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Taking Care of Business

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



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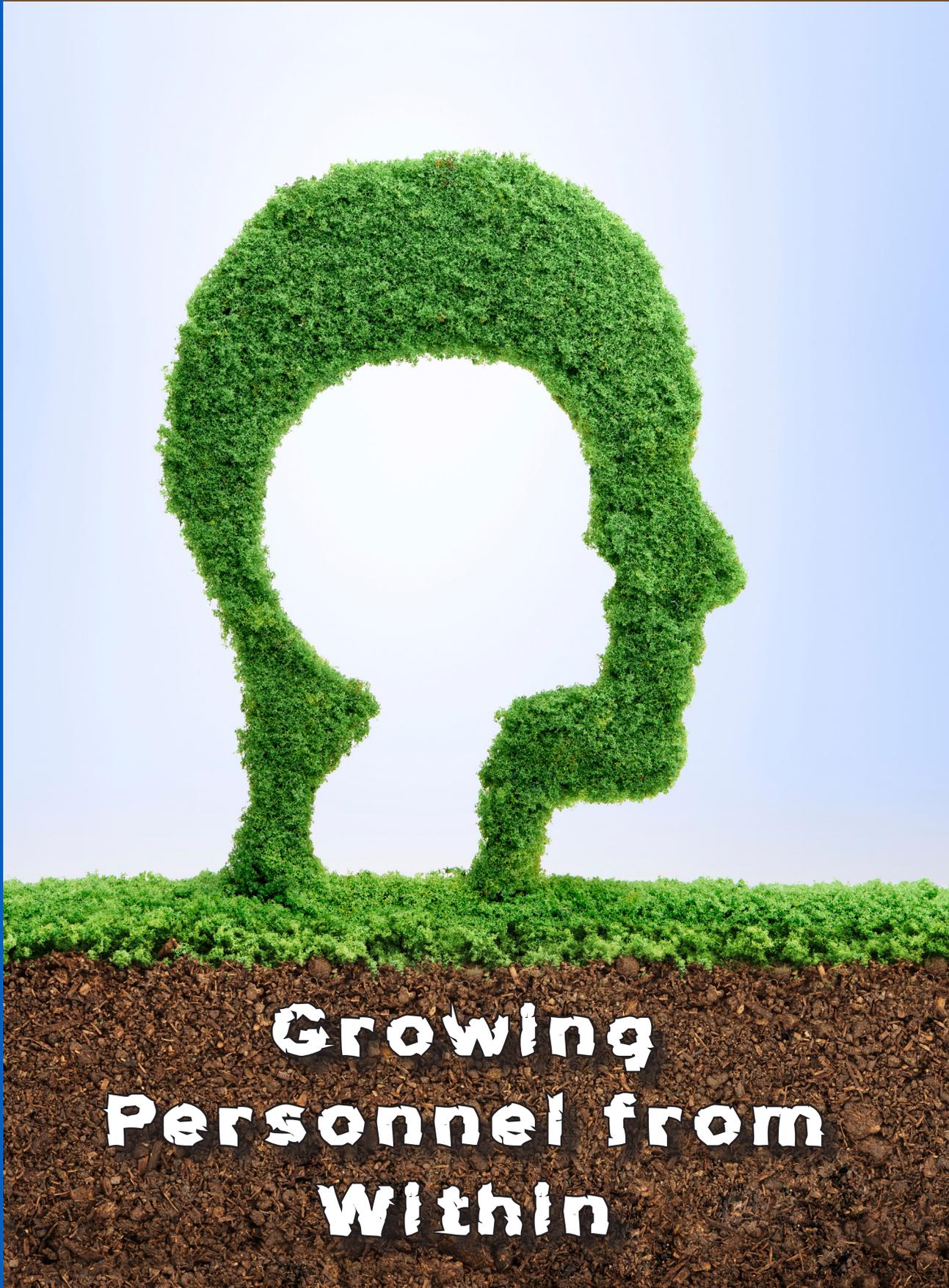
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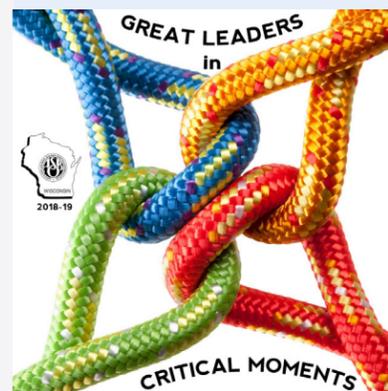
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Editor: Woody Wiedenhoef

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

Leadership: You Probably Don't Need to Look Far for Your Role Models!

There are leadership changes coming this year in both my school district and WASBO. Retirement will impact three important leadership roles for these organizations simultaneously in June. As I evaluate the impact of these changes, I find myself reflecting on this year's WASBO President's Theme, Great Leaders in Critical Moments.

My school district will experience the retirement of both its superintendent and director of instruction. And of course, WASBO will experience the retirement of its executive director. Certainly both my school district and WASBO are currently navigating through critical moments for their organization's leadership with these changes. I did not necessarily envision this exact scenario when I selected this year's theme. Nonetheless, I am confident in both organizations' ability to navigate successfully through these critical moments thanks to the work of both boards in strategic planning and succession planning.

It has been interesting to experience the three important selection processes to find new leaders take place at close to the same time in these two organizations. These processes are real-life experiences that have greatly reinforced previous leadership development I've received from both WASBO and ASBO. This development has helped me to better un-

derstand various traits common in successful leaders as we seek out new leaders.

It is important to select organizational leaders with these traits so they will be able to successfully develop and implement goals in line with the fulfilling the vision set forth by the organization's vision. It will be important to find leaders that will fit in with the organization's culture and know how to lead the employees and volunteers through successfully accomplishing goals.

I find the three gentlemen retiring to be outstanding leaders. Before they go, I need to really reflect on their leadership traits as there is so much that I can take in to improve myself professionally. Here is just a small sampling of things I admire in each of these three.

My district's retiring superintendent, Dr. Fran Finco, seems to value culture above all else in the organization. A positive culture makes achieving goals and working together so much more possible. A negative culture can be full of traps that get in the way of coming together and accomplishing what we need to do to improve. We all see how he values culture as he purposely, yet subtly monitors culture throughout the district. Most importantly, he meets with every teacher to be hired to ensure they will generate the desired culture in their classrooms and support the positive

culture of the district.

Roger Fruit is my district's retiring director of instruction. He is so respected by all our staff—and I really mean all of our staff. I believe one of the reasons for this is his listening skills. Certainly, he fits in well with growing the culture Dr. Finco tries to have throughout the district. His listening adds a great deal to his success as director. No matter how out there an idea or a question might seem, Roger always responds with courtesy. Whatever the circumstance, Roger is always calm. When he makes a decision, people listen intently and respect it.

Finally, our association's executive director, Woody Wiedenhoft, has really helped our board to develop and enhance their strategic planning over the years I have been part of the board. It is very clear he values being as strategic as possible, yet he has never pushed the board to make some of the changes it has in its governance over the last several years. WASBO has seen significant growth in membership and offerings under his tenure. Woody has been able to develop and achieve goals for our organization.

Thank you Fran, Roger, and Woody.

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Woody Wiedenhoft
Executive Director, WASBO

Are These WASBO Offerings on Your "To-Do" List?

There are several important actions to have on one's "to do" list coming up that probably aren't on everybody's radar right now. Here are some things to think about or participate in during Spring 2019:

1. Vote for the candidates of your choice for the WASBO Board. The WASBO Board thinks and acts strategically with a vision in mind as they lead for future years. Their strategic plan will be useful for years – not a few one-year goals. Your vote will have an impact for the next several years. You can view the candidate résumés on pages 23-25.

2. If you are looking to learn strategic tools of leadership that will help you and your colleagues in leading groups of people, assist individuals and even yourself personally and professionally in making long term and short term important and influential decisions, sign up for the Wally Zastrow Leadership Academy! See page 22 to read Tim Erickson's article.

3. Sign up for the Spring Conference. Our WASBO Spring Conference committee has developed over 60 sessions for our professional development and additional sessions involving professional networking. I hope to see all of you in Green Bay May 16-17.

4. The State Budget process and politics will look different this year, for no other reason that we have not had mi-

xed government for eight years. Both parties are not sure how to go about this process and we will have to help them with some patience but also information about how the budget will be affecting Wisconsin children. John Forester will be keeping everyone apprised and up to date through his blog page. He will be sending out information on a regular basis and will also be sending out alerts when needed. Please read and act on the materials John sends out.

5. Think and act on the idea of participating in WASBO. The WASBO organization has demonstrated for years that WASBO members serving WASBO members serves children and school districts. There are numerous ways to volunteer.

It might be premature to reflect on the leadership behaviors WASBO members and WASBO staff have demonstrated since September 2006. But reflecting is what I am doing as WASBO is now getting ready to welcome a new Executive Director. Change, continuous improvement, professionalism and leadership are hallmark behaviors demonstrated by WASBO members. WASBO members are the work horses of the organization. WASBO members ask profound questions of themselves and their colleagues, striving to improve upon the past activities. They stretch themselves to see how others do the same work, looking for improvements without needing to recreate the "wheel". It is easy to find a WASBO committee to improve upon the old processes. "Good enough" sometimes needs to be used in order to meet severe time constraints, but rarely do I

see WASBO members caught in such a trap.

WASBO members are disciplined. They habitually use good organizational tools, not only with their knowledge and skills, but also with their time. WASBO members play "nice in the sandbox." In other words, they practice using consensus processes which value inclusiveness of stakeholders. There is no slap of exclusivity practiced by any WASBO member. Sometimes consensus is messy, but the decisions are always made professionally and respectfully. The WASBO members believe they are all individually responsible for meeting our vision. WASBO members always believe the process of inclusivity always provides a better answer than individual work. A superintendent from my past clearly stated "that what we do is always important. But how we do our work creates the group culture." Culture is always most important because it is the most sustainable leadership characteristic we have. The last 12.5 years have been the best in my career because of the WASBO culture.

Finally, the WASBO staff understands this principle and acts accordingly. Jeanne, Tina, Kristin, Kaitlyn and Clare are the best staff I have ever worked with in my career. But I have one more newsletter article. I will save the wonder of the WASBO staff for that next article which will let me have more room for details.



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David Hoh
Custodial Supervisor, Oshkosh
WASBO Director

Have you ever had someone ask you about WASBO and what makes this organization unique? Have you ever had someone ask you why you go to WASBO conferences? Well, let me try and give you my answer as to “Why WASBO?” The first thing you must know is that the staff and Executive Director are the most organized group I have ever belonged to. They have their vision and mission statements at the forefront of what they do and how they do it. This organization helps several different groups of school business employees including Business Managers and the Directors of Buildings and Grounds.

I can only attest to my experience on the buildings and grounds aspect as this is what I have been involved in for the past 11 plus years. My involvement with WASBO all began with being asked to attend a Custodial & Maintenance Conference to learn a little about HVAC. When I arrived, I did not know anyone and was welcomed with open arms from the WASBO staff. They asked if I had any questions and if I needed anything to just ask them. I learned a lot of info that day and never looked back. I was fortunate enough to have a district that let me get involved with the Facilities Manager Core Certification program and started to attend more professional development to earn this certification. The next thing I knew I was asked if I would like to join the Facilities Conference Planning Committee. The rest is history.

Why WASBO?

“I would not be as successful in my job if it wasn't for the assistance that I have received from being a WASBO member, attending professional development offerings and the assistance of WASBO members.”

- Robert Smith, Tomorrow River

“I believe my school district and I have received 10-fold back from the time that I have invested into WASBO the past 20 years. The access to information from the DPI and other State agencies, expertise provided to me by my peers, and an extensive list of Service Affiliates to help our districts needs are just a handful of ways that WASBO membership has provided direct benefit.”

- Pat Finnemore, Kenosha

“Building relationships with other professionals either experiencing the same items or sharing information with professionals who will deal with these items in the future.”

- John Stangler, Pewaukee

Attending these professional development opportunities is a great way to grow personnel in our field and I am a prime example. I started out as a custodian and worked my way up the ranks with the education I received from going to WASBO conferences and the relationships I have developed along the way. I have a military background, the experience and have built the relationships to take on any challenge that comes to our district. The great thing about building relationships with fellow members and affiliates is that it is not only a benefit for me, but also for my district. Can you imagine the amount of knowledge that is at the fingertips of our members and the amount of money that can be saved?!

As I look at the changes that the education field continues to go through, it is getting more difficult to find people willing to enter the industry, let alone the facilities management field for school districts. Given this challenge, WASBO will become even more pertinent to helping educate and create opportunities for those who may not have a college degree to fill the voids that are being created from retirements and industry transfers. This means that we need to start to grow the personnel with potential and drive up through the ranks and position them to succeed at the next level. I also believe that this would be beneficial for the district as the experience this individual has received working from the bottom up would give this person knowledge of the jobs they would be supervising. Growth from within combined with WASBO involvement will keep employees up-to-date on current issues and trends and an even greater opportunity to succeed in their career. With all of this, I hope with the help of my colleagues' who have provided quotes that we have answered the question of...”WHY WASBO?”

Finding the Right Balance

Over the past 12 years as a K-12 Public School Administrator in Wisconsin, I've found that one of the greatest challenges that successful administrators have is finding the right balance between providing leadership at work in your district and being present, engaged, and supportive of your family. I'm sure the search for balance is something that a majority of WASBO members have experienced themselves as we try to give 110% to everything we do.

This past summer, my wife and I prepared to welcome a second child into our family. As part of the preparation, I carefully considered what amount of time on leave (FMLA) would be appropriate to take to support my family. I wanted to ensure my colleagues and our School District would be well positioned to begin the school year and successfully pass a Fall referendum. Here are some of the factors that I considered:

#1 “This time will be different” Those of you that are parents, especially those that have two or more children know that going from one to two at home is a big change. Gone are the days where we can nap when the baby naps and being mindful of the changing world for your older son/daughter is especially important.

#2 “What do other employees of the District feel is appropriate?” I think of the factors that I considered, this was potentially the toughest and hardest to quantify. As an employer, I want our staff to feel empowered to take the leave granted to them by state/federal law (as well as the employee handbook) and not feel pressure to choose between work and family. At the same time, I realize a senior leadership role in a school district or organization comes with some sacrifice and that involves not being able to do some of the things that others who

aren't in leadership might be able to do.

#3 “What amount of time in/out of the office will allow me to be the most effective at work and most present at home” When our older daughter was born, she spent the first week in the NICU which allowed Laura and I to adjust (and get sleep!) This time, we had a healthy delivery, but had responsibilities immediately with our new daughter and also with our three year old at home which would make it especially important to prioritize at work.

#4 “My spouse and my children come first, but am I putting myself in a position (mentally and physically) to be successful?” We each need to understand our limits. Doing too much significantly reduces that quality of what we are doing and sometimes creates bigger challenges or illness later on.

#5 As the employer, whom can I engage at work in the District to provide more leadership, and whom at home (parents/friends/family) can I ask for help?” We can each do more (and better) together, especially if we're honest about what we can realistically accomplish? Giving colleagues in public education an opportunity to step up can be very fulfilling for them and also help build capacity for organizational/family strength for the future.

#6 “What do I need to give up?” My parents would often joke that they “missed the 1980s” as my siblings and I were very young. Missing out on opportunities at work, in your community and/or church, and with friends can be disappointing, but those opportunities will come along again.

I'm blessed with a strong leadership team in Hartford and with a great support team at our District Office. Though there have been challenging



John Stellmacher
Chief Financial and Operations Officer
Hartford Jt #1; WASBO Director

moments, I feel that I've have been able to find a good balance the past 12 weeks in giving our daughter the start in life she deserves, while also ensuring that my absence didn't become a burden to others in the office. We talk every day about having high expectations for students and then doing our best to support them achieve/exceed those expectations. Sometimes we forget to offer our colleagues the opportunity to do the same. Most of the time, those people we work with the closest can meet/exceed those expectations and develop new leadership potential and having a true team mentality will make future challenges easier to tackle collaboratively.

Though taking a significant stretch of uninterrupted leave time is challenging, being a school business official provides great economic opportunities, benefits, and schedule flexibility that not every parent is fortunate to have. Ultimately, I've found that working “partial weeks” was the right solution for me to feel connected at home (and disconnected from work), while providing the extra support for my spouse and children. It has allowed me to be successful in getting the crucial work done for the District while avoiding the situations where I felt I would have to “choose” between work and family. When the time comes, make sure to [find the right balance](#) that works for you and remember that taking care of your own health and family will make your position more fulfilling and will make you more effective in your position.



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

Continuous Improvement: Finding the Zero in the Corner of the Page

When I transitioned from my first job as a business manager at Hustisford School District to the DeForest School District, I had a couple weeks to work with my replacement, Tim Stellmacher. Tim was new to school business management but had worked in the private sector for many years and was a teacher before that. Although I was technically helping him transition into this new role, I think I probably learned more from him than he did from me.

Tim worked for a manufacturing company for many years primarily out of the Sheboygan Wisconsin area but also internationally. To improve their manufacturing process and their profitability, Tim's company introduced an initiative called "The Toyota Way". The Toyota Way is widely known as Lean Enterprise. The Toyota Way had two key principles: Continuous Improvement and Respect for People. As Toyota developed its "Continuous Improvement" approach, they created a culture where they would consistently evaluate the efficiency of their processes. Tim shared two stories with me from his time at Toyota that forever changed the way I think about developing efficient processes.

The Zero In the Corner

A process improvement consultant working for a London, England manufacturing company noticed that almost every sheet of paper in the company's offices had a zero in the upper right hand corner. Puzzled by what the zero was there for, the con-

sultant decided to dig into it further. He first approached the staff responsible for creating many of these documents and when asked about the zero, the consultant found that no one on the team could tell him why it was there. Their response was essentially, "We don't know what it means, but it has always been done like that, so we continue to do it." As the consultant dug a little deeper, he found some of the most experienced people in the company and asked them if they knew what the zero in the corner meant, and the discovery was almost unbelievable. Apparently, back in World War II, air raid sirens were daily occurrences in London. In order to document the number of air raids per day and the effects of the raids on production, the staff would handwrite a number in the upper right hand corner of the daily report for the company. Toward the end of the war, there weren't any air raids, so the number written was always zero. Incredibly, this practice of writing zero on the report continued several decades after the war had ended. In fact, it became so ingrained in their process that people would train the person after them to put a zero in the corner of the page just because "that was the way it was always done."

70 Business Office Reports Every Month to Zero

Likewise, as "Continuous Improvement" became more and more a part of the culture at Tim's company in Sheboygan, one of the the staff noticed that the number of reports produced by the business office seemed high. To their astonishment,

the team counted that they produced 70 reports every month. As an experiment, their manager encouraged them to not create or send out any reports the following month. (The manager wanted to see how much time they could save and who would notice the reports were not being sent out). Incredibly, not one person said something! The business office team did not do a single recurring report from that day forward.

Moral of these stories, look for your "zeros." Many times there are things being done in a process because they have always been done that way. As you reevaluate a process, walk through each step and ask yourself and/or your team one main question: "What can we eliminate?" Then follow up with, "If we stopped doing this, would anyone even notice?" I've used this approach so many times in life and business. In fact, we typically start by sharing the "zero in the corner" story anytime we have a meeting to discuss a process.



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Julie Kelly
Assistant Superintendent for Business and
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WASBO Director

Redefining Wellbeing Programs - From the Planning Process to Action to Results

Six years ago, Muskego-Norway began our wellness journey. At the time, our focus was keeping health insurance rates low. Every year we saw double digit increases in our premium rates, which forced us to make plan changes and change health insurance companies on an annual basis. This process was not only a drain on our system, but it created instability for our employees. We needed to look for innovative ways to address health insurance costs and increase the overall wellbeing of our employees.

We needed experts that could look holistically at the insurance industry and bring forward new ideas that could bring drastic change to our system. In order to make a real impact on our system we had to shift the focus from how to manage health insurance costs to what systemic changes we could make to help increase employee engagement, purpose, retention, effectiveness and wellbeing.

In order to maintain a focus on this initiative, we knew we needed to find our “why”. Once we understood how important employee wellness was to our system, we needed to align our wellbeing goals and actions to our strategic plan. Two of our district’s core competencies are Highly Effective Personnel and Sound Stewardship of Resources. It was within these two areas that we set small

goals every year to study, develop and deploy solutions that would set us apart from others in order to attract and retain the very best employees.

Once we had our “why”, we had to further define what we wanted our wellness program to be and where we wanted to focus our efforts. We wanted our program to address prevention, assessment and wellbeing in the areas of physical, mental, financial, career and community health in a way that was convenient for our employees. Through research and analysis of internal and external data factors, we determined that opening an on-site clinic would be the launch point for our system into a whole new world of wellbeing opportunities.

Since the inception of our on-site clinic in 2016, we have grown from a clinic that was open 20 hours a week to a 30-hour a week clinic. The clinic is staffed by a physician’s assistant and a medical assistant and can provide about 80% of services that a physician can provide. The partnership we have with our clinic provider has allowed us to expand opportunities for our employees including the following:

- Incentive Program – Employees can earn points for various activities in the areas of assessment, prevention and wellbeing. The points then lead to an end-of-year bonus if the employee successfully completes the program;
- Health Risk Assessments and Bio-

metric Screenings – The screening is offered anytime at the clinic. The clinician also goes to each building once per year to administer screenings making it convenient for employees to access;

- Flu Shots – Flu shots are available at the clinic and free to all employees. The clinician also has a flu shot clinic at each building in the fall for convenience;

- Imaging – This is a direct contract with a local imaging site where we have negotiated low imaging rates, saving a significant amount of money per scan. Our employees on the health insurance pay nothing and can usually get in for their scan within 24-hours. Same-day results are usually provided;

- Pre-Employment Screening and Drug Test – All of our new employees are able to go to our clinic for their pre-employment screening and drug tests. This allowed us to eliminate the cost of having an outside provider perform these services;

- Worker’s Comp – Employees have the option of going to the clinic for an evaluation if they are injured on the job;

- Mental Health Services – We are studying the potential of adding mental health services for our employees through the clinic. Mental health support services and mindfulness are the next phase of opportunities that we are looking to make available outside of our employee assistance program.

Outside of the clinic, we have grown

our program to provide additional opportunities for staff, including:

- Mobile Mammography – A mobile mammography bus is on-site three times per year. The mammograms are done and read while the employee is at the appointment. Employees leave knowing whether or not they need to set up follow-up appointments with their doctor.

- Financial and Retirement Planning - Onsite one-on-one financial planning and retirement planning sessions are offered to employees. We have found that large seminars after work do not have high attendance and are not as valuable to employees as the one-on-one sessions;

- Onsite Fitness Programs - Employee-led onsite fitness programs are available to all employees before and after school include weight training, boot camps, Zumba, yoga and Insanity classes;

- Fitness Areas - The addition of small fitness areas into buildings for staff to utilize;

- Walking Meetings - These are common on professional development days;

- Monthly Health Bulletins - Our staff newsletter contains monthly health bulletins around various wellbeing topics;

- Physical Therapy Services - We direct contract with a physical therapy company that has numerous locations for staff to access. We do not run the costs through the insurance plan, but rather pay direct. The negotiated rate is so much less than other local rates that the district pays 100% of the cost for employees and dependents on the health insurance plan;

- Peer-to-Peer Recognition – Employees are asked if they want to recognize any of their peers across the system. Building or department leaders forward the recognitions through an email, a hand-written note, a phone call or in person.

Wellbeing is and continues to be a focus in our organization. Through the PDSA (Plan Do Study Act) cycle, goals and action plans are established annually and data is collected and evaluated to determine the effectiveness of the programs we offer. The

data also provides us with information on what programs we may want to focus on depending on high-risk areas for our employees. A few examples of the types of data we have chosen to collect and analyze are:

- Participation programs offered through the clinic;
- Clinic data including usage, top prescribed medications and reduced health risks;
- Health insurance data;
- Employee absenteeism;
- Substitute costs;
- Employee retention;
- Employee engagement (district surveys);
- Employee testimonials.

Our program took years to build and we continuously look to improve by bringing in new and innovative ideas that can support the overall wellbeing of our employees and provide stability for health insurance costs within our budget.

Whether you are looking to start a new program, or grow your current program, here are a few steps you can take:

1. Develop your why. Having a strong purpose behind the program shows employees that it is not just about the bottom line. The fiscal impact is extremely important, but the financial results happen organically when employees realize the importance of their own wellbeing;
2. Determine what you want out of your wellness program;
3. Determine what data points you want to measure;
4. Set your action plan. Develop goals and actions as part of your short- and long-range plans across all parts of the organization;
5. Start slow. Add and communicate opportunities for staff and give them a chance to get acclimated to them. Adding too much can be overwhelming and you may not get employee buy-in;
6. Get your leadership team involved. The best way to fully integrate any wellness program is to get your

leadership team to participate in the opportunities available and incorporate the opportunities into the everyday building activities;

7. Talk to your health insurance consultant about new innovative ideas they may have for wellness programs. If you do not have a health insurance consultant, you may want to consider finding one to support your efforts;

8. Review and communicate the results of your program;

9. Determine financial impact and adjustments that may need to be made to align with the budget;

10. Celebrate success.

If you would like to learn more about Muskego-Norway's wellness journey, feel free to contact Julie at julie.kelly@muskegonorway.org.

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Today's Cyber Liability Landscape

Contributor | Derek Lacznik

2 018 picked up where 2017 left off in terms of data breaches. Despite the number of reported data breaches decreasing (1,232 from 1,597), the number of overall records exposed increased 133% in 2018.

nals aim to monetize data breaches by taking over computing power in order to mine valuable cryptocurrency like bitcoins. New IT detection tools will be necessary to monitor decreases in computing performance across multiple devices and platforms.

under ongoing consideration to tackle gray areas like terrorism and physical hardware loss.

6. The cyber liability market remains competitive with capacity increasing in excess of \$600M. Renewal pricing is stable (between -5% and +3%) with an added underwriting emphasis on IT security controls and incident response. Low hazard industries (i.e., construction, manufacturing, etc.) are experiencing a very competitive market with below average pricing.

7. Insurers and security professionals place ongoing emphasis on the need to create and maintain an IRP plan. An active Incident Response Plan (IRP) can reduce cyber losses by up to 20%, but 77% of organizations indicate that they do not have one in place. Timely incident response is critical in data breach remediation.

For more information, contact Derek Lacznik at derek.lacznik@m3ins.com

2018 Facts & Figures:

Average cost of a data breach **\$3.86M**

197 days Average time to identify a breach

Average increase in cost of cyber crime in 2018



\$4B Current cost of Equifax data breach

7 out of 10 organizations say their risk increased



Three largest data breaches of 2018:

- > Marriot International - \$500M
- > Exactis - \$340 M
- > Under Armour - \$150M

3. Malware threats evolve as cyber criminals exploit vulnerabilities across various software platforms. As organizations diversify the software they use to conduct business, their vulnerability to malware increases. Malware puts steadily swelling pressure on the budgets and staffing of internal and external IT security teams.

4. Increased regulatory scrutiny surrounding data breaches continues throughout 2019. The Office of Civil Rights (predominately under HIPAA Law) and the Federal Trade Commission are demonstrating federal authority in their respective divisions. Meanwhile, states are

taking up the task of rewriting data breach laws to be more in line with the European Union General Data Protection Regulation (GDPR) and 2020 California Consumer Privacy Act (CCPA) legislation. Better armed with authority granted by their state laws, state attorney generals will be diligent in investigations and in exercising fines.

5. The cyber liability market is responding to discord on whether a breach should be covered as peril or through a standalone insurance policy. Modifications to policy forms are

What to Watch for in 2019:

1. Ransomware continues to be the leading cause of data breaches in 2019. This year will see an estimated \$11.5B in ransomware costs alone. However, the average cost of each attack is projected to decrease as criminals target volume in lieu of larger dollar amounts. Regulators and data breach professionals continue to struggle with determining if information encrypted in a ransomware attack constitutes an actual breach.

2. Cryptojacking is emerging as one of the top cyber threats of 2019. Crimi-

Court of Appeals Issues Decision Upholding Paid Administrative Leave of School Business Manager

Contributor | Jenna E. Rousseau

Facts

The Business Manager was hired by the District in February 2007. The term of his most recent contract was July 1, 2008 to June 30, 2010. On February 9, 2009, the District Administrator placed the Business Manager on paid administrative leave pending an investigation into “financial irregularities.” The District Administrator informed the president of the local education association about the Business Manager’s paid administrative leave as labor negotiations were in process and the Business Manager was on the District’s bargaining team. The president of the local education association informed eleven (11) members of the association. An auditing firm conducted the investigation and found irregularities.

The Business Manager requested to return to work but the District Administrator continued his paid administrative leave. The Business Manager and District entered into a Memorandum of Understanding under which the District would provide letters of reference. In July 2009, the Business Manager filed a notice of claim with the District seeking damages and reinstatement. On November 3, 2009, the District provided notice that it was considering non-renewal. Approximately a week later, the District denied the Business Manager’s notice of claim.

The District Administrator intended to recommend that the Board non-renew the Business Manager’s contract. However, the District cancelled the non-renewal hearing when the Business Manager submitted his resignation effective July 1, 2010. The Business Manager had signed a contract of employment with a new school district in Illinois. However, the Illinois school district later rescinded its offer after the local news media published articles related to the Business Manager’s administrative leave. The District Administrator then issued a public statement summarizing what occurred.

The Business Manager subsequently filed suit against the District Admin-

istrator, District, and Board alleging contract-based claims and due process violations. Because one of the claims fell under federal law, the District Administrator brought the case before the federal court.

Federal Law Claim

The only federal claim in the case involved an alleged deprivation of a liberty interest without due process (a property interest was not alleged). Towle v. Bd. of Educ. Sch. Dist. of Brown Deer, 2016 WL 547842. The Business Manager was required to show that (1) he was stigmatized by the District’s actions; (2) the stigmatizing information was publicly disclosed; and (3) he suffered a “tangible loss of other employment opportunities as a result of the public disclosure.”

The court found that the e-mail notification to the local education association members was not a public disclosure. Next, the court found that the District Administrator’s general statement to the media regarding the Business Manager’s business management skills was not “sufficiently stigmatizing to give rise to a liberty interest.” After finding in the District’s favor on this claim, the court sent the remainder of the case back to state court.

State Law Claims

The lower court found in favor of the District. The Business Manager then appealed to the Court of Appeals. As to his breach of contract claim, the Business Manager argued that the District breached his contract by not allowing him to perform his duties and by constructively discharging him. The Court of Appeals found that the contract did not prohibit the District from placing the Business Manager on a paid administrative leave pending an investigation related to his job performance and that this was distinguishable from cases involving a unilateral reassignment of one’s position. Towle v. Kerr, 2019 WL 367035. In addition, the Court found that the Business Manager was not constructively discharged, as there were no facts to suggest that the

District Administrator had engaged in harassing behavior or created an “intolerable” working environment.

With regard to the Business Manager’s other contract-related claims, the Court upheld the lower court’s decision. Specifically, the Court affirmed the lower court’s dismissal of the Business Manager’s claim for tortious interference with contracts because the Business Manager failed to comply with the notice of claim statute and based on governmental immunity. In addition, the Court found that there was no evidence to support a violation of the duty of good faith and fair dealing as none of the District Administrator’s actions deprived the Business Manager of any rights under the contract.

Furthermore, the Court found that there was no violation of due process under the Wisconsin Constitution. Specifically, the Business Manager failed to show that he was entitled to perform his duties while on paid administrative leave during an investigation regarding his job performance. Therefore, there was no due process violation of a protected property interest. In addition, with regard to a liberty interest, the Court reasoned that the federal court’s judgment precluded the Business Manager’s state claim which was based on the same facts. Therefore, there was no due process violation of a protected liberty interest.

Conclusion

These decisions support the conclusion that school districts may place administrators/employees on non-disciplinary paid administrative leave pending job-related investigations. School districts often use paid administrative leave to protect the integrity of investigations. Importantly, these decisions did not address unpaid leave, which would involve a different analysis.

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

The Wisconsin Court of Appeals recently issued a noteworthy decision in a case involving a Business Manager who was placed on paid administrative leave pending an investigation related to his job performance. Specifically, in Towle v. Kerr, No. 2017AP2528, 2019 WL 367035 (Wis. Ct. App. Jan. 29, 2019), the Business Manager filed suit in state court against the District Administrator, School District, and Board of Education, alleging contract claims, as well as due process claims under state and federal law. The federal claim was addressed separately by the federal court in Towle v. Bd. of Educ. Sch. Dist. of Brown Deer, No. 11-CV-542-JPS, 2016 WL 5478421 (E.D. Wis. Sept. 29, 2016). Both the state court and federal court found in favor of the District. Specifically, the District did not breach its contract with the Business Manager by placing him on paid administrative leave pending an investigation, and there were no violations of due process. Although the decisions of both courts are unpublished, they will likely serve as persuasive value in similar cases.

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2019 Forward Together Award: WI School Districts with Passion & Pride

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At WEA Trust, we recognize that Wisconsin is filled with teachers who have passionate ideas for their schools and classrooms. We also understand that sometimes the best ideas go unnoticed or teachers and districts face budget constraints. These are just some of the reasons why WEA Trust started the annual Forward Together Award.

In 2013, we launched the Forward Together Award to not only help teachers but to recognize and reward innovation in Wisconsin's schools. Over the past five years, WEA Trust has granted more than \$55,000 to support school and municipal projects.

This January, the Forward Together Award selected three educators to win a \$3,000 grant each to fund their innovative, school project ideas. We received over 100 project proposals, which were reviewed by a panel of judges made up of education experts from UW-Madison, the State Superintendent's office and previous Forward Together Award winners.

This year's winners included: **Kira Morrissey** and **Megan Lassa** from the School District of Iola-Scandinavia, **Tracy Bartels** of Chilton Public Schools and **Mary Thompson** of

Neenah Joint School District.

Greenhouse Restoration, School District of Iola-Scandinavia

Kira Morrissey and Megan Lassa will use the Forward Together award to fund the restoration of their school greenhouse. Once functional, the greenhouse will be integrated into multiple areas—from a worm farm to growing fruits, vegetables, herbs and flowers.

"We believe that a school greenhouse has many benefits," wrote Morrissey and Lassa in their proposal. "This passion project grant would allow us to make it a functional learning space."

They expanded, "Finally, it's just plain fun. Nothing like finding yourself covered in dirt, laughing, learning and eventually munching on the fruits of your labor!"

The Trout in the Classroom Aquaponics Project, Chilton Public Schools

Tracy Bartels proposed the "Trout in the Classroom Aquaponics project" to take their current Trout in the Classroom (TIC) program to the next level by assisting with the purchasing of a scientifically engineered aquaponics system. Aquaponics combines aquaculture, the raising of fish and hydroponics—growing plants without soil—in one integrated system.

"The mission of the TIC has been to successfully raise the brown trout, so the plants haven't been an emphasis on our program," wrote Bartels. "With this project, students will actively participate in the planting, monitoring and harvesting of the vegetables." All Chilton High School sophomores in Biology will benefit from the TIC program.

Summer Backpack Program, Neenah Joint School District

The 2019 grant will help fund Mary Thompson's summer backpack program at Lakeview Elementary. Funds will be used to purchase additional books, graphic novels, books based on student choice and replacement backpacks.

"I'm setting up these at-risk students to be able to experience a high volume of success in their reading during the summer months," wrote Thompson. "My drive to help each student experience this type of success outside of the school setting not only impacts them in a positive way, but my school as well. It's work that I'm proud and passionate about." Thompson first launched her backpack program in the summer of 2015.



**Congratulations
to this year's
winners!**



Seventh Circuit Upholds Wisconsin's

Open Enrollment

LAW

Contributor | M. Tess O'Brien-Heinzen

On January 22, 2019, the Seventh Circuit Court of Appeals ruled that Wisconsin's Open Enrollment law does not violate the Americans with Disabilities Act or Section 504 of the Rehabilitation Act ("federal discrimination law"). In *P.F. v. Carolyn Stanford Taylor*, three students with disabilities were denied open enrollment on the basis that the nonresident districts did not have the capacity to provide the services required by the students' individualized education programs ("IEPs"). The students, by their parents, filed suit against the State Superintendent of Public Instruction, the Wisconsin Department of Public Instruction, and the three school districts that rejected their applications, claiming that the open enrollment program discriminated on the basis of disability in violation of federal discrimination law and arguing that the defendants were liable for their role in administering it. The lower court determined the program did not violate the law and ruled in favor of the defendants.

The Court of Appeals affirmed. In doing so, the court reiterated that federal discrimination law forbids discrimination based on stereotypes about a disability, but does not forbid decisions based on actual attributes of a disability. Under the open enrollment law, a district must consider the needs of an open enrollment applicant in light of the district's capacity and resources. For students with disabilities, this requires a district to consider

the services required by the student's IEP. The district may deny open enrollment if it does not have the capacity to meet the student's needs. The court found this process is consistent with federal disability law. Under the law, to be a "qualified individual with a disability," a student must meet the "essential eligibility requirements." If a district lacks capacity to meet the needs of a student with a disability, the court concluded that the student does not meet the program's essential requirements. Further, the court held that requiring a district to modify the program's requirements for the student would require the district to fundamentally alter the open enrollment program, an action not required by law.

What To Do

The open enrollment application period opened on February 4, 2019, and districts may continue to apply the law as in previous years. However, even if a district determined at the January meeting that it did not have space in its special education programs, it should

review the application of each student with a disability to determine whether it has a program to meet the student's needs. While the law still allows a district to deny an application from a student with a disability, it must first make an individual determination for each student that it lacks space in special education or a program required by the student's IEP.

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Wisconsin Federal Funding Conference

Even Mother Nature could not stop over 500 school personnel from attending this year's WI Federal Funding Conference, February 25-26 at the Kalahari, WI Dells. Over 25 concurrent sessions were held to cover the nuts and bolts of compliance, monitoring and management of federal funds.

New topic areas this year included:

- Written Procedures and DPI's Risk Assessment
- ESSA's Maintenance of Effort Requirements and Title I Comparability Reporting
- Planning for Fund 27 Under the IDEA MOE Requirement
- ESSA School Level Reporting: What's Happening, What's Next and Why You Should Care
- Indirect Costs Recovery and Federal Funds

In addition to providing introductory sessions on Federal Funding for staff new to federal grants management, this year's conference focused on the importance of the local education agency's compliance with the Federal Uniform Grant Guidance, how student level data impacts Federal funding, and the implementation of ESSA along with the school level expenditure reporting requirements under ESSA.

Next year's conference will take place March 4-5, 2020, at the Kalahari.

We Thank Our Conference Sponsors:

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The Wally Zastrow Leadership Academy: Wanna Know More?

Contributor | Tim Erickson

I don't normally volunteer to write additional newsletter articles, but after reflecting on my experience in the Wally Zastrow Leadership Academy (Academy), I really felt compelled to let members know about this great program and how it will accelerate growth in your leadership skills. I hope the following information will entice you into registering for the Academy. If it does not move you to register, but you still would like to know more, I can be reached at 715.377.3704 or via email at erickstj@hudsonraiders.org. The WASBO office is also available to answer questions and will connect you with one of my classmates. The next Academy begins on July 29 and registration information is available at wasbo.com/leadership.

My experience in the Academy is best described as the deepest dive into leadership I have ever experienced. The Academy is by no means a "sit and get." You will be challenged, you will participate with your classmates, you will grow as a leader and you will bring true value back to your district.

My colleagues in the Academy range from those who are fairly new to the profession to those who have many years of experience and we have become professionally close in a very short period of time. Trust in our group began with the first session, purposefully designed by our co-facilitators, and has continued to

grow from there. When we can share openly and honestly, it creates an atmosphere that fosters our individual growth. As well as learning and interacting with our co-facilitators, my classmates and I also learned a great deal from each other and accepted great feedback related to our own situations and challenges.

Over the past few months, we've



delve into our emotional intelligence to learn more about our personality traits and how to effectively interact with others that have traits different than ours. We used cognitive fitness to help us grow as leaders and have taken failure and learned how to use it as an experience that strengthens our leadership. We learned how to develop high performing teams and we've practiced through role playing and

effective communication. We honed our skills to become more innovative in our thinking and we used habit-forming techniques to develop new leadership habits. We learned how to ask more provocative questions to get more out of communicating with others. This is just a short list of activities. My colleagues and I took all of these subjects and applied them in our own district.

If you plan to attend the spring conference this year, you will get to see some of the projects my colleagues planned and implemented in their districts. We also plan to share our experiences and answer questions about the Academy along with our co-facilitators Buck and Brett.

Our co-facilitators, Buck Rhyme and Brett Remington, bring a dynamic to their program that I have not experienced before. You have to take the program to truly appreciate their skills at leading and engaging us throughout the Academy.

My final thought on the Academy is this: leadership abilities are not something one is born with, but rather acquired through learning and experiences, both of which the Academy delivers on.

My thanks goes out to our WASBO Past President, Jason Demerath and the group he led for taking membership feedback and creating this outstanding opportunity for members.

Candidate Résumés for WASBO President-Elect



John Stellmacher
Chief Financial and Operations Officer
School District of Hartford Jt1
President-Elect Candidate
(Will move through the office as President Three-year term)



Dale Zabel
Director of Facility Services and Safety
School District of Kettle Moraine
President-Elect Candidate
(Will move through the office as President Three-year term)

Work Experience			Work Experience		
2011-Present	SD of Hartford Jt1	Chief Financial and Operations Officer	2008-Present	SD of Kettle Moraine	Director of Facility Services and Safety
2010-2011	Waupun Area SD	Director of Business Services	1994-2008	Watertown Unified SD	Supervisor of Buildings and Grounds
2007-2010	Barron Area SD	Business Manager	1982-1994	Pine Creek Equipment Inc.	Owner, Operator of repair shop
Educational Experience			Educational Experience		
2005-2016	UW-Whitewater	Masters in School Business Management (MSE)	2011-2012	WASBO	Certified School Risk Manager (CSRM)
2002-2015	UW-Whitewater	BBA in Finance - Actuarial Science	2006	WASBO	Facilities Manager Certification
2002	UW-Washington County		2010-2012	WSSCA	School Safety Coordinator Program
2000-2001	UW-Green Bay		1981-1983	AMI Florida	Certified Mechanics Course
Professional Activities			Professional Activities		
WASBO: Member since 2005; Board of Directors 2016-Present; Joint Convention Committee member since 2008, Co-Chair 2012-Present; School Finance Puzzle Committee & DPI Fiscal Transparency Workgroup Member; WASBO Mentorship Program Mentor			WASBO: Board of Directors; Facilities Committee Co-Chair; Midwest Facilities Masters Conference Committee Co-Chair; Student Scholarship Committee		
School Administrators Alliance: Member since 2008; WASBO Chair 2018-Present					
Community Activities			Community Activities		
Hartford Rotary: Board of Directors Barron Kiwanis: Board of Directors Boys and Girls Club of Barron County: Board of Directors Waukesha County: Spring 2018 Board of Directors Candidate Concordia University of Wisconsin: Adjunct Instructor in School Finance and Administration Courses			Watertown Optimists Club: Committee for Fitness Training Center at Watertown High School Pullers Incorporated: Senior Tech Officer and Inspector Share the Field Committee: Member to develop athletic fields at Kettle Moraine Schools		
Interests & Hobbies			Interests & Hobbies		
2012 Wisconsin Ironman Finisher, My Team Triumph (MTT) Triathlon Team, St. Dominic and St. Charles Catholic Parishes, Dad to Catherine and Vera			Motorcycling, traveling, camping, four wheeling, snowmobiling, raising my kids, eating at Mom and Pop diners.		

Candidate Résumés for WASBO Board of Directors



Demetri Andrews
School Business Manager
North Crawford School District
Director Candidate
(Three-year term)

Audra Brooks
Financial Management &
Bookkeeping
Colby School District
Director Candidate
(Three-year term)



Holly Burr
Business Manager
Clintonville Public School District
Director Candidate
(Three-year term)

Marta Kwiatkowski
Director of Business Services and
Human Resources
School District of Rhinelander
Director Candidate
(Three-year term)



Work Experience			Work Experience		
2014-Present	North Crawford SD	School Business Manager	2012-Present	Colby SD	Financial Management & Bookkeeping
2011-2014	Mount Horeb Area SD	Business & Information Technology Teacher	2006-2012	Marathon County Special Education	Medicaid Specialist, Secretary
2008-2011	Belmont Community Schools	Business & Information Technology Teacher	1995-1999	Liberty Mutual	Underwriter
			1993-1995	Wausau Insurance Company	Credit Services
Educational Experience			Educational Experience		
2012-2014	UW-Whitewater	Masters of Science in Education-School Business Administration	2019	ASBO International	Certified Administrator of School Finance and Operations (SFO) designation
2004-2008	UW-Whitewater	Bachelor of Science in Education-Business Education	2012-2013	Northcentral Technical College	Accounting Certificate
			1991-1993	Northcentral Technical College	Business Management
Professional Activities			Professional Activities		
WASBO: 2019 George Gray WASBO New School Business Manager of the Year Award Recipient; Southwest Regional Chair; WASBO Mentorship Program Mentor			WASBO: Member		
ASBO: 2018 Emerging School Business Leader Scholarship Recipient					
Community Activities			Community Activities		
Crawford County Fair: Volunteer			Parish Council of Catholic Women: Treasurer		
North Crawford Community Education Foundation: Fiscal Agent			Central WI Volleyball Club: Volleyball Coach		
			St. Anthony's Catholic Church: Instrumentalist		
Interests & Hobbies			Interests & Hobbies		
Spending time with family, traveling, sports, home brewing.			Volleyball, snowshoeing, boating, spending time with family, biking.		

Work Experience			Work Experience		
2018-Present	Clintonville Public SD	Business Manager	2006-Present	SD of Rhinelander	Director of Business Services and Human Resources
2007-2018	Gresham SD	Director of Finance and Operations	1999-2006	Virnig & Associates, LLC	Director of Auditing
1999-2007	College of Menominee Nation	Vice President of Finance and Operations			
1997-1999	Independent Media Group, Inc.	Controller			
1992-1997	Kerber, Rose & Associates, S.C.	Accountant			
Educational Experience			Educational Experience		
2015-2017	UW-Milwaukee	Masters of Science in Educational Leadership, Administrative Leadership & Supervision	2004-2006	Marian College	Masters of Arts in Education
1990-1992	UW-Green Bay	Bachelor of Science in Accounting	1999-2002	Caroll College	Bachelors of Science in Accounting
1988-1989	UW-Whitewater	General Studies			
Professional Activities			Professional Activities		
WASBO: Member since 2007 ASBO: Member since 2007 WI CPA: Member 1996-2015			WASBO: Member since 2006; 2019 School Business Manager of the Year Award Recipient ASBO: Member since 2006		
Community Activities			Community Activities		
Our Kids, Our School, Our Community, Our Future: Community committee to promote school bond referendum			Tomahawk Swim Club: Board Member (2014-16)		
Lions Club: Member for 10 years			Hodag Facilities Foundation/Hodag Schools Foundation: Board Member/Finance Committee (2012-Present)		
Interests & Hobbies			Interests & Hobbies		
Camping, horseback riding, reading, crocheting.			Spending time with my family, traveling, swimming and soccer.		

Online Voting April 1-30

You will vote for one President-elect and 2-three year directors. View candidates' written submissions and the online ballot information at wasbo.com

Candidate Résumés for WASBO Board of Directors



Edward Then, Jr.
School Business Manger
School District of Crandon
Director Candidate
(Three-year term)

Work Experience

2015-Present	SD of Crandon	School Business Manager
2015-2015	Nathan Hale High School	High School Math Teacher/ Math Team Advisor
2008-2011	Watertown High School	High School Math Teacher/ Supermileage & Skills USA Advisor

Educational Experience

2013-2016	UW-Whitewater	School Business Management M.S.E.
2009-2010	UW-Madison	Started Education Leadership & Policy Analysis Program
2003-2008	UW- Eau Claire	Math Major/Econ Minor - Secondary Education

Professional Activities

WASBO: Joint Convention Committee member; Volunteer; WASBO Mentorship Program Mentor

Community Activities

Cardinal Grill: No Offices - Sell food during summer to raise scholarship funds

Interests & Hobbies

Two children, motorcycling, bicycling, snowmobiling, downhill skiing, fishing.

Upcoming WASBO Events

Professional Development

Spring Conference **

May 16-17 - KI Convention Center, Green Bay
(Modules 6 & 7)

Custodial & Maintenance Conferences

July 17 - Eisenhower Middle/High School, New Berlin
July 24 - Westby High School, Westby
July 31 - Appleton East High School, Appleton

New School Administrators & Support Staff Conference **

August 7-8 - Holiday Inn Stevens Point

WASBO Fall Conference **

October 3-4 - The Osthoff Resort, Elkhart Lake

ASBO International Annual Meeting **

October 25-28 - National Harbor, Maryland

Midwest Facility Masters Conference **

November 4-5 - Kalahari Resort, WI Dells

SFO Study Group

December 3 - Kalahari Resort, WI Dells

Winter at a Glance

December 3 - Kalahari Resort, WI Dells

WASBO/WASPA School Personnel Academy **

December 4-5 - Kalahari Resort, WI Dells

Scholarship Fundraisers

Spring Golf Fundraiser

May 15 - Thornberry Creek

Spring Bike Fundraiser

May 15 - Fox River Bike Trail

Certified School Risk Managers (CSRM) Courses **

Fundamentals of Risk Management

September 18 - WI School Leadership Center, Madison

Handling School Risks

September 19 - WI School Leadership Center, Madison

Measuring School Risks

October 16 - WI School Leadership Center, Madison

Funding School Risks

October 17 - WI School Leadership Center, Madison

Administering School Risks

November 13 - WI School Leadership Center, Madison

Crisis Prevention

November 14 - WI School Leadership Center, Madison

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Facilities Management and Transportation & Bus Safety Conferences

Over 230 attendees converged at the Kalahari March 7-8 for the Facilities Management Conference and its sold-out exhibit hall. This professional development opportunity offered 27 sessions including those in Modules 1 & 2 of the WASBO Facilities Core Certification program and continuing education programs. Nine attendee scholarships were provided thanks to the generous support of Focus on Energy which enabled facility professionals who would not otherwise be able to participate to attend the conference. This year's recipients were:

- **Chad Donovan**, PM District Lead, Whitnall School District
- **Louise Fischer**, Business Manager, Shawano School District
- **Rod Hutchins**, Facilities Director, Lake Mills Area School District
- **Brandon Johnson**, Building & Grounds Supervisor, Cumberland School District
- **Chris Kapinus**, Building, Grounds & Transportation Director, Wauzeka-Steuben School District
- **Katelyn Mark**, Operations Manager, Woodlands School State Street Campus
- **Bill Peterson**, Facilities Director, Lourdes Academy
- **Justin Rebicek**, Head of Maintenance, Salem School District
- **Dan Van Vuren**, Building & Grounds Supervisor, Kickapoo Area School District

The Transportation & Bus Safety Conference was held concurrently to the Facilities Management Conference on March 7 focusing on issues unique to school transportation responsibilities in 6 sessions for over 40 attendees.

This year's raffle raised a record \$2,783 for the Facilities Management/Joel Konze Memorial Student Scholarship! Thank you to all who participated & donated items!

Next year's conferences will take place February 4-5, 2020, and February 5, 2020, respectively at the Kalahari.

Disciplined Investing as Fed Signals Change

Contributors | Brian Hextell and Mercy Ndungu

Market Volatility is Back

Market volatility spiked in the second half of 2018 as the bond market began pricing in more accommodative monetary policy over the next several years. At the conclusion of its January meeting, the Federal Reserve confirmed market expectations in their statement by eliminating a reference to “further gradual increases” in the fed funds rate. The Fed reiterated that it will remain patient as the committee determines if future adjustments to the federal funds rate may be appropriate to support its dual mandate of maximum employment and price stability. Future rate hikes will be dependent on incoming economic data and financial market developments.

In its January meeting, the Federal Reserve also outlined a more dovish plan for normalizing its balance sheet. The Fed had previously indicated that Quantitative Tightening, or a shrinking of its balance sheet, would run on “autopilot.” The change in tone from the Fed including an anticipated pause in interest rate hikes and slower Quantitative Tightening reflects factors such as policy uncertainty about trade and Brexit, slower global growth, and reduced stimulus in 2019 from the December 2017 U.S. tax cuts.

The result of these market developments is that since the 4th quarter of 2018, the yield curve has flattened and even inverted between 1 and 5 years. Historically, an inverted yield curve has been a signal of economic weakness ahead. Focusing on the 2-year US Treasury as displayed in Chart 1, yields have trended down from near 3.00% to below 2.50% while exhibiting a fair degree of volatility. Market volatility often breeds fear among investors, which could lead to unwarranted investment decisions that impair portfolio performance. Whether interest rates move up or down, investors should strive to understand the impact of changing interest rates and the impact of these changes on their investment strategy.

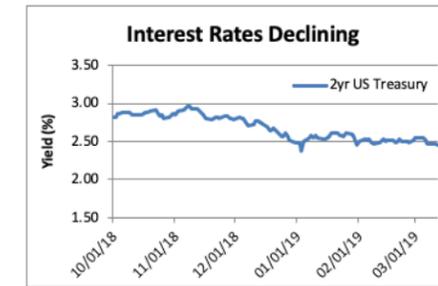


Chart 1

Investing with Purpose

Most public entities have conservative investment policies that require investing in high quality fixed income vehicles. Common investment objectives include capital preservation and providing sufficient liquidity while maximizing income. This is the axiom: **Safety, Liquidity, Yield.**

“How should our municipality’s investment strategy change as the Fed signals a pause in interest rate hikes?”

Investment returns are maximized when executed in alignment with a comprehensive investment strategy.

Safety

Protection of principal is of primary concern to all public entity investors. Public funds investors should implement suitable credit analysis procedures and achieve proper collateralization, when required. For the purpose of this article, it should be emphasized that each investment vehicle carries unique risks that must be thoroughly understood and analyzed. All investments should be aligned with state statute and the public entity’s investment policy and risk tolerance.

Liquidity

Conducting a cash flow analysis is a good starting point when developing an investment strategy. This analysis should map out dates and amounts for items such as payroll, accounts payable, debt schedules and expected revenues. A cash flow analysis helps public entities separate funds into monies that are needed in the current

budget year (operating funds) versus reserves that are available for future needs.

Yield

Executing a successful investment plan requires diligence. Simply identifying future liabilities does not result in higher interest income. The value of cash flow analysis is realized by aligning investment maturity dates with future liabilities and identifying and investing long-term reserves in long-term investments. Since the yield curve is normally positively sloped (see Chart 2), investing longer out the yield curve can generate additional yield and income.

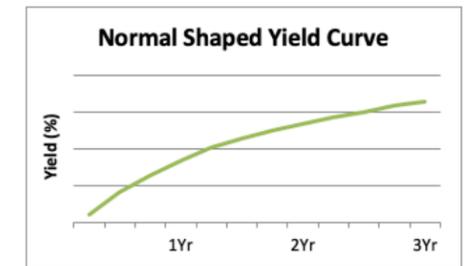


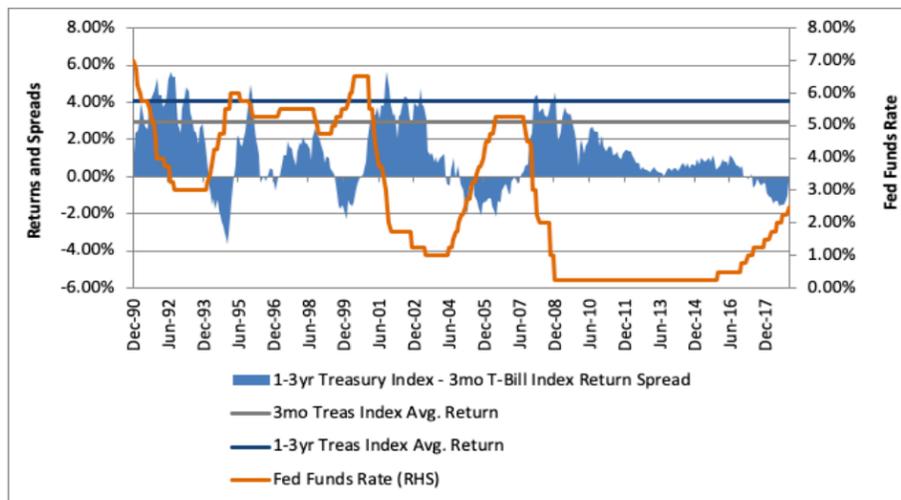
Chart 2

Maximizing Returns

Based on the investment objectives of safety, liquidity and then yield, we know that public entities have a low risk tolerance and a short to intermediate investment horizon. However, over the past decade, many investors have become accustomed to holding most if not all available funds in overnight accounts such as money market funds and bank savings accounts. Using two market indexes as a proxy for short-term and longer-term investments, we show that over time, returns can be increased by investing in longer-term investments.¹

Financial markets are always changing and continuously present new opportunities and challenges for investors. The most successful investors are those that stick to a well-defined investment plan which enables them to maximize income and limit risk throughout market cycles. For many public entities, an effective approach is an asset-liability investment strategy. Matching expected liabilities (expenses) with investment maturities reduces interest rate risk and can improve investment returns over time. In this paper, we integrate both a historical return analysis and current market conditions to evaluate investment strategies that can add value to investment portfolios over the long run.

Chart 3



Total Return

Total return is the sum of income return and price return. Income return is generated through coupon payments and the accrual of interest. For fixed income investments, income is fixed regardless of the interest rate environment. Price return is a function of market interest rates – all else equal, bond prices decline when interest rates rise and bond prices increase when interest rates fall. While other investment characteristics such as yield can offer insights into income, total return is the best measure of investment income. In addition, total return aligns with GASB accounting rules which require mark-to-market accounting.

Historical Return Analysis

In Chart 3, the blue line shows that the annualized return for the 1-3 year Treasury Index was 4.09% from 1990-2018 while the grey line shows the annualized return for the 3-month Treasury Bill Index was only 2.95% over the same time period. The value of investing further out the curve is immediately evident with an annualized return more than 1.1% higher when investing in the longer-term index.

For each month, the area filled in light blue represents the spread between returns of the 1-3 year Treasury Index and the 3-month Treasury Bill Index. The spread is positive for most months, but typically turns negative as the Fed raises interest rates. The Fed Funds Rate is shown in orange. You will see that during the most recent rate hiking cycle by the Federal Reserve, the spread between the two indexes first turned negative in March 2017.

Investors who only focus on recent performance may have observed short-term investments outperforming longer-term investments. Focusing only on recent performance ignores the prevailing trend over time. There is a benefit in extending out the yield curve and a cost to staying too short. Don't pay for liquidity you don't need. Upon more careful analysis of the data, history shows that the spread between these two indexes typically

turns positive prior to the Federal Reserve first reducing interest rates. Indeed, the negative spread narrowed during the fourth quarter of 2018 and was only -0.29% in December 2018. Furthermore, the data shows that the spread can leap very quickly into positive territory as we saw in 1995, 1997, 2000 and 2007. This data clearly highlights the message that investors should avoid timing the market since returns can change rapidly and unexpectedly. Note that staying short and waiting for conditions to change is timing the market. Instead, a prudent investor should maintain a disciplined approach and match investments with future liabilities.

Investment Ladder

A laddered portfolio is a useful strategy to maintain diversification across the yield curve. For operating funds, investments should be laddered to match expected expenses. For long-term reserves, a laddered portfolio of investments from 1-3 years, for example, is an effective strategy to extend investments out the yield curve while creating consistent opportunities to reinvest maturities.

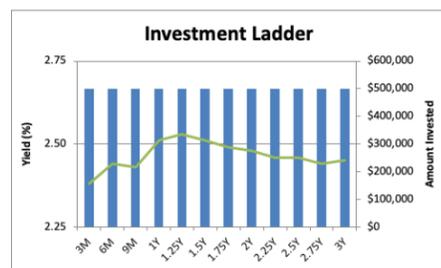


Chart 4

Chart 4 depicts a 3-year ladder for \$6 million of reserves using current market interest rates. In this example, a \$500,000 investment matures every 3 months from 3 months through 3 years. The average yield for the portfolio is 2.47%. Even with the partly inverted yield curve as of March 11, 2019, the average yield of the portfolio is higher than if all investments were held in 3-month Treasury Bills (2.38%).

Once the ladder is constructed, one investment will mature every 3 months. If in 3 months there is no need to spend the maturity amount, these maturity proceeds may be invested to the end of the ladder. A 3-year, fixed rate investment helps protect the investor from a decline in interest rates over the next three years. Investment ladders contribute to investment diversification and create liquidity in the event of unforeseen expenses.

Common Challenges Facing Investors

Extending investments out the yield curve can result in increased returns over time; however, this strategy can also present risks that must be understood by investors.

Interest Rate Risk

Interest rate risk increases for bonds with a longer time to maturity, or more precisely, bonds with a longer duration. Duration is a measure of interest rate risk and it represents the approximate percentage change in price for a 100 basis point change

in rates. For example, if a portfolio has a duration of two years and interest rates increase by 0.50%, the portfolio is expected to decrease in value by 1.00%.

As market volatility has increased, portfolios have experienced more price change resulting in greater volatility in total returns. Interest rate risk can be mitigated by aligning investments with future expenses. An asset-liability investment strategy combined with good liquidity planning reduces the risk that a security will need to be sold prior to maturity.

Timing the Market

As previously discussed, attempting to time the market is a chief risk and one which may be exacerbated in times of increased market volatility. A good adage to remember is time in the market is more important than timing the market. Moreover, attempting to stay short to capitalize on rising short-term interest rates is not an effective strategy over time.

Yield Chasing

The changing investment landscape may also produce another undesirable action by investors – yield chasing. Yield chasing is characterized by investors who seek out the highest yields available in the market with limited regard to issuer credit risk, portfolio diversification, investment strategy or asset/liability considerations. The result can be portfolios highly concentrated by issuer, industry or maturity.

In general, securities with higher yields hold greater risk so yield chasing investors are more likely to

purchase riskier securities. While the prudent investor should focus on extending out the yield curve when possible to maximize returns, these investments should only be made after first considering the safety, liquidity and interest rate risk of each investment.

A Disciplined Approach

Market conditions have changed considerably in recent months. We have moved from a period of gradually rising interest rates to an environment marked by a partly inverted yield curve and more volatile interest rates. An investment strategy predicated on creditworthy investments, cash flow analysis and a disciplined investment plan will help your municipality prudently manage risk while offering the potential for higher interest income.

1 Short-term and longer-term investments are being represented by the ICE Bank of America Merrill Lynch 3-month Treasury Bill Index and the ICE Bank of America Merrill Lynch 1-3 year Treasury Index, respectively.

For questions regarding this article, contact the authors Brian Hextell (bhextell@pmanetwork.com) or Mercy Ndungu (mndungu@pmanetwork.com)

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2018 CIC Member CSRM Graduates

Jonathan Mitchell
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RECIPIENTS

WASBO is fortunate to count among its ranks many outstanding members who work tirelessly on behalf of their school districts and Wisconsin's students. In recognition of their tremendous work, WASBO provides several annual awards to honor those who truly go above and beyond in their service to their school district, their community and WASBO. These awards are an opportunity to showcase WASBO members' contributions to their districts, and to provide the public with a better understanding of the exemplary work WASBO members do to benefit students.

WASBO and award sponsors are proud to honor the below recipients for a 2019-20 Professional Recognition Award at the WASBO Spring Conference on May 17:

Wallace E. Zastrow Lifetime Achievement Award
Wisconsin Investment Series Cooperative
Patrick Finnemore, Kenosha

School Facilities Manager of the Year Award
Dude Solutions & Stalker Sports Floors
Joe Bellomo, Waunakee

Safety, Security & Wellness Award
M3 Insurance
Hartford Jt #1

WASBO and award sponsors are proud to honor the below recipients for a 2019-20 Professional Recognition Award at the WASBO Fall Conference, October 4:

Tina Hafeman Friend of WASBO Award
Kevin King, Skyward

Mike Roshar WASBO Shining Star Award
Quarles & Brady, LLP
Jerrud Rossing, Monona Grove

WASBO and award sponsors are proud to honor the below recipients for a 2019-20 Professional Recognition Award at the WASB-WASBO-WASDA State Education Convention, January 23, 2020

School Business Manager of the Year Award
M3 Insurance
Jonathan Mitchell, St. Francis

George Gray WASBO New School Business Manager of the Year Award
Hays Companies
Andrew Thorson, Neeah

WASBO congratulates all of this year's award recipients! We also congratulate those that were nominated by their colleagues for their efforts in their districts and through WASBO to improving education every day.

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UnitedHealthcare's mission is to help people live healthier lives and to help make the health system work better for everyone.

UnitedHealthcare is supporting DentaMed Healthcare and VisionQuest 20/20 in their efforts to bring dental services and vision screenings to students, at no cost to schools.

Dental Care:
Through a grant from UnitedHealthcare, DentaMed will provide comprehensive dental care to students at schools like yours via its new state-of-the-art mobile dental clinic. Screenings are available to any student, regardless of whether the child has health insurance.

Vision Screenings:
VisionQuest 20/20 will provide schools in Wisconsin with access to its EyeSpy 20/20 vision screening software to check students for vision problems. Participating schools will receive unlimited use of the EyeSpy 20/20 vision screening software and training on how to administer the screenings and utilize the data collection systems.

To discuss bringing the DentaMed mobile dental clinic to your school, email: info@dentamedhealth.com or call 414-877-0707.

To discuss bringing the EyeSpy 20/20 vision screening software to your school, contact: Chris Greening, 630-503-7650, chris@good-lite.com.

DENTAMED HEALTHCARE
VISIONQUEST 20/20

DentaMed and VisionQuest 20/20 are not affiliated with UnitedHealthcare and each entity is responsible for its own contractual and financial obligations.

BUILD YOUR TEAM AT THIS YEAR'S WASBO SPRING CONFERENCE

Please join us for this year's WASBO Spring Conference from May 14th through May 17th. This year's conference is at the KI Convention Center in Green Bay.

Take time for professional development by attending a variety of sessions presented by your peers and industry experts on Thursday and Friday. These educational sessions cover topics in leadership, technology and auxiliary services, best practices and money saving ideas, facilities and safety (including certification sessions in Modules 6 & 7), human resources, Year of Success Program sessions for those new to the business office, and health plans, funding, and much more. Spend some time with WASBO Vendors in this year's exhibit hall on Thursday. While you're catching up with the vendors come check out the silent auction and raffle items that will be in the exhibit hall. Proceeds from the auction and raffle will benefit WASBO members' involvement in ASBO International.

The Learning Lab returns for a fourth year on Thursday. Bring your software and forecast model questions with you. Representatives will be available to assist you from Baird,

Skyward, PMA, Focus on Energy and the WASBO p-Card Program on Thursday from 1:50- 4:20 p.m.

On Friday, May 17th the professional development opportunities continue for all WASBO members. Additionally, the Business Meeting will provide us a chance to recognize the successes of award recipients, mentors, Facilities Manager Certification, CSR Designees and graduates of the first Wally Zastrow Leadership Academy.

Looking for ways to give back? Consider donating your time and/or your blood. There are plenty of volunteer opportunities available please contact Kaitlyn Peters at kaitlyn.peters@wasbo.com for more information. The Red Cross will also be available on Thursday from 8 a.m. - 1 p.m. at the KI Convention Center for those wishing to donate blood.

The conference provides many networking opportunities. The first begins in the Hyatt Regency Atrium on Tuesday, May 14th at 8 p.m. This is a great opportunity to catch up with your colleagues and meet some new friends.

On Wednesday, May 15th enjoy the day outside with your peers by participating in the scholarship bike ride or the scholarship golf outing. Bike ride participants will spend the day on the beautiful Fox River Trail. Golf participants will get to play on the Official Course of the Green Bay Packers: Thornberry Creek at Oneida. Proceeds from both events go towards student scholarships.

The networking opportunities continue Wednesday night with professional networking at the KI Convention Center. Be prepared for a night of fun activities. As a special event this year, WASBO is hosting an additional networking event at Lambeau Field on Thursday evening from 6 - 10 p.m. All members are welcome for a night of Hall of Fame and Stadium Tours, visiting with colleagues and celebrating our retiring Executive Director, Woody Wiedenhoef. Separate registration for this event is available at www.wasbo.com/spring.

The WASBO Spring Conference Committee is looking forward to seeing you in Green Bay!

WASBO Accounting Conference

Over 350 business officials attended the Accounting Conference, March 20-21, at the Kalahari in the WI Dells.

The two-day conference was filled with sessions on school district financial and business office topics, including the DPI Spring Finance Workshop. For those new to the profession, the conference featured sessions from the Year of Success Program. Again this year, the p-Card User Group was incorporated as part of the conference.

Next year's conference will be held March 20-21, 2020, at the Madison Marriott West, Middleton.

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- EXHIBITS, MAY 16
- CONFERENCE SESSIONS, MAY 16-17

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Stay Connected

Interim Assignments

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

WASBO Board of Directors Election

District Professional and retired members, please check your email for information regarding online voting April 1-30. You will vote for one President-Elect and 2 three-year directors. View candidate résumés on pages 23-25. You can also view résumés and introduction letters online through the election email.

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 davhoh@oshkosh.k12.wi.us.

Dues Renewal

To continue receiving the benefits of your WASBO membership, including your subscription to *Taking Care of Business*, be sure to renew your membership for 2019-20. Your dues invoice will arrive via email in mid-April, so be sure to watch for it! When you are the only one in your district fulfilling your job role, you need to stay connected to your colleagues across the state who are facing the same challenges.

Service Affiliate Checklist

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

- Sponsorship Opportunities:
 - Spring Conference
 - Custodial & Maintenance Conferences
 - New Administrators & Support Staff Conference
 - Fall Conference
 - Midwest Facility Masters Conference
 - Winter at a Glance Conference
 - WASBO/WASPA School Personnel Academy

- Exhibit opportunities are available for all three Custodial & Maintenance Conferences this summer. Visit wasbo.com/custodial for more information.
- *Taking Care of Business* articles due May 15 for the June issue.
- Advertise in *Taking Care of Business*. Advertising contracts now available for 2019-20.
- Update your profile and communication preferences at WASBO.com to ensure you are receiving communications about the above.
- Renew your 2019-20 membership dues!



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LEGAL UPDATE

CONTRIBUTOR |
DOUGLAS WITTE

DOL Releases New Overtime Rules

As we reported last month, the Department of Labor (“DOL”) was on the cusp of releasing its long-anticipated proposed changes to rules governing the Fair Labor Standards Act overtime exemptions. On March 7, 2019, DOL released the proposed rule. In developing the proposed rule, the DOL received extensive public input during six in-person listening sessions held around the nation in the fall of 2018 and received over 200,000 comments as part of its Request For Information process. The DOL is taking comments on the proposed rule for 60 days. Currently, the rule is projected to take effect in January 2020.

The proposed rule is significant both in what it did and what it did not do.

Salary Level Change

The most anticipated change was the salary level. The new proposed salary level is \$679 per week (equivalent to \$35,308 per year) [Salary payments can also be made of at least \$1,358 bi-weekly; \$1,471 semi-monthly; or \$2,942 monthly. As a reminder, while you can have a salaried exempt employee work part time, there is no pro-ration of the salary amount for part-time employees]. Under currently-enforced law, the salary level is \$455 per week (equivalent to \$23,660 per year). The current level was set in 2004. In establishing the new amount of \$679, the DOL used the same salary level methodology it used in 2004 but projected the amount to January 2020, the month that the new rule is expected to take effect. The DOL felt that using the same methodology as 2004 would be beneficial because it is familiar to employees and employers; it can be used without causing significant hardship or disruption to employers or the economy; and, it has withstood the test of time.

Other Proposed Changes

The DOL also proposes to permit employ-

ers to use non-discretionary bonuses and incentive payments to satisfy up to 10% of the standard salary level. For employers to take credit for non-discretionary bonuses and incentive payments toward a portion of the standard salary-level test, they must make such payments on an annual or more frequent basis.

If an employee does not earn enough in non-discretionary bonus or incentive payments in any given year (52-week period) to retain his or her exempt status, the DOL permits the employer to make a “catch-up” payment within one pay period of the end of the 52-week period. This payment may be up to 10% of the total standard salary level for the preceding 52-week period. Any such catch-up payment will count only toward the prior year salary amount and not toward the salary amount in the year in which it is paid.

Finally, the DOL proposes to increase the total annual compensation requirement for highly compensated employees to \$147,414 per year. This is an increase over the \$100,000 level set in 2004 (and higher than the \$134,004 which is where it was set in 2016). To be exempt as a highly compensated employee, an employee must also receive at least the new standard salary amount of \$679 per week on a salary or fee basis without regard to the payment of non-discretionary bonuses and incentive payments.

What The Proposed Rule Does Not Do

The proposed rule does not contain an automatic indexing or schedule to update the salary level over time. However, the DOL stated that it is committed to periodically reviewing and updating the salary threshold. It has asked for guidance and comments on this issue as to how and when it should update the salary level, but right now the DOL is suggesting every 4 years would be appropriate. Any update would continue to require notice and comment rulemaking process.

Surprisingly, the proposed rule does not propose any changes to the “job duties” tests for administrative, executive, or professional employees, which many commentators had anticipated. Likewise, there were no changes proposed in the definition of “salary basis.”

Take-Aways For Employers

The new proposed rule appears to have struck a middle ground between the 2004 salary level and the 2016 salary level. This is welcome news for most employers as it will have less of an impact on their operations and labor costs.

For school districts, no changes were made to the teacher salary exemption, which has no “salary level” test.

While the duties tests did not change for administrative, executive, or professional employees, school districts are still bound by the duties tests and must ensure that any employees that they are treating as exempt from the overtime rules fall within the confines of those tests. It has been our experience that many employees who are classified as exempt employees may not actually meet the duties test, and therefore, districts who are paying individuals as exempt employees may not be in compliance with the law. Now is a good time to reevaluate your classification of employees.

The new rule will not take effect until the final publication of the rule. There still may be changes to the final rule, but for now, no other significant changes are anticipated. The final rule will have a definitive effective date (right now projected to be January 2020). It is unknown whether the 2019 proposed rule will generate litigation like the 2016 rule did. If so, that could further delay any effective date.

School districts may wish to consult with legal counsel to ensure compliance with both state and federal wage and hour laws in reviewing any policies or practices concerning overtime and exempt employees.

Welcome to our New Members!

District Professionals

- **Freda Barkley**, Business Manager, 21st Century Preparatory School
- **Duane Bemis**, Director of Buildings and Grounds, Hayward Community Schools
- **Sandy Chrobak**, Senior Financial Analyst, West Bend SD
- **Gina Cifaldi**, Dean of Operations, Seton Catholics Schools
- **Jamie Dusick**, Director of Buildings & Grounds, Cadott Community SD
- **Paul Lamers**, Head Custodian, West DePere SD
- **John Matthews**, Pod Leader, West Allis-West Milwaukee SD
- **Joseph Mazzara**, Night Time Lead, Waunakee Community SD
- **Shelly Neuman**, District Accountant, Webster SD
- **Isaac Palmer**, Grounds Supervisor, Shorewood SD
- **Anthony Peterson**, Frederic SD
- **Cynthia Rabbitt**, Comptroller, CESA #1

- **Terry Vande Hey**, Maintenance Manager, West DePere SD
- **Thomas White**, Facilities Manager, Crivitz SD
- **Samantha Woelfel**, Business Manager, Chilton Public Schools

Service Affiliates

- **Khaliah Davis**, ESS
- **Tiffany Farnsworth**, Senior Associate - District Assistant, AXA Advisors, LLC
- **Luis Fernandez**, Treasury Management Officer, Town Bank
- **Cornelio Heinrichs**, Sales, Schnell Industries Inc.
- **Matthew Josten**, Regional Vice President, TSA Consulting Group Inc.
- **Jake Paider**, Vice President of Sanitary Maintenance and Laundry Division, Belson Co.

Students

- **Carl Christopher**, Teacher
- **Caleb Kleinhans**
- **David Ziegelbauer**, Mequon-Thiensville SD

Member Moves and Retirements

On the Move

- Dan Dommek, Special Projects, SD of New Berlin --to-- Facilities Operations Supervisor, Indian Community School of Milwaukee
- Suzi Gould, Plum City SD --to-- Director of Business Operations, SD of Albany
- Denee Mott, Vice President-Commerical/Treasury Management --to-- Senior Vice President, Hometown Bank

Retirements

- **Emily Koczela**, Chief Financial Officer, Messmer Catholic Schools
- **Ken Roskom**, Commerical Sales Associate, Tri City Glass & Door

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 Wiedenhoeft at woody.wiedenhoeft@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. 📞

CONTRIBUTOR |
KATHY JOHNSON

Planning for Summer: Reducing Workers' Compensation Costs

As the end of the school year approaches, districts are preparing for many activities and events: prom, graduation, award ceremonies, audits and more. Those who are responsible for managing Workers' Compensation injuries and their impact on the district's costs may not be aware of a very effective tool to reduce costs as the school year ends: offering work within an injured employee's physical restrictions to avoid the carrier paying Temporary Total Disability (TTD) over the summer.

The Workers' Compensation Act dictates that when an injured employee is unable to return to his regular job, TTD will be paid by the carrier (or you may continue wages) unless you offer work within the doctor-prescribed restrictions, which

halts the TTD payments. You know that applies during the school year when all employees are scheduled to work, correct?

But, did you know that when the school year ends, an employee who is still unable to perform his normal job duties—even though his job does not require him to work during the summer—will continue to collect TTD, unless you offer work that is within his physical restrictions? Being prepared for the year-end injury and ensuing disability with restricted-duty tasks will mitigate the impact of that injury on your Experience Mod, and perhaps your dividend. Often, the job doesn't have to be within the employee's department or a job even close to the employee's own.

And the even greater savings occur when you return to the employee to restricted duty before the state-

imposed 3-day waiting period occurs. You save 70% on how that claim is calculated into the Experience Mod.

Many times, the employee has summer plans that discourage or prevent him from accepting the offer of work. Fortunately, when the offer is refused, the carrier's obligation to pay TTD ceases and your Workers' Compensation exposure is reduced. To ensure that there is no misunderstanding regarding the offer to work, especially when the employee learns that the TTD payments cease, it is wise to prepare a document outlining the work offered and obtain the employee's signature declining the offer. Provide that to your carrier's adjuster to halt any TTD payments.

As always, an insurance agent or consultant who provides claims consulting services will assist you with this strategy.



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wasbo.com/RENEW

Spring/Summer WASBO Event Calendar

Here is a look at the conferences, workshops, regional meetings, committee meetings, and other events that make up the Spring/Summer 2019 WASBO Event Calendar. For more information, see the Calendar of Events at wasbo.com

April

8-9

Wally Zastrow Leadership Academy
wasbo.com/leadership

10

Southwest Regional Meeting
9 AM, CESA #3, Fennimore

10

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

11

Bullying & Liability
CSRM Update Course
Best Western Premier, Oshkosh
wasbo.com/riskmanagement

Wausau Business Office
Professionals Conference
Northcentral Technical College, Wausau
wasbo.com/sbo

12

Madison Area Regional Meeting
9-11:45 AM meeting, lunch to follow
Sun Prairie SD

19

Southeast Regional Meeting
Lunch 1 PM, presentations 1:30-3 PM
Hamilton SD

24

Midwest Facility Masters Conference
Planning Committee Meeting
10 AM, conference call

25

Fall Conference Planning Committee
Meeting
9 AM, conference call

May

10

Madison Area Regional Meeting
9-11:45 AM meeting, lunch to follow
Stoughton Area SD

Northeast and Bay Area Regional
Meeting
Sturgeon Bay SD

15

WASBO Foundation Spring
Scholarship Golf & Bike Outings
*Thornberry Creek at Oneida &
Fox River Trail*
wasbo.com/spring

16-17

WASBO Foundation Spring
Conference
KI Convention Center, Green Bay
wasbo.com/spring

22

Midwest Facility Masters Conference
Planning Committee Meeting
10 AM, conference call

23

Fall Conference Planning Committee
Meeting
9 AM, conference call

June

6

WASBO Board of Directors Meeting
9 AM, WASBO office

19

Midwest Facility Masters Conference
Planning Committee Meeting
10 AM, conference call



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**ASBO International Membership
Milestones**

March 2019

25 Years

- James Milzer, Franklin

10 Years

- Michael Markgren, Altoona
- Patty Sprang, La Crosse

ASBO International New Members

February 2019

- Anthony Klein, Delavan-Darien



**Registration Now Available
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Attend this six-session academy series designed to assess, gain and enhance valuable leadership skills and the ability to develop leadership skills in others.

This opportunity is open to all District Professional members.

Learn more at wasbo.com/leadership

**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





Wisconsin Association of School Business Officials
4797 Hayes Road, Suite 202
Madison, WI 53704

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