned off and spectators became panicked while heading to the exits.

Pair up your supervisors if at all possible. There is always strength in numbers.

Make sure your supervisors have communication access to '911,' police, and emergency medical services.

Ensure that select supervisors are trained in first aid/CPR and the use of a defibrillator.

Supervise your parking lots before and after events take place.

Develop 'away event' activity security controls. Your school district accepts the responsibility to control the behavior and activity of participants and spectators attending a school sponsored event at your school. However, your school district may have little control over the safety/security of events sponsored at other schools, such as "away" athletic events. I strongly encourage you to contact the administrators, program coordinators, and athletic directors at these schools to ensure proper safety and security controls are in place.

Police Supervisory Controls

Maintaining a uniformed law enforcement presence at a school event creates a new level of supervision. Uniformed officers may command more respect from participants simply because spectators realize that the consequences of their actions may be more severe.

Never underestimate the importance of having full-time police officers or police reserve officials at an event. There are certain instances where a police officer can be much more effective than a school employee. Instances such as:

- eliminating rowdiness/fighting among spectators
- keeping unauthorized personnel away from the activity or event
- assisting school staff members when requested

- calling for additional police/ fire/EMS assistance

- checking, clearing, and directing traffic when needed

Encourage your police officers and sheriffs deputies to stop by the event on a periodic basis. This is another good reason for your school to have a full-time police resource officer.

Research the use of uniformed police officers/sheriffs deputies for large event security. Contact your local police or sheriff's department and ask questions such as:

- does your department allow off-duty employment?

- if off-duty employment is not allowed, will you assign an off-duty officer on overtime to the large event?

- what is the cost of an on-

duty officer or an officer on overtime?

- if the use of an off-duty officer is possible, what is the cost?

- are hired police officers allowed to wear their uniforms?

Determine if your school district must provide insurance coverage for off-duty officers in the event of an injury or civil lawsuit that may arise as the result of an off-duty officer action.

Many acts of violence occur when student's actions are unsupervised. Ensuring that effective supervisors are in place will go a long way in preventing unacceptable behavior by spectators. 🇺🇸

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DPI Seeks Summer Food Service Program Sponsors



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

Wisconsin's Summer Food Service Program is seeking sponsors to provide meals to economically disadvantaged children during the 2017 summer break from school.

Sponsors can be:

- Public or private nonprofit school food authorities;
- Public or private nonprofit summer camps;
- Units of local, municipal, county, tribal, or state governments;
- Public or private colleges or universities that are currently participating in the National Youth Sports and Precollege Programs; and
- Private nonprofit organizations (special considerations and restrictions apply).

Last year, Wisconsin's 217 Summer Food Service Program sponsors provided nearly 2.83 million free meals to children from low-income families during the summer months. Sponsors operated 888 sites statewide in 2016, up nearly 100 sites over the past two years.

"Wisconsin has been offering meals to disadvantaged youth through the Summer Food Service Program since the federal program began in 1975," noted State Superintendent Tony Evers. "We've seen continued growth over the years as the state's public and private schools and nonprofit organizations step up their sponsorship and number of nutrition sites so they can serve the many families who need food assistance during the summer."

The most common sponsor for the Summer Food Service Program has been local school districts that combine a meal program with their summer school sessions. Through partnerships and creative

collaboration, some districts have been able to work with other organizations to extend the Summer Food Service Program beyond summer school to meet the needs of more children.

All sponsors for the 2017 program year must complete the online Summer Food Service Program application at www.wisummerfood.org. New sponsors for the program will be required to attend a training session on March 24 in Madison. Continuing sponsors for the 2017 summer program are encouraged to attend one of the training sessions to be offered around the state. Those sessions will be held on March 3 in Rice Lake and March 17 in Madison. The deadline to register for training is Feb. 24 and must be done online at <https://forms.dpi.wi.gov/se.ashx?s=56301B2D37AEEEB7>.

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.) should contact the agency (state or local) where they applied for benefits. Individuals who are deaf, hard of hearing, or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of

discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by U.S. mail, fax or e-mail to:

Mail: U.S. Department of Agriculture
Office of the Assistant Secretary for
Civil Rights

1400 Independence Avenue, SW
Washington, D.C. 20250-9410

Fax: (202) 690-7442

E-mail: program.intake@usda.gov

The DPI has administered the Summer Food Service Program since its inception in 1975 and is an equal opportunity provider. Additional information about the program is available from Amy Kolano, (608) 266-7124, the DPI website at www.wisummerfood.org, or the USDA at <http://www.fns.usda.gov/sfsp/summer-food-service-program-sfsp>.

This news release is available electronically at http://dpi.wi.gov/sites/default/files/news-release/dpinr2017_12.pdf.

What Will Be Your Legacy?

Continued from page 3

One of the ways that I have gotten involved in working with students individually over the years has been through coaching middle school basketball. I have been coaching almost continuously for the past 30 years at some level. There are plenty of times when I question my sanity for volunteering to coach a bunch of 13 and 14 year old boys each year. Their minds can be all over the place, they can be very defiant at times, school and family issues can impact their commitment to the team and their behavior, their parents can be difficult on occasion questioning playing time or their son's role on the team. All of those issues are real and any one of them can ruin your day, especially after a long day at work. But the reward blows that stuff away. I can think of examples from almost every week I have coached over all of these years; here is one that I haven't told too many people but I thought of the other day while cleaning up some files.

Seventeen years ago, I was coaching a 7th grade middle school team. It was a fairly talented group of kids, several of whom had very good high school careers and one ended up playing Division 2 basketball. One of the better players on that team was a boy name Eric. Eric was one of the more memorable players I had ever coached, but not

always in a good way. He had a bad temper which seemed to always have him in trouble with his teachers and principal, the majority of his teammates wanted nothing to do with him away from basketball because he was so mean to them, he loved to talk back in a sarcastic way and he had a fairly sizable vocabulary of profanity. He was also a "bad student" who was always right on the borderline of being ineligible to play because of his grades. His parents seemed very nice and appeared to be embarrassed by his actions. I never really figured him out – he seemed to tolerate me and nothing more. He certainly gave me no signs that he actually respected me as a coach or person. But, we talked a lot; mainly after he said something inappropriate to a teammate, a referee, myself or others. I guess it was more like I talked a lot, he would listen, say a few words that didn't seem sincere and then get away from me as quickly as he could.

I didn't think about Eric much for over ten years until one day not quite seven years ago when I received a phone call from a woman who lived in Kenosha. Her daughter had just graduated from a small college in Minnesota, and she said that a student who spoke during the commencement exercises talked about me in his speech. It was Eric. She said that she was really impressed by his speech and that he

talked about overcoming hardships and the importance of having people who believe in you, and that he used me as an example of someone who believed in him. She relayed the story he told about me – I was pretty much stunned. I went to the college's website and they had videos of all of the commencement speeches. I watched Eric's speech that evening in my office - actually I watched it three times. I don't cry often but I did that night alone in my office. I never even thought he was listening to me when I talked to him, let alone that he would remember those conversations ten years later. It's not three movies about my life or some sort of glamorous award, but it is part of a legacy. One that I hope to improve on every day. 🐼

“I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

~ Maya Angelou

WASBO Foundation Accounting Conference



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WASBO Purchasing Card (p-Card) User Group
Tuesday, March 14, 1-4 pm (No Charge - Must Pre-Register)
Come early for an afternoon session on p-Card administration best practices, Skyward interface and Q & A.

Little Chute School District Prevails Against WEAC and Retirees Before the Wisconsin Court of Appeals in Case Involving Provision of WEA Long Term Care Insurance



By Christine Hamiel, Attorney, von Briesen; Ryan Heiden, Attorney, von Briesen; Andrew Phillips, Attorney, von Briesen

On January 18, 2017, the Wisconsin Court of Appeals issued a decision in favor of Little Chute Area School District (the “District”) affirming the Circuit Court’s ruling that dismissed the claims of Wisconsin Education Association Council (“WEAC”) and thirty-seven retirees (“Retirees”) of the District. *Little Chute Area Sch. Dist. v. Wisconsin Educ. Ass’n Council et al.*, No. 2015AP2033 (Wis. Ct. App. Jan. 18, 2017) (pending publication). Specifically, the Court of Appeals held that the District’s decision to terminate its WEAIT group Long-Term Care (“LTC”) policy in June of 2013, did not violate the terms of previous Collective Bargaining Agreements (“CBAs”) between the District and the Little Chute Education Association (“LCEA”) because all of the CBAs from 2001 and on “included clear anti-vesting language.” *Id.* at ¶ 16.

The Applicable CBAs

The Court of Appeals separated the applicable CBAs into three separate groups: (1) CBAs between 1995 and 2001; (2) CBAs from 2001 until 2011; and (3) CBAs from 2011 until 2013.

The CBAs from 1995 to 2001 contained language that permitted early retirees the ability to elect to continue coverage under the LTC policy as long as WEAIT received the required premiums and continued to insure the active employees of the District. Retired employees could also elect an “accelerated paid-up” option that required a single, lump-sum payment if certain conditions were met. Once

a person reached “paid up” status, their coverage was not subject to termination. Under the 1995 to 2001 CBAs, the District agreed that early retirees could remain covered by the LTC policy until age 65.

In the 2001-2003 CBA, the District and LCEA agreed to cap a retired employee’s eligibility for coverage under the LTC policy at “a maximum of ninety-six (96) months.” Likewise, the parties agreed to make early retirees’ continued participation in the group LTC program subject to “any collectively bargained changes in those benefits and programs,” in addition to being subject to the carrier’s terms and conditions as before. Significantly, the following clause was bargained into the CBA: “The benefits, premiums, and contributions under this Article are established for the term of this collective bargaining agreement and subject to amendment, termination or extension through future collective bargaining.” These changes remained in effect in all CBAs from 2001 through 2011.

On the eve of 2011 Wis. Act 10’s effective date, the District and LCEA agreed to an extension of the 2009-2011 CBA, known as the 2009-2012 Master Agreement. The parties also bargained the elimination of all post-retirement insurance benefits, including group LTC insurance benefits, for early retirees. Additionally, Article 16 of the CBA, which had previously defined early retiree benefits, was deleted entirely from the Master

Agreement.

In June of 2013, the District terminated the WEAIT group LTC policy and WEAC and the Retirees brought a lawsuit asserting the District breached the relevant CBAs by curtailing their vested benefits in the group LTC policy.

WEAC’s Arguments and the Court of Appeals’ Analysis

On appeal of the Circuit Court’s decision dismissing the claims, WEAC and the Retirees raised the following arguments:

1. Retirees have a vested right to participate in the District’s group LTC policy until the Retirees achieved “paid-up” status under the policy or, alternatively, until the District made ninety-six months of group LTC premium contributions for the last early retiree under the 2009-2011 CBA.

The Court of Appeals expressly held that the CBAs’ plain language conditioned receipt of the benefit on “any collectively bargained changes in those benefits and programs.” *Id.* at ¶ 16. The court further stated that the most compelling evidence of the parties’ intent not to vest the group LTC coverage benefit was the following provision within the 2001 to 2011 CBAs: “The benefits, premiums and contributions under this Article are established for the term of this collective bargaining agreement and subject to amendment, termination or extension through future collective bargaining.” In other words, the court applied the clear language of the CBA

Continued on page 32

Come to the WASBO Transportation & Bus Safety Conference

By Rhonda Page, Business Services Manager, Sun Prairie Area School District
Submitted on behalf of the WASBO Transportation Committee



Join colleagues for a day of professional development on Wednesday, March 8 at the Kalahari Conference Center in Wisconsin Dells. The WASBO Transportation Committee has a full day scheduled with sessions that cover a broad spectrum of transportation topics.

If you're looking at going out to bid for transportation services you won't want to miss the presentation of a case study involving the implementation of a new school bus contract. Learn about how to avoid all those little things that can and do go wrong.

DPI staff will present on multiple topics including transporting students with disabilities, best practices when using parent contracts, and advantages/

disadvantages to using alternative vehicles.

The Wisconsin Bike Federation will share important information on how to make sure students get to bus stops and to school safely.

Positive Behavioral Intervention (PBIS) continues to be a hot topic in schools. Learn how one school district and bus company come together to connect the school and bus environments.

You will want to attend the exciting session that will address lifesaving tips when facing an armed intruder or active shooter on a bus.

Experienced attorneys, insurance company professionals, and law enforcement will review transportation issues from their perspective.

The conference will wrap up with an interactive sharing and learning session.

Don't miss this opportunity to learn and share your valuable experiences with others! For a complete conference schedule and to register, go to wasbo.com/transportation or call 608-249-8588. We look forward to seeing you in the Dells on March 8. 📍

WASBO Foundation Transportation & Bus Safety Conference

March 8, 2017

Kalahari Resort &
Conference Center
Wisconsin Dells, WI



Wisconsin Association of School
Business Officials Foundation

Who Should Attend?

- Transportation Directors
- Contractors
- Business Managers
- District Administrators

Register at WASBO.com/transportation



Earn one graduate credit when attending this conference and day one of the WASBO Foundation Facilities Management Conference on March 7.

PROFESSIONAL DEVELOPMENT TO USE TODAY AND PLAN FOR TOMORROW

Large Van Student Transportation

By Kevin Miller, Account Executive, M3 Insurance

Submitted on behalf of the WASBO Transportation Committee



There seems to be confusion regarding a school district's ability to own or use a vehicle, other than a school bus, that can transport more than 9 passengers. This article will provide references to the legal issues and the concerns from a risk management perspective in an effort to clear up that confusion.

Let's start with the legal issues. In case you were wondering, I'm not an attorney and can't interpret these Statutes for you. But I want to provide the information you would need to research additional information or discuss this information further with your attorney.

The first federal reference is National Highway Traffic Safety Administration (NHTSA) 49 U.S.C. §30112(a)(2). This regulation indicates a school may not

purchase or lease a 15 passenger van if it will significantly be used for student transportation unless the vehicle meets all of the safety requirements of a school bus. These safety guidelines are established by the Federal Motor Vehicle Safety Standards (FMVSS), but are too extensive to list here. However, it includes yellow paint, reflective tape, stop-arm, flashing lights, etc. It is unlikely the school district will be able to find a 12- or 15-passenger van with these safety features.

In order to enforce this federal legislation, Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) established penalties of dealerships selling or leasing a 15-passenger vehicle to a school without the

required safety features. The penalty is \$10,000 and up to a maximum of \$15,000,000 for multiple violations. This Act also defines a 15-passenger vehicle as "a vehicle that seats 10 to 14 passengers, not including the driver".

The Wisconsin Department of Transportation (WIDOT) defines a school bus as a motor vehicle which carries 10 or more passengers for the purposes of transporting students to or from school, curricular, or extracurricular activities. WIDOT also recommends avoiding the use of vans able to hold 11 or more passengers based on federal safety guidelines. Wisconsin State Statute §121.555 further defines the alternative methods of transportation a school can utilize and specifically limits the

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vehicle size to 9 or less passengers. These regulations have been developed to ensure student safety. According to WIDOT, crash data shows that larger vans are highly prone to roll over, especially when they are fully loaded. This higher center of gravity and the lower roof supports of a van, increase the potential for serious injury to the occupants of the vehicle in the event of a crash. This also becomes a problem if the school district removes a row or 2 of seats to reduce passenger count to 10. This creates a tendency to overload the rear of the vehicle with equipment and increases the potential for problems.

One of the primary goals for schools typically involves student safety. Does the school really want to ignore State and Federal guidelines indicating these vehicles should not be used for student transportation? Would the use of one of the vehicles impact the school district's liability limitations provided by Wisconsin Statutes? Instead of answering these questions,

the school district can easily avoid this risk by using alternative transportation. This might include multiple mini-vans or 10-passenger vans to transport the students. The additional cost for extra vehicles and additional drivers would be worth the avoidance of the additional risk.

Here are some additional safety tips when using 10-passenger vans for student transport.

- Make sure the vehicle is properly maintained.
- Properly inflated tires are critical. Check the tire pressure and tire wear prior to each trip.
- Use drivers that are familiar with the different handling issues created by larger vehicles. A large van handles much differently than a regular automobile.
- Do not overload the vehicle. This can occur when transporting an athletic team and all of the necessary equipment. Overloading the vehicle

can lead to a greater rollover tendency. Remember, another school utilizing a 12- or 15-passenger vehicle does not change the regulations and should not be a factor in your decision when evaluating the risk associated with these vehicles. 🐾

If you have questions or comments about this article, contact Kevin at kevin.miller@m3ins.com

“Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do.”

~ Steve Jobs

SMALL DISTRICTS, BIG IMPACT

Sometimes good things come in small packages! Miron assisted two rural school districts with comprehensive pre-referendum services that resulted in their success in November. These projects will bring great benefits to students, staff, and the community well into the future. **Congratulations to the Colby School District and the School District of Florence County!**









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Important p-Card Reminders

1) If you are interested in growing your p-Card program, starting a program in your district, or generally learning more about the Wisconsin p-Card program, plan to attend the p-Card User Group Training on March 14 at the Madison Marriott West. This 3-hour session runs from 1-4 PM and is free to attend. Please pre-register on the Accounting Conference webpage, available at www.wasbo.com/accounting.

2) As we head into the last couple months of the p-Card fiscal year (April 1-March 31) remind your staff to keep putting purchases on those p-Cards! Let's break the \$350M tier this year!

3) Now is the time to change the number of grace days for the upcoming BMO fiscal year (April 1 – March 31). If you wish to change the number of grace days in which your district pays their bill, please contact Kevin Noren at kevin.noren@bmo.com and copy Holly Wallace at [\[iasbo.org\]\(http://iasbo.org\) by March 15 so your changes will go into effect April 1.](mailto:hwallace@</p></div><div data-bbox=)

4) Audited Financials must be submitted annually, when you receive them. They can be sent via email, fax or USPS. Emailed links or scans should be sent to pcard.reviews@bmo.com, faxes to 312.293.5811 and mail to:

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Chicago, IL 60603

5) Districts that need to add or change their p-Card Administrator(s), please fill out the Organization Set Up Form, available here: <http://illinois-pcard.com/wp-content/uploads/2016/12/IASBO-Schedule-C-Organization-Set-up-Form-IACT-09-2014.pdf>. Send the completed form along with a description of what needs to be

changed to iasbo.requests@bmo.com.

6) If you have been migrated to the new online management tool, Spend Dynamics, and would like to learn more about how it works, visit the tutorials on the p-Card Website at www.illinois-pcard.com There are resources there to help!

Do you have additional questions regarding the Wisconsin p-Card program? If so, please visit www.wasbo.com/pcard or contact Kaitlyn Peters at kaitlyn.peters@wasbo.com.

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Understanding the Epidemic - Drug Overdose Deaths and Opioid-Involved Deaths

By Jessica Schroeder, Risk Management Consultant, Community Insurance Corporation
Submitted on behalf of the WASBO Safety and Risk Management Committee



Drug overdose deaths and opioid-involved deaths continue to increase in the United States. The majority of drug overdose deaths, more than six out of ten, involve an opioid. Since 1999, the number of overdose deaths involving opioids, including prescription opioids and heroin, quadrupled. From 2000 to 2015 more than half a million people died from drug overdoses. 91 Americans die every day from an opioid overdose.

We now know that overdoses from prescription opioids are a driving factor in the 15-year increase in opioid overdose deaths. Since 1999, the amount of prescription opioids sold in the U.S. nearly quadrupled, yet there has not been an overall change in the amount of pain that Americans report. Deaths from prescription opioids—drugs like oxycodone, hydrocodone, and methadone—have more than quadrupled since 1999.

Today, nearly half of all U.S. opioid overdose deaths involve a prescription opioid. In 2015, more than 15,000 people died from overdoses involving prescription opioids.

The most common drugs involved in prescription opioid overdose deaths include:

- Methadone
- Oxycodone (such as OxyContin®)
- Hydrocodone (such as Vicodin®)

Among those who died from prescription opioid overdose between 1999 and 2014:

- Overdose rates were highest among people aged 25 to 54 years
- Overdose rates were higher among non-Hispanic whites and American Indian or Alaskan Natives, compared to

non-Hispanic blacks and Hispanics

- Men were more likely to die from overdose, however, the mortality gap between men and women is closing

Overdose is not the only risk related to prescription opioids. Misuse, abuse, and opioid use disorder (addiction) are also potential dangers.

- In 2014, almost 2 million Americans abused or were dependent on prescription opioids
- As many as 1 in 4 people who receive prescription opioids long term for noncancer pain in primary care settings struggles with addiction
- Every day, over 1,000 people are treated in emergency departments for misusing prescription opioids

In order to prevent overdose deaths, we need to improve prescribing of opioids, expand treatment of addiction, and reduce access to illegal opioids.

- Improve opioid prescribing to reduce exposure to opioids, prevent abuse, and stop addiction
- Expand access to evidence-based substance abuse treatment, such as Medication-Assisted Treatment, for people already struggling with opioid addiction
- Expand access and use of naloxone—a safe antidote to reverse opioid overdose
- Promote the use of state prescription drug monitoring programs, which give health care providers information to improve patient safety and prevent abuse
- Implement and strengthen state strategies that help prevent high-risk prescribing and prevent opioid overdose
- Improve detection of the trends of

illegal opioid use by working with state and local public health agencies, medical examiners and coroners, and law enforcement. 🇺🇸

If you have questions about this article, please contact Jessica at jessica@aegis-wi.com

Service Affiliate Checklist

Your contact for sponsorship, advertising, and newsletter submissions is Clare May, clare.may@wasbo.com

- Sponsorship Opportunities:
 - Facilities Management Conference
 - Transportation & Bus Safety Conference
 - Accounting Conference
 - Spring Conference
- *Taking Care of Business* articles due March 15 for April issue.
- Advertise in *Taking Care of Business*.
- Call for Presentations due March 31 (see page 43).
- Update your profile and communication preferences at WASBO.com.
- Join a WASBO Committee.

Spotlight on Lynn Knight



For the past eight years, Lynn Knight has served as the business manager for the School District of Nekoosa in Nekoosa, Wisconsin. This small, rural school district serves 1,240 students on three campuses—one each at the elementary, middle, and high school levels. The middle school houses two charter schools along with a traditional school. Students have the opportunity to attend Central Wisconsin STEM Academy, which focuses on project based curriculum in science, technology, engineering, and mathematics. In addition, Nekoosa partnered with the Ho-Chunk Nation to create the Niikuusra Community School, which offers project-based learning as well as learning opportunities related to the Ho-Chunk language, culture, and history. Wisconsin school districts receive their funding from state aid and property taxes. “In most cases, if state aid decreases, property taxes increase,” Lynn says. “The funding formula puts an enormous amount of weight on property values per student in determining aid for school districts.”

Nekoosa’s state aid has been cut by over \$800,000 in the past three years. The school district’s local tax is levied by its five municipalities, one of which carries 62% of the tax burden. The district administrator, school board, and Lynn are working diligently to educate the public on school funding and the importance of community involvement. In her 11 years in school business, Lynn has learned the truth of the phrase “the devil is in the details.” During an ASBO International Annual Meeting & Expo, she attended a session on websites, which opened her eyes to the importance of improving Nekoosa’s website—first impressions are critical! Upon returning home, she listed the website’s pros and cons and defined their target audience. “After months of communicating and collaborating with the various departments in our district, our new website will go live on January 1, 2017,” Lynn says. “Had I not attended that session, our website probably would have gone under the radar.” In addition to the business office, Lynn is responsible for school nutrition, technology, transportation,

buildings and grounds, and human resources. She loves attending ASBO Annual Meetings, where she often picks up useful information relating to more than one of these departments. “Without ASBO International, I never would have been able to take advantage of these phenomenal professional development and networking opportunities,” Lynn says. “Through ASBO, I have met so many experienced business officials from around the world.” 🇺🇸

“This article originally appeared in the January 2017 School Business Affairs magazine and is reprinted with permission of the Association of School Business Officials International (ASBO). The text herein does not necessarily represent the views or policies of ASBO International, and use of this imprint does not imply any endorsement or recognition by ASBO International and its officers or affiliates.”

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WASB-WASDA-WASBO State Education Convention

The WASB-WASDA-WASBO State Education Convention took place Jan. 17-20 at the Wisconsin Center in Milwaukee. WASBO provided 11 sessions along with a pre-convention session on The School Finance Puzzle.

During WASBO's business meeting on Thursday, the School Business Manager of the Year award was presented to Jill Bodwin of Pulaski, and the New School Business Manager of the Year award was presented to Ben Irwin of Cedarburg. (See page 1 for details.)



School Business Manager of the Year Jill Bodwin (left) is congratulated by WASBO President Pat Finnemore, State Superintendent Tony Evers, and WASBO Executive Director Woody Wiedenhoef. The award was sponsored by BELFOR Property Restoration.



Bob Avery presents to attendees during the pre-convention, School Finance Puzzle as a hands-on interactive approach to school finance.



Attendees at the WASBO Business Meeting heard from Business Manager of the Year and New Business Manager of the Year, as well as WASBO President Pat Finnemore.



New School Business Manager of the Year Ben Irwin (above) receives his award from Linda Mont from Key Benefit Concepts, sponsor of the award.



Support Student Scholarships!

Hit the greens or jump on your bike to support over \$21,000 in student scholarships awarded by WASBO annually to deserving Wisconsin high school seniors! Network on Wednesday, May 10 with district professionals and those who provide products and services to Wisconsin schools, then join us for two days of powerful professional development at the WASBO Foundation Spring Conference & Exhibits. WASBO offers two different fundraising activities. Golfers have the opportunity to play 18 holes at either Cedar Creek or Fox Hollow Golf Courses in the La Crosse area, while bikers will ride the Great River Trail.

Register:

wasbo.com/spring



Little Chute Prevails Against WEAC and Retirees

Continued from page 24

in determining the parties' intent.

The Court of Appeals asserted that the Retirees' reliance on *Roth v. Glendale*, 2000 WI 100, 237 Wis.2d 173, wherein the Supreme Court held that retirement health benefits are presumed to "vest" in the absence of contract language or extrinsic evidence suggesting otherwise, was entirely misplaced due to the clear anti-vesting language contained in the CBAs identified above. *Little Chute Area Sch. Dist.*, No. 2015AP2033, at ¶¶ 19, 25.

2. The anti-vesting provision merely informs current employees contemplating retirement that the same early retirement benefits may not be available under a subsequent CBA.

The Court of Appeals was quick to dismiss this argument, stating that such an interpretation would do no more than inform prospective retirees of what is already clear from the provision limiting the term of each CBA to two years. *Id.* at ¶ 21. Again, the court relied upon the plain language of the CBAs to discern the parties' intent.

3. The District's interpretation of the purported anti-vesting language amounts to an "implied consent" theory, a theory which was rejected by the Wisconsin Supreme Court in *Roth*.

The Court of Appeals rejected this argument, stating that, although in *Roth* the Wisconsin Supreme Court expressed wariness of employee unions' "unilaterally bargain[ing] away contractual promises made to retirees," there is no indication the Supreme Court intended to establish a substantive rule providing parties with an avenue for relief from an otherwise clear contract in existence before they retired. *Id.* at ¶¶ 22, 23.

Because the 2001-2011 CBAs contained clear anti-vesting provisions, the Court of Appeals stated that all Retirees who retired under those CBAs were expressly put on notice

that there may come a day when their early retirement benefits would be terminated through collective bargaining, including after they retired. *Id.* at ¶ 23. The Court of Appeals further stated that the Retirees' argument that active employees had "whittled away" their retiree benefits was misplaced, which was demonstrated by the Retirees' acknowledgment that LCEA had served as the exclusive bargaining unit for all current and former members, including the Retirees. *Id.*

4. The District's termination of the group LTC policy was unilateral and, therefore, not in compliance with the CBAs' directive that any changes were to occur only pursuant to collective bargaining.

The Court of Appeals also rejected this argument, stating that the Retirees failed to acknowledge that the LCEA and the District mutually agreed to eliminate all post-retirement benefits in the new CBA effective July 1, 2011. Therefore, as of that date, the District had no obligation to continue providing group LTC benefits to the Retirees and, as a result, the District's decision to terminate the policy was within the scope of the agreed-to CBA. *Id.* at ¶ 24.

5. Reading the CBAs "as a whole" leads to the conclusion that the Retirees have a vested right to continuing group LTC coverage.

The court held that, to the extent the 1995-2001 CBAs gave rise to a vested right to LTC insurance benefits, it is undisputed that the District performed its obligations by making group LTC insurance coverage available and paying the premiums of retired employees under those agreements until they reached age 65. *Id.* at ¶ 26. The court further rejected the Retirees' argument by highlighting language within the 2001-2011 CBAs, which clearly qualified the retired employee's "right" to participate in group LTC coverage for a maximum of

96 months. The court stated that the use of the word "maximum" clearly established a ceiling beyond which the District's obligations did not extend. Likewise, the term "maximum," according to the court, failed to create a floor that obligated the District to offer coverage for the full 96 months. *Id.* at ¶ 27. Thus, the Retirees were contractually entitled to the potential of LTC coverage for up to 96 months, but the language clearly established the District's right to eliminate that coverage at any point prior to the 96 month threshold.

The Retirees next pointed to a survivorship provision, providing for continuation of premium contributions to a surviving spouse/dependents upon a retiree's death, within CBAs from 2001 to 2007, which, according to the Retirees, reflected an intent to vest them with a continuing right to WEAIT insurance coverage.

The Court of Appeals rejected the Retirees' reliance on the survivorship provision, stating that the Retirees failed to explain how the inclusion of such provision demonstrated the parties' intent to vest group LTC insurance benefits. The court further stated that the survivorship provision is fully compatible with non-vesting, as survivorship benefits would be available if, for example, an individual retiree died during the term of the relevant CBA under which he or she retired, or during a longer period if the parties chose to carry over the survivorship benefit in subsequent CBAs. *Id.* at ¶ 29.

6. The terms of the WEAIT group LTC policy must be considered by the court in determining if the LCEA and the District intended early retirees to have vested rights in the group LTC policy because, according to the Retirees, the terms of the policy showed that the parties contemplated that early retirees would have a right to participate in the policy until they

received “paid-up” status.

Once again, the court rejected this argument, stating that it is not clear that the WEAIT group LTC policy was “part” of the relevant CBAs such that it could give rise to a legally enforceable right on the part of the Retirees against the District.

The court also made clear that it did not buy the Retirees’ argument that the terms of the group LTC policy had been incorporated into the CBAs simply because the CBA referenced the LTC insurance policy, as neither party mutually agreed to such incorporation, a requirement that must occur for the terms of a document to be incorporated by reference into a CBA. *Id.* at ¶ 31.

7. The CBAs should be examined in light of the relevant industry-specific “customs, practices, usages, and terminology.”

The court rejected this argument, stating that the Retirees failed to identify what relevant “industry-specific” customs and practices shed light on the parties’ CBAs but, instead, only presented evidence related to the parties’ customs and practices. *Id.* at ¶ 35. The court further noted that, even if the Retirees had presented the proper industry-specific customs and practices, such customs and practices are only relevant when a CBA’s language is ambiguous; however, the language of the CBAs before the court were anything but ambiguous, rendering the consideration of industry-specific customs and practices irrelevant. *Id.*

8. Even if they did not have a vested right to continue to participate in the group LTC policy, the Retirees’ counterclaim for breach of the duty of good faith and fair dealing should have survived dismissal.

The court, once again, rejected this argument, holding that the District did no more than that authorized by the CBAs from 2001 and on, as those CBAs contained clear anti-vesting language. Thus, according to the court, the Retirees could not prevail on their

claim for breach of the duty of good faith and fair dealing.

Conclusion

The Court of Appeals applied simple contract interpretation principles to the plain language of the CBAs. According to the court, despite WEAC and the Retiree’s earnest attempts, the law will not allow parties to circumvent clear contractual language.

This decision confirms that school districts are legally justified in relying upon contract language to support modifications of benefit plans. However, it is important to note that decisions surrounding modification of benefit plans can be tricky depending upon the CBA or policy language at issue. Therefore, school districts are strongly encouraged to consult with legal counsel before implementing changes that impact benefits previously made available to employees and retirees. 📌

If you have questions surrounding the Little Chute Sch. Dist. case or this Legal Update, please contact any of the authors or a member of the von Briesen School Law Team.

“Consult not your fears, but your hopes and your dreams. Think not about your frustrations, but about your unfulfilled potential. Concern yourself not with what you tried and failed in, but with what it is still possible for you to do.”

~ Pope John XXIII



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Wisconsin Schools Digital Library Collaborative - February 2017 Update

By WSDLC Interim Board

The Wisconsin Schools Digital Library Consortium (WSDLC) is rolling along! CESA Purchasing, on behalf of the interim board, has issued an RFP for vendors who could provide ebook content for the consortium. More information about the RFP can be found on the WSDLC RFP page.

For those of you new to the project, the intent of the WSDLC is to develop a shared collection of ebooks and other materials that will be available to all participating districts and schools in the state. The expectation is that the collection will maximize the effectiveness of expenditures on digital library materials and addresses the inequity across districts through a shared digital collection. There will be three distinct collections: one for K-4, one for 5-8, and one for 9-12. The plan is to have the collections available for use by Fall 2017. The collections could supplement existing ebook collections in schools, or could be an affordable way for schools to begin to purchase ebook content.

Based on feedback gathered from the community, the ideal opening day

collections will include:

- A high percentage of unlimited simultaneous use titles
- A mix of fiction and non-fiction
- Award winning titles
- Titles that cover a wide range of subjects
- Current titles (published in the last two calendar years)
- Spanish language materials
- High interest/low reading level content
- Content that can be downloaded or streamed
- Readalong titles
- Text-to-speech capabilities

Our expectation is that the cost to participate for a school or district will be between \$1 and \$2 per student. Common School Funds will be able to be used to fund participation in the collection.

We'd now like schools and districts to preliminarily commit to joining the consortium for the 2017/18 school year. If your school or district is likely to participate in the consortium, given the scope of the collection and expectation for cost, please fill out the We (Might) Want to Participate! Form.

Filling out the form is not a binding commitment. In order for us to move forward, it is helpful for us to know how many schools and districts are likely to participate.

If you're interested, but not sure yet, we'd love to know your feedback, including what other information you need to know to feel more certain. Please feel free to fill out our survey (https://docs.google.com/forms/d/e/1FAIpQLSdzk2RI2edgiqZPcRKZg_ZzEKWwK1ChFs2e_5qq5liZPlw1CQ/viewform) to share anonymously or contact us directly with questions.

We'd also encourage you to join the Google Community and watch the project website to keep updated with all of the information about the consortium. We will have a session at the WEMTA Conference about the consortium, and the WiLS and CESA Purchasing booths will both have information. We'll post more details to the website as we have them.

Submission instructions and materials overview can be found on pages 35-37.



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Submission Instructions for Suppliers

Please follow these instructions to submit via our Public Portal.

1.Directions on how to upload your submission at:

<https://cesa.bonfirehub.com/opportunities/2386>

Your submission must be uploaded, submitted, and finalized prior to the Closing Time of **Feb 21, 2017 2:00 PM CST**. We strongly recommend that you give yourself sufficient time and **at least ONE (1) day** before Closing Time to begin the uploading process and to finalize your submission.

Important Notes:

Each item of Requested Information will only be visible after the Closing Time.

Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.

You will receive an email confirmation receipt with a unique confirmation number once you finalize your submission.

Minimum system requirements: Internet Explorer 8/9/10+, Google Chrome, or Mozilla Firefox. Javascript must be enabled. Browser cookies must be enabled.

Requested Documents:

Please note the type and number of files allowed. The maximum upload file size is 100 MB.

Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.

Need Help?

CESA Cooperative Purchasing uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at Support@GoBonfire.com for technical questions related to your submission. You can also visit their help forum at <https://bonfirehub.zendesk.com/hc>

2.Submission materials overview:

Requested Information

Name	Type	# Files	Requirement
Exhibit 1 - Transmittal Letter	File Type: PDF (.pdf)	Multiple	Required

Name	Type	# Files	Requirement
Exhibit 2 - Executive Summary	File Type: PDF (.pdf)	Multiple	Required
Exhibit 3 - Firm Proposal Terms	File Type: PDF (.pdf)	Multiple	Required
Exhibit 4 - Bidder Background Information	File Type: PDF (.pdf)	Multiple	Required
Exhibit 5 - Experience	File Type: PDF (.pdf)	Multiple	Required
Exhibit 6a- Financial Information	File Type: PDF (.pdf)	Multiple	Required
Exhibit 6b - Financial References	File Type: PDF (.pdf)	Multiple	Required
Exhibit 7 - Termination, Litigation and Debarment	File Type: PDF (.pdf)	Multiple	Required
Exhibit 8 - Criminal History & Background Information	File Type: PDF (.pdf)	Multiple	Required
Exhibit 9 - Acceptance of Terms & Conditions	File Type: PDF (.pdf)	Multiple	Required
Exhibit 10 - Certification Letter	File Type: PDF (.pdf)	Multiple	Required
Exhibit 11 - Authorization to Release Information	File Type: PDF (.pdf)	Multiple	Required
Exhibit 12i - K - 4 Options for Collections	File Type: PDF (.pdf)	Multiple	Required
Exhibit 12ii 5 -8 - Options for	File Type: PDF (.pdf)	Multiple	Required
Exhibit 12iii 9-12 Options for Collections	File Type: PDF (.pdf)	Multiple	Required
Exhibit 13 - Searching and Reading Platform	File Type: PDF (.pdf)	Multiple	Required

Name	Type	# Files	Requirement
Exhibit 14 - Integration with LMS System	File Type: PDF (.pdf)	Multiple	Required
Exhibit 15- Reporting	File Type: PDF (.pdf)	Multiple	Required
Exhibit 16 - Implementation Plan	File Type: PDF (.pdf)	Multiple	Required
Exhibit 17 - Additional Content	File Type: PDF (.pdf)	Multiple	Required
Exhibit 18 - Administrative Features/Settings	File Type: PDF (.pdf)	Multiple	Required
Exhibit 19 - Training	File Type: PDF (.pdf)	Multiple	Required
Exhibit 20 - Marketing & Promotion	File Type: PDF (.pdf)	Multiple	Required
Exhibit 21 - Support	File Type: PDF (.pdf)	Multiple	Required
Exhibit 22 - Teacher Tools	File Type: PDF (.pdf)	Multiple	Required
Exhibit 23 - Integration with Integrated Library System	File Type: PDF (.pdf)	Multiple	Required
Exhibit 24 - Access Methods	File Type: PDF (.pdf)	Multiple	Required
Exhibit 25 - Optional Features, Products or Services	File Type: PDF (.pdf)	Multiple	Required
5.3.1.a - Pricing Spreadsheet	File Type: Excel (.xls, .xlsx)	Multiple	Required
5.3.1.b,c,d,e,f,g - Pricing Narrative	File Type: PDF (.pdf)	Multiple	Required
5.3.2. Payment Calendar and Terms	File Type: PDF (.pdf)	Multiple	Required

Welcoming the New Year

By John D. Musso, CAE, RSBA



As we usher in the New Year, there will be new leaders, policies, and challenges in 2017 that will require school business officials to be more innovative than ever before.

We must continue to ensure that every dollar and resource is effectively allocated to provide our students with the quality of education that they need and deserve. But we also must ensure that we increase our efforts in advocating for our children in an educational and political environment that likely will offer less funding and more regulatory uncertainty than we're accustomed to.

Myriad news outlets report that the incoming Trump administration will aggressively promote school choice policies, and that the president-elect has already nominated school choice activist Betsy DeVos as Secretary of Education. Considering Donald Trump's \$20 billion proposal to redirect federal education funding to public, private, charter, parochial and magnet schools alike—and DeVos' record of expanding charter school programs in the state of Michigan—we can expect to see an unprecedented level of federal support for school choice programs.

And, while the education funding "pie" is likely to be divvied up into smaller slices, the overall size of it is shrinking, too. Congress is still working out a federal budget for fiscal year 2017, but spending on education and other domestic programs is likely to decrease. New leadership in the House Education and Workforce Committee will see that the Education Department's programs are downsized and streamlined, and funding is cut to rein in federal spending.

Even program funding for the new Every Student Succeeds Act (ESSA), which is critical to the new law's success, is uncertain. Fewer resources coupled with new ESSA regulations for

states and school districts to comply with, on top of a possible repeal of the Affordable Care Act, and an outstanding child nutrition law awaiting to be reauthorized, means school business officials will certainly have their work cut out for them.

Although the picture painted may seem grim, remember that we have dealt with much worse. I recall saying, back when we celebrated ASBO International's 100-Year Anniversary, that for a century, school business has endured war, economic depression, social change, and more. But, "we have a legacy of persevering, of believing in public education, and of making the impossible happen. There's nothing more powerful than a group of dedicated, creative education leaders advocating for the students we serve." These words still stand true.

Remember that as we face a new year of challenges, you are not alone. ASBO International and the network of school business peers that it represents are here to support you. Rely on your colleagues and empower one another. Ask for help on the Global School Business Network, stay informed of K-12 news with our publications, leverage our legislative resources to advocate for your students, and boost your leadership skills at our professional development events.

One step you can take right now to equip yourself for the challenges of this year is to register and attend the 2017 Executive Leadership Forum in Miami, Florida, February 16-18. (Learn more at asbointl.org/Forum). There, you will learn practical risk management and crisis communications skills that can help you in any situation. I hope I will see you there.

In the meantime, I wish all our members a Happy New Year and challenge each of you to make meaningful resolutions that will help

mold you into even stronger, more innovative school business leaders this year.

"This article originally appeared in the January 2017 School Business Affairs magazine and is reprinted with permission of the Association of School Business Officials International (ASBO). The text herein does not necessarily represent the views or policies of ASBO International, and use of this imprint does not imply any endorsement or recognition by ASBO International and its officers or affiliates."

For more information about ASBO please visit www.asbointl.org.

“

Each New Year, we have before us a brand new book containing 365 blank pages. Let us fill them with all the forgotten things from last year - the words we forgot to say, the love we forgot to show, and the charity we forgot to offer."

~ Peggy Toney Horton

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Why Understanding Millennials is Key to Fighting Teacher Attrition

By: Todd Kominiak, Managing Editor, TrustED

With a nearly eight-percent national teacher attrition rate, schools across the country are looking for better ways to keep teachers engaged in their work.

Higher pay, better training, more autonomy—we've all heard the list of proposed solutions. And yet, the U.S. teacher attrition rate is still double of those in higher-performing countries, according to the Learning Policy Institute.

Millennials now make up the majority of new teacher hires. Unfortunately, less than half of them will still be teachers in five years, according to Forbes.

To attract and retain the best talent, schools will have to adapt to millennials' changing life and work priorities, or risk losing a new generation of teachers.

The problem? Only six percent of superintendents think they understand the needs of millennials in the workforce, according to a recent Gallup study.

Gallup outlines six key changes districts will have to make to ensure satisfaction among its newest faculty members. Keep these in mind as you navigate your own hiring challenges.

1. Give teachers a better sense of purpose

Teachers don't become teachers for the money. By choosing education, they show an innate sense of purpose. But, millennials want constant reminders of how their day-to-day work relates to the broader purpose of educating students. School leaders must provide that inspiration.

2. Provide development opportunities, not just perks

In recent years, many of America's

leading brands have offered perks to attract talent. Think of Facebook or Google offering ping-pong tables, dry cleaning, and meals.

But, Gallup reports that the workplace of the future will move away from this approach and instead prioritize "opportunities for employees to learn and grow and develop their full potential."

While perks are great, giving teachers the opportunity to master their positions through professional development and other programs is critical.

3. Be a coach, not a boss

Workplace leadership was once defined by top-down control. But, millennials are looking for a stronger working relationship with their school leaders. Moving forward, administrators will need to think of themselves as coaches leading a team, working hand-in-hand with their faculty and staff to achieve common goals.

4. Provide and invite ongoing feedback

"Annual performance reviews are no longer sufficient," says the Gallup report. Millennials want regular feedback on their performance, and they want to provide feedback to their district and school as well.

Do your teachers know they can approach you whenever they need to? If not, it's time to rethink how you communicate.

One-on-one meetings are important, but you should also have other ways to collect feedback from your staff and community. Surveys offer an easy way

to solicit that input.

5. Focus on strengths, not weaknesses

While "room for improvement" has long been a staple of job reviews, the Gallup report recommends a new model for assessing performance.

Millennials want to further improve what they're good at, and want leaders who inspire excellence in them. Constructive feedback is helpful, but it should focus on what teachers have done right rather than what they've done wrong.

6. Provide a lifestyle, not just a job

Work-life balance has been a workplace buzzword for years. For millennials it's a must.

To retain the best talent, you must give them a reason to stay that goes beyond money and benefits. Make sure the goals of your district align with your teachers' aspirations, and that your work environment reflects the lifestyles of your staff. 🏡

This article originally appeared and was published by TrustED and can be found at: <http://trustedk12.com/understanding-millennials-key-fighting-teacher-attrition/>



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Welcome New Members • December 2016 - January 2017

District Professional Members

- **Ron Beaver**, Maintenance Director, Southwestern Wisconsin SD
- **Rita Brodjieski**, HR/Financial Assistant, Merrill Area Public Schools
- **Andrew Daniels**, Custodian, Oak Creek Franklin Joint SD
- **Kristie Dirks**, District Accountant, Sheboygan Area SD
- **Jonathan Ellis**, Custodian, SD of Cudahy
- **Maureen Gehring**, Accountant, Hartford Union High SD
- **Justin Harris**, Transportation Coordinator, Mount Horeb Area SD
- **Greg Hartjes**, Principal, Appleton Area SD
- **William King**, Operations Supervisor, Oconomowoc Area SD
- **Arick Madrigal**, Transportation Coordinator, Saint Croix Falls SD
- **Jacob Majstorovic**, Maintenance Supervisor, St. Alphonsus Parish
- **Lee Mattern**, Transportation Director, SD of Wabeno Area
- **Lindsey Mueller**, District Bookkeeper, Campbellsport SD
- **John Newton**, Director of Maintenance, Rio Community SD
- **Carmen O'Brien**, Business Manager, SD of Manawa
- **Joan Rankin**, District Accountant, West Allis-West Milwaukee SD
- **Dave Reed**, Business Services Coordinator, Mount Horeb Area SD
- **Michelle Silver**, Facility Foreman, SD of Menomonee Falls
- **Marcus VerDuin**, Grounds Keeper, Sheboygan Falls SD
- **Tom Voight**, Maintenance, Ripon Area SD
- **Meaghan Voigt**, A/P Accountant, SD of Menomonee Falls
- **Charlie Wiedmaier**, Maintenance Supervisor, Mondovi SD

Service Affiliate Members

- **Jeremy Bellile**, Vice President of Operations, Upper 90 Energy
- **Meghan Blythe**, Business Development Communications Specialist, Associated Benefits and Risk Consulting
- **Bill Dermody**, EMC Consultant, GFConsulting
- **Ron Duncan**, President, Magic Aire
- **John Erickson**, Principal, DSGW Architects

- **Andrew Halverson**, Vice President of Business Development, Ellis Construction
- **Sean Hamilton**, National Marketing Manager, Perfection Cleaning & Restoration
- **Jessica Hartje**, Sales Manager, Custof foam Corporation
- **Joni Juergens**, Territory Manager, Patcraft Commercial Flooring
- **Heidi McFee**, Energy House
- **Mariah Negron**, ISG
- **Tanner Nussbaum**, Sales Rep, Bassett Mechanical
- **Tami Olszewski**, Financial Specialist, Ehlers
- **Jim Qualley**, Innovative Modular Solutions
- **Jody Saso**, Cat 5 Restoration
- **Chad Stevens**, General Manager, Building Material Supply, Inc
- **Deborah Suzan**, Commercial Consultant, Acquire Restoration
- **Isaiah Thaler**, Executive Director of Field Services, EDUStaff, LLC
- **Wade Uhlenbrauck**, Sales Manager, Bassett Mechanical
- **LuAnn Verduzco**, Lighting Consultant, The Retrofit Companies

Student Members

- **John Bremmer**
- **Sarah Duncan**
- **Grace Green**, Bookkeeper, CESA #7

Member Moves and Retirements

On the Move

- **Dennis Hall**, from Senior Security Consultant, Per Mar Security Services to unknown
- **Sherri MacGregor**, from Comptroller, Kettle Moraine SD, to Business Manager, Merton Community SD
- **Megan Nussbaum**, from Business Development Specialist, Miron Construction Co, Inc, to Account Executive, McKinstry
- **John O'Neill**, from Custodial Supervisor, De Forest Area SD, to unknown
- **Sarah Viera**, from Business Manager, Merton Community SD, to Executive Director of Business Services, Mequon-Thiensville SD

Retirements

- **Sue Buchholz**, Director of Business Services, Unified SD of DePere
- **Kathy Matthaidess**, Finance Manager, Marathon County Special Education

Keep us Posted!

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

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



Stay Connected



Call for Presentations

Has your school district implemented a new practice? Do you have a story to tell? WASBO invites you to share your experience and expertise by applying to present at one of our upcoming conferences: **Fall Conference**, **Midwest Facility Masters Conference**, and/or **School Personnel Academy**. A Call for Presentations is posted at WASBO.com/present. Deadline is March 31.

If you are a District Professional, consider teaming up with your colleagues/Service Affiliate members to present a session on an innovative idea or best practice you have implemented in your district. Attendees appreciate the information provided by their peers and often find they can apply what they have learned at the conference when they return to their districts.

Service Affiliate Members are encouraged to team up with a school district professional to co-present educational and informative solutions that address the needs of school districts. Inviting district personnel to co-present gives additional credibility to the information you are providing. If you present quality information, attendees will remember the expert who provided it.

Final programming decisions for each conference are made by that conference's planning committee.

Questions? Contact Kaitlyn Peters, kaitlyn.peters@wasbo.com or 608.729.6631.

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.

Submit a Newsletter Article

Has your school district implemented a new practice? Do you have a story to tell? Share your experience by writing an article for *Taking Care of Business*. Email your submission to Clare May, clare.may@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.

Collaborating for Change

WASBO Accounting Conference Contest

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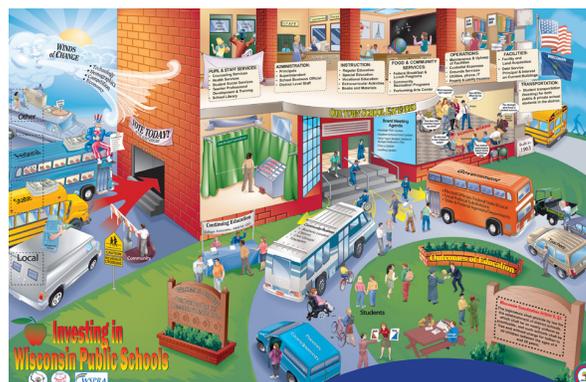
We want to learn what you have done and how it has benefited your district.

Submit your entry at WASBO.com. Conference attendees will select the winner.

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Upcoming Events - WASBO.com

Professional Development

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 (Viterbo Credit)
Spring Conference
May 11-12, 2017 - La Crosse Center, La Crosse
Custodial & Maintenance Conferences
June 21, 2017 - Waunakee High School, Waunakee
July 12, 2017 - Logan High School, La Crosse
July 19, 2017 - University School of Milwaukee, Milwaukee
July 26, 2017 - Amherst High School - Tomorrow River SD, Amherst

Scholarship Fundraisers

Spring Golf Fundraiser
May 10, 2017 - Cedar Creek and Fox Hollow
Spring Bike Fundraiser
May 10, 2017 - Great River Trail
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

Safety & Risk Management
All meetings at 11:45 am, WASBO Offices in Madison unless otherwise noted. April 4, 2017; Aug 1, 2017
School Facilities
All meetings at 9:30 am, WASBO Offices in Madison unless otherwise noted. April 4, 2017; Aug 1, 2017

Spring Conference
Meetings at 2 pm by conference call unless otherwise indicated. Feb 24, 2017; March 14, 2017 (6:30 pm during Accounting Conference)
Fall Conference
All meetings at 1 pm, WASBO Offices in Madison unless otherwise noted. Feb. 21, 2017
Midwest Facility Masters Conference
Meetings at 10 am by conference call unless otherwise indicated. March 2, 2017; April 6, 2017

Regionals

Check WASBO.com for details.
Bay Area/Northeast - Meetings start at 9 am. 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. April 5, 2017

Southeast - Meetings at 1 pm.
Hartland-Lakeside; April 21, 2017, Northland Pines
Southwest - Meetings start at 12:30 pm at CESA 3. TBD

West Central - Meetings from 9 am - 1:30 pm at Sparta Area SD Admin & Education Center. April 6, 2017 (April meeting held in Black River Falls)

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