



WASBO Foundation

Accounting Conference

Collaborating for Change Contest

Entries from:

- **CESA #10**
- **New Berlin**
- **North Fond du Lac**
- **Omro**
- **Pittsville**

CESA #10

Submitted by Brad Henningfeld
brad@cesa10.k12.wi.us

What was the issue you were trying to solve?

Our agency was trying to solve two issues. First, we were trying to save money for our districts by lowering the mileage costs of our itinerant staff. Second, we were attempting to become a "greener" agency.

What was the proposed plan to address the issue?

The proposed plan was to purchase two or three fuel-efficient vehicles per year beginning in 2008. These vehicles would be offered to the employees who drove the most miles in the previous fiscal year. Those not accepting a agency vehicle would have their mileage reimbursement rate decreased by .15 per mile from the current IRS rate for that year.

How was the plan implemented?

A member of our Facilities Management Department prepared a cost study on the most affordable, fuel-efficient vehicles that year. This study was presented to our Board of Control. Upon hearing the study, the Board approved the purchase of two Honda Civics. At that time, a policy was also established that decreased the mileage reimbursement rate by .15 per mile for any eligible employee that declined the use of an agency vehicle. In August, those two Civics were assigned to the two employees with the highest mileage during the previous fiscal year, as determined by our Business Services Department. The employees who were assigned a vehicle tracked their mileage on their monthly expense forms. The Business Services Department then tracked all the costs associated with the vehicle (gas, maintenance, depreciation, insurance, etc.), and determined the annual savings to the agency and its districts.

How did it solve the problem?

The purchase of affordable, fuel-efficient vehicles, as well as the adoption of a solid policy, have saved the agency hundreds of thousands of dollars since 2008. These savings are then passed on to our districts by lowering or maintaining our service billing rates in these high-mileage areas. The use of these smaller vehicles has also reduced the amount of harmful emissions entering the atmosphere.

What was saved? Or what new funds were generated?

Our fleet has grown to 17 vehicles since the plan's inception in 2008. This mileage savings program has saved the agency and its districts almost \$150,000 over the past two years.



New Berlin

Submitted by Shari Kordecki
shari.kordecki@nbexcellence.org

What was the issue you were trying to solve?

Our goal was to reduce paper use in the district office— especially the business office—and make audits easier.

What was the proposed plan to address the issue?

We purchased desktop scanners for staff to scan most/all documents and save to an appropriate drive and file.

How was the plan implemented?

We purchased Canon Desktop Scanners for all district staff and asked them to scan documents they might normally keep as paper, which would have been filed and then archived, taking up space in the warehouse. Staff now saves documents to a shared business office folder called Audit, further sorted by Fiscal Year and by other categories such as Accounts Payable, Accounts Receivable, Bank Reconciliations, Balance Sheet Report, Revenue Reports, Expenditure Reports, fixed Assets, Food Service, Grants, etc. We started this practice two years ago, and every year we use less paper.

How did it solve the problem?

In our third year of utilizing scanners, we potentially could have a paperless audit! Our auditors have commented every year how much they like the paperless approach, as they can access our files from the cloud. We have created a special folder which they can access from anywhere. Whether they are in one of our offices, at their office or working at home, they can access practically all the documents they need to complete the audit. We are hoping either this year or the next they won't need to come to our office at all. Everything they need will be accessible on the cloud. The departments within the district office also like not having to gather piles of paper as they prepare for audit or file them all away after the audit is done.

What was saved? Or what new funds were generated?

This program has saved time for the auditors, the business office and other district office staff, as they do not have to pull reports and files or compile documents once they give us their list of requirements. It has saved money on paper supplies, copier ink and toner. It has freed staff time since they are saving documents during the year as they occur instead of putting in extra time specifically to gather items for the audit. Everything is in one place, and many of our reports are downloadable into Excel from our financial software so auditors can manipulate files as needed. This results in reduced hours to complete the audit.



School District of New Berlin

North Fond du Lac

Submitted by Maria Putzer
mputzer@nfdlschools.org



The School District of
North Fond du Lac

"Working Together for the Success of All."

What was the issue you were trying to solve?

We wanted to provide 1:1 technology devices to all staff and students grades K-12 without exceeding the revenue cap (going to referendum).

What was the proposed plan to address the issue?

We decided to implement a leasing program.

How was the plan implemented?

After obtaining quotes from vendors and leasing companies, we decided to work with John Vonder from Providence Capital. John customized a leasing program so we could not only provide devices to all our students and staff, but maintain an appropriate replacement rotation.

2012-13: Can our Infrastructure handle a 1:1 initiative?

The first step was to develop the infrastructure to be able to support a 1:1 initiative. This resulted in our first 4-year lease in 2012. It provided all of the hardware, installation, and support to maintain a 1:1 device initiative.
Lease #1: 4 years, 2012/13-2015/16

2012-13: Staff and Student Rollout

The first rollout was during the summer to equip staff with iPads. We provided setup and Google Apps for Education training to ensure that staff was familiar and comfortable with the many teaching and learning opportunities available with the devices. October 2012 brought the first rollout to students in select grades. District-specific data provided by Marian University showed that the iPads were an effective teaching and learning tool so we worked with John to expand the initiative to all K-12 students and staff.
Lease #2: 4 years 2012/13-2015/16 (option to purchase built in)

2013-14: Let's try Chromebooks

After research and collaboration with other districts, a decision was made to add Chromebooks in some of our elementary grades and in our high school. We also started providing MacBook Pros to staff as an alternative to aging desktops. Lease #3: John was helpful in creating three different leases to match the replacement and buyout options of our high school students. The 4-year leases were meant to accommodate our freshman students with a buyout option at the end of the four years. The 3-year lease was for our sophomore devices with a buyout option and the 2-year lease was for our junior devices also with a buyout option.

2015-16: The program is a success!

You may be wondering how we support all of these devices. Under the direction of our superintendent, who also serves as our technology director, we developed a team of six educators called the EMT (Education Machine Team). For an annual extra duty stipend, they serve as our day-to-day tech support team answering staff questions, providing tutorials, and recommending appropriate classroom apps. They also meet monthly to determine future technology needs in the district and participate in professional development opportunities throughout the state to stay current. To address minor repairs, one of our technology education teachers has added a computer repair class to his day. This not only saves the district money in repair costs, it offers students hands on problem-solving opportunities.

How did it solve the problem?

Resulted in a 1:1 technology device program and technology support without exceeding our revenue cap (referendum).

What was saved? Or what new funds were generated?

Community member tax dollars were saved. We have been able to maintain a 23+ fund balance and spread the cost of hundreds of devices over several years while keeping up with aging technology.

Omro

Submitted by Dennis Wesenberg
dewese@omro.k12.wi.us

What was the issue you were trying to solve?

Omro is a small district with limited tax revenue. We are always looking for ways to lower our operating costs. One of those areas is natural gas usage. We worked at upgrading our equipment and controls and improving efficiency. The next step was finding reliable low cost fuel.

What was the proposed plan to address the issue?

Dave Hoh from Oshkosh Schools introduced me to the WE2C program at a WASBO conference. Our district contacted Paul Rudewick who educated us on the program.

How was the plan implemented?

Paul looked at our past usage district-wide and determined we could use his program at one of our three campuses, the other two were too small. Paul worked with us on installing the necessary equipment and phone lines and got us up and running for the start of November heating season.

How did it solve the problem?

By joining the energy co-op, we obtained considerably lower supply costs.

What was saved? Or what new funds were generated?

In our first three months in the program, we saved a difference of \$4,883.38. These savings were for just one campus. We hope to be able to reallocate these funds into other energy saving upgrades around the district.



SCHOOL DISTRICT OF
OMRO

Pittsville

Submitted by Pam Tesch
teschpam@pittsville.k12.wi.us

What was the issue you were trying to solve?

Over the past years, many service provider contracts were automatically being renewed, without reviewing the details. As the new Director of Business Services (I began in mid-July 2015) I decided to start going through the contracts to determine if we were even still using the services and/or items.

What was the proposed plan to address the issue?

I took a careful look at all of the contracts and recurring monthly bills that were coming across my desk for payment, to verify if the services/items were still in use and determine if we were just set up in an 'auto renew' cycle.

How was the plan implemented?

I pulled historical data and contracts, then started to contact the vendors to get the contract details as the contracts/bills were coming due.

How did it solve the problem?

I've been able to get more details about the contracts and have been able to work with the vendors to save money for the district while maintaining the same or better service for the district.

What was saved? Or what new funds were generated?

I have experienced many victories and fine tuned many of our smaller contracts. Two notable larger contracts I have had success with are our cell phone service provider and our refuse pickup service provider. With the cell phone service provider, I determined that we were paying for nine cell phone contracts, but were only using five. With the help of our IT director, we contacted the cellular company regarding this overpayment. They told us that they could determine when the phones were deactivated, and they issued us a substantial credit going back to July 2014. Regarding the refuse pickup service provider, I determined that our contract had never been reviewed since its implementation more than 10 years prior. With the help of the Director of Buildings and Grounds, we were able to add services while still cutting our monthly bill by nearly 50%. The service provider also agreed to credit our bills back several months. I'm currently working with our various insurance providers (other than health) to find ways to improve our coverage and yet reduce our costs, such as implementing safety training and slip/fall training to help reduce our Workers' Compensation insurance and claims. While I have initiated the push to get all of the contracts reviewed, I have had significant help from other staff members to put our plans into action. I have many more contracts to still review, but I feel that we have made great strides toward saving the district money while keeping or improving upon our services.

