

Taking Care of Business

The Official Bimonthly Publication of the Wisconsin Association of School Business Officials



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*Happy
Holidays*

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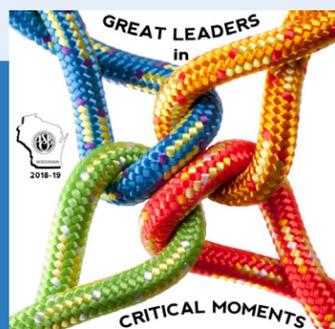
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Editor: Woody Wiedenhoef

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Kent Ellickson
Director of Finance and Business Services,
Onalaska
President, WASBO Board of Directors

Final Thoughts on Culture and Improvement in 2018

As 2018 comes to a close, it is good to step back and reflect on celebrations, challenges, and lessons learned during the past year. For me there have been quite a few things to reflect on. Here are two: one from our District and one from WASBO.

In our district we are marking the first full year of district administrative offices and support services being consolidated under one roof at our new administrative offices and support center. Previously the superintendent, director of instruction, and director of finance and business services and various business office staff worked out of a 3400 square foot office that was separated from everything else in the district. Pupil services, buildings and grounds, technology, instructional coaches and personnel from other support areas were spread throughout our five school buildings.

As we have all come together in our new office during the year, the conversation has focused around how we avoid making our office the place staff come to "have things done to them" and how we can best make sure how we can support our staff to make sure our mission—high levels of learning for all is achieved. How can we really support our employees so they are successful in achieving our mission? What obstacles can we move out of the way for our employees to help them be successful? And yes,

how do we help them to understand that sometimes what they want and sometimes what they need are not necessarily the same thing? Certainly as we work to continuously improve, some of the conversations might not always be easy. Fortunately, I believe our culture is right so we can engage in these conversations and allow us to work through the things we need to accomplish to improve.

Those who attended the WASBO Fall Conference will remember Dave Skogen from Festival Foods was one of the keynote speakers and a proponent of servant leadership. Our new office is the former Festival Foods Support Center. Dave stressed the importance of their culture in his organization's success. While occupants of our building changed from administrative and support staff for Dave's grocery store chain to administrative and support staff of our school district, the focus on promoting a healthy culture has not changed within the walls of this building. Leadership promoting a healthy culture is important to both the success of a grocery business and the success of a school district. The office surroundings provide me a nice daily reminder of the importance of this focus on positive culture.

How do you think your administration is doing with culture? More importantly, how does all of your district staff think you are doing with culture? Are you able to discuss all that you need to in order to improve?

For WASBO, the end of the calendar year has focused on continuous improvement of our organization. The WASBO Member Resources Committee has been working feverishly along with the WASBO staff to set the stage for the next cycle of WASBO's continuous improvement plan. By the time you read this, the WASBO membership survey will have been developed, distributed, and started a review of the survey responses. These responses will help WASBO to identify themes that will be used to create organizational goals over the next few years. In working towards these goals that are derived from information from our members, WASBO will be able to improve to better meet the changing needs of our membership.

Thank you to the Member Resources Committee and WASBO staff for your work on this important project! We look forward to using the data compiled from the survey as we move forward improving WASBO in 2019 and beyond.



Woody Wiedenhoef
Executive Director,
WASBO

Let me express the WASBO office's best holiday wishes to all WASBO members and people who collaborate with WASBO. Life is a wonderful set of people relations. In this holiday season we get a reminder to appreciate those relationships and how these relationships make a better life for all of us.

There are many people who help WASBO be a member driven association, but today I wish to do a "shout out" to the WASBO members who developed the Wally Zastrow Leadership Academy that started in August. The committee included WASBO members Jason Demerath, Sara Viera, Kent Ellickson, Eddie Then, Lynn Knight, Sara Thiel, Leah Hauser, Lori Ames, Don Hietpas, Steve Summers, Brian Walters and John Gahan. The Leadership Academy has now met for the first 6 of 12 scheduled sessions. Andy Chromy from Oak Creek and a participant in the Academy provided the following evaluation statement:

"The Leadership Academy is the best piece of professional development ever provided by WASBO. It has forced a lot of internal reflection about my role in the district and how I can bring improvement, to not only myself, but those around me. Well worth every penny!"

Happy Holidays WASBO!

The evaluations by first year participants reflect that the Leadership Academy is very practical and engaging as it develops and provides specific skill sets to tackle difficult situations, builds self-awareness and confidence. The Leadership Academy Committee will be reviewing all the survey and evaluation comments provided by the District Professional Survey as well as the evaluations from first year participants. WASBO will open enrollment for the Wally Zastrow Leadership Academy in March for the 2019-20 school year.

ESSA School Level Expenditures Reporting Requirements have been presented at some of our conferences and will be offered in the future at the Federal Funding, Accounting and Spring Conferences. This is a federal, state and local process by which changes are being made regularly this year as we learn and prepare for the 2018-2019 Annual Report. Besides the mechanics of school building expenditure reporting changing our school accounting world, please know that when all this data is reported out in June of 2020 the political dialogue could become very new, daunting and challenging.

As a leader in your district start preparing your district now for these discussions.

If you are thinking about holiday gifts, you may want to consider how you can encourage your employees to participate in professional development and networking. As you help the colleagues around you improve professionally, you may find this gift returns to help you in your professional endeavors. Encouraging continuous improvement and supporting professional development of those around you just may end up being a gift you give yourself.

Last but certainly not least, I want to thank the WASBO staff for all their endeavors and accomplishments that help support WASBO members. Thank you Jeanne, Tina, Kristin, Kaitlyn and Clare. I am very fortunate in having the opportunity to serve with them.



2019-20 Professional Recognition Awards and 2019 Student Scholarship Programs

As WASBO prepares for the 2019-20 Recognition Program we should begin with the renaming of the New Business Manager of the Year Award. It is with pleasure that this award will honor George Gray. George Gray was responsible for creating the School of Business Management Master of Science degree program at UW-Whitewater that trained several of Wisconsin's school business managers through the "Fairly Normal School District" budget mock Annual Meeting. George was very proud of his association with WASBO members and admired their success whether they were one of his students or not. George's favorite philosophy was that as the Business Manager, you were really the one in control of what was happening at your district. George is known for saying: "Business Managers are driving (the district) from the back seat." It is with great pleasure, that starting January 2019, the New Business Manager of the Year Award is renamed to the George Gray WASBO New Business Manager of the Year Award to recognize those members who are keeping the 'car' on the right side of the road!

We encourage you to nominate a peer for one of the WASBO Professional Recognition Awards. Is there someone in your Regional stepping outside the lines to share successes and is involved both in their community and WASBO? The nomination deadline is Jan. 11. You can find more information at WASBO.com/awards.

Four awards will be presented at the WASBO Spring Conference May 16-17 in Green Bay: the Wallace E. Zastrow Award, School Facilities Manager of the Year, Business Services Award, and Safety, Security & Wellness Award.

Two others will be presented at the WASBO Fall Conference Oct. 4-5 in Elkhart Lake: the Tina Hafeman Friend of WASBO Award and the Mike Roshar WASBO Shining Star Award.

The final two awards are presented at the State Education Convention in Milwaukee: School Business Manager of the Year and the newly renamed George Gray WASBO New School Business Manager of the Year. The recipients selected earlier this year are being recognized at the upcoming convention next month. Marta Kwiatkowski, Rhinelander, will receive the School Business Manager of the Year Award at the General Session on Wednesday, Jan. 23. She and the George Gray New Business Manager of the Year recipient, Demetri Andrews, North Crawford, will speak during the WASBO Luncheon on Thursday, Jan. 24.

To make a nomination for 2019-20, visit WASBO.com/awards — links are available to each nomination form.

Return your form with supporting documentation to:

**4797 Hayes Road
Suite 202
Madison, WI 53704**

You may also email scanned documents to Kristin Hauser at kristin.hauser@wasbo.com.

WASBO is also currently accepting applications for high school student scholarships as well as the Bambi Statz Academic Scholarship. This graduate student scholarship is awarded to a student working towards certification in school business management. Application materials for this scholarship can be found at WASBO.com/statz

We are proud to offer a total of \$27,000 spread amongst eleven scholarships to award this coming spring! The WASBO Foundation thanks the following sponsors for their support of continuing education of deserving Wisconsin students: EMC Insurance Companies, Stalker Sports Floors, Dude Solutions, BMO Harris Bank, Nexus Solutions, Sodexo, National Insurance Services, Miron Construction, United Healthcare, Call One and CG Schmidt.

The WASBO Foundation, through the efforts of all of you, by participating in golf outings, bike rides, run/walks, raffles, etc. match the funds of our sponsors for each of the scholarships.

Application materials for high school students can be found at WASBO.com/scholarships. All applications are due Feb. 1.

"Outstanding leaders go out of their way to boost the self-esteem of their personnel. If people believe in themselves, it's amazing what they can accomplish."
- Sam Walton



John Forester
Director of Government Relations,
School Administrators Alliance

SAA Legislative Committee Discusses Legislative Priorities



On Monday, November 19th, the SAA Legislative Committee assembled in Stevens Point to receive a postelection legislative/political update, to review the SAA's 2018 Evidence-Based Policy Agenda and to discuss the SAA's 2019-21 budget/legislative priorities. Interest in the subject matter was nearly off the charts. Longtime committee members commented that they had never seen 43 members seated around the Committee table before. And while there was no shortage of interesting topics on the meeting agenda, the highlight of the day was the discussion surrounding the SAA's 2019-21 budget/legislative priorities.

In my estimation, the following 10 items (in order of priority) rose to the top during the discussion. I greatly appreciate the work of the Committee members and their dedication to the SAA Legislative Committee. The SAA continues to refine these priorities in our attempt to craft a legislative agenda that is truly representative of the SAA membership. Please contact me with any questions, comments or suggestions you may have regarding these draft priorities.

No Time to Lose

The SAA recommends the state convene a Wisconsin Advisory Commission on Excellence in Education to oversee the design, implementation and evaluation of a wholesystem

education reform in Wisconsin as recommended by the National Conference of State Legislatures in its *No Time to Lose* report. To support the work of the Commission, the SAA also recommends the state contract with nationally recognized school finance experts to conduct an adequacy study designed to determine the funding necessary for all Wisconsin school children to meet Wisconsin's education performance objectives and expectations.

Predictable, Sustainable School Funding

Index general school revenue growth to the consumer price index (CPI) to align allowable revenue growth with school cost increases and the investments necessary to meet student needs.

High Needs Students

In *Vincent v. Voight* (2000), the State Supreme Court specifically identified three classes of students to which the state has a special obligation for ensuring equitable opportunities: economically disadvantaged students, students with disabilities and English learners. Today, maintaining flat highneeds funding while costs are rising to serve each of these students challenges the abilities of local school districts to meet the court's standard. The SAA supports:

- *Students with Disabilities.* Increase the current level of state categorical aid funding for special education to reimburse 60 percent of aidable costs.
- *English Learners (EL).* The SAA supports increasing the current bilin-

gualbicultural (BLBC) program appropriation to reimburse 30 percent of aidable costs; creation of a new categorical aid program to provide \$100 per EL student currently not covered by BLBC categorical aid; and an effort to restructure Wisconsin's program requirements, funding and overall approach to educating EL students.

- *Students in Poverty.* Wisconsin currently has no comprehensive program that targets additional resources to raise achievement among economically disadvantaged students. The SAA supports providing "weighting" under revenue limits and the equalization aid formula for economically disadvantaged students.

Early Learning Opportunities

Numerous studies have shown that improving early learning opportunities, especially for those in poverty, will help prepare children for their PK12 experience and help reduce achievement gaps. The SAA supports:

- Counting fullday 4K students as 1.0 FTE for general aid and revenue limit purposes.
- Greater investments in high quality birthtothree programming for those children who have a high probability of not being ready for school.

Children's Mental Health

In Wisconsin, too many children have unmet mental health needs, with these unmet needs resulting in serious negative consequences for the individual, their families, our communities and the learning environment in our schools. While we greatly appreciate the school mental health investments made in the 2017-19 State Budget, we believe a stronger, longterm commitment from the state is required to meet this challenge. As a next step, the SAA supports:

- Expand the SchoolBased Mental Health Services Collaboration Grant Program to support more school districts in connecting students to needed mental health services.
- Increase Medicaid payment rates for individual and group therapy.
- Increase financial support for staff training in mental health.
- Expand the School Mental Health Categorical Aid Program to provide incentives for school districts to expand services provided by school psychologists, nurses, counselors and social workers.

Educator Preparation, Development, Recruitment & Retention

The SAA supports the ongoing work of the State Superintendent's Working Group on School Staffing Issues to focus on recruitment/retention of quality teacher and administrator candidates and to conduct a review of educator prepara-

tion 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 shortterm:

- Develop pilot loan forgiveness and "grow your own" efforts.
- 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.

Private School Vouchers

The SAA supports the following proposals regarding private school vouchers:

- Moratorium on further expansion of private school voucher programs.
- Revise Wisconsin property tax bills to clearly identify the portion of the school tax levied to finance private school tuition.
- Change state law to remove the resident school district's responsibility for any per pupil Special Needs Scholarship Program costs above that of the statutory payment amount.
- Contributorize a study of the Wisconsin private school voucher programs, with a focus on the fiscal impact these programs have on Wis-

consin school districts and Wisconsin taxpayers.

- Require greater public accountability for voucher schools in areas such as the use of licensed teachers, state instructional requirements, student due process protections, uniform high school graduation requirements, and IDEA protections for students with disabilities.

Revenue Limit Equity

The SAA supports setting the low revenue ceiling at 95 percent of the statewide average revenue limit per student. A steadily improving low revenue ceiling policy is an important part of ensuring equitable resources for all children no matter where they live.

Declining Enrollment Relief

Whatever the mechanism, the SAA supports additional, effective relief for those school districts in declining enrollment.

Secondary Cost Ceiling

The SAA supports increasing the secondary cost ceiling from 90% to 100% of the prior year's average statewide shared cost. In order to manage this change and mitigate the effects of aid redistribution, the state will need to increase equalization aid and probably phase the change in over several years.

For questions, please contact John at john.forester@wsaa.org



Julie Kelly
Assistant Superintendent for Business & Human Resources, Muskego-Norway
WASBO Director

How Engaged are Your Employees?

School districts are in the people business. Approximately 70-80% of most school district budgets are allocated to employee compensation, while the remaining dollars go to support the students and school community as a whole. With such a high percentage of dollars allocated to employees, it is imperative that districts create work environments that support high employee engagement and retention.

Why is creating an employee engagement system so important?

There have been a number of studies done on the impact of Act 10 in schools. No matter what side of the fence you stand on, we should be able to agree that the change in the collective bargaining law significantly changed the way that schools operate from an employment perspective. In the past, it was common to see employees working for the same school district from the time they entered the profession until retirement. After Act 10, the idea of "free agency" came into play. School districts had to start thinking differently about how to attract and retain employees.

In Muskego-Norway, we had concerns about low engagement and retention. Employee engagement surveys showed that employees felt there was a lack of information,

communication and transparency across the district. As a district that focused on continuous improvement, we knew that these were barriers to change. We had to find ways to build a culture of open, honest communication and transparency in order to move our system forward. We also knew that without a strong culture we could not retain our "highfliers" or those who had greatest impact on student success, staff engagement, and continuous improvement.

Unfortunately, "highfliers" and low performers are retained at strikingly similar rates. This happens because as a system, we tend to focus on the low performers. We put them on plans to help them improve or we coach them out of the system. An organization's "highfliers" are viewed as those employees that do not need tending to because they do their job exceptionally well. We assume they will ask for additional supports if they need them. This is a mistake that districts cannot afford to make. We need to invest just as much time and attention in our "highfliers" as we do our low performers.

What steps you can take to positively impact employee engagement?

1. Start with a plan. Include employee engagement and retention in your strategic plan. Determine what you value when it comes to your employees and district culture.
2. Set annual and longterm goals.
 - What type of environment will you create to attract and retain employees?
 - Do you know what prospective employees value in a work environment?
 - o If it is salary, how do you com-

- pare to surrounding districts?
 - o If it is professional development, what opportunities are you providing? Have you differentiated what each of your employees need based on what stage of their career they are in?
 - o If it is benefits, how does your plan design compare to others? Have you created a culture that focuses on employee wellbeing?

3. Determine what metrics you will use to measure your goals. Include measurements like longevity, retention, engagement, and satisfaction.

4. Survey your employees. Make sure the surveys are short and concise. Ask questions regarding how they feel personally about their job, if they have the tools they need to be effective, if they feel people at work care about them, if expectations are clear, and if they would recommend the organization as a place to work or send their children?

5. Respond to the survey results. Once you send out a survey, be prepared to accept the data, be open and transparent about the results, and develop action plans to address one to three main areas in need of improvement. Then share the action plans and progress monitoring steps with the staff to show you are using their input to make purposeful change.

6. Incorporate checkins with employees throughout the year. Do not wait for an annual survey to find out there are concerns.

In Muskego-Norway, we found that using the steps above, along with specific checkin tactics such as rounding, 3090 day interviews, surveys and employee recognition, we could improve districtwide transparency and increase our employee engagement and reten-

tion results on an annual basis. With high employee retention, we have seen a direct savings in recruitment and advertising costs, the onboarding and training costs of new employees, and the cost of district leader time to interview replacement employees. We have also avoided indirect costs such as loss of employee knowledge with high turnover, loss of productivity while onboarding new employees, and most importantly loss of student learning.

If you would like to learn more about Muskego-Norway's journey to increased employee engagement, please attend our session at WASBO's spring conference or contact Julie at julie.kelly@muskegonorway.org.

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Getting to Know Wisconsin's CESAs: The History and Purpose

When I first started working in a school district, I had never heard of a CESA before. I literally had no clue what they were or even that CESA stood for Cooperative Education Service Agency. As I started my first job in a school district, I immediately realized that CESAs provide valuable services. We used CESA not only for special education services but also as the first line of support when we needed help. I knew I could call my local CESA and someone could answer my question in a timely manner.

In order to learn more about the CESAs, I thought it would be valuable to share their history and purpose as defined by state statute. In 1965, the Wisconsin legislature organized 19 Cooperative Educational Service Agencies to replace the county superintendent offices. In 1984, legislation reorganized the 19 CESAs down to 12 under 116.01 of the Wisconsin State Statutes, which reads: "Cooperative educational service agencies are designed to serve educational needs in all areas of Wisconsin by serving as a link both between school districts and between school districts and the state. CESAs provide leadership, coordination and educational services to school districts, UW system and technical colleges. CESAs may facilitate communication and cooperation among all public and private schools, agencies and organizations that provide services to pupils."

On average, each CESA region serves 35 school districts. CESAs are governed by an eleven member

board of control similar to a school district. Each member school district elects one of their board members to serve for a three year term as a CESA board delegate. As a result, each of you as member districts, cast the vision of your CESA.

A common misunderstanding of CESAs is how they are funded. In Wisconsin, CESAs have no taxing Contributority and receive no state aid. All of CESAs revenue comes from services to customers and grants. Therefore it is up to each CESA to provide quality service in order to maintain the capacity to serve their districts.

CESA's main purpose is to provide services that meet the needs of schools. Although each CESA is different, there are core services each CESA provides. Some of these core services include special education staffing, curriculum support, technology services, and career and technical education. In addition to these core services, all CESAs provide professional development to their administrators, teachers and support staff. As a result, CESAs provide hundreds of professional development opportunities that serve thousands of school district employees every year.

Over the past few years, as districts needs have changed, many CESAs have made changes in their offerings as well. At CESA 5, we have noticed the increased need for offering support to business offices. In the past two years, we have been able to support seven different districts in a variety of ways. Other CESAs are offering this service as well and have



Mike Koltes
Director of Business Services, CESA #5
WASBO Director

expanded to help with payroll and accounts payable as well.

Remember that CESAs are the link between the school district and the state. If you have questions, give us a call. Even if we are not able to answer the question on the spot, because of our relationship with DPI, we are typically able to find an answer and get back to you quickly. Keep in mind, you are our customers and owners. If you see the need for a CESA to help your school district with something, reach out and ask if it is possible. If you have additional questions regarding Cooperative Educational Service Agencies, please contact your local CESA.

For questions regarding CESAs and/or this article, please contact Mike at koltesm@cesa5.org.

.....
"Real leadership is leaders recognizing that they serve the people that they lead."

Pete Hoekstra



Kathy Davis
Director of Business & Auxiliary Services
De Forest Area
WASBO President-Elect

Eagle Institute 2018 Philadelphia, PA

“We constantly change the world, even by our inaction. Therefore, let us change it responsibly.” Benjamin Franklin

Annually, WASBO sends the President-Elect of WASBO to the ASBO Eagle Institute. Having been elected to this role, I was the lucky attendee for 2018. In the following I would like to share some highlights of this year’s institute along with some of my greatest takeaways.

This year’s Eagle Institute ran for three days and was held in Philadelphia, PA. Every year the institute is centered around a historic theme and/or leader. This year’s theme was the history of Philadelphia, the early years of the United States, and the historic leader Benjamin Franklin.

Not being much of a history buff (nor the best history student back in the day) I was not aware of just how much of a role Philadelphia played in the formation of our country. As our nation was first forming the founding fathers didn’t have the luxury of a capital building in Washington DC to hold their meetings or write their first drafts of the Declaration of Independence. Instead, they borrowed the Philadelphia State House (and other nearby buildings) to meet and draft the Declaration of Independence and Constitution of the United States. By the way, Philadelphia (which means brotherly love in Greek) was founded by William Penn, who did not invent the pen or pencil, but did design the original city layout.

Another historical epiphany that I had was that Ben Franklin wasn’t just the man who invented electricity or the face of a \$100 bill (and prior to popular belief of those lacking proper United States history knowledge, he was NOT a president of the USA). He did however play a pivotal role in the founding of our Country and was one of six persons to sign both the Declaration of Independence and the Constitution. Prior to his founding father role, he had a life full of variety. He was a printer, postmaster, founded a public library, and retired in his 40s prior to being heavily involved in the formation of our Country.

Besides the surprisingly interesting history lessons of the institute, there were several great topics on leadership. Some key ones revolved around: organizational culture and change, turning negative heat into positive energy, strategic leadership, and the power of positive psychology. I won’t go into too much detail on these topics, but I will share a few of my takeaways.

Starting with organizational culture and change, my main takeaway was the essential ingredients to change. Which are urgency, the right team with the right strategy and vision, buyin, removal of barriers, easy wins, and keeping the urgency level going. Successful change must also address three factors:

- Mind—How do we do it? Is there a good reason? Does it make sense?

- Heart—Why do we do it? Is it inspiring? Will it make things better? Can we do it?
- Environment—What are the obstacles? Can we do it? Can we make it simpler or even automatic?

Turning negative heat into positive energy was an interesting topic as well. The essential component of this was how to use a negative situation as a motivator to improve things. Also an important reminder that there is a lesson to be learned from some of the worst moments. Even the most tragic of times can be an opportunity of growth.

My ultimate favorite session of the institute was centered around the topic of positive psychology. By utilizing positive psychology methodologies we can build qualities that help individuals and communities not just endure and survive, but also flourish. With the digital/social media world we now live in, the need to counteract the negative impact this can have on us is more evident than ever before. One of the most meaningful data elements shared with us was a trend history of the wellbeing of adolescents. The presenter shared that in 2012 (and moving forward) there was a drastic decrease in the happiness of adolescents. This trend also correlated with increasing popularity and use of smartphones among adolescents. I also picked up a few great resources for improving positive psychology:

“We are all born ignorant, but one must work hard to remain stupid.” Benjamin Franklin

<https://greatergood.berkeley.edu> and <https://ggia.berkeley.edu>. These resources have a variety of articles, quizzes, videos, and other tools that can help improve culture, deal with stress, build compassion and empathy, and improve happiness. The first site also has a nice section on education and the workplace. Both sites are from the University of Berkeley, which has done considerable research on positive psychology.

Benjamin Franklin

I’d like to finish by sharing some other takeaways that have absolutely nothing to do with school business. The iconic scene of Rocky Balboa running up the stairs in the Rocky movies was filmed in Philly. Philly cheese steaks are delicious, but most likely made with cheese whiz versus real cheese. The crack in the liberty bell was extended to prevent it from cracking further. Finally, Benjamin Franklin really had some great sayings back in the day!

“When you have finished changing, you’ve finished” Benjamin Franklin

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The Children in Our Schools Today

As we all look at how education is evolving and the buildings we have now compared to several years ago, there is a big difference. In most Oshkosh schools and districts across the state, children have computers instead of chalkboards. It makes me think back to the nonelectric typewriter that I had compared to keyboards on a computer. Children are no longer taught cursive writing and use the Internet to look up items instead of an encyclopedia which I had the opportunity to use. The one thing that we are forgetting in this line of thought is how the children currently enrolled in our schools have changed. You might say that they color their hair a little different and they all have cell phones, or you might say all they do is sit in front of the TV and play video games instead of going outside and playing kick the can, basketball in the driveway or baseball out in an abandoned field down the street. With all this being said, and you now have an idea of how old I am, let's get back to the point of the article: children's behavior.

Let me start this with a little introduction of what happened between me and one of the Head Custodians I have the pleasure of working with. About two years ago I was visiting one of our Elementary schools where we hired a new Head Custodian. He was very happy, doing a good job and enjoyed being around all the "little people" as he would say. A couple of months into his position, the principal called me and said that she was very concerned with the him and his attitude. I assured her not to worry as his attitude will change. A couple of weeks passed and she called again, this time getting frustrated, so I stopped by to chat with this employee. We were taking a walk as a child

was running through the hallways saying some notsonice words. The Head Custodian looked at me and said, "Do you believe that?" "WOW! What is going on?" is all I could say as the custodian stated, "This happens all of the time and pretty soon you will see this child with a sucker or something of that order and being praised for his behavior. When I was in school, they would have called my parents and I would have received a spanking when I got home." I looked at the custodian and acknowledged I would have received the same punishment as we turned to each other trying to figure out what was taking place.

As time passed, our Head Custodian became more and more frustrated with the situation as the principal was with him. I set up an appointment with the principal to sit and discuss what we had witnessed in the hallway that day and explained that things would have been handled differently when I was in school. Then the principal began to explain some things about this child and what the school had discovered on a home visit to speak with the mother. The house was filthy with trash everywhere and a permeated smell of urine. The child did not have anything in the house to eat and the only food he received was from school as he had a single mother with issues of her own. The news made me sick to my stomach and I asked the principal if our custodian knew the child's situation. The principal stated that he did not and I realized we need to educate our staff on the home lives of the children in our schools and how it can affect their behavior.



Dave Hoh
Custodial Supervisor, Oshkosh
WASBO Director

After this discussion, I contacted our Head of Special Needs so that I could sit down and explain what had happened and what I had discovered. She informed me that there are a lot of children that are going through the same or even worse conditions in our schools. "Is there something we could do to help our staff understand what these children are going through and maybe even help?" I asked. She agreed to look into this as any positive affirmation can not only help the child, but also the teachers. We met with her staff and developed a program to show our Head Custodians, and after the meeting a large number of Head Custodians agreed to have this presented to the rest of the custodial staff. In early June, we had the entire custodial staff attend the presentation and it was mentioned that the bus drivers and kitchen staff could also benefit from the material. This program has now been presented to several department staffs and at professional development conferences for other districts.

The main takeaway of my story is that not only has the way children are taught or the devices they use changed, but the children themselves have changed due to the way society has become. We all play a role and need to be a part of the solution in understanding how a child's behavior can have an affect on our schools as a whole.

Public School Districts and Private School Pupil Transportation

Contributor | Colin M. Lane

Public school districts are responsible for providing transportation to private school pupils under certain circumstances. A recent Seventh Circuit Court of Appeals decision serves as a reminder of public school districts' responsibility in this area, while the court grappled with a particular provision of Wisconsin's private school pupil transportation requirements.

Wis. Stat. § 121.54(2)(b)1 provides that pupils attending a private elementary or high school, including four and five-year-old kindergarten, are entitled to transportation from a public school district to and from school if the following conditions are met:

1. The pupil resides within the public school district's boundaries;
2. The pupil resides two (2) miles or more from the private school he/she attends;
3. The pupil resides within the private school's approved attendance area; and
4. The private school is located within the school district or not more than five (5) miles beyond the boundaries of the school district measured along the usually traveled route.

However, Wis. Stat. § 121.54(1) also provides an exemption to these transportation requirements for certain school districts. This exemption, known as the "city option," provides that public school districts are not required to transport "pupils who re-

side in a school district that contains all or part of a city unless the school they attend is located outside the city but within the boundaries of the school district" or unless the city is a first, second, or third class city with a population exceeding 40,000. The city option also provides that a public school district is not required to provide transportation to pupils in a first, second, or third class city with a population exceeding 40,000 if transportation for these pupils is available through a common carrier.

As noted above, a pupil must reside within the approved "attendance area" of the relevant private school district to be entitled to transportation provided by the public school. Wis. Stat. § 121.51(1) defines attendance areas and sets certain limitations on these areas. Under § 121.51(1) a private school's attendance area is defined as "the geographic area designated by the governing body of a private school as the area from which its pupils attend and approved by the school board of the district in which the private school is located." Importantly, "[t]he attendance area of private schools affiliated with the same religious denomination shall not overlap unless one school limits its enrollment to pupils of the same sex and the other school limits its enrollment to pupils of the opposite sex or admits pupils of both sexes."

The problem of overlapping attendance areas was the key issue in *St. Augustine Sch. v. Evers*, No. 172333 (Oct. 11, 2018). In *St. Augustine*, the *St. Augustine* school, a self-described private Catholic school, applied for

transportation for its students. However, the Friess Lake School District denied *St. Augustine's* request, citing § 121.51(1) because there was already another Catholic school in the relevant attendance area. Wisconsin's Superintendent of Public Instruction, Tony Evers, subsequently upheld the decision. *St. Augustine* and an affected family then filed suit against the school district and the Superintendent arguing that the decision violated their First Amendment rights under both the Free Exercise Clause and the Establishment Clause.

The Seventh Circuit Court of Appeals ultimately concluded that the decision to deny transportation for *St. Augustine* students was not a violation of the First Amendment. The court first tackled the argument that *St. Augustine* was being denied a public benefit on account of religion. While the language of § 121.51(1) expressly places transportation limits in situations involving overlapping attendance areas of schools "with the same religious denomination," the court, however, looked to the Wisconsin Supreme Court's *State ex rel. Vanko v. Kahl*, 52 Wis. 2d 206 (1971) decision that interpreted this phrase to mean "all private school affiliated or operated by a single sponsoring group, whether such a school operating agency or corporation is secular or religious." For example, under the backdrop of the *Vanko* decision, just as a public school district is not responsible for providing transportation to two Catholic schools, a public school district is not responsible for providing transportation to two French International Schools. There-

fore, because the *Vanko* decision interprets § 121.51(1) to apply equally to both secular and religious schools, the court concluded that the statute was neutral and generally applicable; thus it is not a violation of the First Amendment's Free Exercise clause.

The court then addressed *St. Augustine's* argument that the Superintendent had violated the First Amendment's Establishment Clause by probing too deeply into *St. Augustine's* religious affiliation. However, the court rejected this theory as well, citing *St. Augustine's* self-description as a "Roman Catholic" school on its website and other readily available materials.

The *St. Augustine* decision provides an important reminder of the responsibilities that public school districts have for transporting private school pupils and the scope of those responsibilities. Public school districts should ensure they are providing transportation for all of those students for which it is required, but should be aware of overlapping attendance areas for both religious and secular schools.

For questions regarding this article, contact the author, Colin M. Lane at clane@strangpatteson.com

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- Eleanor Roosevelt

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New Notice Required

FOR
BACKGROUND
CHECKS
THROUGH
**Third
Parties**

Contributor | **Richard F. Verstegen**

School districts certainly want to learn as much as they can about their job candidates before boards hire them, which explains the reliance on background checks. Background checks are designed to uncover relevant information about a job applicant's past that will better inform the district's hiring decisions. Many school districts utilize outside agencies to obtain background information on job candidates or current employees.

School districts using outside agencies must comply with the Fair Credit Reporting Act (FCRA). The FCRA is a federal law that imposes specific obligations on employers that order background checks from vendors (known as consumer reporting agencies). A school district triggers FCRA obligations when it requests a "consumer report" on an applicant or employee, a term which includes a broad category of reports such as driving records, criminal records, credit reports, and many other reports procured from a thirdparty. Such FCRA obligations are not triggered when a district conducts its own background check using the Wisconsin Circuit Court Access system (CCAP) or uses a governmental agency, like the Wisconsin Department of Justice (DOJ) criminal history report service. Districts should also be aware the CCAP or DOJ may be limited as they only contain state court information, they may not be up to date, and they may not be completely accurate.

In addition to the other requirements of the FCRA, at different stages of the process, districts are required to provide applicants or employees with a summary of their rights (Summary of Consumer Rights) under FCRA. This includes providing such information before a district takes an adverse employment action based on the results of a background check. While third party vendors typically provide copies of notices to employers for their use, it is the employer's responsibility to give these to applicants and employees at the appropriate times and make sure the notices are accurate and up to date. Failure to

abide by the obligations under the FCRA can result in legal claims by those adversely affected. Districts therefore that use criminal record screening services must continue to be vigilant about compliance with all applicable laws.

The Federal Trade Commission (FTC) is one of two federal agencies with oversight of the FCRA; the other one is the Consumer Financial Protection Bureau (CFPB). On September 12, 2018, the CFPB issued an interim final rule updating the model Summary of Consumer Rights. Effective September 21, 2018, the new form replaces the old form. Use of the model form is not required. However, the information in the form must be provided to applicants or employees.

The change in the form is the result of the recent enactment of the Economic Growth, Regulatory Relief, and Consumer Protection Act. The new law requires nationwide consumer reporting agencies to provide a "national security freeze" free of charge to consumers. The national security freeze restricts prospective lenders from obtaining access to an individual's background report, which in turn makes it more difficult for identity thieves to misappropriate the individual's personal information. The law also states that, whenever the FCRA requires a "consumer" to receive a Summary of Consumer Rights, a notice regarding the availability of a security freeze must be included. The new Summary of Consumer Rights form includes language related to security freezes, consistent with the new law.

School districts which use outside agencies to complete background checks on applicants must begin using the new form, make sure that any hiring managers are aware of the new form, and integrate the updated document into any hiring practices. The updated form is available from the CFPB website.

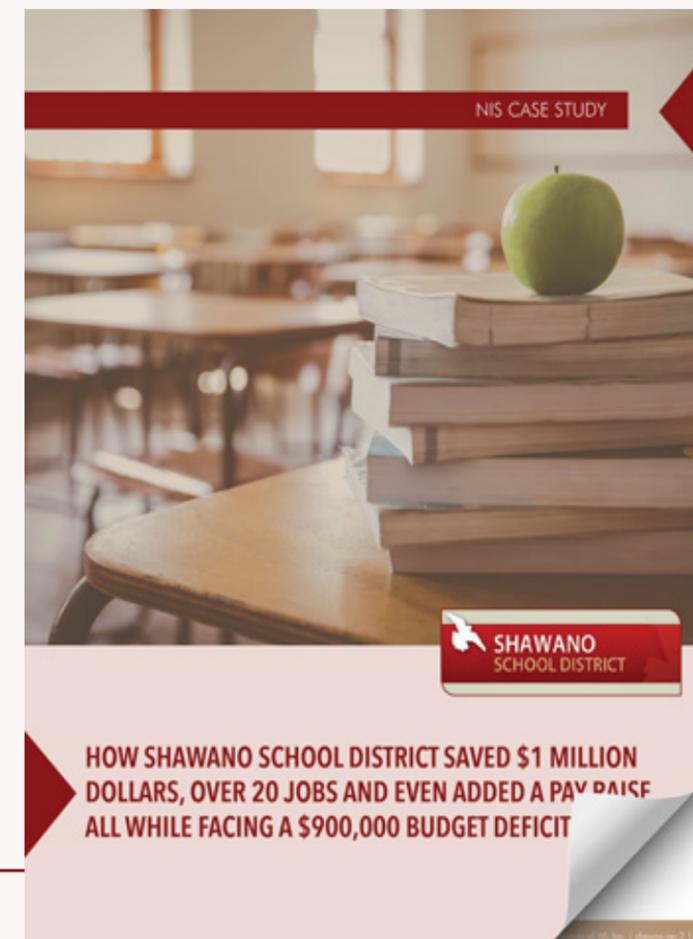
If you have questions surrounding this article, please contact the author Rick Verstegen rverstegen@boardmanclark.com

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The Importance of Threat Assessment

Contributor | Paul Mascari

What did you know, when did you know it, and what did you do about it? Inevitably, these are the first questions asked of schools and law enforcement following any school shooting.

But how do you know and what do you do about it? If we could accurately predict violent acts, we would not be in the situation we are in with violence in our schools. There is considerable research on acts of mass violence, including school shootings, and the one thing they all have in common is the conclusion that there is no reliable profile for someone who will commit a school shooting.

So, if mental health experts and law enforcement professionals cannot accurately predict violence, how can educators? The simple answer is they can't.

What schools can and should be doing is creating a threat assessment team and drafting a districtwide threat assessment policy. While the creation of School Safety Intervention Teams (SSIT) and attendance at mental health/threat assessment training is required under the most

recent round of Wisconsin Department of Justice school safety grant funding, this is also the most effective proactive measure a district can take to keep schools safe.

Having served on and chaired numerous threat assessment teams, I can tell you the most important thing any team can do is meet regularly especially when there is not a threat. Use the opportunity to discuss scenarios, review and refine policy, and take advantage of professional development opportunities as a team. While the training provided by the Office of School Safety is a significant first step, eight hours of training will not be enough for a team to be proficient if they do not take the initiative for further development.

States like Virginia have been mandating threat assessment in schools for years. A threat assessment model adapted to the K-12 setting, the Virginia Student Threat Assessment Guidelines (VSTAG), was first developed in 2001 at the University of Virginia and has been the subject of numerous field tests and academic studies.

Because of its proven effectiveness in tests and studies, VSTAG is listed

on the National Registry of Evidencebased Programs and Practices and is an excellent resource for threat assessment policy and procedure development.

Research also suggests that schools utilizing evidencebased programs like VSTAG see reduced rates of suspensions and racial disparities in school discipline. The Youth Violence Project at the University of Virginia's Curry School of Education has a wealth of information and statistics to support the positive outcomes that come from using threat assessment.

There is no doubt that a heavy burden rests on any threat assessment team. What did you know, when did you know it, and what did you do about it? The good news is threat assessment works, and there is considerable evidence and realworld examples to prove it. If schools put time and effort into developing a sound threat assessment policy and threat assessment team, it undoubtedly will be the single best proactive measure they can take to make schools safer.

For questions regarding this article, contact contributor Paul Mascari at paul@clearwallsafety.com

LEGAL UPDATE

Referenda Alert

Contributor | von Briesen & Roper, s.c.

Many Wisconsin school districts saw their electors approve referendum projects in the recent elections and are now thinking about the steps that need to be taken to bring these projects to a successful completion. von Briesen has discussed construction contract issues and process at last year's WASDA Conference, those materials can be found at <https://bit.ly/2QbY7mJ> von Briesen has drafted and negotiated dozens of these contracts with architects and contractors all over the state. If you have any questions about the contracts, the contracting process or your particular situation, please contact a member of our School Law Section such as Andrew Phillips (aphillips@vonbriesen.com) or Christine Hamiel (chamiel@vonbriesen.com)

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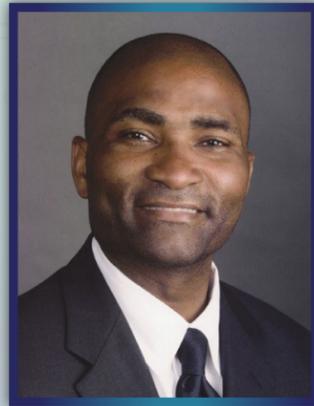
Steve Pemberton

A passionate advocate for disadvantaged youth, Steve Pemberton's triumphant life journey, now a major motion picture, is about defying the seemingly insurmountable odds of the path of the unchosen.



Dr. Michele Borba

Dr. Michele Borba is an internationally recognized educational psychologist and parenting, bullying and character expert whose aim is to strengthen children's empathy and resilience, and create safe, compassionate school cultures.



Salome Thomas-EL

An award-winning teacher and principal and internationally recognized speaker, Principal EL believes that every child can succeed and that resilient leaders make courageous decisions, take risks and challenge the status quo.



JANUARY 23-25, 2019

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WASBO Sessions at the State Education Convention

Tuesday, Jan. 22

1:30-5 PM

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

- *WASBO Members and DPI School Finance Team.*

3:30-4:30 PM

SAA Legislative Update 201AB

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

- *John Forester, Director of Government Relations, School Administrators Alliance*

What Does a Facilities Manager Do? 201CD

The management of our school facilities is more than changing a light bulb. Learn more about what your School Facilities Director needs to address in today's educational environment. This session will cover those areas related to buildings and grounds that all districts should be doing and planning for with inspections, maintenance schedules and funding. Learn what is required and how funding impacts this from the perspectives of a consultant, buildings and grounds and the business office.

- *Pat Finnemore, Kenosha Unified*
- *Jim Beckmann, Glendale-River Hills*

Wednesday, Jan. 23

8-9 AM

Impact of Voucher/Charters on Wisconsin Public Schools 102C
Learn about the effects, issues and concerns about school vouchers at the local and statewide levels. Information will be shared about specific local school districts as well as statewide information.

- *Bob Soldner, Director, School Financial Services Team, Department of Public Instruction*
- *Susan Schnorr, Executive Director of Business Services, Oshkosh*

A Collaborative Effort Between Law Enforcement Agencies and School Districts; Building Relationships and Making a Safe Environment for Students 201AB

This session features law enforcement officers from Everest Metro Police Department and school officials in the DC Everest School District. Some of the topics that will be covered include: perspectives from a School Resource Officer (SRO) on how relationships matter in the school and what SROs do to help educate students and staff on school safety. Information will be shared on how training, routine patrol, and technology can prepare everyone for an unthinkable event. The session will include a discussion on the challenges administration face as related to school threats, the media, and budget constraints. You will leave with an understanding of why developing a great working relationship between all law enforcement agencies in the county and the school district is vital to student safety and achievement.

- *Shane Hellmann, School Resource Officer, Everest Metro Police*
- *Dr. Kristine Gilmore, Superintendent, DC Everest*
- *Dr. Jeff Lindell, Police Chief, Everest Metro Police*
- *Clay Schulz, Police Captain, Everest Metro Police*
- *Frank Wierzbanski*

New Federal School-Level Reporting:

What Do School Boards Need to Know? 101AB

The federal Every Student Succeeds Act (ESSA), which replaced the No Child Left Behind Act, includes a financial transparency requirement for districts to report per-pupil spending by school. What is the purpose of this law? What information is being collected and how will it be reported? How does this affect your district? This session will walk through the new ESSA School Level Reporting requirement and what it means for board members and the public.

- *DPI School Finance Team*

Thursday, Jan. 24

8:45-11:45 AM

A Deep Dive into School Finance 201AB

Take a deep and detailed dive into Wisconsin's school finance system with the Department of Public Instruction's School Financial Services and WASBO members. In this in-depth session, learn how the revenue limit sets the total dollars that can be raised through local property taxes and state equalization aids for each district. Learn how state equalization aids are calculated based on a district's spending, property tax base and number of students. Learn the importance of maintaining a strong fund balance and cash reserve. Presenters will discuss the variables and factors influencing each district's revenue limit, share of equalization aid and the effect of cash reserve on fund balance board policy provisions that should be in place. Attendees will improve their understanding of how the overall district budget works and the concepts of fund accounting while gaining confidence in advocating for school funding for their district.

- *WASBO Members and DPI School Finance Team.*

An Overview of Trauma-Informed Care 102C

Trauma-informed care is intentionally focusing on being sensitive to the needs of the children in our classrooms. The focus of this session will be to provide an overview of the construction of these strategies and the positive outcome for students in every classroom. A child's ability to focus in class may be altered by experiencing trauma in a multitude of ways, from the death of a close family member or family pet to hostility in the home or watching violence on the news. Included in this interactive discussion will be an overview of Social Emotional Learning (SEL).

- *Gary Myrah, Executive Director, Wisconsin Council of Administrators of Special Services*

10:45-11:45 AM

Youth Mental Health First Aid Training

and Solutions 202AB

Learn how your district can provide mental health training, awareness and services through reasonable cost options. Youth Mental Health First Aid Training provides staff members and the community at large awareness and identification tools for youth in a mental health crisis. This responsiveness reduces the stigma around mental health and helps an adult support the youth and identify when referral to treatment is necessary. The Pulaski Community School District provides this training to staff and support staff along with providing mental health resources on-site. This panel will inform attendees and provide a forum for questions on this critical area of need for our youth with mental health needs.

- *Jackie Schoening, CESA 6*
- *Carol Zabel, Western Region Coordinator for Wisconsin Safe & Healthy Schools, CESA 10*

1:45-2:45 PM

Baited Hooks and Trap Doors 202DE

Current issues, trends, legislation and regulation related to special services are creating challenges for local school boards and administrators. Topics in this session will include: maintenance of effort, results-driven accountability, state and federal law updates as well as funding sources for behavioral health programs.

- *Gary Myrah, Executive Director, Wisconsin Council of Administrators of Special Services*

Friday, Jan. 25

8-9 AM

Financial Roles & Responsibilities of

School Board Members 103AB

The financial roles and responsibilities of school board members including relevant statutes will be reviewed in this session. Additionally, the presenter will address policies development and budgeting practices and procedures.

- *Roger Price, Consultant, Wisconsin Association of School Boards*

9:15-10:15 AM

The Blue Ribbon Commission: Where Do

We Go From Here? 102AB

The Wisconsin Blue Ribbon Commission on School Funding has spent the past year examining our current system of public school finance. As part of that process, they held eight public hearings around the state, reviewed challenges inherent in the current system and studied critical issues of resource inequity for school districts and children. This session will feature the commission co-chairs as well as several other commission members in a discussion of their recommendations and how they may impact the upcoming 2019-21 State Budget process.

- *John Forester, Director of Government Relations, School Administrators Alliance*

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“Officials and board members must be cautious about accepting food, drinks and/or entertainment without charge or at less than fair value, that are offered at social events sponsored by entities or organizations other than the event organizer when the entities or organizations may be current or prospective district vendors.”

- See article on next page for more info

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

Contributors | **Brian Goodman, Michael Julka and Steven Zach**

Many school districts will be sending administrators and school board members to Milwaukee to attend the annual WASB/WASDA/WASBO State Education Convention in January 2019. Administrators and board members are obligated to comply with the legal and ethical standards established for local public officials that affect their participation in convention-related events. This Legal Comment will discuss the Open Meetings Law and the Code of Ethics for Local Public Officials as these laws relate to and govern the actions of administrators and board members while in attendance at the convention.¹

Open Meetings Law

Convention participants whose districts send more than one board member to the convention should consider how Wisconsin's Open Meetings Law may impact their ability to participate in convention-related activities.² The Wisconsin Attorney General has issued a number of opinions that offer Open Meetings Law guidance to board members with regard to their attendance at conferences, workshops, seminars and conventions, including, but not limited to, the annual State Education Convention.

The fundamental purpose of the Open Meetings Law is to ensure that the public has access to full and complete information regarding governmental affairs.³ In order to advance

this purpose, meetings of state and local governmental bodies, including school boards, must be held in locations reasonably accessible to members of the public and must be open to all citizens at all times unless otherwise expressly provided by law.⁴ The Wisconsin Supreme Court has held that a “meeting” of a governmental body, including a school board, occurs whenever: (1) there is a purpose to engage in governmental business, and (2) the number of members present is sufficient to determine the governmental body's course of action (i.e., a quorum, including a walking quorum, negative quorum, etc.).⁵

The Wisconsin Attorney General was asked to issue an opinion as to whether the social nature of many activities offered at the convention makes attendance at the convention outside the scope of the Open Meetings Law.⁶ It is well-established that a “social or chance encounter” of members of a governmental body is not a meeting of the body requiring public notice and accessibility pursuant to the Open Meetings Law.⁷ Any presumption that the members are present to engage in governmental business is rebutted when members meet in a social setting or by chance. However, according to the Attorney General, the attendance of board members and administrators at a conference, convention, or seminar, does not constitute a chance encounter because such attendance is pre-planned. Moreover, such attendance is not a purely social gathering because such conferences, conventions

and seminars are designed for board members to discuss issues related to the responsibilities, authority, power or duties delegated to or vested in the board.

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

The Attorney General warned, however, that when a quorum of a board or any committee or subunit of a board is present during the convention and all related activities, including the ride to and from the convention, board members must not discuss business specifically related to the district.⁸ Moreover, board members should not formally attempt to convene during any of the convention-related activities.

In order to avoid the perception that

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

The Code of Ethics for Local Public Officials

Regardless of the number of board members and/or administrators in attendance at the convention to represent the district's interests, the Code of Ethics for Local Public Officials should be considered in order to determine how this law may restrict the activities and events in which the board members and/or administrators participate during the trip.⁹

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

The Wisconsin Ethics Commission has opined that an official may attend conventions and participate in convention-related activities, by and large, without violating the Code of Ethics.¹⁰ Specifically, while attending a convention authorized by and on behalf of a district, officials may accept meals, refreshments and the like without charge that are provided, sponsored and/or sanctioned by the event organizer. According to the Wisconsin Ethics Commission, when a board authorizes the attendance of its officials at the convention, it is fair to presume that their attendance is in

furtherance of a public purpose or benefit and that the board contemplates that they will partake fully in all the convention has to offer, including forums and receptions that are sponsored by the event organizer. Given this interpretation, as long as the board has authorized attendance at the convention, those officials in attendance are not required to pay the cost of meals, refreshments and the like offered during the convention by its organizers, i.e., the Wisconsin Association of School Boards, the Wisconsin Association of School District Administrators and/or the Wisconsin Association of School Business Officials, in order to comply with the Code of Ethics.¹¹

However, during the convention, officials must be cautious about accepting food, drinks and/or entertainment, without charge or at less than fair value, that are offered at social events sponsored by entities or organizations other than the event organizers when the entities or organizations may be current or prospective district vendors. According to the Wisconsin Ethics Commission, beer, wine, liquor, meals, buffets and the like have more than token value, and a purely social event, such as a hospitality suite, a happy hour or a dinner, provides a primary benefit to the official, rather than to the district that authorized his or her attendance. District officials responsible for making or approving purchasing decisions for the district should not accept food, drinks and/or entertainment, without charge or at less than fair value, from current or prospective vendors because receipt of such items of value could serve as the basis for an allegation that the items influenced the officials' decisions regarding the purchase of goods or services from the vendor.

Thus, a district official is advised to avoid attending an event that is purely social, sponsored by a current or prospective vendor of the district, and provided to the official without charge or at less than fair value. This is true even if the event is identified in the convention program or in the convention materials. That said, the

district official may attend such an event and avoid a Code of Ethics violation by paying the vendor the full cost of the meal, refreshments and entertainment offered at the event.

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

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

Conclusion

The convention offers the opportunity for administrators and board members to obtain new information about the latest products, services and developments in education. However, in doing so, it is important for them to be aware of the rules and requirements of the Open Meetings Law, as well as to understand and recognize how the Code of Ethics for Local Public Officials regulates when they may accept food, drink or other items of value,



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without charge or at less than fair value, and when such acceptance will be problematic. Moreover, under no circumstances should receipt of any such items influence the decisions of the district officials. Finally, it is also important for administrators and board members to review board policies for additional, more restrictive rules about convention attendance and participation, and to direct any additional questions or concerns to the district's legal counsel.

Endnotes

1. For additional information on related topics, see Wisconsin School News: "The Government Accountability Board" (March 2008); "Compliance with Wisconsin's Open Meetings Law, Part I" (September 2004); "Compliance with Wisconsin's Open Meetings Law, Part II" (October 2004); "Board Duties and Obligations and Potential Ramifications for Non-Compliance" (April 2016); "Recurring Issues for School Board Members: School Board Member Conflicts of Interest, Ethics, and Incompatibility of Offices" (May 2013).

2. Wis. Stat. sec. 19.81 et seq.
3. Wis. Stat. sec. 19.81(1).
4. See, e.g., Office of the Attorney General, Informal Opinion to Clifford Miller (May 25, 1977).
5. State ex rel. Newspapers v. Showers, 135 Wis. 2d 77, 97, 398 N.W.2d 154 (1987).
6. Office of the Attorney General, Informal Opinion to Donald MacTaggart (May 25, 1977).
7. Wis. Stat. sec. 19.82(2); see also Wisconsin School News: "Meeting or Chance Encounter? The Wisconsin Supreme Court Interprets the Open Meetings Law" (September 1993).
8. Office of the Attorney General, Informal Opinion to Beatrice Weiss (January 20, 1981); see also State ex rel. Krueger v. Appleton Area Sch. Dist. Bd. of Educ., 2017 WI 70, 376 Wis. 2d 239, 898 N.W.2d 35 (defining "committee" for purposes of the Open Meetings Law).
9. Wis. Stat. sec. 19.59 et seq.
10. 1992 Wis. Eth. Bd. 31 (November 25, 1992), wherein the Ethics Board concluded that a vendor should not sponsor a river

cruise for local public officials if more than an insignificant number of the officials attending are responsible for making or approving purchasing decisions that could involve the vendor's goods. In January 2009, the Government Accountability Board reaffirmed 1992 Wis. Eth. Bd. 31 (November 25, 1992). Subsequently, 2015 Wis. Act 118 § 266(6) provided that all formal ethics opinions issued by the Government Accountability Board were transferred to the Wisconsin Ethics Commission.

11. 1993 Wis. Eth. Bd. 8 (November 3, 1993). In November 2008, the Government Accountability Board reaffirmed 1993 Wis. Eth. Bd. 8 (November 3, 1993), and the opinion has subsequently been transferred to the Wisconsin Ethics Commission.

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LEGAL UPDATE

A Primer on Employment Discrimination Laws

Contributor | Jenna E. Rousseau

When an employer is faced with defending against a discrimination complaint, it is important to understand the process and best practices for responding to the complaint. Under the Wisconsin Fair Employment Act (WFEA), employers are prohibited from discriminating against employees and applicants on the basis of certain protected categories. In addition, there are various federal antidiscrimination laws that apply in the employment context. Employers should be aware of both state and federal antidiscrimination laws to prevent discrimination claims from arising in the first place and, if a complaint is filed, to ensure that they can adequately defend against such claims.

Under the WFEA, an employer may not discriminate against an employee or applicant on the basis of any of the following categories: age (40 or older); arrest and/or conviction record; creed; disability; genetic testing; honesty testing; marital status; military service; pregnancy or childbirth; race; color; national origin; ancestry; sex; sexual orientation; and use or nonuse of lawful products off the employer's premises during nonworking hours. The WFEA also prohibits harassment based on one's protected characteristic, as well as retaliation. The WFEA's prohibition against discrimination applies to various employment actions, including hiring, job assignments, promotion, compensation, other terms or conditions of employment, and termination.

Similarly, under Title VII of the Civil Rights Act of 1964 (Title VII), employers are prohibited from discriminating against employees and applicants on the basis of race; color; religion; national origin; and

sex. Other federal antidiscrimination laws include the Americans with Disabilities Act of 1990 (ADA), the Age Discrimination in Employment Act of 1967 (ADEA), the Pregnancy Discrimination Act (PDA), the Equal Pay Act of 1963 (EPA), and the Genetic Information Nondiscrimination Act of 2008 (GINA). There are also prohibitions against retaliation under these federal laws.

The WFEA is administered by the Wisconsin Department of Workforce Development (DWD). If an employee or applicant wishes to pursue a complaint based on an alleged violation of the WFEA, he or she must file a complaint with the DWD. The applicable statute of limitations is 300 days. After a complaint is filed, the DWD assigns an investigator to investigate the complaint. The investigator provides the employer with a copy of the complaint and specifies a deadline by which the employer must submit a written response (often called a position statement). The employer should take note of this deadline and determine whether it should request an extension of time.

The position statement is a very important document for the employer. It gives the employer the opportunity to assert defenses, such as a statute of limitations defense, and also gives the employer the opportunity to explain its side of the story. The employer can also address factual inaccuracies in the complaint, factual deficiencies of the complaint, and why the complaint falls short of establishing a violation of the WFEA.

In responding to a complaint of discrimination, it is often helpful to submit copies of relevant documents as exhibits, such as copies of disciplinary records that formed

the basis of the adverse action. An employer must also take care to preserve any and all records that may relate to the matter. After the employer submits its position statement and relevant exhibits, the investigator may follow up with the complainant, as well as the employer, to request additional information. The investigator may also inquire on whether the parties are interested in participating in mediation or discussing settlement.

If the case does not settle, the investigator will proceed with issuing a decision. The investigator may decide either that there is probable cause to believe that the employer engaged in discrimination or that there is no probable cause to believe that the employer engaged in discrimination. If the investigator issues a "no probable cause" determination, the decision is final unless the employee appeals the decision within thirty (30) days. If that happens, the case is then scheduled for a hearing before an Administrative Law Judge (ALJ) on the issue of whether there is probable cause to believe that a violation occurred. If the ALJ finds probable cause, the case then proceeds to a hearing on the merits. Conversely, if the ALJ finds no probable cause, the decision is final, but may be appealed to the Labor and Industry Review Commission (LIRC).

If there is an initial finding of probable cause, the case is scheduled for a hearing before an ALJ to determine whether a violation occurred. Both parties have the opportunity to present evidence, including witness testimony, in support of their respective cases. If the employee is ultimately successful, the ALJ may order remedies in the nature of back pay, reinstatement, lost benefits, costs, attorney's fees, and interest.

The ALJ's decision may be appealed to LIRC. After that, if a party wishes to pursue the matter further, it may seek review of LIRC's decision before a circuit court.

Importantly, the above procedures apply to a complaint that was initially filed with the DWD. In many cases, the U.S. Equal Employment Opportunity Commission (EEOC) also has jurisdiction to investigate the complaint under a corresponding federal law. The EEOC is responsible for enforcing the antidiscrimination laws described above. Similar to claims under the WFEA, an individual who wishes to pursue a discrimination charge under federal law must first file a charge with the EEOC (except for EPA claims). Under a worksharing agreement between the DWD and EEOC, the agency that initially

receives the complaint will investigate it, but the complaint is automatically crossfiled with the other agency. In most cases, the second agency will adopt the findings of the first agency; however, the complainant may request that the second agency independently investigate the matter.

The EEOC resolves charges of discrimination in a different manner than the DWD. If the EEOC is unable to find a violation, it issues a Notice of Right to Sue. With respect to claims under Title VII or the ADA, this starts the 90day time clock for an employee to file a lawsuit in federal court. After that time expires, the employee cannot bring a federal lawsuit. Conversely, if the EEOC finds a violation, it will attempt to reach a settlement. If the

EEOC is unable to obtain a settlement, the EEOC will bring a lawsuit on its own or will issue a Notice of Right to Sue.

This article was designed to provide a general background of state and federal antidiscrimination laws, as well as a roadmap of the process when an employer receives a discrimination complaint/charge. Employers are strongly encouraged to document the reasons for adverse employment actions. Such documentation will assist an employer in defending against discrimination claims, in that the employer can show that it had a valid, nondiscriminatory reason for its action.

For questions regarding this article, contact Jenna Rousseau at jrousseau@strangpatteson.com

New Requirements

The amendment added the following two new items to the list of "material events" which must be reported to EMMA within ten (10) business days of their occurrence:

1. Incurrence, or Amendment to Terms, of "Financial Obligations". Under new event (15), issuers must report the incurrence of a "financial obligation", if material. "Financial obligation" is defined as a debt obligation; derivative instrument entered into in connection with, or pledged as security or a source of payment for, an existing or planned debt obligation; or guarantee of either. The SEC noted in the final rules that, with respect to a "debt obligation," whether an obligation is "debt" for state law purposes is not determinative; rather, the term "debt obligation" refers more broadly to circumstances under which an issuer has borrowed money.

Local bank notes and loans, capital leases (such as equipment leases), state trust fund loans, clean water and safe drinking water loans, temporary school borrowings, and USDARD loans are financing instruments commonly found in Wisconsin, which could fall within this definition, depending on their terms. A guarantee of another entity's debt could also fall within the definition. However, a "financial obligation" does not include municipal securities as to which a final official statement has been filed on EMMA in accor-

dance with the Rule.

Additionally, issuers are required to report any agreement to amend or change the terms of such a financial obligation (such as covenants, events of default, remedies, priority rights, or other similar terms), any of which affect security holders, if material.

In the final rules, the SEC advised that notices for new event (15):

"Generally should include a description of the material terms of the financial obligation. Examples of some material terms may be the date of incurrence, principal amount, maturity and amortization, interest rate, if fixed, or method of computation, if variable (and any default rates); other terms may be appropriate as well, depending on the circumstances."

2. Event Under Financial Obligation Reflecting Financial Difficulty. Under new event (16), issuers are required to report a default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation described above, any of which reflect financial difficulties.

Compliance Date

The date for compliance with the amendments has been set for February 27, 2019. This means that for all bond and note issues closing on or after February 27, 2019, the continuing disclosure undertaking must include new events (15) and (16).

What the Amendment Means for Governmental Issuers of Bonds and Notes

Beginning with any publicly offered bond or note issues closing on or after February 27, 2019, issuers should be aware that they will likely be required to agree to monitor and report:

- The incurrence of any "financial obligation", if material (which could include, but is not limited to, entering into any bank loan, state trust fund loan, capital lease, clean water or safe drinking water loan, temporary school borrowing, USDARD loan, and guarantee of obligations of others),
- Agreeing to the amendment of the terms of a "financial obligation" (such as covenants, events of default, remedies, priority rights or similar terms) which affects holders of the bonds or notes, if material, and
- A default, event of acceleration, termination event, modification of terms or similar event under a "financial obligation" reflecting financial difficulties.

Issuers may wish to review their records and develop plans now to monitor, evaluate, and report such events.

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Legal Update

SEC Expands Disclosure Obligations for Governmental Bond Issuers

Contributors | Patrick Dittmer and Rebecca Speckhard

Summary

In August 2018, the Securities and Exchange Commission ("SEC") published final rules amending SEC Rule 15c212 (the "Rule") to add two additional types of events which issuers of governmental bonds which enter into continuing disclosure agreements will have to monitor and, if they occur, of which they will need to provide notice within ten (10) business days.

Background

The Rule generally requires a governmental issuer of publicly offered bonds or notes to enter into an agreement to (1) file annual financial information and operating data with the Municipal Securities Rulemaking Board's Electronic Municipal Market Access (EMMA) system on an annual basis, and (2) provide notice of the occurrence of certain "material events" specified by the Rule on the EMMA system on an ongoing basis within ten (10) business days of their occurrence. The amendment adds to the list of "material events" covered by the Rule.

TO FUND OR TO DEFUND: MAKING THE HARD DECISIONS

Six factors that can help SBOs evaluate budget items in a fair, transparent manner.



Each year, district and school leaders must adjust their budgets to ensure that limited resources are used most effectively in achieving the organizational mission. Those district leaders often face the dilemma of funding a limited number of new programs or discontinuing existing ones. Such decisions have high stakes, not only because they involve hundreds of thousands—or even millions—of dollars but also because they have a lasting effect and broader implications for programming, personnel, and students.

Effective decisions send a clear signal to the school system and the community about what those leaders consider important. In contrast, poor decisions can damage morale and the culture and cripple leaders' effectiveness and authority. Even worse, poor decisions waste resources and energy that could have been spent elsewhere to students' advantage.

Despite the significance of budgetary decisions, many districts lack the necessary organizational infrastructure for making sound, informed decisions about which programs to fund or defund. Six factors can help decision makers evaluate each budget item in a fair, transparent manner.

Factor 1. Alignment with Organizational Priorities

During budget discussions, alignment is often a basis for decisions about program funding. Does the program align with the district's mission, stated goals, strategic plan, and current priorities? Despite being conceptually straightforward, alignment can be difficult to apply because of a lack of communication in defining organizational priorities.

For example, "student learning" as an organizational priority is so general that the case can be made that almost any program can be aligned with it. In contrast, increasing the recruitment of minority teachers is a specific priority against which district personnel can easily assess a program's alignment. The more specific the organizational priorities, the easier it is to assess alignment of program funding decisions.

Factor 2. Evidence of Impact

District leaders are expected to invest limited resources in programs that are effective. However, many districts lack the capacity to critically review the research literature to identify proven adoptable programs or to evaluate their own programs rigorously.

Ideally, districts could evaluate a program's impact by reviewing student performance before and after implementation to determine whether outcomes recommend accepting or rejecting the program. The best way to gather such evidence is to assign students randomly to a "treatment" group where they participate in a program and to a "control" group where they don't participate.

Alternatively, "quasiexperimental" studies can be conducted in which statistical methods rule out factors other than program participation as the cause of any differences in performance.

Districts can find information on widely available, highly evaluated programs on such websites as the federal government's What Works

Clearinghouse (<https://ies.ed.gov/ncee/wwc>) and Johns Hopkins University's Best Evidence Encyclopedia (www.bestevidence.org). Program impacts are presented in a standardized form called "effect sizes" that can be used as a metric for decision making across different program types. Decision makers must still consider whether the effects identified in these studies can be replicated in their own districts.

Districts can apply, with a certain level of confidence, a conservative approach to identifying programs that appear not to work for their population and consider discontinuing them. If no improvement in teacher or student performance is documented after a program has been in place for a few years and the demographics of the program participants have not changed substantially, the program likely is ineffective.

Factor 3. Cost per Pupil

In many cases, districts decide not to fund a program because of its high price tag. However, total cost is often a misleading measure that masks or even distorts the true expense of a program. Instead of relying only on the program price, education leaders should use cost per pupil to guide their decision making.

For example, Program A with a cost of \$250,000 is seemingly more than twice as expensive as Program B with a cost of \$100,000. However, Program A serves 5,000 students, while Program B serves only 400 students. Therefore, Program A's cost per pupil is one-fifth of that for the ostensibly cheaper Program B.

Total cost is often a misleading measure that masks or even distorts the true expense of a program.

Part of the reason for the current focus on total cost instead of cost per pupil is that decision makers often do not consider how many students will be served under a new

proposed program. Even when that information is available, it may not be routinely documented and used in decision making.

Documenting the per-pupil cost and requiring that it be included in the program description are the first steps to establishing it as a criterion for budget decisions. After a few years of collecting cost-per-pupil information, districts can develop a local norm for economical, acceptable, and expensive program costs per pupil, which can be used to guide decisions.

It should be noted that although the immediate "cost" consideration of a program is the burden on the budget, a full evaluation of a program's costs should consider the amount of time required by teachers and other staff members to implement it and the amount of training and ongoing support required.

Additionally, some programs may demand new facilities, equipment, or services, such as transportation. This full cost evaluation is especially important when considering a program for replication or expansion.

Factor 4. Political Support

It is no secret that programs are more likely to succeed if they have buy-in from teachers and staff members within the school system along with the support of board members, parents, and the community. In addition to considering alignment with district priorities, evidence of effectiveness, and costs, district leaders should consider the level of support or opposition toward a new program among the relevant stakeholders.

The primary obstacle to discontinuing a program is pushback from stakeholders, especially from teachers and staff members whose jobs would be affected. Parents whose children's needs would no longer be served as the result of a program cut may raise objections, and teachers may be concerned about absorbing "troubled" students into their classrooms if those students have

nowhere else to go. If new programs can address unmet needs, concerns and resistance might lessen.

Another political aspect to consider is whether the program has a viable “champion” or “owner” who will maintain its profile and ensure that it is well resourced and implemented. Such ownership is often critical to helping the district remain focused and committed, despite the many distractions and interruptions that leaders face throughout the year. The first four factors discussed help district leaders assess programs individually, without considering how each program could potentially affect or be affected by other programs. However, educational programs are not implemented in isolation. What happens in and to one program not only affects the students in the program but also has implications for those in other programs.

In addition to the merits and weaknesses of an individual program, leaders must take a holistic view to examine the interaction a program might have with the school system from at least two angles: feasibility of implementation and coherence with other programs.

Factor 5. Feasibility of Implementation

Feasibility of implementation concerns both the central office department that is in charge of implementation and the schools where the program will be rolled out.

In many districts, it is not uncommon to see schools—especially lowachieving schools—attempt to implement multiple initiatives simultaneously. In spite of noble intentions, decision makers need to think hard about whether the principals, teachers, and students in those schools have the time and energy to devote to yet another new initiative. Stretching personnel too thinly will likely take a toll on both the new initiative and the existing ones.

At the district level, leaders need

to look at how many programs each department currently operates and how successful they are. If a department is already struggling to implement some programs, it may be unwise to add more weight to its responsibilities. Even if the department is implementing those programs successfully, it is still necessary to assess the burden each additional program places on the department’s staff members to ensure that they are not set up to fail.

Sometimes, feasibility of implementation depends on other departments that provide support. For example, a new program may call for hiring a large number of highquality minority teachers to provide both instructional and socialemotional support to minority students. But if the human resources department has been unable to fill vacant teaching positions, money allocated to this new program will probably remain unused instead of being allocated to meet other needs that can be more easily satisfied.

Factor 6. Coherence with Other Programs

The second angle from which to look at programs holistically is coherence. Will the programs under consideration complement each other and existing programs, or will they create confusion and competition instead?

It is not uncommon for two programs that target the same improvement area to differ in philosophy, language, approach, and method. When the differences contradict each other directly (e.g., one reading program focuses on whole language while another emphasizes phonics), adopting both may not be a wise decision.

In many cases, however, the differences may not necessarily lead to conflicts in implementation. Leaders need to consider whether the department that will be rolling out the two programs has a plan that articulates how the two improvement efforts will be coordinated to enhance each

other, and whether the department has the capacity to execute it.

Decision Making Protocols

In developing a protocol that governs decision making, depending on the local context and culture, a district can use all or a subset of the six factors sequentially or simultaneously to make program funding decisions.

Sequential protocol. A sequential decisionmaking protocol involves consideration of each factor, one after another. Before practicing the sequential protocol, leaders need to reach a consensus on (a) which of the six factors will be considered for decision making, if not all six; and (b) the order in which they will be considered based on their relative importance.

The chosen factors should be ranked from most important to least important. All programs are then assessed on the basis of the first factor; only those that receive unanimous or majority support can advance to the next round where they are reassessed on the basis of the second factor. This process continues until the final assessment based on the last factor is complete. Programs that survive the entire process will be approved for funding support. Any current programs that fail during the process will be discontinued.

For example, through discussion, a leadership team agrees to use Factor 1 (alignment with organizational priorities), Factor 2 (evidence of impact), Factor 5 (feasibility of implementation), and Factor 3 (cost per pupil) in that order to help decide which new programs to fund and which existing programs to defund.

Table 1. Example of a Sequential Decision-Making Protocol

Factor	Yes	No
1. Alignment with organizational priorities	A, B, C, D, E	F, G
2. Evidence of impact	B, C, D, E	A
5. Feasibility of implementation	B, D, E	C
3. Cost per pupil	D, E	B

Table 1 demonstrates the process of how the leadership team makes funding decisions about seven programs (A–G) following the sequential protocol. Among the seven programs, Programs A and D are existing and in bold. After the last assessment is complete, two programs remain (D and E). As a result, existing Program D will be continued, and new Program E will be launched with funding support.

Simultaneous protocol. In contrast to the sequential protocol where factors are examined one at a time, the simultaneous protocol considers all of the factors selected for decision making at the same time. Because of its complexity, the simultaneous protocol can be best facilitated by quantifying the result of assessing each decision factor and then synthesizing the scores.

Of the six factors discussed, Factor 2 (evidence of impact) and Factor 3 (cost per pupil) are quantitative in nature. For cost per pupil, the assessment should lead to a specific dollar amount, say \$200 per pupil. For evidence of impact, effect size—which often ranges between 0 and 0.5 for educational programs—is routinely used to gauge the magnitude of program impact.

For the other four factors, a score can be obtained by having each decision maker rate a program on a scale (0 to 5, for example). Ideally, decision makers would gather evidence to support their ratings and use rubrics that clearly define what constitutes, for example, a 5 for feasibility of implementation. Ratings could be assigned during a meeting of the district’s leaders or cabinet, or by representatives of each stakeholder

group (e.g., district leaders, board members, program directors, principals, and teachers). After each person or group of stakeholders provides a rating, the individual scores can be averaged to obtain an overall

rating for each program.

Sometimes, feasibility of implementation depends on other departments that provide support.

Scores for each factor should be standardized for comparability and combined to produce an overall rating for each program. For example, a utility value can be calculated for each program. If certain factors are more important and should play a bigger role in affecting the decisions, different weights can be assigned to each factor with the more important factors being assigned heavier weights.

Disciplined Process

All districts have an implicit or explicit process for making decisions about program funding. What those processes have lacked, however, is discipline and rigor.

It is not uncommon for leaders to overlook important factors, rely on misguided information, or apply different rules and criteria to different programs when making program funding decisions. Neither is it surprising that some individual leaders have undue influence over final decisions. As a result, despite the best intentions, limited resources are not spent on programs that are the most costeffective for improving student learning.

District leaders can apply these six factors (or other preferred factors that are important to local context) sequentially or simultaneously to help identify the best-rated programs to fund.

This disciplined process will help leaders make budget decisions that are more strategic, holistic, and data driven. Equally important, it will help build a collaborative team among leaders and increase the odds of programs’ being successfully implemented.

For questions related to this article, please contact Bo Yan at bo.yan@jefferson.kyschools.us and/or Fiona Hollands at fmb7@tc.columbia.edu

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“A true leader has the confidence to stand alone, the courage to make tough decisions, and the compassion to listen to the needs of others. He does not set out to be a leader, but becomes one by the equality of his actions and the integrity of his intent.”

Douglas MacArthur

MIDWEST FACILITY MASTERS CONFERENCE

More than 350 attendees utilized this year's theme, "Champions of Change: Motivated and Energized for Our Students" to discover opportunities to bring back to their districts at this year's Midwest Facility Masters Conference at the Kalahari Resort and Conference Center in Wisconsin Dells Nov. 56. Attendees were given opportunities to network with 125+ exhibitors in the extended exhibit hall, gain knowledge on Dude Solutions products while visiting the Learning Lab, and attend concurrent sessions that covered a wide array of subject matter.

Mark Mayfield started the conference on Monday morning with a session on how to learn change theory to manage change. The audience was then sent on their way to 60 concurrent sessions offered throughout the conference.

In addition to continuing education credits towards Certified Plant Manager (CPE), Certified Plant Maintenance Manager (CPMM) and Certified Plant Supervisor (CPS) designations through the Association for Facilities Engineering, attendees had the opportunity to complete Module 7 of the WASBO Facilities Manager Certification Program.

The second day of the conference began with keynote Pat Finnemore discussing the several influencers in his life and the opportunities and challenges that have allowed him to transition his mindset to one of positivity. Additional concurrent sessions were also offered before everyone made their way home.

Exhibitors and attendees raised \$3,205 for next year's attendee scholarships by participating in the exhibit hall raffle. The \$3,745 raised last year was put towards five attendee scholarships. Focus on Energy generously sponsored nine additional scholarships this year, allowing 17 scholarship recipients to attend the conference for the first time. Each recipient received \$500 to cover registration and travel to the conference.

The 17 attendee scholarship recipients were:

- Tim Bisek**
Facility Director
Jordan Public Schools, MN
- Steven Corley**
Buildings & Grounds Manager
Calumet Public SD #132, IL
- Joel Gallegos**
Coordinator of Operations, Buildings & Grounds
Barrington Community Unit SD #220, IL
- Michael Graves**
Fireman II
Oskosh Area SD, WI
- Colin Green**
Director of Buildings & Grounds
Waseca Public Schools, ISD #829, MN
- Sherrie Grogan**
Maintenance Supervisor
Holy Spirit Parish, WI
- Eric Kannel**
Director of Building & Grounds
Plum City SD, WI
- Jay Kurzynski**
Custodial Supervisor
Tomorrow River SD, WI
- Michael Mayoros**
Director of Facilities
Westmont Community Unit SD #201, IL
- William O'Laughlin**
Director of Buildings & Grounds
Winona Area Public Schools, MN
- Addam Paprocki**
Custodian/Maintenance
St. Francis SD, WI
- Justin Rebicek**
Head of Maintenance
Salem SD, WI
- Steve Rohde**
Coordinator of Facilities & Operations
West AllisWest Milwaukee, WI
- LeeAnn Taylor**
Director of Fiscal Services & Asset Management
Barrington Community Unit SD #220, IL

- Paul Tutor**
Maintenance Supervisor
Ashland SD, WI
- Ronald Vick**
Facilities Manager
Warren SD #205, IL
- David Wiczorkowski**
Building Manager
Mukwonago Area SD, WI

Exhibitor and committee member Fred Ringe of EMA Chicago noted the following from a Service Affiliate perspective:

"I have been coming to the Midwest Facilities Masters Conference for several years now. At the right time of year. Able to get away from the daily bustle and by signs of it, many (I mean a lot) of other service and product providers see the same opportunity. The Service Affiliate attendance has grown over the past few years from a full conference hall to adding on the adjoining hall to filling up the hallways with displays offering just about everything a school facility needs to stay on an even keel.

The draw for us Service Affiliates has always been the opportunity to meet school districts that may find what we provide of value. School districts that are able to attend are searching for one or maybe two gems that will make their schools healthier, more comfortable, more energy efficient, and easier to control. There is plenty of that to go around.

A new connection path has emerged for me this year. I see many Service Affiliates that I have seen in the past. Some at adjoining tables and some far down the aisle that we stop by to see how they are finding the conference. I bumped into three different companies that share some synergy with the products I provide or are just willing to support my initiatives with the hopes of a returned favor. I am so impressed with this attitude between companies due no doubt to the ambiance of the setting provided by WASBO."

Mark your calendar and plan to join us for the 2019 Midwest Facility Masters Conference, Nov. 4-5!

WASBO THANKS THESE SPONSORS FOR THEIR SUPPORT OF THE



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School Districts Face Questions as to Administration of CBD Products

Contributor | Chad P. Wade

As the national debate continues over the legal use of medical marijuana and other cannabis products, several states, including Wisconsin, have enacted legislation legalizing Cannabidiol (“CBD”). As a result, Wisconsin school districts are receiving requests from parents and guardians to have CBD products, such as CBD oil, administered to their child at school.



CBD Products

CBD products are not medical marijuana. CBD is one of more than a hundred (100) cannabinoids derived from the cannabis plant. Delta9tetrahydrocannabinol (“THC”) is the cannabinoid most closely associated with marijuana because of its psychoactive effects. Unlike THC, CBD does not cause psychoactive effects. However, CBD has been linked to several health benefits, most notably reducing the frequency and severity of seizures.

CBD products are produced from the cannabis plant, which can be grown as industrial hemp, with low levels of THC, or as marijuana, with higher levels of THC. All CBD products contain some level of THC whether produced from industrial hemp or marijuana. However, CBD products derived from industrial hemp contain only trace amounts of THC and do not cause any psychoactive effects. CBD is sold in a variety of products including nasal sprays, oils, and capsules.

Legality of CBD Products

The Federal Agriculture Act of 2014 (“2014 Farm Bill”) authorized states to create pilot programs for growing industrial hemp. By legalizing industrial hemp, the 2014 Farm Bill also preempted the Drug Enforcement Agency’s (“DEA”) designation of CBD as a Schedule I controlled substance, legalizing CBD derived from legally grown industrial hemp. *Hemp Industries Association v. U.S. DEA*, 720 Fed. Appx. 886 (9th Cir. 2018). Thus, CBD products derived from industrial hemp grown under a state pilot program are legal under federal law, although CBD products from other sources remain illegal.

In 2017, Wisconsin enacted two (2) pieces of legislation concerning CBD products. In April, Wisconsin enacted 2017 Wisconsin Act 4 (“Act 4”), which excluded CBD in any form that does not produce psychoactive effects from the definition of THC. In December, Wisconsin enacted 2017 Wisconsin Act 100 (“Act 100”), which created Wisconsin’s pilot program for growing indus-

trial hemp and further revised the definition of THC to exclude THC contained in “fiber produced from the stalks, [or] oil or cake made from the seeds of a Cannabis plant.” As a result of Acts 4 and 100, CBD products derived from industrial hemp grown under a state pilot program are legal under Wisconsin law.

Issues Associated with Administration of CBD Products

The administration of prescription and nonprescription drugs by school staff at school is governed by Wisconsin’s School Medication statute. Wis. Stat. § 118.29. The statute authorizes school staff to administer prescription and nonprescription medication to students at school subject to the conditions set forth in the statute and provides civil liability protections for staff who administer medication consistent with the statute.

In June, the Federal Food and Drug Administration (“FDA”) approved the first prescription drug containing CBD for the treatment of rare seizure disorders in children. However, other CBD products are widely available without a prescription. Despite the FDA’s recent approval, CBD is not listed in the U.S. Pharmacopeia and National Formulary or in the Official Homeopathic Pharmacopeia of the United States meaning that CBD does not meet the definition of a “drug” under Wisconsin’s School Medication statute. Wis. Stat. § 118.29(1)(b). Thus, Wisconsin’s School Medication statute does not govern the administration of CBD products by school staff. Rather, it is subject to local control.

School districts should review their Board policies to determine whether they address the administration of nonmedications, such as dietary supplements or other substances for preventative health. It is advisable for school districts to address administration of nonmedication substances before it receives a request to do so. Board policies should also address other subjects regarding nonmedications, such as selfadministration and storage on

school grounds.

If a parent requests that school staff administer a CBD product, the school district should evaluate the CBD product to ensure that it is produced legally from industrial hemp. Some producers utilize third-party testing to verify that their CBD products are legally produced from industrial hemp and contain the advertised concentrations of CBD. Manufacturers’ websites and third-party retailers can also be a valuable resource. The Food and Drug Administration (“FDA”) has also issued warning letters for some brands of CBD products for misleading or false advertising. The FDA warning letters are available online at <https://www.fda.gov/NewsEvents/PublicHealthFocus/ucm484109.htm>.

Additionally, school districts should consider whether the request for administration of CBD is based on a student’s disability-related needs. School districts may be required to administer alternative medicines, such as supplements and substances for preventative health, as an accommodation under the Individuals with Disabilities Education Act or Section 504 of the Rehabilitation Act. In re: *Student with a Disability*, 103 LRP 57802 (SEA NM 11/19/02). The school district should convene the student’s Individualized Education Program (IEP) or Section 504 team if the parent of a student with a disability requests administration of a CBD product at school as an accommodation.

School districts can expect to receive more requests for administration of CBD products as they gain popularity. School districts should be prepared to address several aspects associated with CBD products, such as selfadministration by students, storage of CBD products at school, as well as, alternative forms of CBD product administration including, but not limited to, vaping or transdermal patches.

For questions contact Chad at cmade@strangpatteson.com

The Transportation Committee Invites You to Attend the Transportation & Bus Safety Conference!

Join colleagues for a day of professional development on Thursday, March 7 at the Kalahari Conference Center in Wisconsin Dells. Whether you own and operate your own fleet of buses or contract out your transportation service, the conference will offer a full day of professional development that covers a broad spectrum of transportation sessions, include how to:

- Gain an Understanding of how the Chippewa Falls Area School

District is using Positive Behavior Intervention and Supports (PBIS) on the bus. You will hear about their challenges and successes.

- Recognize suspicious activity and how to report concerns through the First Observer program.
- Learn from the Wisconsin Rapids School District and how they addressed Unusually Hazardous Transportation (UHT) Issues.
- Engage your drivers and utilize technology to determine what

tools should be used on your school buses.

- Provide school bus security through the same lenses that we use for our school emergency operations plans.

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 7!

WASBO Foundation Transportation & Bus Safety Conference

March 7, 2019

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

WASBO/WASPA School Personnel Academy



Once again, WASBO collaborated with WASPA to host the 2018 School Personnel Academy – Optimizing Leadership in Human Capital held at the Madison Marriott West on Dec. 56. Sessions focused on various areas of human capital issues including staff recruitment and compensation models, employee engagement, health insurance benefits and regulations, wellness programs, benefits and more.

WASBO and WASPA commend the planning committee on their work in providing another successful conference. Special thanks are due also to the sponsors listed at right. If you would like to participate on next year's planning committee, contact Kaitlyn Peters at kaitlyn.peters@wasbo.com. Mark your calendar and plan to join us on Dec. 45, 2019, at the Kalahari!

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Year of Success: Winter at a Glance Conference

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Year of Success Program



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As part of the Year of Success Program, attendees joined WASBO and DPI for Winter at a Glance on Dec. 4 at the Madison Marriott West. This oneday conference provided both those new to the profession and seasoned business managers with areas of focus for the business office during the winter months. Presenters received high marks for information provided which ranged from the Revenue Limit and Equalization Aid to Fees and an Overview of Employee Benefits.

If you know of someone new to the business office, including district administrators, be sure to let them know about the Year of Success Program. Learn more at <http://www.wasbo.com/success>. The next offering in the Year of Success Program is scheduled at the Wisconsin Federal Funding Conference Feb. 2526 at the Kalahari in Wisconsin Dells.

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

LEGAL UPDATE
403(b) Plans
REMEDIAL
**Amendment
Period**

Contributors | Christopher T. Schmidt and David P. Weller

Many school districts have a 403(b) plan, which is a special retirement plan available to non-profit organizations, like schools. The IRS requires that a 403(b) plan be in writing. This is old news as the deadline for adopting a written plan was December 31, 2009. Many school districts adopted the IRS 403(b) Model Plan, and many made slight modifications to that Model Plan. An IRS determination letter approving such plans was previously not available to school districts adopting a 403(b) plan.

However, the IRS has recently changed its position and has outlined a method for school districts to now have the opportunity to adopt an IRS pre-approved 403(b) plan document. The benefit of adopting a pre-approved 403(b) document is that the school district can rely on the determination letter that the IRS provided for that pre-approved 403(b) plan document.

Insurance companies and third-party administrators are able to obtain IRS approval as a “volume submitter” on standard 403(b) plan documents. The school district should adopt the IRS approved 403(b) document by March 31, 2020. This period ending March 31, 2020, is known as the “remedial amendment” period. If the pre-approved 403(b) plan document is adopted on or before the end of the remedial amendment period, then the adoption of the approved plan document will relate back to December 31, 2009. December 31, 2009, was the deadline for a school district to adopt a 403(b) written plan. A pre-approved 403(b) plan document adopted on or before March 31, 2020, will allow the school district to rely on the determination letter, and that determination letter will relate back to the original written 403(b) plan adopted. In other words, the district would be protected against a later claim that the plan document is not in compliance with tax law. This provides the

school district with certainty that it is protected against a later IRS challenge that the plan document does not comply with tax law, subject to a future law change.

Reliance on the determination letter will not protect the district for an operational failure, which is a failure to operate the plan in accordance with tax law and the 403(b) plan document.

We strongly recommend that all school districts contact a third-party administrator or company who has already received IRS approval on 403(b) plan documents and ask about adopting an IRS approved 403(b) plan document. While there will be some cost associated with adopting a pre-approved 403(b) Plan, we believe it is well worth the extra work and cost. It is important that the adoption of the IRS approved 403(b) plan document take place before March 31, 2020.

For questions related to this article, please contact contributors Christopher Schmidt (cschmidt@boardmanclark.com) or David Weller (dweller@boardmanclark.com)

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“Leadership is lifting a person’s vision to high sights, the raising of a person’s performance to a higher standard, the building of a personality beyond its normal limitations.”

Peter F. Drucker

How to Make a Mistake

Make mistakes work for you.

Contributor | Diane M. Block, Ed.S.

None of us likes to slip up, especially in our profession. We’re trained to ensure accuracy, completeness, and balance. For many of us, that’s also part of our personality (think “type A”). So why should we talk about how to make a mistake?

When I was a practicing certified public accountant, one of our firm’s school clients fired its business manager for making a mistake at the bargaining table that cost the district \$100,000. Although that occurred about 25 years ago, even then, that amount on its face would not automatically be a fatal error for a Class A district. So why was the business manager fired?

I believe it was because of everything that happened before that mistake. The business manager had a pattern of errors, of small missteps, of a lack of attention to detail. The \$100,000 slipup was the tipping point. The district was looking for an excuse, and that was it.

Pattern of Excellence

The lesson here is that even a large mistake is survivable if it is not part of a pattern or an excuse to cut ties. How can you make it so? A pattern of excellence is a great defense. If you are known for your accuracy, timeliness, and completeness, an occasional gaffe is generally pretty forgivable. Seek out ways to help ensure that you are almost always reliable.

Think about checks and balances. Think internal controls. Systems and structures that are designed to catch errors can be applied to your work habits as well as your work. Plan to work on those tasks that require a high degree of accuracy when you

are sharpest.

I try to build in time to put thorny problems on “simmer” overnight or over a weekend. Countless times, solutions have come to me on my early morning walk or while showering before work. Find what works for you.

Be willing to check your ego at the door. Asking others to factcheck your work, verify your formulas, or proofread your report is not a character flaw. Work to prevent mistakes, but accept that they are inevitable.

Taking Responsibility

So what if your error is a doozy? We’ve all made one and felt the fear and worry. You want to cut and run, hide the mistake (or yourself), find someone else to blame, or rationalize it away.

Master your fear by taking action. Allowing yourself to wallow in fear, stymied and reduced to a puddle of indecisiveness, is counterproductive.

That is not to say that you should immediately spring into action simply to avoid feeling the full weight of your error. It’s OK to wallow a bit, as long as you can pick yourself up, forgive yourself, and then work to solve the problem. Don’t phone it in, letting others pick up the pieces. Do your best work. Sometimes, your “mistake” will create a better overall process or solution.

In the movie “Apollo 13,” Flight Director Gene Kranz overhears two NASA directors discussing the low survival chances for the crippled spacecraft. “I know what the problems are, Henry,” one of them says. “This could be the worst disaster NASA has ever experienced.” “With all due respect, sir,” Kranz intevenes, “I believe this is going to be our



finest hour.

“Apollo 13” is one of my top five favorite movies, in part because of that line and all that it exemplifies. How you take responsibility after a mistake is often how it will be remembered. Make your “best” mistakes by redeeming yourself in addressing them. Own the problem and work to find the solution. It will allow your employer to forgive even a doozy of a mistake rather than use it as the excuse to fire you.

Perspective, too, is important. My staff will tell you that I am fond of saying “It’s not brain surgery: no one is dying, no one is bleeding,” in response to someone’s fears and stress around failures on the job.

The point is not to belittle the reality. Being a school business official is much more stressful than the general public probably imagines. Just think of being late with the payroll to feel the fear (been there, done that). But no one died because the payroll was late, so a little perspective can help. Understand that owning your mistakes and working to solve them is the better path. So make those mistakes, but make them work for you.

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2019-20 Open Enrollment Space Limitations Must Be Set During the January 2019 School Board Meeting

Contributor | Shana R. Lewis

If the school board intends to limit the number of open enrollment spaces available in the schools, programs, classes or grades in the school district for the 2019-2020 school year, Wis. Stat. § 118.51(5)(a)1., requires that the school board take action during a board meeting in January 2019 to do so. The school board has the option of establishing space limitations for regular education students, for special education students, or for both.

Before establishing such space limitations, the board policy must explicitly permit the school board to deny an open enrollment application on the basis of space availability. Thus, as a first step, it is important to review the school district's open enrollment policy to confirm that the policy language allows for the school board to accept and reject open enrollment applications based on space availability. Additionally, the policy must identify the criteria that the school board will use to determine whether space is available. This policy should be referenced by the school board when making space determinations in January 2019.

For purposes of establishing regular education space limitations, the school board must designate the number of open enrollment spaces available in the school district based on grade level. The school board should consider factors, such as: class sizes, studentteacher ratios, enrollment projections, tuition agreements with other school districts, and students currently attending school in the district and their siblings.

For purposes of establishing space limitations for special education, the school board must designate the number of

open enrollment spaces available based on the program or service. The school board may not establish space limitations based on the students' eligibility category labels, such as Autism, Specific Learning Disability, etc.

Because many special education service providers in the school district are responsible for students of different ages and abilities, it is advisable to determine space for those services based on caseload rather than class size or studentteacher ratios. In recent years, the Department of Public Instruction (DPI) published a study on recommended caseloads for special education providers: <https://dpi.wi.gov/sped/educators/initiatives/caseloadtaskforce>

The school district should identify all of the special education services and programs that are currently available in the District such as occupational therapy, physical therapy, speech and language, and self-contained special education classrooms. It is important to identify all of the currently available special education programs and services in the school district so that the school board can set space limitations. If the school board does not set a space limitation for a program or service, the school district may not deny a special education student's open enrollment application based on a lack of space.

A school district is not required to set space limitations for alternative placements that are not provided by the school district, such as mental health day treatment or residential care centers. According to DPI, outofdistrict placements are not deemed "available" in a nonresident district through open enrollment. There-

fore, a nonresident district may deny open enrollment for a student who requires an outofdistrict placement based on the fact that the program or service is not available in the school district.

Once the school district has identified the special education programs and services currently offered in the school district, the school board should review information regarding current and projected caseloads, class size, or studentteacher ratios for each program or service, as well as the school district's current standards for acceptable caseloads, class sizes, and studentteacher ratios for the identified special education programs and services.

DPI will uphold a school district's space limitations and subsequent denial of open enrollment, if the school board took action to establish such space limitations during its January meeting, if the school district followed the criteria consistently, and if the denial is not arbitrary or unreasonable. In regard to such an appeal, DPI will review the school board's space determinations and documentation supporting those determinations. Thus, it is important that the school board document its regular and special education space determinations, including the factors and evidence considered, in the minutes of the January 2019 meeting. Thereafter, it is important for the school district to document its analysis and decisions to accept and reject open enrollment applications based on space availability. It is also important for the school district to ensure that the criteria are followed consistently and that denials are not arbitrary or unreasonable.

For questions, please contact Shana Lewis at slew-ist@strangpatteson.com

Stay Connected

Interim Assignments

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

Network by Participating on a WASBO Committee

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

Share Your Expertise

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

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.

Service Affiliate Checklist

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

- Sponsorship Opportunities:
 - Wisconsin Federal Funding Conference
 - Facilities Management Conference
 - Transportation & Bus Safety Conference
 - Accounting Conference
 - Spring Conference
- *Taking Care of Business* articles for the February issue are due January 15.

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. 📞



- Advertise in *Taking Care of Business*.
- Update your profile and communication preferences at WASBO.com.
- Join a WASBO Committee.

Welcome to our New Members!

District Professional Members

- **Luke Butz**, Buildings & Grounds Supervisor and Safety Coordinator, Stoughton
- **Carla Davis**, Racine Unified
- **Ben Gasper**, Supervisor of Buildings and Grounds, Howards Grove
- **Cora Gianoli**, District Accountant, De Soto Area
- **Mike Graves**, Fireman II, Oshkosh Area
- **Emily Kaiser**, District Bookkeeper, Southwestern WI
- **David Lorentzen**, Maintenance Supervisor, Racine Unified
- **Joshua McDaniel**, Business Manager, Northern Ozaukee

- **Tim Moriak**, Custodian, Clayton
- **William Peterson**, Facilities Director, Lourdes Academy
- **Justin Rebicek**, Head of Maintenance, Salem
- **Tom Rheinheimer**, District Administrator, Wautoma Area

Service Affiliate Members

- **Kyle Boudreau**, Product Manager, KI
- **Ashley Endres**, Account Manager, National Insurance Services Inc.
- **Octavio Lorenzo**, End User Specialist, ASSA ABLOY

- **Katie Mangin**, Director of Marketing, Keller, Inc.
- **Paul Mascari**, Owner/Principal Consultant, Clearwall Safety Consultants
- **Micky Osmanski**, ESERV, Johnson Controls
- **Brad Phillips**, Education Solutions Executive, Frontline Education
- **Katie Van Dyken**, Account Executive, The Insurance Center
- **Mark Waldecker**, K-12 Development Manager, KI

Student Member

- **Nathan Knitt**

In April of 2017, WASBO collaborated with CESA 9 to offer the first Bookkeeper and Payroll Professionals Conference which was renamed this year to the School Business Office Professionals Conferences. Since the inception in 2017 we have offered two conferences each at CESA 9, CESA 3 and CESA 4. At CESA 9 Hilary Cordova developed a conference in this CESA area and regional. Demetri Andrews, Wayde Pollock, Jennifer Lorenz, Sandy Malliet, Jeff Lankey and Jeff Johanning worked to bring the School Business Office Professionals Conferences to CESA 3 and CESA 4 in August.

This spring WASBO collaborated with CESAs 6, 7 and 8 to offer a conference on Nov 28 at the Fox Valley Technical College. Members of this committee were Jason Levash, Pat Darnick, Alyson Tress and Jessica Kaczmarek.

Each of the conference committees sought feedback from their CESA members and WASBO Regionals in order to bring professional development sessions on various topics targeted to payroll and bookkeeping roles at each location. The School Business Office Professionals Conferences offer topics on payroll, accounts receivable, accounts payable, ACA reporting, School Level Reporting, tips and tricks when using Google and Excel just to name a few. WASBO thanks each of the individuals who helped develop these learning opportunities!

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Member Moves and Retirements

On the Move

- **Kevin Bahr**, Director of Facilities, Pulaski --to-- Private Industry
- **David Dillon**, Director of Project Development, DLA Architects --to-- The Larson Equipment and Furniture Company
- **Nancy Hazelbert**, Bookkeeper, Swallow --to-- Executive Assistant, Swallow
- **William King**, Operations Supervisor, Oconomowoc Area --to-- Manager of Buildings and Grounds, South Milwaukee
- **Jodi McIntyre**, Bookkeeper, Albany --to-- Business Services Assistant, Evansville
- **Nicholas Phillips**, Director of Buildings & Grounds, Denmark --to-- Director of Facilities, Pulaski
- **Brian Toth**, Badger Bus Lines --to-- Transportation Director, Mount Horeb
- **Caitlin Windler**, Finance Manager, Greendale --to-- Director of Finance and Operations, West Allis-West Milwaukee

Retirements

- **Michael Barry**, Assistant Superintendent, Madison Metropolitan
- **Vicki Fischer**, District Accountant, Oconto Falls
- **Patricia Hammill**, Business Manager, Niagara
- **Julie Lankey-Smallwood**, Business Manager, Mauston
- **Judy Rogers**, HR Coordinator, Kenosha Unified

ASBO International New Members

October 2018

- **Michael Barry**, Madison Metropolitan SD
- **Greg Bell**, Boscobel Area Schools
- **Janel DeZarn**, Columbus SD
- **Jeremiah Johnson**, Muskego-Norway SD
- **Sean Winters**, SD of Beloit
- **Kristopher Zachary**, Marathon County Special Education



ASBO International Membership Milestones

November 2018

- 15 Years**
 - **Tammy Marty**, New Glarus SD

December 2018

- 10 Years**
 - **John Kasha**, Green Bay
- 5 Years**
 - **Todd Hajewski**, Greendale

ASBO INTERNATIONAL MEETING DATES

2019 Annual Meeting & Expo
Oct. 25-28, 2019 National Harbor, MD

2020 Annual Meeting & Expo
Oct. 2-5, 2020 Nashville, TN

2021 Annual Meeting & Expo
Oct. 13-16, 2021 Milwaukee, WI

2022 Annual Meeting & Expo
Sept. 14-21, 2022 Portland, OR



Winter 2019 WASBO Event Calendar

Here is a look at the conferences, workshops, regional meetings, committee meetings, and other events that make up the Winter 2018/19 WASBO Event Calendar. For more information, see the Calendar of Events at wasbo.com

January

9
Spring Conference
Exhibitor Registration Opens
wasbo.com/spring

11
Professional Recognition Award Nominations due
wasbo.com/awards

Madison Area Regional Meeting
9 AM meeting, 11:45 AM lunch, Middleton-Cross Plains SD

22-25
State Education Convention
Wisconsin Center, Milwaukee

February

1
Spring Conference
Attendee Registration Opens
wasbo.com/spring

Student Scholarship Applications due
wasbo.com/scholarships

12
Wally Zastrow Leadership Academy
WASBO Office
wasbo.com/leadership

6
Fundamentals of Risk Management CSRM Course
Best Western Premier, Oshkosh
wasbo.com/riskmanagement

Northwest Regional Meeting
10 AM, Lehman's Supper Club, Rice Lake

7
Handling School Risks CSRM Course
Best Western Premier, Oshkosh
wasbo.com/riskmanagement

West Central Regional Meeting
9:30 AM West Salem SD

WASBO Board of Directors Meeting
WASBO Office

8
Madison Area Regional Meeting
9 AM meeting, 11:45 AM lunch

9
Southwest Regional Meeting
9 AM, CESA #3, Fennimore

Northeast/Bay Area Regional Meeting
Kimberly Area SD

14
ASBO Executive Leadership Forum
San Diego, CA

15
Southeast Regional Meeting
1 PM lunch, 1:30 meeting, Kettle Moraine SD

22
Wisconsin Valley Regional Meeting
9 AM coffee, 9:30 meeting, lunch to follow; Wausau SD

Spring Conference Committee
2 PM, Conference Call

25-26
WI Federal Funding Conference
Kalahari, WI Dells
wasbo.com/federalfunding

March

7-8
Facilities Management Conference
Kalahari, WI Dells
wasbo.com/facilities



7
Transportation & Bus Safety Conference
Kalahari, WI Dells
wasbo.com/transportation

8
Madison Area Regional Meeting
9 AM meeting, 11:45 AM lunch, Middleton-Cross Plains SD

13-14
Wally Zastrow Leadership Academy
WASBO Office
wasbo.com/leadership

13
Measuring School Risks CSRM Course
Best Western Premier, Oshkosh
wasbo.com/riskmanagement

14
Funding School Risks CSRM Course
Best Western Premier, Oshkosh
wasbo.com/riskmanagement

20-21
Accounting Conference
Kalahari, WI Dells
wasbo.com/accounting

22
Spring Conference Committee
2 PM, Conference Call

Mark Your Calendar to Attend WASBO Professional Development!
Register at WASBO.com

WI Federal Funding Conference



Feb 25-26, 2019
Kalahari • Wisconsin Dells

Registration available at wasbo.com/federalfunding



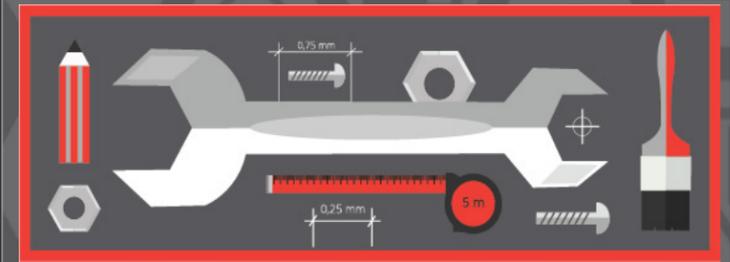
Facilities Management Conference

March 7-8, 2019
Kalahari • Wisconsin Dells



Who Should Attend?
Facilities and Maintenance Directors, Safety Directors, Business Managers, District Administrators

Register at WASBO.com/facilities beginning December 14



Transportation & Bus Safety Conference



Who Should Attend?
Transportation Directors, Contractors, Business Managers, District Administrators

March 7, 2019
Kalahari • Wisconsin Dells
Register at WASBO.com/transportation beginning December 14



Accounting Conference



Questions? We have answers!

Save the Date!
March 20-21, 2019
Kalahari • Wisconsin Dells
Registration opening December 14

Who Should Attend?
Business Managers, Directors of Finance, Bookkeepers, Accountants, District Administrators, Human Resources

Sponsorship Opportunities for each conference at WASBO.com



Wisconsin Association of School Business Officials
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Madison, WI 53704

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