

# Taking Care of Business

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

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# Happy Holidays from WASBO



# See highlights from our fall conferences



Hear what attendees & exhibitors discovered at the ASBO International Annual Conference & Expo, Midwest Facility Masters Conference, and the Northeast/Bay Area School Business Office Professionals Conference.

See more inside this issue!

## About the Cover

The WASBO Board, committees and staff wish all of our members a happy holiday season. Students from the Madison Metropolitan School District remind us to have some fun this winter when we're leading next year's budget discussions.

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Editor: Mike Barry

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**Kathy Davis-Phillips**  
Director of Business & Auxiliary Services,  
De Forest  
WASBO President

# A new decade

As the seasons quickly change it can be all too easy to get caught up in the hustle and bustle of life instead of enjoying the moment. This season I hope that you will be able to enjoy the next few months and recuperate from the busyness that comes with the start of a new school year.

Whether you celebrate the holidays or not, I hope that you are able to take some time to enjoy the company of family and friends and take care of yourself.

Although Thanksgiving will have come and gone by the time you receive this newsletter, I wanted to take a moment to extend my gratitude. For the members of WASBO in general, thank you for helping to make our organization strong. Without our members WASBO would cease to exist.

For those of you who are able to volunteer at conferences, participate in committees, and support our conferences through sponsorship or by presenting, thank you for the value you add to our organization.

To the Board of Directors, thank you for your contribution and time away from your work to help WASBO be successful.

## Public education in Wisconsin also survived, and I believe it is stronger because of it.

To the WASBO staff; Jeanne, Kaitlyn, Kristin, DyShaunn, Tina, and Ryan, thank you for always going above and beyond and being the hard work behind the scenes that makes this organization function smoothly. Finally, thank you to Mike Barry, our new Executive Director. Your leadership has already built upon WASBO's previous successes and has poised us to grow even further.

As we get ready to say goodbye to another decade and head towards 2020, I would also like to briefly reflect on the last ten years. Public Education in Wisconsin has gone through a considerable amount of changes over the last decade.

Just to share a few: Act 10, teacher shortages, reduced funding, recession, political changes, technology advancements, and school report cards. All of these impacted many of us in our roles at work and our personal lives.

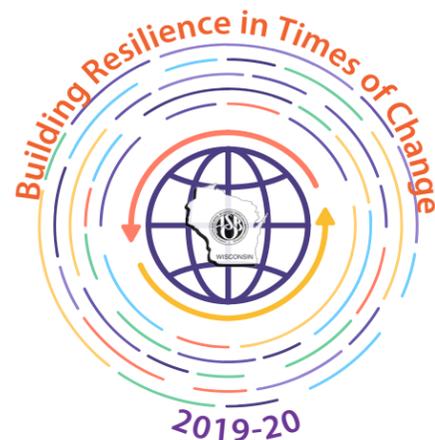
Many of us probably still remember the year our own paychecks were reduced to offset the employee contributions towards WRS. The most important thing though: we survived! Public education in Wisconsin also

survived, and I believe it is stronger because of it.

It is hard to say what public education will be faced with in 2020 and beyond.

Probably some more teacher shortages, more accountability, and continued financial constraints. However, I have hope. Hope that this new decade is the one where Wisconsin lets go of the turmoil of the past and can share a common goal of providing a great education for Wisconsin's kids.

Best wishes to all of you this coming New Year.



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# You can't judge a budget by its cover



**Mike Barry**  
 WASBO Executive Director

**This issue of Taking Care of Business features contributions from several school business managers discussing lessons learned in designing and executing an effective budget development process...We hope you'll enjoy reading your colleagues budget development advice and benefit from their example.**

**I**t was during a one-to-one meeting with the superintendent, which took place in her office every two weeks or so, that I first became aware of a concern about our budget proposal. Well, more specifically, board-level concern about the clear plastic cover on the budget proposal document.

For both of us, it was our first year in the district, a large urban district with an actively engaged community, a reputation for lengthy discussion and debate, and a long history of hands-on involvement by the Board of Education.

Throughout the preceding several months, our staff budget team had worked incredibly hard. We created a balanced budget proposal with a reasonable tax impact. Resources were carefully aligned with the strategic framework. Employees would be compensated fairly. Just as important, funds were allocated more equitably across all the schools. We were proud of our work. We presented the budget proposal to the Board of Education in early April, on schedule, as planned.

"I've received some interesting feedback from the board about the new budget proposal," the superintendent said with a wry smile. "They're generally pleased with the proposal, but there is one thing they don't like - the clear plastic cover."  
 "Huh?" I mean, it was true, the

document was over one hundred fifty pages, and since it was sure to be handled extensively during a two-month review process, we bound it with a plastic spiral binding and added a protective clear plastic sheet over the cover page. Every board member received a printed copy. But why would the board care about the clear plastic cover? In a \$500 million budget proposal, the plastic sheets cost less than a dollar. Weren't there more important things to care about?

"Well, it's not the cost of the plastic covers, or at least let's hope not," offered the superintendent. "I think what's going on here is that we gave the board a balanced, fully developed budget proposal, and that's the right thing to do. But in the past, they received a more open ended proposal, with lots of cuts and adds left for the board to struggle with. Those decisions made some board members feel involved and influential. Now, with this new proposal, and new way of working, they feel like all the

work is already done, and they're not as involved. In a way, the clear plastic cover is evidence of that - it makes the proposal look finished and complete, which to them means less involvement and less transparency."

"So," I asked, "the clear plastic cover symbolizes a lack of transparency?" "Doesn't that strike you as rather odd?" The superintendent smiled again. "Welcome to my world," she said.

This issue of Taking Care of Business features contributions from several school business managers discussing lessons learned in designing and executing an effective budget development process.

As the anecdote above illustrates, understanding the unique culture and context of your school district is an essential prerequisite for success. We hope you'll enjoy reading your colleagues budget development advice and benefit from their example.

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**John Forester**  
Executive Director,  
School Administrators Alliance

# SAA Legislative Committee considers Return to Work Bill

**A**t the SAA Legislative Committee meeting held on November 25, committee members discussed the merits of WRS annuitant return to work legislation for more than an hour.

The legislation, authored by Representative Mary Felzkowski (R-Irma) and Senator Duey Stroebel (R-Saukville), was circulating for co-sponsorship inside the State Capitol at the time of the Committee meeting.

The proposal has the support of the Wisconsin Association of School Boards (WASB). If adopted, the legislation would:

- Increase the minimum WRS retirement age from the current age 55 to the greater of age 59.5 or the age at which the IRS does not penalize a person for taking a distribution from a 401(k) plan.
- First apply the change in the minimum retirement age to individuals who are under the age of 40 on the bill's effective date and who terminate WRS-covered employment on or after the bill's effective date.
- Allow an annuitant who is hired by a WRS employer as an employee to elect to not suspend his or her annuity for not more than a total of 36 months.
- Reduces the break-in-service requirement from the current 75 days to 45 days.

During the lengthy and spirited committee discussion, members expressed strong support for allowing retired teachers, administrators and staff to return to WRS-covered employment without restrictions in order to fill critical positions in school districts throughout Wisconsin.

However, committee members also expressed the following concerns or reservations about the proposed legislation:

- It is difficult to imagine how this proposed change will make the profession more attractive to young people.
- It may result in some under-40 educators who have witnessed the impact of Act 10 to perceive this as another attack on educators and leave the profession.
- The authors' statements about the need to raise the retirement age to maintain the integrity of the system into the future are simply assertions that have not been proven as fact. We need an actuarial study to clarify this issue.
- It may result in significant numbers of retirement age educators leaving the profession a few years before they intended for fear that this bill will open the door for additional retirement system changes.
- It will likely result in teachers who are burned out at age 55 staying in the classroom for an additional 4.5 years, which is not in the best interests of children.

- The "compromise" (the 36-month return to work window in exchange for raising the minimum retirement age) appears one-sided. One Committee member likened it to "trading an apple orchard to get an apple."
- It is unclear how the 36-month return to work window will be defined and ultimately administered. Committee members expressed concern that these provisions will make an already complex law that much more complicated to administer and will likely add administrative burden for school districts.

At the conclusion of the Committee discussion, members were asked, "If the objective is to improve our ability to recruit and retain quality teachers, administrators and staff to fill critical positions, on balance does this proposal help us do that or not?" The clear consensus of the Committee was that the proposal does not help us with that objective.

If you should have any comments or questions on this important policy issue, please contact me at the SAA. Thanks for listening and, as always, thanks for everything you do on behalf of the children you serve.



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**Julie Kelly**

Assistant Superintendent for Business and Human Resources, Muskego-Norway School District, WASBO Director

# Budgeting for continuous improvement

Every year around this time, we embark on the budget development process. The budget process can be difficult as we deal with internal and external factors such as limited funding, variance in enrollment, staff retention and double-digit insurance renewal costs to name a few. Sometimes just maintaining consistency is difficult, so how can we ensure that we are building a budget that is helping our organization continuously improve?

There are a number of processes that can be utilized to verify resources are allocated with purpose. In this article, we will look at the Plan-Do-Study-Act (PDSA) continuous improvement process, the Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis and resource allocation as part of the annual budgeting process.

## Mission-Aligned Budget

The budgeting process itself can be daunting. When reviewing the previous year's budget, did you ever stop to think how your spending from the previous year was actually aligned to your mission? Were the funds spent in areas that helped achieve your annual and long-term goals? Did you actually accomplish the goals you set for the year?

In order to be fiscally responsible, we need to be sure spending is strategic. First, start with your mission. All resources should be spent in areas that

are going to help you achieve your mission. Consider using a zero or priority-based budget process. These processes can be time consuming, but strategically focusing resources can help your team achieve their building and department goals more efficiently.

Next, work with your team to create cascading goals from the district level down to the classroom. This is where you can begin to support the continuous improvement process. Creating aligned goals will allow your organization to remain focused on the right work and not spend randomly in areas that will not achieve the goals set forth for the year.

Finally, in order to operate under a model of continuous improvement, you have to become proactive and agile with the constructs of the annual budget. As a team, you can incorporate processes that will help you analyze and prioritize needs on a short and long-term basis. Two models are outlined below to show how an organization can determine what their greatest areas of need are and how resources can be focused in order to improve.

## PDSA Model

The PDSA model creates a framework for organizations to analyze key work processes, support work processes and new innovations in order to determine what is working well for an organization and where a shift in

resources is necessary.

The Plan phase of the model allows team members to start the review of current key work and support processes, and/or introduce a new program or innovation. During this phase, the team will document the current state of the program or innovation using baseline data. The desired state or vision and indicators of success are then determined. If the change or innovation being proposed is approved through the budget process, the change or process then goes into the Do phase.

In the Do phase of the cycle, team members roll out the change and/or new innovation. The team then determines what data will be used to indicate success. After implementation, the team then analyzes the data through the Study phase. In the Study phase of the cycle team members review the data to determine what is working well, what is not and what needs to change. The change or innovation then moves to the Act phase of the cycle.

In the Act phase of the cycle, team members make adjustments as determined in the Study phase. They then determine what data needs to be collected and analyzed to determine if the adjustments had an impact or if other changes need to occur. If no changes are necessary, the Study-Act phases continue until the key work or

support process is up for the next Plan phase review. If an innovation was introduced and approved, it should continue working through the PDSA process until the team determines that full implementation has occurred. In Muskego-Norway, we maintain a PDSA cycle for all key work and support processes. These processes are reviewed through the Plan phase year every 5-7 years. Our leadership team also utilizes the PDSA process to request new programs, staffing or other innovations every budget cycle.

## SWOT Analysis

The SWOT Analysis is a process that is used to look at an organization's Strengths, Weaknesses, Opportunities and Threats. Once the analysis is done, an organization can identify themes across schools and/or departments, which can be used to set goals and determine where to focus resources for the year. The SWOT analysis can also be used to set up a 3-5 year prioritized list of needs and wants for each school and department. Here are a few questions that may help identify your organization's strengths, weaknesses, opportunities and threats:

Strengths:

- What makes you unique?
- What are you doing well?
- What are you doing to create high engagement from stakeholders?

Weaknesses:

- What programs do you invest in that are not producing results?
- What resources are you lacking?
- When compared to others, where are you falling short?

Opportunities:

- What resources do you have that you can capitalize on?
- What programs will help you gain a competitive edge?
- How can you take your strengths to the next level?

Threats:

- Who are your competitors?
- Are there negative aspects about your district that impact your stakeholders?
- What resources are you lacking?

As you align the findings from your SWOT analysis to your budget development process, you may want to consider the following:

- Strengths - Continue to invest

- in what you are doing well, but maybe not at the same level.
- Weaknesses - Invest in areas that will keep you competitive.
- Opportunities - Determine what resources you may have access to but are not capitalizing on.
- Threats - There will always be things we cannot fully control, but there are opportunities for us to prioritize what we invest our resources in.

For a more detailed explanation of the SWOT analysis, there is useful eSeminar resource on YouTube called, "SWOT Analysis for School Leadership" with Jon Moser.

The PDSA continuous improvement model and SWOT analysis are just two examples of processes that can be used to align your budget to your mission and short and long-term goals.

By maintaining transparency, keeping the lines of communication open and using strategic planning practices, organizations can, even with a limited budget, focus resources in areas that will have the most impact on improving organizational outcomes.

- Litigation
- Public Records
- Crisis Management
- Policy Development
- Residency, Open Enrollment, and Tuition
- Student Discipline
- School Finance
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- Labor and Employment
- Transportation and Vendor Contracts
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**Marta Kwiatkowski**

Director of Business and Human Resources,  
Shorewood School District  
WASBO Director

# Balancing transparency & engagement

**J**ust like many of you, I struggle with how much information to share in order to be transparent without encouraging the board and community to feel that they must micromanage. We can all agree that the role of the school board is to develop policies and to govern the school district, but where we may differ is on what level of involvement is appropriate when it comes to the budget.

As we start developing our budgets for next year, it is important for the board and the community to understand where the district's money is being spent and where it needs to be allocated for next year.

Some school boards are heavily involved in the budget process, from developing assumptions, drafting the list of reductions, devising incentives to evaluating current programming, creating policies on class size and long-term facility projections. At whatever level of involvement your board is engaged in the budget process, it is our duty as the business officials to keep them up to date with financial information.

It is important to gauge your board's level of understanding of school finance, especially any new board members. I always meet with a new board member as soon as they are sworn in, so I can explain school funding.

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**As a district, we need to agree on our priorities and goals before we begin the budget development process. Some of us will consider going to a referendum to exceed the limit, and others will be forced to balance our budget by making cuts.**

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They don't need to be an expert, but they need to know enough to make informed educated decisions.

The budget process should start as early as November or December with the administration evaluating our current initiatives and aligning the budget with the strategic plan. Based on enrollment trends, it may be a good idea to revise the class size policy that will affect staffing at this time, since most of our budget is spent on salaries and benefits.

This is also a good time for a district to examine their health plan design and consider going out for bid, to offer cost saving options. We should ask ourselves this question: are we able to continue our health benefits, or do we need to increase the employee contribution? Since the retention and recruitment is getting more difficult, before we make any changes we need to pause and see what our neighbors offer.

As a district, we need to agree on our priorities and goals before we begin

the budget development process. Some of us will consider going to a referendum to exceed the limit, and others will be forced to balance our budget by making cuts.

Before the board votes on open enrollment, it is crucial that they understand the financial implications of open enrollment in and how this is going to affect class sizes. It is very appealing to receive open enrollment revenues but if not examined closely this may be costly especially if new teachers are hired to meet the class size policy requirements.

Also, if our open enrollment out numbers are high, we need to examine the numbers and the reasons why families are leaving our district. I have been a business manager for fourteen years, and I am still redefining the way I share the information.

You need to find out for yourself the right balance for your board and your community. No two districts are alike, but we have a lot of similarities.



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**Holly Burr**  
Business Manager,  
Clintonville Public Schools  
WASBO Director

# College, career, and community readiness

## Engaging the Third "C"

Public schools are working to graduate every child ready for college and career. But what does college and career ready mean? Federal policies encourage states to adopt high standards but do not touch on curriculum, which is a state and local matter.

The Wisconsin way of college and career readiness includes having knowledge in academic content areas while also valuing skills and habits. Our graduates must be critical thinkers, able to communicate effectively, collaborate with others, and solve real world problems. Ultimately, we want our kids to be good contributing members of society.

Last year as a new administrative team, Clintonville Public Schools held several discussions on what "college and career ready" means in our district and community. From these discussions, we added the third "C" for Community as a requirement to our curriculum and other decisions moving forward.

As a small, rural Wisconsin community, we struggle just like most to keep the talent we produce. Students graduate, go on to college or tech school, and never come back.

There is a great need in the community for skilled workers. Recognizing this specific need, we partnered with sev-

eral businesses and the local technical college to create a certificate program for students to attain or work towards while still in high school.

### The Process

The process was led by our high school principal, with the superintendent and the rest of the administrative team as backup and support.

First was a listening session with several local businesses to ascertain their needs. We also studied what was being taught at the high school and what would be additionally needed after high school. We learned that as a small district we do not have the capital or human resources to operate a program that would satisfy the specific needs.

We then reached out to our local technical college, Fox Valley Technical College (FVTC) to find out what they could offer. Discussions were held on what the program could look like, what FVTC would provide and what the district would be responsible for. We also had follow-up discussions with other districts that have implemented similar programs to determine what it would take for us to move forward. At this point we began to formulate an idea for a solution.

We officially started the program this fall (2019) with six students enrolled.

The program can accommodate up to 16 students. Our goal would be to have 12 students enrolled.

### Community Ready Curriculum

We made a point to think about because there is a need, doesn't mean there is enough interest locally to make the program financially viable. So we spoke with parents and students to gauge whether or not there would be enough interested to move forward with the program.

Once it was determined there was a need, a viable solution, and enough interest, the proposal was taken to the school board for approval. One very important piece at this point: Don't go it alone! At our presentation we had representatives from all stakeholders present: businesses, FVTC, teachers, parents and students.

### Our Program

Students can participate in a one- or two-year program. Their schedules were adjusted so they attend traditional classes at the high school in the morning and then classes at Fox Valley Technical College in the afternoon. The students earn dual credit for the classes at FVTC. Students in the two-year program will only need two additional classes after high school graduation to receive their Industrial Maintenance Certificate. A

few students also have secured concurrent part-time jobs at the partnering businesses, so they are getting hands-on real world experience as they learn.

### Community Ready

When districts consider a program like this, officials should start with what do they know about the school and what do they want to know more about. When talking "partnerships," don't always make it about the money; get to know the businesses. Not just the owners or the CEO, but also get to know the employees of those businesses. They can be an amazing resource.

Tell your story: why is this important to you, your students and your community? Show them how what is being proposed or currently done will support and benefit them. Acknowledge the contribution each entity will be making

to the partnership. What is the commitment of each party involved: students, parents, teachers, the school, the tech college and the businesses.

Follow-up and follow-through. Make sure they understand your commitment to improving the school and the community. Be sure to check in regularly with each of the stakeholders and the community at large. This is about more than just a great education for a few students. Find out what is working and what needs adjustment. Also, promote the impact the program is having. When something is a win-win, be sure your community knows about it!

### Future Vision

Given the successful implementation of this program, we now turn our attention to what's next. We plan to continue with additional partnerships

with FVTC, expanding the programming offering for other needs within the community. We also look to expand the number of businesses offering "apprenticeships" for our students.

We plan to reach out to our smaller neighboring districts to partner with them. We expect to have a few open seats in the program so even if there is only one or two students from our neighbors, they will be able to participate as well. We will continue to conduct community conversation circles every year to spur the discussions of what the community needs from the district. A recent discussion has us looking into the opposite end of the spectrum, wrap-around daycare.

Responding to the specific needs is what being "Community Ready" means to us.

## WASBO Foundation 2019-20 Professional Development & Networking Calendar

[WASBO.com](http://WASBO.com)

### Professional Development Opportunities

**State Education Convention**  
(School Finance Puzzle - Jan. 21)

Jan. 21-24, 2020 - Wisconsin Center, Milwaukee

**WASBO Facilities Management Conference** ⚡ - Module 7

Feb. 4-5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

**WASBO Transportation & Bus Safety Conference**

Feb. 5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

**ASBO Executive Leadership Forum**

Feb. 13-15, 2020 - New Orleans, LA

**WI Federal Funding Conference** ★

Mar. 4-5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

**Accounting Conference** ★

Mar. 18-19, 2020 - Madison Marriott West, Middleton

**School Business Office Professionals Conference**

April 2020 - Wausau

**Spring Conference** ★ ⚡ - Modules 1 & 2

May 14-15, 2020 - Kalahari Resort & Conference Center, Wis. Dells

★ Part of the Year of Success program  
⚡ Facilities Manager Certification Core Modules available

**Certified School Risk Managers (CSRM) Course Offerings**

**Fundamentals of Risk Management**  
Jan. 15, 2020 - School Leadership Center, Madison

**Handling School Risks**

Jan. 16, 2020 - School Leadership Center, Madison

**Measuring School Risks**

Feb. 19, 2020 - School Leadership Center, Madison

**Funding School Risks**

Feb. 20, 2020 - School Leadership Center, Madison

**Administering School Risks**

April 1, 2020 - School Leadership Center, Madison

**Emerging Risk** ⚡

April 2, 2020 - School Leadership Center, Madison

⚡ CSRM Update Credit; anyone may attend

**Scholarship Fundraisers & Networking Events**

**Spring 2020 Golf Outing**

May 13 - Trapper's Turn

**Spring 2020 Bike Outing**

May 13 - 400 Trail



**Eddie Then**  
 Director of Human Resources,  
 Merrill Area Public Schools  
 WASBO Director

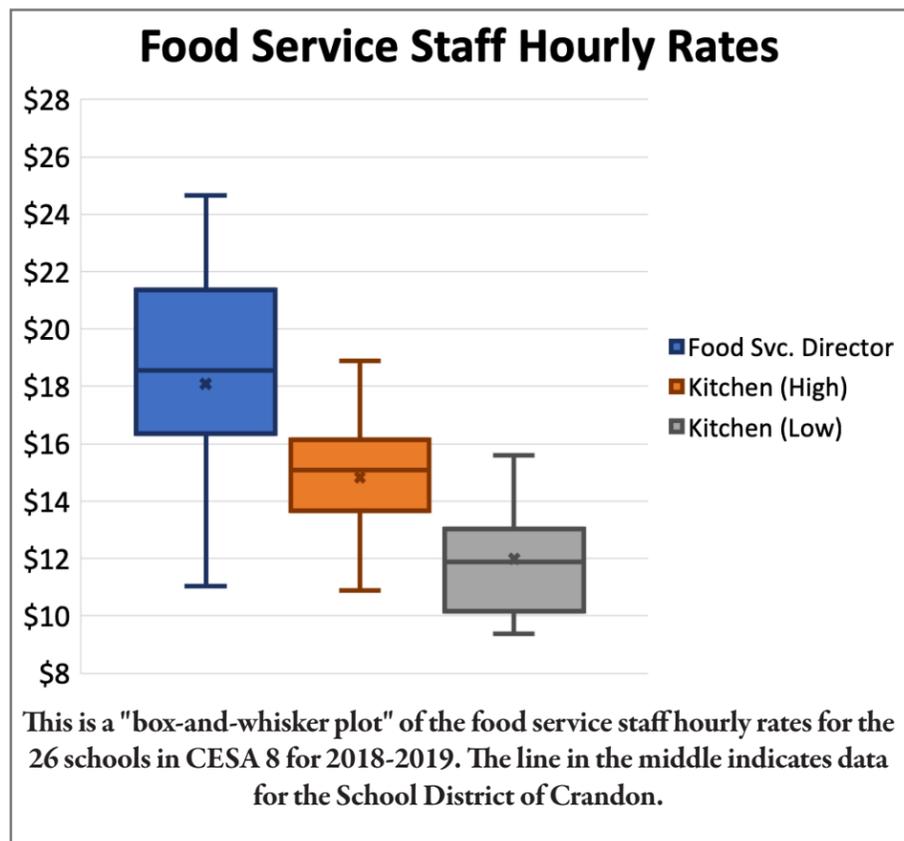
# Comparing wages across classifications

For the last several years, while in the School District of Crandon, I have found myself in conversations about wages that seemed endless and always resulted in unhappiness from the board, employees, and/or the community. Each group of employees (custodians, teachers, food service, secretaries, aides, etc.) all felt raises were warranted. Administratively, our team wanted to strategically increase wages in areas that needed to grow and limit growth in areas that were already well served.

A large reason for this was due to applicant pools. Our support staff applicant pools had enough quality applicants at the current wage rates. The teacher applicant pool was a struggle, as all the CESA 8 schools knew our wages for teachers were lower than several schools in the area as well as schools nearby CESA 9 schools.

To make a long story short, we needed a strategic way to address wage issues in specific areas where we were struggling to recruit and retain.

In prior years our regional business manager group had shared wages for support staff, and I would use the PI-1202 data for teachers and administration. I did basic things, like showing averages or bar graphs, to indicate



where our district was relative to other regional districts.

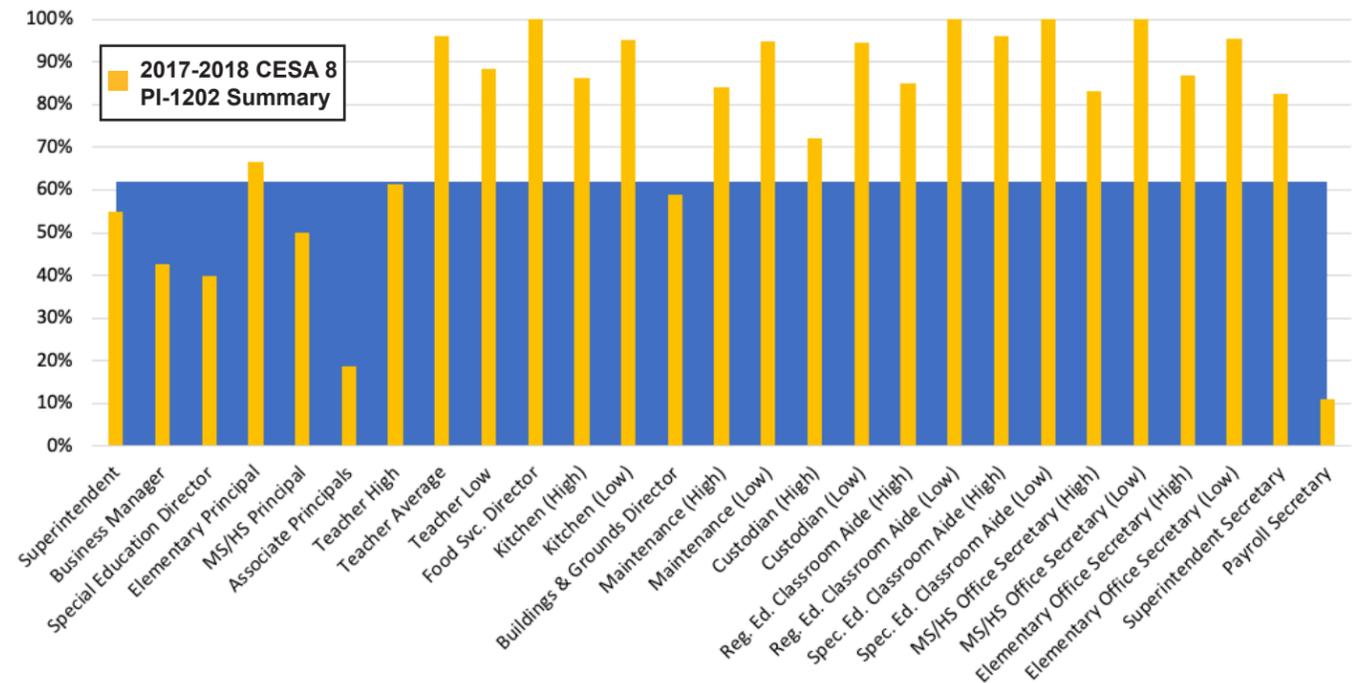
While there was accurate data, it never allowed me to draw conclusions about the dispersion or characteristics of the data; nor was I able to have a conversation across employee groups such as support staff, teachers, and administration.

After three years of conversations that

were not leading to any change, I took a different approach. I broadened my support staff data gathering from our group of regional business managers to the entire CESA. Conveniently enough, the PI-1202 already gathered information about licensed staff that could easily be sorted by the CESA.

After using a Google sheet that I shared with all the CESA schools and making quite a few phone calls, I had

## Summary of Wage/Salary Percentiles by Employee Type



all the data and I could go to work.

In order to be able to understand wages at a higher level, I decided to use different metrics which included "box-and-whisker" plots, percentiles, and standard deviations. While this is more complicated than an average, it is closely related to how our administrative team often talked about individual student achievement scores. For example, understanding that a student scoring at the 95th percentile did better than nearly all of his/her peers. This was logic that the board and employees could understand.

I made "box-and-whisker" plots for everything from the superintendent to teachers to food service. To address hourly wages, I gathered the lowest and highest wage paid to an employee type in each district. As an example, our lowest paid food service worker was at the 85th percentile and our highest paid food service employee was at the 100th percentile.

The box plots gave a good visual of the data to understand the dispersion. On the opposite end of the spectrum, we had associate principals barely making

more than teachers annually at the 19th percentile.

From a logical standpoint, when looking at data involving percentiles, it was rational to conclude that equitable pay for a teacher and food service worker (or any employee type or class) is when they are at the same percentile. For example, if the food service pay is at the 60th percentile, we would expect (likely in a perfect world only) the teacher to be at the 60th percentile.

While it is unreasonable to expect an identical percentage, I think it is somewhat reasonable to say that two groups should not be 50% apart. The key graph that demonstrated the inequities in pay were clearly visible through the graphing of the percentiles by employee type.

We knew our associate principals were paid relatively low. In other words, their pay relative to their peer group was significantly less than all support staff employees relative to their respective peer groups. The information assisted strategic conversations with our board and staff.

The blue shaded region was used for discussion purposes and is based on the high teacher wage (62nd percentile) in the PI-1202. You could use any threshold you want. It made sense for our district because it was the largest employee group and it happened to be in the middle between administration and support staff.

I wanted to be able to give back to the other schools in the CESA who shared data because they were volunteering some vulnerability by sharing the data. I set up the spreadsheet with drop-down menus so that other districts could use it to quickly see their data relative to the other districts that participated.

Overall, it was well received and broadened everyone's understanding of our wage situation. As of July 1, 2019, I have transferred to the Merrill Area Public Schools, which is a part of CESA 9. I now am beginning to collect data for that region.

Thank you for reading and feel free to reach out to edward.then@mapsedu.org with any questions.

# 'Humble Inquiry: The Gentle Art of Asking Instead of Telling'

**Benjamin Irwin**  
Director of Business Services  
Cedarburg School District

When I first became a Business Manager years ago, I was worried that I would have to be in a position where I would have to tell people what to do all the time and deal with situations involving a lot of conflict. I became a Business Manager, because I have a passion for education.

I also enjoy working with budgets and finance, and the thought of having to be a stereotypical overbearing leader was not appealing to me. If a difficult situation did come up, I sometimes found myself taking care of it myself or avoiding it. This would lead to more work for me, or the issue becoming more significant than it needed to be.

Thankfully, due to some valuable mentoring early on in my career from Kathy Zwirgzdas in the East Troy School District and Phil Frei in the Sun Prairie Area School District, I learned that there are many different ways for a person to lead. By observing their techniques, I was able to find a method for being a leader that I was comfortable with and that I found effective.

Over the last few years, I have continued to practice the leadership techniques I learned from Kathy and Phil while also emulating new methods I have learned from other

## Asking questions empowers the people we work with and helps us avoid misunderstandings.

leaders who I would work with or get to know.

However, the book "Humble Inquiry" by Ed Schein helped me define the leadership techniques I was observing and assess which ones I found the most rewarding. Prior to reading this book, I would consistently seek out professional development opportunities in leadership. So when this book was recommended to our district administrative team in Cedarburg, I was happy to see how it aligned with what I had been learning about the last few years.

In the book, Ed Schein defines Humble Inquiry as "the fine art of drawing someone out, of asking questions to which you do not already know the answer, of building a relationship based on curiosity and interest in the other person."

His main point throughout the book is that as leaders we need to spend more time asking the right questions rather than focusing on telling employees what to do.

When we ask questions, we are able to work more effectively with other employees. We can better understand their concerns while obtaining valuable pieces of information. We are able to use the relationships we have built to work on a situation as a team

rather than attempting to work alone. Asking questions empowers the people we work with and helps us avoid misunderstandings from potential incorrect assumptions.

The techniques in "Humble Inquiry" teach us a new way to solve problems. In most of these cases, an employee will bring you an issue and ask you what to do next.

A traditional approach would be to tell them a list of various tasks to complete in order to solve the problem. However, are these tasks the most effective way to solve the issue? What does your employee think about the situation and how to approach solving it? Asking for their perspective and thoughts on the situation can be a fantastic way to empower your employees and find the most effective solution.

Throughout "Humble Inquiry," Ed Schein lists numerous examples of how asking questions in a sincerely inquisitive nature can help build relationships and trust within an organization.

However, in a culture where speaking is typically valued over listening and where accomplishing tasks is prioritized over building relationships, it is important that any leader consider asking questions and being open to re-

ceiving feedback from their employees.

Ed Schein describes how status and rank can restrict Humble Inquiry and how "rules of deference, or how subordinates are supposed to show respect for their superiors," can prevent relationships from developing.

As a result, the employee will plan to interact with their superior in a certain way that matches the norms of society. It is not until a leader embraces a culture of Humble Inquiry that a personalized relationship between employees and their superiors can develop.

Schein says learning together can "reduce status differences [to] make everyone aware of their mutual interdependence." It is important to realize and acknowledge this interdependence since it is a main driving force

for using Humble Inquiry and for building relationships.

Once the need for Humble Inquiry has been identified, the next steps involve putting a process in place. However, changing habits can be a major source of anxiety for many, which can prevent any change from occurring.

In order to be successful, Ed Schein stresses the need to thoughtfully dedicate time to building relationships and trust.

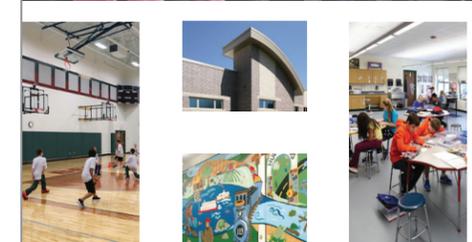
He argues that "once the relationship is built, work actually gets done much faster." In addition, he also emphasizes the importance of reflection and mindfulness toward interactions and relationships you have with your staff.

While it might be difficult with our busy schedules to take the time to put

these practices in place and develop relationships through Humble Inquiry, it is important to realize the benefits of this approach.

Not only does Humble Inquiry help us work through situations more effectively and with less conflict, it also helps develop relationships with our employees so that they feel comfortable sharing valuable input and their perspective. As Ed Schein concludes in "Humble Inquiry," "you should not succumb to telling, but . . . take charge with Humble Inquiry." In other words, you should not be afraid to lean forward and be a Humble Warrior!

*Source: Humble Inquiry: The Gentle Art of Asking Instead of Telling by Edgar H. Schein.*



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# Helping you get WISER

## Meet the new director of DPI's SFS team

**Ryan Silvola**

WASBO Marketing and Communications  
Coordinator

**W**hether it's real or perceived, many school districts across Wisconsin have historically grappled with a separation between the business office and other departments.

Dan Bush, the new director of Wisconsin DPI's School Financial Services (SFS) Team, said one of his team's goals is to help break down this separation where it exists.

Bush said this is necessary, because many district professionals outside of the business office will have to understand and be able to explain the new information soon to be released as part of updated ESSA School Level reporting requirements.

For example, he said this is the first

### Bush said WASBO's Accounting Conference on March 18-19, 2020, at Madison Marriott West in Middleton, will be the official launch of WISEdata Finance.

time districts have been required to report spending per pupil or spending per school, and the public likely will have questions.

He expects everyone — from the superintendents to the principals — will have to understand this data. Bush said one challenge the SFS Team has identified could be with informing principals.

Bush said there's great national data available for superintendents and business managers, but information to educate principals is lacking. This could be a concern for districts.

For example, when Bush presented the new ESSA School Level Reporting data to the state superintendent's advisory council, members said they would expect their child's principal to explain why the district is spending a certain dollar amount per pupil.

Bush is encouraging districts to use this as an opportunity to discuss their decision-making processes and allocation of resources with staff members, the Board of Education and the community.

"We want business office folks to be comfortable with the numbers they're submitting to us and why, but to also be able to start leading conversations in the districts with their administrative

teams, board members and staff," Bush said. "There's a role for business office folks to help their colleagues prepare for those conversations, because they've been living with it the longest."

Overall, Bush said the goal is to move toward an apples to apples comparison with other schools around the state and with the schools in the 38 states that have adopted this national reporting standard.

Bush took over as director of the SFS Team earlier this year. He and the rest of the SFS Team have been working to get all of the districts in the state ready to release the new ESSA reports to the federal government in June of 2020.

To help district's meet the new reporting requirements, the SFS Team is working to release the new WISEdata Finance reporting system.

Bush said the new system will help districts push a budget ledger report directly to DPI through their financial software. It's currently being piloted by five districts and three vendors this school year before it's statewide in 2020-2021. Bush said it will replace a legacy system that's close to two decades old.

"The biggest change for the field is that historically your books didn't have to match your DPI reports, and now they will," Bush said. "So if something

is messed up, isn't right, or needs to be changed, you can't just change it on your DPI report. You have to change it on your books. And that's going to be a big shift for people."

Though the first year might be challenging, Bush said eventually the process will be more streamlined.

"If business managers are wondering what to expect, I would tell them to talk to their enrollment person or student data coordinator, because they had to go through this a few years ago with ISES and WISEdata," Bush said.

He said the first transition year might be difficult, but the new system will eventually help make the submission process much smoother.

Have concerns about the new system? Bush said the SFS Team is here to help. He plans to use the positive relationship between the SFS Team and WASBO to make sure members know about and are prepared for the updates.

He said WASBO's Accounting Conference on March 18-19, 2020, at Madison Marriott West in Middleton, will be the official launch of WISEdata Finance.

Most of the General Session "DPI Spring Finance Workshop" during the Accounting Conference will be focused on the new system. He said DPI also will host online webinars and workshops.

"We think it's very important for WASBO and us to have that opportunity to reach new folks, especially as we're seeing a shift from people who go through one of the graduate programs to be a business manager, to people who were hired as bookkeepers, often out of the private sector, and are given at least some of what I would call business manager responsibilities," Bush said.

He also said the SFS Team is proud

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

"We want new people to have that contact over the year, so they have the right information they need to deal with the things that are coming up. We also think it's important to give them an opportunity to network and for them to realize they're not alone," Bush said. "There's a whole group of folks who are dealing with the same struggles and frustrations that they are. I think that's the other intangible value that people get out Year of Success."

Bush said DPI also wants to support the other main WASBO conferences to provide timely information to the field and to facilitate discussions.

"It's a way for us to communicate with the field in an organized way, but I also see WASBO as a venue for the field to provide feedback to us in an organized way," Bush said.

Bush is hoping to get even more feedback from WASBO members, as he's considering the creation of a formal advisory committee to help the SFS Team update the WUFAR accounting system.

"Having the association have a formal advisory role in updates to the accounting system is a thing that a lot of other states do," Bush said. "So I think it'll be very helpful for us, because we need to move up our schedule of when we do updates and be more proactive."

*The Wisconsin School Financial Services Team has three large roles for Wisconsin School Districts: To pay out state aids, collect financial data from school districts and other education agencies and report that information to the federal government. For more information on the SFS Team, visit <https://dpi.wi.gov/sfs>.*



### Getting to know Dan Bush

**Daniel Bush was a member of the School Finance Team for four years before transitioning to Business Manager of the School District of Lodi for about two years. He then re-joined the School Finance Team and was promoted to director back in May. Bush described his time in the district as valuable. He left the district with a greater understanding of what business managers go through, including the demands on their time with night meetings and other obligations.**

**"Being on the other end of the phone compared to where I had been previously was a great experience," Bush said. "We went through a referendum and debt issue, so I got to live through those, which was very valuable. If you've never borrowed \$22 million it's an interesting experience."**

**Dan Bush and his wife Rebecca Bush, who works in human resources for the University of Wisconsin-Madison, spend their time with their daughter, Leah, a second grader at Mendota Elementary School in Madison. Dan and Rebecca often can be seen cheering on Leah at her gymnastics meets and practices.**





# Sharing thoughts about budget development



**Rebecca Dobbe,**  
**Director of Business Services**  
**Enrollment: 1,928**  
**Years of Service: 15**



**Anne-Marie Malkovich,**  
**Director of Business Services**  
**Enrollment: 3,458**  
**Years of Service: 3.5**



**Beth Sheridan,**  
**Director of Business Services**  
**Enrollment: 5,400**  
**Years of service: 15**



**Lisa Salo,**  
**Accounting Manager**  
**Enrollment: 20,919**  
**Years of Service: 20**

I've been in the school business world for 15 years now, and I'm continuously faced with new challenges. Many of these challenges may appear daily, weekly, monthly or just yearly. The business office has a variety of duties and fluctuates on a day to day basis. So how do I then handle all this while trying to alleviate errors, avoid forgetting things or deadlines and also make sure I'm accurately portraying the district's budget to my administrative team and the Board?

I started using a budget calendar about five years ago which has proven to be extremely helpful. All of us know how busy our days can get and how important it is to stay on task. Creating a calendar has been keeping me more focused on the budget process from developing the budget, to viewing the current numbers, predicting future budgets and all the way to filing reports to DPI. The calendar also has helped the principals know budget due dates and months when they need to work with teaching staff to finalize spending. The calendar I created is comprised by the month and under each month lists the projects that need attention. I also enter in due dates for any deadlines for reports or projects. Another important factor in my budget development process is using a forecasting model. I'm constantly viewing the budget model especially where there are state funding changes or local as well as running different scenarios and how that affects the district's revenues and expenses. A very powerful tool! I have also created school building budgets in google sheets for the principals. I've received really good feedback in regards to this process. I share with principals their total dollar budgets for their building and they distribute to their staff based on the needs in the classroom for that particular year.

Finally, the administrative team meets twice a month and during some of these meetings, we do discuss the budget status. We discuss more during the months of January to June, possible budget additions or budget reductions. We are continuously working as a team throughout the year reviewing the budget, development of the budget and make any changes within the budget that we feel need to be addressed. My final and an extremely important process is reaching out to other business managers for assistance in the budget process.

The annual budget is probably the single biggest responsibility of a school business manager. It can also be a powerful tool for tracking the district's financial health throughout the year. Here are some ideas to help you develop a balanced budget:

**Use your district's strategic plan:** A school district's budget should be an accurate reflection of the district itself. Your district's established strategic plan (goals, mission, vision, beliefs, priorities, etc.) can be used as a guide throughout the budget development process. For proposed expenditures, or even existing expenditures, you can look to the strategic plan as an objective standard for determining budget priorities.

**Go to meetings:** As a business manager, you will get invited to many meetings by departments, committees and activities, and you might be inclined to think that some of those meetings have nothing to do with you. If it involves spending money, it impacts the business office and the budget. Be thankful that you are invited and go to those meetings. You will have a better understanding of things that are happening in the district throughout the year, and when it comes to putting together the budget, you will already have a great handle on planning for next year's expenses. You can also provide some helpful reality checks at those meetings.

**Know your staffing:** For many districts, staffing costs (salaries and benefits) are 75-85% of the district's total budget. As a result, if you can accurately budget for your staffing costs, you've got a great start! First, you need an accurate accounting of the staff you currently have because you can build off of that when planning for next year. Then, you will need to know what will change for next year and by how much. This includes staffing changes (retirements, new hires, adding/eliminating/restructuring positions, or adjusting hours for a position, which could affect benefit eligibility); any changes to your insurance benefits, WRS, FICA; and of course, any Board-approved salary increases. Also be aware of changes in funding sources for positions. If your district is funding staff with a grant, and the grant ends, you might find yourself having to absorb those staffing costs into your budget.

Ask your leadership team and the Board what they liked/what went well and identify if there are any opportunities to make improvements.

How can I best engage administrators/principals, the Board, and staff? Engagement can be painstaking and feel inefficient, but you'll wind up with a better budget, more buy-in, improved support, and greater respect for your work. Understand the level of detail and engagement expected by your Board and leadership team. Develop a plan to engage your Board, prepare them to provide you with guidance, and help them make informed decisions. Understand what they need and how they want to be communicated with about the budget and budget development process.

Take good notes during meetings and conversations. Track allocations and budget requests. It's hard to remember what a principal requested two weeks ago after 8 additional budget meetings. Engage your leadership team in prioritizing budget requests. Follow your strategic plan. There will never be enough budget to go-around, to do everything, or make everyone happy. Use data to inform your decisions. Standardize allocations when possible and allow for exceptions when needed. Be creative – if a budget need is important and resources are limited, ask your leadership team “How can we make this work? Can we stop doing something or reallocate existing resources? Can we use a phase-in approach to make it affordable and sustainable?” Use budget discussions and presentations as opportunities to inform staff, Board, and the community about school finance. They don't work in this arena every day and there is plenty of misinformation, incorrect assumptions, and negative perceptions.

Listen to your site and department leaders. Understand what initiatives need to be funded in the short and long-term. Be mindful of your language and your leaders' language around the budget. ‘The Budget’ gets a bad rap. It's easy to blame ‘the budget’ for not doing things, doing things a certain way, or being the source of poor staff morale. However, it's not ‘the budget's’ fault. It's “our choices on how we use our available resources”. ‘The Budget’ is our financial proposal to support the strategic plan and achieve success.

State statutes regulate many aspects of school districts, including, the development and timeline of an annual budget. A business manager knows how to develop a budget in the general sense as well as know the regulatory deadlines as a pre-requisite to the position. However, what a business manager does not know when stepping into the position are the school district policies, procedures, and environment, as these matters can vary from district to district. Also, the budget process is a continuous cycle from year to year. At any point during the year, District personnel may be working with three different budget cycles.

The other important aspect a business manager should know in preparing an annual budget is the school district's environment. Every school district environment is different. Business managers need to know how the budget information has been presented in the past. If this is your first year as a business manager, it is not recommended to make major changes to the budget documents and presentations unless specifically asked by the Board to do so. However, the following questions should be asked to enhance current year documents. What information does the Board of Education want to see? What information does the public want to know? What communications have been sent out in the past? Does the Board of Education or the public want change on how the budget is presented? What is the general public environment or board environment like? Is the public supportive or not supportive of the district? Is the district in good or poor financial standing? The answers to these types of questions will assist the business manager in developing precise, but informative budget documents. Having a budget timeline/checklist and knowing the district's environment provides new business managers with important information needed in preparing an annual budget and the related documents.

State statutes regulate many aspects of school districts as well as districts having their own budget policies and procedures. A business manager needs to know the regulations and the district's specifics to prepare and present a successful annual budget.



# Thanks for attending!

The theme “What Kind of Workplace Culture are you Creating?” welcomed over 390 attendees to the 2019 Midwest Facility Masters Conference on Nov 4-5 in the new convention space at the Kalahari Resort and Conference Center. Participants joined our Wisconsin colleagues from Illinois, Iowa and Minnesota.

The conference kicked off Monday morning with keynote Will Bowen. Bowen’s message provided attendees with insight to address complaining. He involved attendees by sharing that complaining costs money, damages health and destroys relationships. Participants learned that people complain to get attention, remove responsibility, inspire envy, gain power and excuse poor performance. Bowen equipped attendees with these ideas to help change the situation or complainer by asking “What is going well? If the situation were possible, how might you do it? Compliment the Opposite; How do you plan to improve the next time?” Attendees appreciated the topic and left the session with ideas to apply to daily life.

Monday and Tuesday provided over 64 learning opportunities on diverse session topics to broaden knowledge in leadership, enhance the learning environment, and provide improved safety,



security, maintenance, and operations just to name a few. Sessions in the WASBO Facilities Manager Certification Program Module 3 covering Environmental Health & Safety were offered on both days.

The conference also provided three specific networking opportunities, including a welcome reception Sunday evening, a networking reception in the exhibit hall on Monday afternoon and a Tailgate Networking event on Monday evening. Breakfast and lunch also offered attendees and exhibitors the chance to meet with peers and build relationships.

Attendees also were joined by 126 exhibiting companies providing innovative products and services to help school districts improve efficiency, save money, and improve the learning environment for students. Additionally, WASBO thanks conference sponsors who help support excellent professional develop-



ment and networking opportunities for our conference attendees.

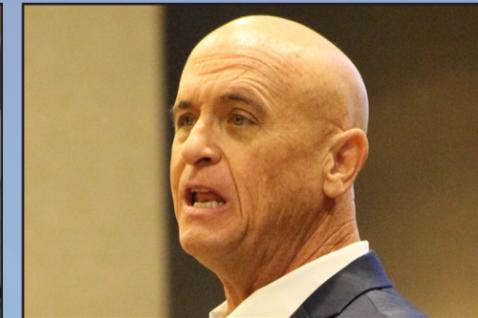
Sixteen attendee scholarships were awarded this year. Nine were sponsored by Focus on Energy and seven were



funded through the drawing prize raffle at the 2018 conference. We thank the exhibitors who provided prizes and those who participated by purchasing tickets. Congratulations to these professionals who received exceptional learning. Their participation will provide the students and staff in their school districts with improved facilities and operations. This year’s raffle raised over \$4,200 which will allow seven attendee scholarships for the 2020 Midwest Facilities Conference.

Stacie Weber and Mike Freybler joined Joe Ledvina for Tuesday’s keynote Making a Difference. Each of the co-presenters shared their experience and inspired attendees to be role models and impact the students and staff in school districts positively. Attendees appreciated hearing an optimistic message from their peers.

We thank the planning committee for their commitment to provide a successful conference and the presenters who provided engaging learning opportunities.



Mark your calendar and plan to attend in 2020 on Nov. 2-3 at the Kalahari Resort and Conference Center. Here is the 2020 planning schedule:

**Jan. 31**  
Right of First Refusal Deadline for 2019 sponsors to renew sponsorship

**Feb. 3**  
Companies invited to sponsor

**Feb. 3 - April 3**  
Call for Presentations applications accepted

**June 1**  
Speakers notified of their selection as 2020 speakers

**June 17 - July 13**  
Priority exhibitor registration open for sponsors

**July 14**  
Exhibitor registration opens for all vendors & attendee registration opens

**Sept. 14**  
Exhibit booths must be paid in full

**Nov. 2-3**  
Conference dates

The 2019 Midwest Facility Masters Conference was provided by:



We thank these sponsors for their support of the 2019 Midwest Facility Masters Conference

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## Congratulations Carl Hayek for winning the 2019 Pinnacle Achievement Award

### My experience at the 2019 ASBO International Annual Conference

**Carl Hayek**  
Director of Business Services,  
School District of Waupaca

**M**artin Buber an Australian born philosopher wrote about differences between an I-it relationship and I-you relationship. An I-it relationship is basically what we create when we are in transactions with people whom we treat like objects – people who are simply there to serve us or complete a task. I-you relationships are characterized by human connection and empathy. What if everyone always chose the I-you relationship all the time? How would our world be?

As I was standing on stage receiving a Pinnacle Achievement Award at the 2019 ASBO National Convention in National Harbor Maryland this past October, never having attended an ASBO Convention, it became very clear to me that WASBO guided me to

this place with individuals encouraging me along my journey such as Woody Weidenhoeft (literally making me aware of this award and excited for the WASBO organization and myself), Jeanne Deimund (getting me a professional photo instead of the selfie which yes, I sent to her) and Molly Barrie (ASBO preparing me for what was to come) and Brian Kirkwood (Virco) supporting the ASBO community/convention itself embracing our individual creativity. Limitless, anything is possible, a human connection, empathy.

I met so many wonderful individuals at the convention, some who will become lifelong friends such as John and Lisa Callopy (2019 Pinnacle of Excellence Award Winner) who personally and professionally inspired me in profound ways, which was entirely unexpected and truly immeasurable. Gifted professionals such as yourselves representing different states in America and different countries in the world, in this together, making a difference, connected with

empathy for others and a commitment to professional integrity and respect. We can imagine and create and build and serve others, yet we do none of this alone. Too often I believe organizations get caught up in competition with each other rather than collaborating together lifting each other up to our highest self.

ASBO and WASBO truly know this and practice this caring not only about each member but also the communities and the people they have the privilege to serve. A lesson to us all in empathy, the I-you relationship. My final note is this, although I was honored and humbled receiving this award, my true Pinnacle Award at the ASBO convention though came before the convention even started or the award ceremony itself. On October 23, on top of a lit up Lincoln Memorial, on my knee, overlooking the Washington Monument, I proposed to the love of my life Cathi. Pretty sure she said yes between the tears, kisses and hugs. Relationships truly are the pinnacle of our lives. Join ASBO, expand your vision, your relationships, I promise you, you won't be disappointed for the relationships fostered through WASBO and ASBO truly are life-changing.



# Thanks for attending!

**W**ASBO celebrated with members at the ASBO Annual Conference and Exhibits on October 25-28, 2019 in National Harbor, Maryland.

This year's conference offered a variety of professional learning opportunities covering topics on the business manager as an educational leader and a look at the future of American Health Care Reform to a critical look at clauses in construction and purchasing contracts just to name a few. Several sessions were standing room only including a session on Leveraging School Financial Data to Improve Outcomes and Create Messaging That Builds Trust was repeated as well as recorded. Recorded sessions are available to ASBO members on the Global School Business Network. Additionally, attendees had the opportunity to network with their peers from across the world and visit the exhibit hall where they met with several WASBO Service Affiliates as well as other vendors helping to find solutions to assist school business officials.

We celebrated the success of Carl Hayek and the School District of Waupun as one of three 2019 Pinna-

**It was so much fun to meet and learn from other business officials from around the U.S. and even globally that are facing the same issues as my school.**

cle of Achievement Award recipients. Carl was congratulated by ASBO President Tom Wohlleber. This was extra special for both Tom and Carl because Tom is also a Wisconsin ASBO member. Jeff Johanning (Lancaster) and Christine Thelen (Michicot) received Emerging School Business Leaders Scholarships. Christine and Jeff enjoyed meeting and networking with 16 of their peers in special sessions and networking. Lynn Knight appreciated the support of her colleagues at Saturday's reception as she continues her 2021 candidacy for ASBO Director.

Why do Wisconsinites attend the national conference? Lynette Edwards, Business Manager, Osceola says "I'm so impressed by the level of professionalism and knowledge I've experienced at the ASBO Expo. The sessions are timely and engaging and have provided immediate value." Jeff Johanning who was a first-time attendee and Bookkeeper from Lancaster noted "The ASBO Annual Conference is a great worthwhile professional development with endless

networking opportunities throughout the entire conference. It was so much fun to meet and learn from other business officials from around the U.S. and even globally that are facing the same issues as my school. I learned so many new ideas I would like to implement back in my district." Cindy Reilly, Business Manager from Wautoma has attended several ASBO Annual Conferences said "ASBO AM&E never disappoints! The expertise represented by the school business professionals shines a light on the current issues as well as challenging me to be an advocate for school funding locally, statewide and nationally. I always walk away with a better understanding of school finance along with new techniques that enhance my abilities making me a more effective school business leader."

Join us next year on October 2-5, 2020 in Nashville, TN. In addition to all the annual conference provides WASBO will be promoting the 2021 ASBO Conference which will be held in Milwaukee. Mark your calendar and plan to attend on Oct 13-16, 2021.



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# F M C

## FACILITIES MANAGEMENT CONFERENCE

[WASBO.COM/FACILITIES](http://WASBO.COM/FACILITIES)

### Discover the future of school facilities

One and a half days of targeted learning and networking await those who attend the 2020 Facilities Management Conference on February 4-5, at the Kalahari Resort and Conference Center in the Wisconsin Dells.

More than 25 sessions will cover a range of topics, from first aid training to energy efficiency, buildings and grounds best practices, technological advancements in the field and much more.

On February 4, the Dane County Sheriff's Office will be offering two "Stop the Bleed" sessions, which will teach civilians basic training in Bleeding Control principles so they are able to provide immediate, frontline aid until first responders are able to take over care of an injured person. This would help cover the delay between the time of injury and the time a first responder is on the scene. We also will

**More than 25 sessions will cover a range of topics, from first aid training to energy efficiency, buildings and grounds best practices, technological advancements in the field and much more.**

offer Facilities Manager Core Certification Module 7, covering emergency management school safety and security, and the Introductory "So You Want to be a Facilities Manager" course.

When the district professionals aren't learning about the future of Wisconsin school facilities, they can network with 125 service affiliates in the exhibit hall.

The wide range of vendors cover a variety of goods and services, including construction, technology, flooring, restoration, energy efficiency, cooperative purchasing, bleacher installation and repair and much more. Facilities and maintenance directors, safety directors, business managers and

district administrators can't miss this conference!

After a great first day of learning, spend your evening networking at Tom Foolery's Adventure Park for go karts, laser tag, mini golfing, a ropes course, carousel and much more. Bond with both district professionals and service affiliates in this unique and fun-filled venue.

The conference runs adjacent to the Wisconsin School Safety Coordinators Association's (WSSCA) Conference on February 3 and 4 and WASBO's Transportation and Bus Safety Conference on February 5 to give district professionals and service affiliates more access to knowledge and networking.

### Save the Date: Transportation & Bus Safety Conference on Feb. 5

[wasbo.com/transportation](http://wasbo.com/transportation)



**Rhonda Page**

Transportation Committee Chair

Please join us for this year's WASBO Transportation and Bus Safety Conference on February 5 at the Kalahari in the Wisconsin Dells. The WASBO Transportation Committee has a full day scheduled with sessions that cover a broad spectrum of transportation topics.

If you're looking at how to improve safety and incorporate student tracking and electronic maps for drivers, you won't want to miss this presentation! This session will be led by a Transportation Director that has gone through the work and can point out the difficulties as well as the immense benefits. Do your bus drivers have the training they need to respond to a medical emergency? Learn best practice recommendations for drivers and see how one district and their transportation provider partner

**Come see a live demo simulating real-world school bus stop situations!**

with the schools health services team to provide annual training. Are you following the law and best practice for parent contracts and private school transportation? The DPI and a local school district will present valuable information and insight on how to address these unique transportation situations.

Come see a live demo simulating real-world school bus stop situations! The demo will be outside and will include the Predictive Stop Arm (PSA) and Right- Hand Danger Zone (RHDZ) solutions. Learn more about this new technology and how it increases student safety. Wayne Georgeson, WI DMV CDL Coordinator will discuss upcoming changes to

Entry Level Driving Training (ELDT). Requirements for new drivers and companies wishing to become ELDT training providers will be reviewed and discussed. Safety continues to be a hot topic. The world is becoming a more complex and dangerous place every day and the school bus is no exception.

Are your drivers prepared to address situations of accidents, active shooters, terrorism, health emergencies? This session will explore things you should consider when creating a transportation emergency plan. The conference will wrap up with an interactive roundtable discussion where colleagues will dive deeper into the day's topics to gain valuable insight into how others are addressing the topics in their districts. For a complete conference schedule and to register, go to [WASBO.com/Transportation](http://WASBO.com/Transportation) or call 608-249-8588.

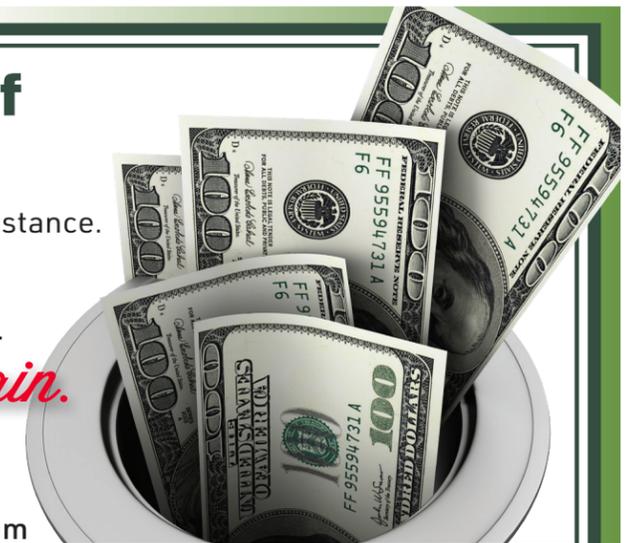
**Are you paying for any of these services?**

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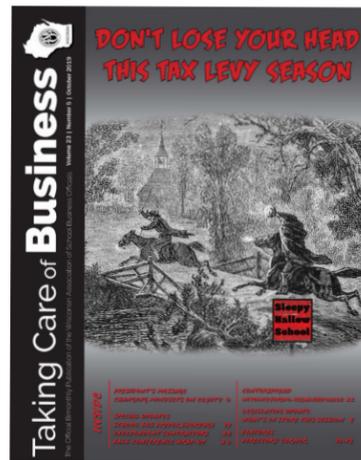
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# SERVICE AFFILIATE CHECKLIST

Your contact for sponsorship, advertising, and newsletter submissions is Ryan Silvola, [Ryan.Silvola@wasbo.com](mailto:Ryan.Silvola@wasbo.com)

- Sponsorship Opportunities:
  - Wisconsin Federal Funding Conference
  - Facilities Management Conference
  - Transportation & Bus Safety Conference
  - Accounting Conference
  - Spring Conference
- Taking Care of Business articles are due January 15 for February issue.
- Advertise in Taking Care of Business for increased visibility with district professionals.
- Update your profile and communication preferences at [WASBO.com](http://WASBO.com) to receive updates on sponsorship and exhibitor opportunities.
- Join a WASBO Committee to get more involved and have your voice heard.
- Mark your calendars! Exhibit hall registration opens January 8 for the 2020 Spring Conference



## 2020-2021 Professional Recognition Awards and 2020 Student Scholarship Programs

**[WASBO.COM/AWARDS](http://WASBO.COM/AWARDS)**  
Award nominations are due Jan. 13, 2020!

**[Scholarships Available!](http://WASBO.COM/SCHOLARSHIPS)**  
**[WASBO.COM/SCHOLARSHIPS](http://WASBO.COM/SCHOLARSHIPS)**

We encourage you to nominate a peer for one of the WASBO Professional Recognition Awards. Is there someone in your Regional stepping outside the lines to share successes and is involved both in their community and WASBO? The nomination deadline is Jan. 13. You can find more information at [WASBO.com/awards](http://WASBO.com/awards).

Four awards will be presented at the WASBO Spring Conference May 14-15 at the Kalahari: the Wallace E. Zastrow Award, School Facilities Manager of the Year, Business Services Award, and Safety, Security & Wellness Award. Two others will be presented at the WASBO Fall Conference Oct. 15-16 in Elkhart Lake: the Tina Hafeman Friend of WASBO Award and the Mike Roshar WASBO Shining Star Award.

The final two awards are presented at the State Education Convention in Milwaukee: School Business Manager of the Year and the newly renamed George Gray WASBO New School Business Manager of the Year. The recipients selected earlier this year are being recognized at the upcoming convention next month. Jonathan Mitchell, Greendale, will receive the School Business Manager of the Year Award at the General Session on Wednesday, Jan. 22. He and the George Gray New Business Manager of the Year recipient, Andrew Thorson, Neenah Joint, will speak during the WASBO Luncheon on Thursday, Jan. 23.

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

We are proud to offer a total of \$23,000 spread amongst nine scholarships to award this coming spring! The WASBO Foundation thanks the following sponsors for their support of continuing education of deserving

Wisconsin students: EMC Insurance Companies, Stalker Sports Floors, Dude Solutions, BMO Harris Bank, Nexus Solutions, National Insurance Services, Miron Construction and United Healthcare.

The WASBO Foundation, through the efforts of all of you, by participating in golf outings, bike rides, run/walks and raffles match the funds of our sponsors for each of the scholarships. **Application materials for high school students can be found at [WASBO.com/scholarships](http://WASBO.com/scholarships). All applications are due Feb. 3, 2020.**

### WASBO Thanks Award/Scholarship Sponsors



To make a nomination for 2020-21, visit [WASBO.com/awards](http://WASBO.com/awards) — links are available to each nomination form. Return your form with supporting documentation to:  
Wisconsin Association of School Business Officials  
4797 Hayes Road, Suite 202  
Madison, Wisconsin, 53704

You may also email scanned documents to Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com).

# Expanding Your Vision

Convention 2020



Learn. Network. Celebrate.

## Keynote Speakers



Scott McLeod

An associate professor of educational leadership at the University of Colorado Denver, Dr. Scott McLeod is widely recognized as one of the nation's leading experts on P-12 school technology leadership issues.

Dr. McLeod has worked with hundreds of schools and received numerous awards for his technology leadership work, including the 2016 Award for Outstanding Leadership from the International Society for Technology in Education.



Holly Hoffman

Author of "Your Winner Within," Holly Hoffman believes that within each of us is an ability to focus our thoughts, emotions and energy to succeed — if only we have the knowledge, tools and discipline to do so.

Holly was the last woman standing on Season 21 of CBS' hit reality show "Survivor." Through that experience and others, Holly was inspired to share her message of positivity, determination and confidence.



Yong Zhao

An expert on globalization and education, Dr. Yong Zhao holds positions at the University of Kansas, East China Normal University, the University of Bath in the U.K., and Victoria University in Australia.

Dr. Zhao has published more than 100 articles and 30 books, including his most recent, "Reach for Greatness: Personalizable Education for all Children" in 2018 and "Counting What Counts: Reframing Education Outcomes" in 2016.



Shane Feldman

Founder and CEO of Count Me In, Shane Feldman is the visionary behind the world's largest student-led movement. Over the past decade, Count Me In has initiated tens of thousands of projects worldwide, contributing a value of more than \$2.6 billion to the global economy through service.

Shane was featured in an A&E documentary TV series that followed his work mentoring teens.

# Legal and ethical standards related to attending the State Education Convention

Michael J. Julka,  
Steven C. Zach &  
Brian P. Goodman

Boardman & Clark LLP, WASB Legal Counsel

Many school districts will be sending administrators and school board members to Milwaukee to attend the annual WASB/WASDA/WASBO State Education Convention in January 2020. Administrators and board members are obligated to comply with the legal and ethical standards established for local public officials that affect their participation in convention-related events. This Legal Comment will discuss the Open Meetings Law and the Code of Ethics for Local Public Officials as these laws relate to and govern the actions of administrators and board members while in attendance at the convention.<sup>1</sup>

## Open Meetings Law

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

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

Administrators and board members are obligated to comply with the legal and ethical standards established for local public officials that affect their participation in convention-related events.

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

The Wisconsin attorney general was asked to issue an opinion as to whether the social nature of many activities offered at the convention makes attendance at the convention outside the scope of the Open Meetings Law.<sup>6</sup> It is well-established that a "social or chance encounter" of members of a governmental body is not a meeting of the body requiring public notice and accessibility pursuant to the Open Meetings Law.<sup>7</sup>

Any presumption that the members are present to engage in governmental business is rebutted when members meet in a social setting or by chance. However, according to the attorney general, the attendance of board members and administrators at a conference, convention or seminar does not constitute a chance encounter because such attendance is pre-planned.

Moreover, such attendance is not a purely social gathering because such conferences, conventions and seminars are designed for board members to discuss issues related to the responsibilities, authority, power or duties delegated to or vested in the board. Nevertheless, the attorney general also concluded that attendance at the convention did not necessarily constitute a "meeting" of the board. According to the attorney general, discussions at the convention generally involve concerns common to all school districts, rather than discussions about a particular district's business. As such, even if the number of board members present is sufficient to determine the board's course of action, the purpose of the gathering is not to engage in the business of the particular district, but rather to take advantage of the convention-related activities. Therefore, the attorney general has concluded that attendance of a quorum of a board at the convention, by itself, does not result in a "meeting" of a governmental body, as defined in the Open Meetings Law.

The attorney general warned, however, that when a quorum of a board or any committee or subunit of a board is present during the convention and all related activities, including the ride to and from the convention, board members must not discuss business specifically related to the district.<sup>8</sup>

Moreover, board members should not formally attempt to convene during

Visit [WASB.org/convention](http://WASB.org/convention) to register.

any of the convention-related activities.

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

### The Code of Ethics for Local Public Officials

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

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

The Wisconsin Ethics Commission has opined that an official may attend conventions and participate in convention-related activities, by and large, without violating the Code of Ethics.<sup>10</sup> Specifically, while attending a convention authorized by and

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**"When a quorum of a board or any committee or subunit of a board is present during the convention and all related activities, including the ride to and from the convention, board members must not discuss business specifically related to the district."**

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on behalf of a district, officials may accept meals, refreshments and the like without charge that are provided, sponsored and/or sanctioned by the event organizer.

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

However, during the convention, officials must be cautious about accepting food, drinks and/or entertainment without charge or at less than fair value that are offered at social events sponsored by entities or organiza-

tions other than the event organizers when the entities or organizations may be current or prospective district vendors. According to the Wisconsin Ethics Commission, beer, wine, liquor, meals, buffets and the like have more than token value, and a purely social event, such as a hospitality suite, a happy hour or a dinner, provides a primary benefit to the official, rather than to the district that authorized his or her attendance.

District officials responsible for making or approving purchasing decisions for the district should not accept food, drinks and/or entertainment without charge or at less than fair value from current or prospective vendors because receipt of such items of value could serve as the basis for an allegation that the items influenced the officials' decisions regarding the purchase of goods or services from the vendor.

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

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

District officials may accept educational or informational materials, prizes or other giveaway items at the convention for the purpose of conveying the item to the district for the use or benefit of the district. However, if the district official wishes to keep the item for himself or herself, the item must be of nominal or insignificant value, in contrast to an item of merchantable value, in order to remain compliant with the Code of Ethics.

The statute does not establish a specific dollar value as a "merchantable" value. The determination of whether an item has more than token or inconsequential value is left to the official's discretion. That said, the Wisconsin Ethics Commission has opined that some tote bags, caps, t-shirts, mugs, pens, rulers, refrigerator magnets and key chains containing a company logo are likely to be of inconsequential value; while other items, including jackets and watches, are likely to have more than inconsequential value, i.e., merchantable value.

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

1. For additional information on related topics, see Wisconsin School News: "The Government Accountability Board" (March 2008); "Compliance with Wisconsin's Open Meetings Law, Part I" (September 2004); "Compliance with Wisconsin's Open Meetings Law, Part II" (October 2004); "Board Duties and Obligations and Potential Ramifications for Non-Compliance" (April 2016); "Recurring Issues for School Board Members: School Board Member Conflicts of Interest, Ethics, and Incompatibility of Offices" (May 2013).
2. Wis. Stat. sec. 19.81 et seq.
3. Wis. Stat. sec. 19.81(1).
4. See, e.g., Office of the Attorney General, Informal Opinion to Clifford Miller (May 25, 1977).
5. State ex rel. Newspapers v. Showers, 135 Wis. 2d 77, 97, 398 N.W.2d 154 (1987).
6. Office of the Attorney General, Informal Opinion to Donald MacTaggart (May 25, 1977).
7. Wis. Stat. sec. 19.82(2); see also Wisconsin School News: "Meeting or Chance Encounter? The Wisconsin Supreme Court Interprets the Open Meetings Law" (September 1993).

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

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### Conclusion

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

of value, without charge or at less than fair value, and when such acceptance will be problematic.

Moreover, under no circumstances should receipt of any such items influence the decisions of the district officials. Finally, it is also important for administrators and board members to review board policies for additional, more restrictive rules about convention attendance and participation, and to direct any additional questions or concerns to the district's legal counsel.



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# WASBO sessions at the 2020 State Education Convention

## Tuesday, Jan. 21

### 1:30-5 PM

#### School Finance Puzzle ..... Hyatt Regency D

Gain a conceptual understanding of the major components of the Wisconsin school finance system using a hands-on, interactive approach. The presentation team will include members of the Wisconsin Association of School Business Officials and the School Finance Team for the Wisconsin Department of Public Instruction. Attendees will become acquainted with the basics of the budget cycle, revenue limits, equalization aid, property taxes and referendums — how these components interrelate and how they impact board decision-making. Leave the workshop with increased confidence in discussing school finance concepts and using this knowledge to help foster an environment of trust in your community for the benefit of students.

- *WASBO Members and DPI School Finance Team.*

## Wednesday, Jan. 22

### 8-9 AM

#### Bullying Prevention to Create Safer and Healthier Schools ..... 101CD

Bullying, including cyber bullying, harms students and staff in a myriad of ways. In this interactive session, learn about student and staff bullying, its effects, pertinent laws and the associated legal liabilities. Participants will have an opportunity to share stories from their districts and learn how other districts handled their incidents of bullying.

- *Marty Malloy, Director Education and Government Practice, M3 Insurance*
- *Jodi Traas, Senior Risk Management Consultant, Community Insurance*

#### Financial Roles & Responsibilities of School Board Members ..... 103AB

The financial roles and responsibilities of school board members, including relevant statutes, will be identified in this session. Additionally, the presenters will address policy development, budgeting practices and procedures, and financial audit considerations from the perspective of three former board members who are active school business managers.

- *Bob Chady, Business Manager, Marshall Public Schools*
- *Dan McCrea, Chief Financial Officer, Janesville School District*
- *Tim Stellmacher, School Business Management Consultant*



### 10 AM - 12 PM

#### General Session ..... Ballroom CD

Cindy Zahrt, WASDA President, Tomah Area School District will preside with the Richland Center High School Symphonic Band performing and presentation of the colors by Greenfield High School students. We will recognize Jonathan Mitchell as the 2020 Business Manager of the Year.

### 1:30-2:30 PM

#### Mental Health Collaborations: Increasing Access to Counseling ..... 202AB

In this panel discussion, district representatives will talk about different types of agreements with mental health providers to bring high-quality outpatient services to students and families as well as memorandums of understanding, licensing and billing, and how to effectively collaborate with practitioners to maximize student outcomes and serve students in a comprehensive manner.

- *Dr. Maggie Peterson, Director of Special Education/Pupil Services, School District of Rhinelander*
- *Matthew Huettl, Director of Student Services, Clinton School District*
- *Dr. Lanora Heim, Director of Pupil Services, Whitewater School District*

#### SAA Legislative Update ..... 102AB

There is always something going on in the State Capitol that directly impacts school board members and administrators. In this session, School Administrators Alliance Executive Director John Forester will recap the 2019-20 legislative session to date and review legislation that may be in play for the remainder of the session. There will be time for questions and answers.

- *John Forester, Executive Director, School Administrators Alliance (SAA)*

### 3:30-4:30 PM

#### Creating a Safe Environment for Students: A Collaborative Effort Between Law Enforcement Agencies and School Districts ..... 102AB

This session features law enforcement, emergency management and school officials from Clinton and Rock County. Some of the topics that will be covered include: how training, routine patrol and technology can prepare everyone for an unthinkable event. The session will include valuable discussion on the challenges school officials face addressing adolescent mental health, assessing school threats, and working collaboratively with law enforcement agencies to ensure an effective multi-agency response to a crisis. You will leave with an understanding of why developing a great working relationship between emergency management services and the school district is vital to student safety and student achievement.

- *Jim Brewer, District Administrator, Clinton Community School District*
- *Robert Butler, Facilities Director, Clinton Community School District*
- *Dave Hooker, Clinton Chief of Police*
- *Sgt. Shena Kohler, Rock County Emergency Management*
- *Janae Gile, Director of Academics and Innovation, Clinton Community School District*

#### Additional Compensation and Fringe Benefits - Do's and Don'ts ..... 103AB

In this session, the presenters will review tax requirements and best practices for providing additional employee compensation as well as wellness plan incentives and giveaways. Using specific situations, this interactive session will provide attendees with tips regarding the do's and don'ts of offering additional compensation or cash-related benefits.

- *Lynn Knight, Business Manager, School District of Neokosa*
- *Julie Lewis, Attorney/ Principal, Lewis Law Office, LLC*
- *Sarah Plohocky, Operations Coordinator, Key Benefit Concepts*

### 4:30-5:30 PM

#### Hilton Milwaukee City Center, Crystal Ballroom

Relax with your colleagues and exhibitors and enjoy refreshments. Lamers Bus Lines will provide transportation to designated hotels from the Hilton Milwaukee City Center Hotel on Wednesday, Jan. 22 from 5 to 6 pm to accommodate the reception. The pick-up location is at the 6th Street entrance (at the end of the Wisconsin Broadcasters Hall of Fame hallway).



## Thursday, January 23

### 8:45-9:45 AM

#### Why Your District Should Conduct a Comprehensive Facilities Assessment ..... 103AB

Gain knowledge from two experienced facility directors who will take you through a comprehensive facilities assessment. They will guide you through a step-by-step planning process that helps school districts and their communities better understand the current state of their facilities and how well the infrastructure supports educational goals.

- *Dave Hob, Custodial Supervisor, Oshkosh Area School District*
- *Joe Ledvina, Supervisor of Buildings & Grounds, La Crosse School District*

#### Baited Hooks and Trapdoors: A Closer

#### Look at Special Services ..... 201CD

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

- *Gary Myrah, Executive Director, WCASS*

### 8:45-11:45 AM

#### A Deep Dive into School Finance ..... 102DE

Take a deep and detailed dive into Wisconsin's school finance system with the DPI School Finance Team and WASBO members. In this special, in-depth session, they'll describe how the revenue limit sets the total dollars that can be raised through state equalization aids and local property taxes for each district. They'll also step through the calculation of state equalization aids based on the variables and factors that drive the formula: each district's spending, property tax base and number of students. Finally, they'll discuss the importance of maintaining a strong fund balance and cash reserve as well as best practices for board policy in this area. Attendees will improve their understanding of how the overall district budget works and the concepts of fund accounting, while gaining confidence in their advocacy on school funding for their districts.

- *Debby Brunett, School Business Specialist, Baird Public Finance*
- *Tom Owens, Business Manager, Stevens Point Area Public School District*
- *Bob Borch, 2r charter schools business manager, CESA 1*
- *Dan Bush, Team Director, DPI School Financial Services*
- *Derek Sliter, consultant, DPI School Financial Services*

## Thursday, January 23

### 10:45-11:45 AM

#### Act 143: Navigating the Needs and Expectations for Safety and Security . . . . . 101AB

What is the School Board's role in the culture of safety/security in the District? In the aftermath of Wisconsin Act 143, Menasha conducted a security audit to better understand the district's security and safety needs and to make proactive recommendations to improve student safety. This session will educate board members on everything required by Act 143 and how the School Safety Grant was used effectively to help meet the district's needs.

- Chris L Vanderheyden, Superintendent of Schools, Menasha Joint School District
- Brian Adesso, Director of Business Services, Menasha Joint School District
- Glenn Rehberg, Deputy Director, Office of School Safety

### 12-1:15 PM

#### WASBO Luncheon. . . . . Empire Ballroom, Hilton

Join your peers for the annual luncheon and business meeting. Hear from 2020 Wisconsin School Business Official of the Year, Jonathan Mitchell and New School Business Manager of the Year, Andrew Thorson, Neenah. This is a ticketed event and requires pre-registration.

### 1:45-2:45 PM

#### Impact of Vouchers on Wisconsin

#### Public Schools . . . . . 101AB

Learn about the effects, issues and concerns surrounding the impact of private school vouchers on local school districts.

\*Session to be recorded and included in Virtual Attendee Access program.

- Dan Bush, Director, School Financial Services, WI Dept. of Public Instruction

## Friday, January 24

### 8-9 AM

#### The School District Budget Cycle. . . . . 102DE

The school district budget is one of the primary management tools for school administrators and boards. Its primary purpose is to translate the district's strategic initiatives into programs and services that support student learning. Referencing the WASB/WASBO Budget Cycle Handbook, this presentation will discuss revenue sources and limits, budget planning and development, reconciliation and approval, budget management and reporting. Board members in attendance will have an opportunity to share their best practices.

- Roger Price, Organizational Services Consultant, WASB
- Sue Schnorr, Business Manager, Oshkosh Area School District

### 8-9 AM

#### Building a Championship Team! Maximizing the Impact of Your Buildings & Grounds Department . . . . . 101CD

Each district has unique challenges in regards to their facilities and safety initiatives. Using the expertise of two recent WASBO school facility managers of the year, this session will offer best practices and a variety of tactics that can be deployed in your district to engage, maximize and enhance your buildings and grounds department. It will offer a systems and team perspective on how to value people, focus on organizational learning, and integrate processes and programs to create a positive work culture.

- John Stangler, Director of Buildings & Grounds, Pewaukee School District
- Jeremiah Johnson, Director Of Operations & Human Resources, Muskego-Norway School District

### 9:15-10:15 AM

#### New Federal Requirement for School Level Financial Reporting: What Do School Boards Need to Know? . . . . . 101AB

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

\*Session to be recorded and included in Virtual Attendee Access program.

- Dan Bush, Director, School Financial Services, WI Dept. of Public Instruction
- Mike Barry, Executive Director, WASBO

### 10:30 AM - 12 PM

#### Friday General Session

Kathy Davis-Phillips, WASBO President, Deforest Area School District presides with music performances from the Platteville High School Blue Notes. Governor Tony Evers will speak followed by Keynote Shane Feldman.



# Stay Connected

### Participate 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](http://WASBO.com/committees). Contact Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com).

### Mentorship Program

New professionals are entering the field regularly. If you know of someone new in your region who could use the help of a mentor, contact WASBO's Mentor Coordinator, Mary Jo Filbrandt, at [maryjo.filbrandt@wasbo.com](mailto:maryjo.filbrandt@wasbo.com).

For a school facilities mentor, contact Joe Ledvina at [jledvina@lacrossesd.org](mailto:jledvina@lacrossesd.org) or Dave Hoh at [david.hoh@oshkosh.k12.wi.us](mailto:david.hoh@oshkosh.k12.wi.us).

### Get Connected to Your Peers

WASBO's ConNectwork online community allows district professionals to share resources, network and ask and answer questions to their peers.

Try out the community by using your current username (email) and password to access all things WASBO at [www.wasbo.com](http://www.wasbo.com). Then click on "Resources" at the top of the homepage and then ConnectWork.

### Submit a Newsletter Article

Share your experience by writing an article for Taking Care of Business. Email submissions to [Ryan.Silvola@wasbo.com](mailto:Ryan.Silvola@wasbo.com).

### Interim Assignments

As WASBO members take new positions or retire, the districts they leave are left may be temporarily short-handed. In addition, many districts are in need of consulting help.

If you are interested in an interim assignment, please send a one-page resume to Mike Barry at [Mike.Barry@wasbo.com](mailto:Mike.Barry@wasbo.com).

### Keep us Posted

Retiring? Contact WASBO before you leave so we can update your member type and get your new contact information. Email Kristin Hauser at [kristin.hauser@wasbo.com](mailto:kristin.hauser@wasbo.com).

Changing Districts? Be sure to update your profile at [WASBO.com](http://WASBO.com) so you don't miss any communications. Call 608.249.8588 if you need help.



## More on Coaching for Mentors & Protégés

WASBO offers a Mentorship Program which provides technical assistance and advice to **first- and second-year school business officials** relative to the myriad of duties and responsibilities that are inherent within every school business officials' job description.

The mentorship program is designed to provide opportunities for new school business officials to acquire the performance skills and knowledge necessary for the effective implementation of their job responsibilities.

**WASBO.com/Mentorship**

# In memory of Don Siegfried

**Robert Borch,**  
WASBO Past President

We are saddened to announce that we will no longer have the pleasure of seeing Don Siegfried and his wife Jean at our WASBO spring conferences anymore. While Don retired from the Elmbrook School District in 1986, in his retirement he was always at the spring conferences, not just for the President's Dinner, but to attend all of the general sessions as well as many of the other sessions. He passed away on Saturday, October 26, 2019, at the age of 93 years and 10 months.

Don's career as a business manager spanned 31 years. He began his career as business manager of one of the elementary school districts that later, in 1963, combined with four other elementary districts to become Elmbrook. Until it consolidated there was



not a high school to serve the area and that was a part of the consolidation, with Brookfield Central becoming the first high school.

He led Elmbrook through tremendous growth to almost 12,000 students and equally large enrollment decreases, to 5500 students when he retired. This meant the building of many new schools as well as the closing of many. His staff gave him the nickname of "The Chief" and he held that title even in retirement. He was proud

of the fact that during his 31 years working he never missed a day of work for sickness. Don was well-loved and remained a strong supporter of the Elmbrook Schools and Brookfield community throughout his retirement and, in 2014, he was recognized as an Outstanding Educator at the District's 50th Anniversary celebration.

Don was active in WASBO and ASBO. He served as president of WASBO in 1977-78. He was known by his peers as "King of Arbitrage" for his ability to maximize his short term borrowing with low borrowing rates and using those funds to earn money for the district with high rates of interest earned on investments. He was a guide and mentor to many WASBO members. He is survived by his wife, four children, as well as grandchildren and great-grandchildren. He will be greatly missed.

# In memory of John E. Coyle

John E. Coyle, age 83, of Rhinelander, passed away on October 31, 2019. John was the WASBO Board President in 1984-85.

John proudly served his country in the U.S. Navy in San Diego during the Korean War. John and his wife Dolores moved to Madison for one year and then moved to Whitewater, WI where John earned his Bachelor of Education degree.

He continued his education at the University of Northern Illinois at the School of Business Management where he earned a Master's of Science degree. The couple moved to Oshkosh in 1962 where John was employed by



the Oshkosh Area Public Schools as administrative assistant.

They moved to Stevens Point in 1974 where John served as Administrator of Business Affairs with Stevens Point Area Schools. The family then moved to Rhinelander in 1978 where John

served as Assistant Superintendent for Rhinelander Public Schools, retiring in August of 1993.

John is fondly remembered as a professional, mentor and friend to his colleagues. He was always willing to answer questions and help a new business manager in any way. Many of you may have met John at a past WASBO Spring Conference.

He is survived by his wife, six children and 14 grandchildren and five great-grandchildren, two sisters and brother. He will be greatly missed.

*We thank Mary Jo Filbrandt for providing the information.*

# Celebrating our New Members!

PLEASE REACH OUT AND CONGRATULATE OUR NEW MEMBERS

## District Professionals

- **John Berglund**, Director of Facilities and Grounds, Ashland School District
- **Jay Dereszynski**, Facility Technician, Indian Community School
- **Jessica Johnson**, Benefits Manager, West Allis-West Milwaukee School District
- **D.J. McNamer**, Buildings & Grounds Supervisor, Kickapoo Area School District
- **Corinne Rice**, Bookkeeper, Sturgeon Bay Schools

## Service Affiliates

- **Jen Apa**, Sr. Marketing Communications Consultant, CM Regent Insurance Company

- **Elizabeth Crain**, Account Executive, Mohawk Group
- **David Swan**, Managing Director, Bright Schools Project
- **George DeGraffenreid**, Director of Commercial Sales, Batteries Plus Bulbs
- **Gabrielle Forstner**, Business Development Manager, Mavo Systems
- **Randy Herwig**, Client Service Manager, Muermann Engineering, A Division of MSA Professional Services
- **Andrew Joosten**, Midwest Representative, GOVDeals
- **Jeanine Lopez**, Business Development Director, Elior North America

- **Blake Peuse**, Senior Business Consultant, Unesco Group
- **Mike Roekle**, Account Manager, Wolter Power Systems
- **Barry Thielen**, RM Cotton CO
- **Keith Wein**, Vice President, Sales Rep, Marshfield Book & Stationary

## Member Retirements

THANK YOU FOR ALL YOU'VE DONE FOR STUDENTS AND THE PROFESSION. PLEASE KEEP IN TOUCH!

- **Martin Hintz**, Facilities Coordinator, Appleton Area School District
- **Bill Berenz**, Manufacturer Representative, Nevco Wisconsin Office
- **Bob Eidahl**, Administrator, Berlin Area School District
- **Dan Bubolz**, Vice-President, Marshfield Books & Stationary
- **Andy Christensen**, Business Manager, Fall River School District

# Member Moves

CONGRATULATE WASBO MEMBERS ON THEIR NEW SUCCESSES

- **Jacquelynn Schreiber**, Finance Manager, School District of Abbotsford to Accounting Manager School District of Marshfield

- **Eric Hidde**, Maintenance Manager, Sun Prairie Area School District to Buildings and Grounds Maintenance Director Markesan District School
- **Lindsey Zarling**, District Bookkeeper, Cambellsport School District to Bookkeeper Kewaskum School District

# WASBO Events Calendar

Here is a look at the conferences, workshops, regional meetings, committee meetings, and other events that make up the upcoming WASBO Event Calendar. For more information, visit [wasbo.com/calendar](http://wasbo.com/calendar)

## January

**7**  
School Facilities Committee Meeting  
9:30 AM, WASBO Offices

Safety & Risk Management  
Committee Meeting  
11:45 AM, WASBO Offices

**15**  
CSR: Fundamentals of Risk  
Management  
8:30 AM, School Leadership Center,  
Madison  
[wasbo.com/riskmanagement](http://wasbo.com/riskmanagement)

**16**  
CSR: Handling School Risks  
8 AM, School Leadership Center,  
Madison  
[wasbo.com/riskmanagement](http://wasbo.com/riskmanagement)

**21-24**  
Wisconsin State Education  
Convention  
Wisconsin Center, Milwaukee

**23**  
Spring Conference Committee  
Meeting  
Wisconsin Center, Milwaukee

## February

**4-5**  
Facilities Management Conference  
Kalahari Resort and Conference Center  
[wasbo.com/facilities](http://wasbo.com/facilities)

**5**  
Transportation & Bus Safety  
Conference  
8AM, Kalahari Resort and Conference  
Center  
[wasbo.com/transportation](http://wasbo.com/transportation)

Northwest Regional Meeting  
10 AM, Rice Lake

**6**  
West Central Regional Meeting  
9:30 AM, Sparta Area School District

**7**  
Northeast/Bay Area Regional Meeting  
9 AM, Kimberly Area School District

**12**  
Wally Zastrow Leadership Academy:  
High Performance Teams  
10 AM, School Leadership Center  
[wasbo.com/leadership](http://wasbo.com/leadership)

**17**  
Spring Conference Committee  
Meeting  
2 PM, conference call  
[wasbo.com/spring](http://wasbo.com/spring)

**19**  
CSR: Measuring School Risks  
8:30 AM, School Leadership Center,  
Madison  
[wasbo.com/riskmanagement](http://wasbo.com/riskmanagement)

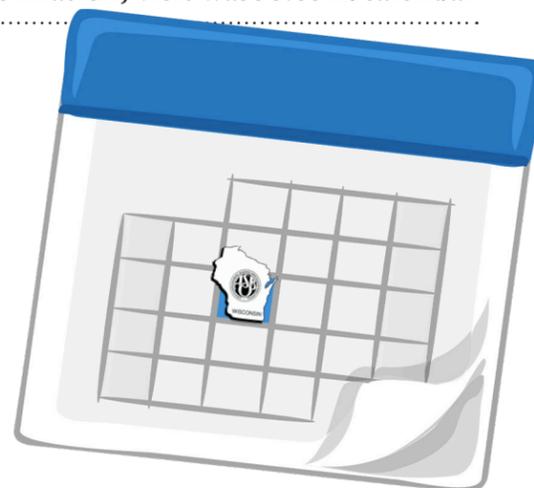
**20**  
CSR: Funding School Risks  
8 AM, School Leadership Center,  
Madison  
[wasbo.com/riskmanagement](http://wasbo.com/riskmanagement)

WASBO Board of Directors Meeting  
9:30 AM, School Leadership Center  
[wasbo.com/board](http://wasbo.com/board)

**21**  
Madison Area Regional Meeting  
9 AM, Madison School District

Wisconsin Valley Regional Meeting  
9 AM, Wausau School District

Southeast Regional Meeting  
12:30 PM, Cudahy School District



## March

**4-5**  
Wisconsin Federal Funding  
Conference  
Kalahari Resort and Conference Center  
[wasbo.com/federal\\_funding](http://wasbo.com/federal_funding)

**18-19**  
Accounting Conference  
Madison Marriott West  
[wasbo.com/accounting](http://wasbo.com/accounting)

## ASBO INTERNATIONAL MEETING DATES

**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



# HAPPY HOLIDAYS FROM THE WASBO BOARD

## With the holiday season in full swing, board members share their festive traditions

### Kent Ellickson



Our family always got together on Christmas Eve for a big dinner and church. Later this evolved into getting together with other families on Christmas Eve for a big dinner and party. Christmas morning in the youngest years was always in PJs opening gifts, similar to the photo. However, I think the photo was taken by my parents for the upcoming Christmas card. I'm the infant.

### Eddie Then

We make sure nobody works so we can eat a lot of sugar cookies. We also do something outside. We've gone sledding, snow shoeing, snowmobiling, and downhill skiing depending on the weather.

### Tim Erickson

For a few years I used to go out to some land my parents owned and look for a beautiful tree to cut down and put in my home. Every year I would find a tree that looked perfect, cut it down, haul it home, shove it through the doorway and put it in the stand. I would then step back and look at it and be amazed at how much of a Charlie Browner it looked like. They always looked so much better in the woods. I am now the proud owner of an artificial tree!

### Mike Koltes

My brother and I wrote letters to Santa. We would bake cookies and set them out on Christmas Eve night for Santa (along with the letters). We would get up super early Christmas morning to see if Santa wrote back and open the presents that Santa brought. There was always great anticipation.

### Brian Adesso

Our family tradition is to wake up on Christmas Day and start to chop fresh parsley and garlic to mix with a couple types of meat. We then add in some parmesan cheese and bread to finish up the meatball mixture. While those are cooking we slice up fresh mozzarella cheese (the kind that is in water) and some type of pastry usually mohnstriezel (German poppy seed roll). Lately we eat and share stories of our childhood experience with the whole family.

### David Hoh



In my family the tradition was for our three boys and myself to go out and cut down the Christmas tree. Every year the tree became bigger and bigger to the point where it was 16' and then we had to decorate the tree which involved extension ladders to reach the top of the tree. The boys since have moved out, but I still get a very tall tree and decorate it. My wife is never happy as she would like to have an 8' tree.

### Kathy Davis-Phillips

One of my favorite holiday traditions is going to my best friend's house on Christmas morning to exchange gifts, drink mimosas, and play with all of her kids new toys!

### Julie Kelly

We have a few holiday traditions in our family. Unlike most families that make baked goods for the holidays, our family, given our Polish and German heritage, makes homemade polish sausage and ziltz. Yes, we still use the old school hand meat grinder and stuffer to make the sausage. It has become a popular item to gift during the holidays, so we now make upwards of 60 pounds of polish sausage by hand to share with friends and family. We also make a dish called Ziltz. For those who are unfamiliar, Ziltz was usually made by families who were poor and needed an inexpensive dish to feed their large families. It is basically a meat jello. You boil pigs feed and pork hocks with a number of spices. You then remove the meat from the bones, place in it pans and top it with the broth from the meat. Once jelled, you serve it cold and top it with white vinegar. I know...it is disgusting to think about, but many people in my family still eat it. For the sake of tradition, I assist in the-ziltz making process but refuse to eat the final product. Outside of cooking, the whole family heads up to our cabins in Land O' Lakes the day after Christmas and we spend the week ice fishing. There is nothing better than bringing in the new year in the northwoods!

### Holly Burr



My parents, siblings and all the kids get together during the holidays. This sounds fairly normal until I tell you I am the youngest of 10 children. My siblings and I have 8 spouses/significant others, 33 children with 23 spouses/others, 42 grandchildren and counting! Needless to say we rent a hall, it is usually 80 - 100 people that make it. Eat, drink, play games, and exchange gifts. It is an afternoon of organized chaos that we all look forward to!



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