



Taking Care of Business

The Official Bimonthly Publication of the Wisconsin Association of School Business Officials Volume 23 | Number 5 | October 2019

DON'T LOSE YOUR HEAD THIS TAX LEVY SEASON



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FALL CONFERENCE

HIGHLIGHTS AND MORE!



HEAR MORE ABOUT HOW OUR SPEAKERS, SPONSORS AND ATTENDEES ILLUMINATED THE FUTURE OF WISCONSIN SCHOOLS!

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ABOUT THE COVER

WHAT TENDS TO KEEP MANY OF OUR DISTRICT PROFESSIONALS UP AT NIGHT DURING OCTOBER IS PASSING THE TAX LEVY. DID YOU KNOW ICHABOD CRANE IN WASHINGTON IRVING'S CLASSIC STORY "THE LEG-
END OF SLEEPY HALLOW" WAS A WEARY AND OVERWORKED SCHOOL ADMINISTRATOR?

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Editor: Mike Barry

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

CHANGING MINDSETS ON EQUITY

Race is not something that is always easy to start a conversation about. It can be difficult to have open conversations about race and racial inequities. Some fear they will say the wrong thing, or that it's not a problem, or maybe that it doesn't concern them.

However, to not talk about race — especially in school districts — means we are turning away opportunities for our kids and community. These opportunities can include: developing relationships within our community that can help us problem solve together, giving all students a voice, and removing barriers that continue to give some students an unfair advantage over others.

To have equity in our schools, we must remove the predictability of success or failure that currently correlates with any social or cultural factors. We need to stop inequitable practices, examine our own biases and cultivate the unique gifts and talents of every one of our students.

Recently in DeForest, we decided to commit ourselves to seeking equity for our students. Although we are a less diverse district than others in Wisconsin, it was evident in our student data that we were not free of racial inequities.

There were indicators in our student testing data, discipline numbers, and attendance data which signaled a need to start talking about equity and try to figure out how we can change. We needed to start having those difficult conversations. Creating a school environment that is equitable to all is no easy task, it is a transformational change that takes time and a lot of hard work. We are not there yet, however, there have been some great things happening in DeForest that have gotten us to start changing mindsets and to view our practices with an equitable lens.

In full disclosure, none of these activities were initiated by me. Also in full disclosure, there were some that I did not want to participate in and struggled with giving up time to prepare financial reports or other business office duties. However, my mindset has changed as a result of participating, and I now realize that this type of work is more important than the tasks that could be done another day. I hope at a minimum by sharing DeForest's efforts below, that I have helped to create awareness and share ideas.

Recent Equity Work of DeForest National Equity Project - Leading for Equity Institute

- Institute centered around developing capacity to foster positive change on behalf of historically under-served students and families.

Participation in the Dane County Equity Consortium

- Mission of the consortium: The Dane County Equity Consortium is committed to creating equitable opportunities and taking collective action to eliminate barriers associated with the predictability of success based on race, ethnicity, gender identity, first language, income or ability statuses.

Dane County Youth Social Justice Forum

- Student representatives from 14 Dane County districts participated in student and adult led sessions with opportunities for cross-district collaboration and problem solving.

Student Equity Planning Team

- Provide consultation and feedback for district administrators for equity planning and related curriculum.

Administrative book study – “White Fragility” by Robin Diangelo

- The author explores how white fragility develops, how it protects racial inequality and what we can do to engage more constructively.

Community Equity Circles

- Events throughout the year in DeForest where the district provides an opportunity for student and parent voice.

A special thank you to the administrators at DeForest who have helped bring these opportunities to us.

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Mike Barry
WASBO Executive Director

ADOPTING A 'FAIRLY NORMAL' TAX LEVY

It's late October, you've checked and re-checked your district's October 15 equalization aid estimate, 3rd Friday September membership count, and updated revenue limit calculation. Now your school board, and school boards throughout the state, will vote to set their property tax levies for the 2019-20 school year. That means it's time to check in again at WASBO's favorite fictional location, the Fairly Normal School District, where things don't always go as planned.

“Thank you, Mr. Board President, this brings us to our final agenda item for tonight, which is a vote to adopt the 2019-20 property tax levy,” said a tired sounding Superintendent Squarely Stable, leader of the Fairly Normal School District.

The hour was getting late and the high school library, where Fairly Normal board meetings are held, had grown uncomfortably warm, since the facilities manager programmed the ventilation system to turn off at 7.00 p.m. to save money.

“Our business manager, Truly Patient,

has a brief update on the tax levy, which we will need to vote upon,” explained Superintendent Stable.

“To get right to the point, given all the new information about enrollment and equalization aid, our tax levy will increase by 4.6% this year,” offered Ms. Patient, double-checking her worksheet.

“Now, hold on a minute!” Board member Nathan Nertz leaned into his microphone. “That’s twice the rate of inflation. Why can’t you people do a better job of controlling spending?”

“Actually, our spending will increase by only 2.0%, which is below the rate of inflation,” explained the business manager. “The tax levy is increasing more than our rate of spending because we’re getting less equalization

aid this year.”

“Well, now, I read the newspaper,” countered board member Nertz, “and I happen to know that the state budget put more money in the equalization aid pool, not less!” “So why would we get less aid when there’s more money in the pool?”

“We could use a pool,” offered beloved Red Barnes, Wisconsin’s longest serving school board member, first elected in the Eisenhower landslide of 1952. “I’m glad we’re talking about a pool, but only if we keep the water real warm.”

“So, um, thank you, Red, but we’re talking about the equalization aid pool, which is a little different. Now, let me try to explain about the tax levy,” said Superintendent Stable.

“Equalization aid is based on a complex formula. Applying that formula, Fairly Normal qualified for less aid this year than last due primarily to local tax base growth. Making up that aid loss explains why the tax levy increase is greater than the rate of inflation.”

“If I may offer a thought,” intoned Fairly Normal’s Director of Instruction, Dr. Stephanie Jargon-User, “perhaps we would do well to spend more time engaged in rich conversations around deep instructional practices and less time on these rather mundane financial distractions.”

“Well, yes, of course, thank you Dr.

Jargon-User, I’m sure we all agree, but sometimes we just have to run a school district,” replied Superintendent Stable.

“If we are considering a swimming pool,” added Dr. Jargon-User, “research indicates that most backyard pools are round, so I strongly recommend building a round pool to demonstrate our commitment to universal design, specifically as it relates to emergent aquatic learners.”

“And keep the water warm!” added Red Barnes.

“So, okay,” said board member Nertz, “you’re telling me property taxes on my house are going to go up 4.6%, is that right?”

“Well, not necessarily,” responded Fairly Normal’s business manager, always eager to delve into the complexities of school finance, no matter the hour. “There are a number of intervening variables. First, the school levy is apportioned among the municipalities based on the relative equalized values of the municipalities. Then, each municipality apportions their levy among each taxable property based on the assessed value of the individual property relative to the total assessed value of the municipality. Of course, there are also local reassessment practices to account for, as well as overlying taxing jurisdictions, such as the City of Fairly Normal. So, it’s difficult to predict a specific tax outcome for your home, but I’m sure we all agree it’s really quite fascinating.”

“You know, you guys should learn to be more transparent about costs and prices, like we are in my business, Nertz Used Auto Sales.”

A spirited discussion followed until, at half past ten that evening, the Fairly Normal school board unanimously adopted the recommended tax levy, voted to create a pool feasibility study, and wearily adjourned. Superintendent Stable, his work done for another day, gathered his papers. Outside, he looked across a pitch-black high school parking lot - all the lights had been switched off at 9.00 p.m. to save money - and thought, “Well, who knows, maybe we could fit a pool in over there.”

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John Forester
Executive Director,
School Administrators Alliance

WHAT'S IN STORE

CONSIDERING THE REMAINDER OF THE LEGISLATIVE SESSION

With the 2019-21 State Budget battle in our rear-view mirror, several SAA members have been asking about the education policy items that may be in play for the remainder of the two-year legislative session. Even though Capitol GOP sources are indicating that not much legislation will pass in the remainder of the session, I want to use this opportunity to share with you some of the Blue Ribbon Commission recommendations and other legislative proposals that are garnering attention inside the Capitol right now:

Selected Legislation

1. Testing for Lead in School Drinking Water – Requires schools to test drinking water for lead concentration at least once every three years. SAA is working with the authors and the leadership of the Speaker's Task Force on Water Quality to shape a bill that is reasonable and effective.
2. AB 422/SB 364 – Tobacco 21. The bill would raise the minimum sales age for all tobacco and nicotine products to 21, up from the current 18. SAA supports this bill.
3. AB 110 – Development of a dyslexia guidebook. The SAA is neutral on the bill. We believe the

- bill has merit. We have had influence in shaping the composition of the advisory committee created by the bill to participate in the development of the guidebook.
4. AB 194/SB 183 – Special education licensure. The bill provides an alternative to requiring passage of the FORT exam. SAA supports the bill.
5. AB 195/SB 184 – Licensure reciprocity. The bill allows DPI to issue a teaching license if the person taught two semesters under DPI license or permit. SAA supports the bill.

Blue Ribbon Commission Recommendations

1. AB 368/SB 327 – Declining enrollment relief. The bill would delete the prior year base hold harmless adjustment and modify the main declining enrollment adjustment to compare each year's three-year rolling average to a base year. If the current year average is less than the base year, a district would receive 90% of what the decline would have generated. SAA supports the concept but would like to see more detailed analysis of the impact on declining enrollment districts.
2. AB 196/SB 182 – This bill makes additional school districts eligible for sparsity aid and provides additional funding. SAA supports the bill.
3. AB 224/SB 206 – This bill in-

creases the secondary cost ceiling to 100% and changes how shared costs are determined for negative tertiary districts. This bill is being modified.

4. AB 223/SB 207 – Supplemental state aid for certain consolidated school districts. SAA supports the bill.
5. AB 441 – This bill creates a shared services aid program for school districts.
6. AB 442 – This bill creates a whole grade sharing categorical aid for school districts.
7. SB 409 – Aid for feasibility studies for consolidation, whole grade sharing.
8. SB 408 – Counting 4K students as 1.0 FTE for full-day programs.
9. SB 407 – Modifying the age at which a child may attend a 4K program.
10. Equalization aid payments – This bill would gradually make all four general aid payments 25% of a district's total.

Please contact the SAA with your questions and concerns about any of these proposals. Thanks for listening and, as always, thanks for everything you do on behalf of the students you serve.



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Bill Freeman
President,
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WASBO Director

Why worry about lead in schools?

Lead is a toxic material known to be harmful to human health if ingested or inhaled. Research has shown that exposure to lead is associated with adverse mental, physical, and behavioral effects in children. Scientific consensus is that there is no safe level of lead exposure. Therefore, any blood lead level can have negative health effects. While water is just one potential source of exposure to lead in the environment, reducing lead in school drinking water can decrease an individual's overall exposure to lead.

A report by the U.S. Public Interest Research Group Education Fund and Environment America Research & Policy Center found more than two-thirds of 31 states surveyed received "failing grades" in their efforts to make inroads into the lead-contamination problem in schools. Even the schools addressing the issue are not eliminating their drinking water systems entirely of lead.

The American Academy of Pediatrics recommends no more than 1 part per billion. Many schools tested had at least 5 ppb, and some have much more.

COPING WITH LEAD IN SCHOOLS

There were some bright spots, including Illinois, which got kudos for requiring its schools to take action on any lead level detected. Other states showing improvement included California, Oregon, and Maryland.

Health Risks of Lead

While we have known that lead is toxic for many centuries, there has historically been a level of exposure presumed to be "safe." Over the years, the safe level has been reduced based on new research, but it was always there. However, in 2012, the Centers for Disease Control and Prevention dramatically changed the way lead toxicity is assessed. Instead of setting a safe level, the new approach acknowledges the fact that there is no currently known safe level of lead exposure and recommends a primary prevention approach (i.e., preventing a problem before it occurs) to reducing risk. This concept of "no safe level" is similar to the way we assess risks from carcinogens.

Health risks from carcinogens are managed by setting an acceptable risk probability (not zero) that balances the need to reduce exposure with the practicality of avoiding chemicals that are widely distributed in our envi-

ronment. The new approach for lead hazard reduction is similar in that it balances the need to reduce exposure (i.e., primary prevention) while recognizing that lead is still present in many areas of our environment.

Current Legislation for Drinking Water

There is current legislation for sampling of water systems, which are referred to as Non-Transient Non-Community (NTNC) systems that serve a population of more than 25.

The regulation which requires sampling of these systems is NR 809, which is adopted by the WDNR from the federal Safe Drinking Water Act (SDWA). This regulation requires a certified well operator be established and sampling be conducted on a regularly scheduled basis for a variety of contaminants, which include lead. Many schools have been testing lead since 2002 under this regulation.

A Look at Proposed Wisconsin's LRB 19-3539

This proposed bill requires all K-12 schools that receive public funding to test all sources of drinking water, known as potable water, for lead con-

tamination. Testing is phased in over three years and allows the submission of tests already completed in prior years if it meets the testing standards prescribed by this bill. Testing continues to be required every three years unless two consecutive tests show lead levels that are effectively negligible, defined as below 1 part-per-billion.

Test results must be posted on the school's website or available for examination upon request and submitted to DPI within thirty days of receiving results. If no potable source had lead levels higher than federal standards of 15 parts-per-billion, no further action is required. However, if lead levels on any source of drinking water exceed the federal standard, the source of water with lead contamination (i.e. a drinking fountain) must be taken offline and, if necessary, alternative sources of potable drinking water must be provided. Additionally, a remediation plan must be developed, posted online or made available for examination upon request, and submitted to DPI within six months. If only one or a couple of water sources are contaminated, alternative sources or remediation may not be necessary as taking the source offline may suffice since other safe potable sources are available.

If remediation efforts are necessary and may not be absorbed in the current budget of a school district, LRB 19-3539 allows districts to go to referendum outside of a regularly scheduled election and to ask more than two questions in one year if necessary and only for the purposes of lead remediation. This referendum limit exemption is similar to the current law exemptions for natural disasters.

Finally, this proposed legislation provides an incentive for schools to

fund remediation by applying for a School Trust Fund Loan at the Board of Commissioners for Public Land. This legislation takes 20% of the total funding from the Safe Drinking Water Loan Program (SDWLP), which is largely federally funded, for the purposes of buying down the interest rate of schools using BCPL for lead remediation efforts. Estimated at \$15 million per year, this can be absorbed in the current SDWLP budget while still funding existing priorities and will help school districts provide clean drinking water while reducing some of the added expenses from long-term bonding. This funding must be distributed equitably among all eligible applicants, and no one community can receive more than 20% of the total funding made available for lead remediation. While the goal of this program is to buy down interest rates, if funding is still available near the end of the fiscal year, it may be used to buy down principal.

More Questions Than Answers

Unfortunately, from a technical perspective, the proposed LRB 19-3539 leaves us with more questions than answers. The federal Safe Drinking Water Act (SDWA) and WDNR NR 809 are proven regulations that have been in place for more than 17 years. As they prepared the final version of the new regulation, hopefully the current regulations at the federal and state level are referenced.

A few of the questions/clarifications that need to be addressed in the final rule include:

Section 5 of LRB-3539

- What types of school buildings are included in testing program? Will this include district offices, maintenance shops, and rented

- or leased space in property not owned by the School District? Our assumption, and our recommendation, is that the proposed legislation is for buildings designated as schools only that are owned or leased by the District.
- Clarification on "all potable water sources" is needed. NR 809 requires the selection of a pool of approved sampling sites to collect samples from that are typically used for human consumption (i.e. kitchen taps, drinking fountains, teachers lounges, etc.). It would be extremely burdensome to test, "all potable sites" that may include, for example, slop sinks, bathroom sinks, and eye wash stations.
- Under NR 809 the WDNR has input on what sites from the designated pool are actually sampled. Will DPI have input or will it be up to each School District to select representative sites?
- NR 809 refers to sampling tiers to help determine sampling sites. Will the new legislation require the same?
- NR 809 sets that number of sample collection sites based on building population. Will the new legislation follow this same chart for number of samples?
- Clarification or published sample collection procedures would be helpful as varied sampling collection techniques will result in varied results.

Many Wisconsin schools on public water systems have conducted proactive sampling for lead in drinking water. Most of these results indicate local (fixture) issues rather than system-wide issues, which is encouraging news. If you are considering proactive sampling, it must be carefully planned and executed in cooperation with the current regulatory framework prescribed under NR 809.



Mike Koltes

Director of Business Services, CESA #5
WASBO Director

DEVELOPING RESILIENCE IN DIFFICULT TIMES

Moving, flooding, work stresses and family health emergencies. I recently had to undergo these challenging personal events, which greatly affected my professional life because of the amount of time and energy that was required to resolve them. Given that WASBO's theme this year is "Building Resilience in times of Change" I wanted to discuss these challenges and how I handled it.

My wife and I moved a couple weeks ago. Like any move, it was stressful – long days of lifting heavy furniture, boxes and other stuff you never even knew you owned. I'm sure you have all been there. To make matters worse, within one day of our move to this new (old) house, we woke to our septic alarm going off. Apparently, the septic tank was full and the pump had failed. Of course this happened on Labor Day, and the soonest any contractor could come to pump the tank was a few days after that, and then it would be another 7-10 days before they could actually replace our pump. We were told by the contractor that as long as we did our best to conserve water, we had about two to three days after the alarm sounded before we'd be at risk for a "backup."

To make matters even worse, on the second day at the new (old) house, our water well started leaking uncontrollably down the driveway. Luckily, it wasn't running into our house, but it was almost flooding one of our out build-

ings. I called about ten contractors and only one got back to me. They said they could fix the well in about 7-10 days but in the meantime, we should shut the water pump off as much as possible. So now we were going to be without water for 7-10 days and without a functioning septic system. My wife and I spent most of the week using almost no water. To confess, we actually ended up doing laundry at our parents' house and it felt like we were back in college again. Oh, and did I mention that we also (STILL) don't have any internet? What else could go wrong...

At work, we had all the normal back to school issues to attend to, along with trying to complete our budget. To top it all off, my father was hospitalized during this time for an illness. (He is okay now).

Initially I was in a "why me" and a "I can't handle all this" thought pattern. I wasn't getting enough sleep, I wasn't eating well, I was physically exhausted from several days of moving, and I was stressed to the maximum. Every "bucket" in my life was running on empty. Thankfully my wife didn't divorce me, but it may have been close.

All kidding aside, what I've discovered is that when you are pushed to a point beyond what you think you can handle, you often have default responses. Those default responses are learned behaviors from your childhood and your prior training. Often times the childhood behaviors are dysfunctional,

but hopefully what was learned from your prior training will help you deal with adversity in a productive way and trump the childhood behaviors.

On the second day of all this happening, I decided to create a plan and stick to it. Each day I would wake up and get really detailed with my schedule. I took 15 minutes to "manage myself" and write down a priority list of everything I needed to do. Then I wrote on the paper "one thing at a time" and stuck to it. I made sleep a priority and tried to eat better. Also, although it may have been difficult, I found a way to laugh. Did I have my moments of poor behaviors during those two weeks? Yes, but I gave myself a little bit of a break because of the circumstances and I tried to stay as focused as possible.

All of us deal with adversity in different ways. Many of the solutions I mentioned may seem like common sense. However, sometimes we forgot to use common sense when we are faced with difficult things. I encourage you to slow down, manage yourself first, and then take one thing at a time. If you think about everything that needs to happen all at once, that is when stress and anxiety take over. As leaders of our schools, we are all susceptible to challenging situations in both our work and personal lives, so if you are struggling, hang in there! You can't control the events that happen, but you can control your responses to them.

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David Hoh
Custodial Supervisor,
Oshkosh Area School District
WASBO Director

LEARNING & GROWING WITH WASBO

The WASBO mission statement is this: "To provide professional development, foster a network of support, and advocate for funding that ensures outstanding educational opportunities for all children in Wisconsin."

I often think about this statement and how we are doing. I believe we are providing excellent professional development opportunities and continue to adapt to help the children we serve. Teachers also have adapted to help students. The way the teachers are teaching now is totally different than the way it was when I was in school.

Instead of a chalkboard there is now a 75" monitor in classrooms. Rather than books, students are carrying a tablet or computer in their backpack. Here at WASBO, we also have learned to adapt. We review our conference sessions and make them relevant to today's perspective. On the facilities side of school operations, we often look at how we can improve our sessions to fit our changing world.

As far as fostering a network of support, I believe we also are doing well. Giving discussion topics to the regionals with up to date items helps keep the districts in compliance and knowledgeable. All of the conferences that WASBO offers helps create a network of our peers. This

"I've learned more about the importance that we all carry for the children of this state and providing them a safe, clean and healthy environment, not only in our district but the entire state."

allows us to become more efficient and effective in our jobs.

Advocating for funding is also a key to help educate the children of Wisconsin. Advocating for funding and policies which support public education is the work of John Forester and the SAA Legislative Committee. Together they keep the membership informed of legislative developments and their possible impact on school districts.

Are you reaching out to all the districts you know or are close with to find out if they are involved with WASBO? Can we help get them involved in any way? Do we mention all of the advantages of being an engaged member and all of the knowledge they'll gain, such as money savings, record keeping, and shared practices? Yes, professionally I can go on

and on about all the advantages.

Personally, since joining WASBO I have grown. I've learned so much. Also, the relationships I've forged are built on mutual respect. These relationships have given me and my district access to more resources. I've learned more about the importance that we all carry for the children of this state and providing them a safe, clean and healthy environment, not only in our district but the entire state.

I strongly encourage you to reach out to your neighboring school districts to help them or create a network. If you have, is there anything that WASBO can do to help you or your neighboring district be involved? If there is something, please let the staff at WASBO know so we can help all the children in Wisconsin.



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John Stellmacher
Chief Financial Officer,
Kettle Moraine School District
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LEARNING FROM 300 YEARS OF LEADERSHIP

Few places in the United States contain as much history and strategic importance as the United States Military Academy (West Point). I was fortunate to attend the ASBO Eagle Institute as the incoming President-Elect and had the tremendous opportunity to learn not only more about the history and formation of our country, but also how nearly 300 years of leadership training has shaped the United States Army.

As the son of an army veteran and grandson of a marine, I've long known about the prestige and honor of being a cadet and later commissioned officer from West Point. Being on-base for the Eagle Institute was a very rewarding and humbling experience. As a millennial, my classmates and I have not been touched by war in the same way as our parents and grandparents. Visiting West Point definitely reminded me that life and career I have is the result of the sacrifices men and women in the armed forces (and their families) have made and continue to make on a daily basis for the freedoms we enjoy as citizens.

The Eagle Institute was facilitated by the Thayer Leadership Development Group (TLDG), a relatively new organization that was founded by former West Point graduates and US Army veterans to help leverage the

"Many officers talked about learning how to move from 'proving people wrong' to 'proving people right,' and how we should calibrate ourselves to a standard of excellence rather than comparing ourselves to peers or our community."

tremendous capacity at West Point. Their goal is to provide leadership training for civilians. TLDG led us through a series of discussions and exercises to demonstrate how West Point has dealt with adversity to manage culture change in the pursuit of excellence. Using this model, they are helping attendees become more effective leaders in their organizations and communities.

Key themes from the conference:

- The military has moved from an attrition model to a developmental model. Far too many potential leaders were being lost at West Point through the "weeding out" of each incoming class. Given the significant capacity needed to serve our country and the world, a more effective approach was needed.
- Through the development of our personal leadership philosophy, the first person we need to lead is ourselves. We can't empower people without giving up some pow-

er. We should not do the work for someone; we should develop each individual to reach their full potential and increase the capacity of our team as problem solvers.

- Case study of Rick Rescorla, a decorated veteran of the Vietnam War and a man who is credited with saving thousands of lives on 9/11. As a security analyst for Dean Witter/Morgan Stanley, Rescorla developed and implemented emergency training for employees of the World Trade Center. He was able to advocate for and implement emergency lighting and a training process that allowed thousands to escape the buildings after impact. Rick believed that in a time of crisis, we default to our training, and effective training and development is critical for success.
- We developed and conducted "After Action Reviews" (AARs). Asking questions such as "do we have a common operating pro-

cedure?" "What decisions do we need to make?" "What information do we need to make those decisions?" and "How do I get that information?" We learned to frame the problem, solicit ideas, and pursue the ones we like. Following an event or new initiative, we analyzed the plan, what really happened, did we fulfill our obligations, what we learned, and who else needs to learn what we learned from the experience.

- The experience was capped with a real life "staff ride" tour of the West Point Campus and discovery of how American Revolutionary Forces were able to use AARs to make strategic decisions that ultimately turned the Revolutionary War in favor of the United States.
- Several retired officers provided lessons in how we can improve

our skills as evaluators. We also learned how to help people get "into the flow" with an alignment of their skills and the challenges that they are equipped to overcome. We learned about the power of "knee to knee conversations." These conversations are what motivates people, and how important it is to clarify our intent and provide the "why" when leading our teams.

Throughout the experience, I reflected on the leadership philosophy that I have brought to my new district at Kettle Moraine. I've asked myself, "how can I improve the feedback that I provide people on my team on a regular basis?" Coming into a new position, the experience at West Point has been extremely valuable in examining where I need to grow as a leader and how I can model the professional behavior and expectations for my team that I expect for my colleagues both at WASBO and Kettle Moraine.

Finally, we examined the value of having difficult conversations and the trust that can be built from tackling those conversations head on. Many officers talked about learning how to move from "proving people wrong" to "proving people right," and how we should calibrate ourselves to a standard of excellence rather than comparing ourselves to peers or our community.

I want to thank the WASBO membership for this opportunity and for the trust you have placed in me as the new President-Elect of WASBO. I look forward to a great year and applying the skills learned at West Point to work with the WASBO Board, our new Executive Director Mike Barry, and WASBO staff. Together, we will strengthen our organization and provide meaningful and effective professional development for the nearly 1,500 members of WASBO.

WASBO Foundation 2019-20 Professional Development & Networking Calendar

WASBO.com

Professional Development Opportunities

- ASBO International Annual Meeting**
Oct. 25-28 - National Harbor, Maryland
- Midwest Facility Masters Conference** 🏆 - Module 3
Nov. 4-5 - Kalahari Resort & Conference Center, Wis. Dells
- SFO Study Group**
Dec. 3 - Kalahari Resort & Conference Center, Wis. Dells
- Winter at a Glance** ★
Dec. 3 - Kalahari Resort & Conference Center, Wis. Dells
- WASBO/WASPA School Personnel Academy**
Dec. 4-5 - Kalahari Resort & Conference Center, Wis. Dells
- State Education Convention (School Finance Puzzle - Jan. 21)**
Jan. 21-24, 2020 - Wisconsin Center, Milwaukee
- ASBO Executive Leadership Forum**
Feb. 13-15, 2020 - New Orleans, LA
- 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
- 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**
- Administering School Risks**
Nov. 13 - School Leadership Center, Madison
- Crisis Prevention** 🏆
Nov. 14 - School Leadership Center, Madison

- 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

ENHANCE YOUR RISK MANAGEMENT, SAFETY AND INSURANCE KNOWLEDGE

As a member of the business office or facilities staff, you play an important role in the success of our students. You may not realize it, but a lot of the work you do in risk management and safety plays an important role in student achievement.

Academic studies from prestigious institutions such as Harvard, Duke and Stanford universities have shown these four items are important factors in student achievement:

- Keeping teachers healthy and safe in the classroom
- A school climate in which students, staff, and parents feel safe
- Students and staff that feel connected to their community and community members feel connected to their school
- A healthy student and community population

All four of these items can be enhanced through the proper use of safety and risk management. Where can you learn more about this? WASBO CSRMS Classes.

The five CSRMS courses teach attendees about risk management, safety and insurance. The classes also teach insurance and safety basics for any member of school staff. Classes include time for group discussion and networking.

You can learn what is happening at other districts in Wisconsin and across the country. Perhaps you can find a new solution or risk management technique to apply in your district during the courses along with information on how risk management can help increase student achievement.



The Courses

Fundamentals of Risk Management

Fundamentals of Risk Management provides an in-depth look at the overall risk management process, delves into the identification step of the process, and examines the function of the school risk manager.

- The next course is offered on Jan. 15, 2020 (Registration opens soon!)

Handling School Risks

Handling School Risks studies the development of a safety and health plan, loss control fundamentals, risk control and mitigation of exposures, and managing school claims. A post-accident loss control reduction technique is included.

- The next course is offered on Jan. 16, 2020 (Registration opens soon!)

Measuring School Risks

Measuring School Risks includes the mechanics of developing, forecasting, and trending losses to be used in determining insurance program retentions and deductibles.

- The next course is offered on Feb. 19, 2020 (Registration opens soon!)

Funding School Risks

Funding School Risks examines various loss funding techniques, including guaranteed cost programs, deductibles and retention programs, pools, and transferring risk through contracts.

- The next course is offered on Feb. 20, 2020 (Registration opens soon!)

Administering School Risks

Administering School Risks covers how a school risk manager implements and monitors the school risk management program, the risk management team, information technology, allocating costs, ethics in school risk management, and requests for proposals.

- The next course is offered on Nov. 13, 2019. Registration opens soon for the April 1, 2020 course.

Emerging Risk

This is a New Update Credit Option. It's a course designed for school risk managers, K-12 and higher education administrators, and insurance professionals who have schools as clients.

- Registration opens soon for the April 2, 2020 course.

All courses taught at the School Leadership Center in Madison

HANDLING THE SCHOOL BUS DRIVER SHORTAGE TOGETHER

Cherie Hime
Executive Director
Wisconsin School Bus Association

The school bus driver shortage has been plaguing the industry for years and becoming increasingly worse.

On behalf of the Wisconsin School Bus Association (WSBA) members, which includes bus contracting companies and school districts that own buses, we'd like to offer some suggestions for school districts to consider as we partner in addressing this issue.

The entire transportation industry continues to experience a drastic decrease in the driver pool. While staffing for the standard morning and afternoon transportation routes are manageable currently, it is increasingly problematic to cover all the athletic events, field trips and other extra-curricular activities that take place during and after school.

With the increase in the number of sports offered, the number of teams (freshman, JV and varsity) in each sport, as well as the number of extracurricular and field trip activities, school districts sometimes need as many as 5-10 additional drivers and buses at one time to cover all the chartered trips. The busiest days are typically Tuesdays and Thursdays in September, October, April and May.

The question, "What happens on the day that extra charter trips cannot be covered?", may soon arise. To minimize this potential and help ensure a driver is available for all events, we are asking every district to consider ways to strategically alleviate burdensome schedules.

Some suggestions include:

- Schedule athletic events evenly throughout the week and on Saturdays.
- Stagger leave times to athletic events so that some teams leave after the afternoon routes are finished perhaps at 4:15 or 4:30 pm.
- Limit the number of buses that are out for charters during afternoon routes.
- Have most elementary field trips return by 2:30 pm.
- Decrease the frequency of scheduling all athletic teams from one school at away games on the same night, with no home games scheduled.
- Schedule games [such as JV and varsity] on a tighter schedule, instead of an hour or hour and a half between games.
- Encourage coaches, referees, teachers, support staff, parents and/or retirees to become bus drivers.

School bus companies and transportation managers want to meet your needs and ensure the safe transportation of students. We are hopeful these suggestions will start the conversation among school bus transportation officials, managers, and stakeholders.

From those affected most by the driver shortage, our members appreciate any thoughtful consideration given by those who make the decisions on scheduling, thereby decreasing the difficulty of moving students to games and home again.



THE IMPACT OF INDEPENDENT CONTRACTORS ON WORKER'S COMP

Marty Malloy

Director of Education and Government Practice
M3 Insurance

Almost every school district or CESA hires independent contractors (IC), and when doing so, the school district must consider and, to the extent possible, ensure the IC's own workers compensation (WC) insurance will respond for injuries its employees sustain while working on a district project.

It's not enough for a contract between a district and an IC to state the IC is an IC, and not an employee of the district. And a person is not an IC for WC purposes just because they say they are, the boss over them says so, or other regulators (including the Federal government and other state agencies) say so. The criteria used to define an "employee" vary by governmental agency, such as the Wisconsin Department of Revenue, the U.S. Department of Labor and the Wisconsin Department of Workforce Development.

Nine Tests

Parties injured in the course of work are either considered an employee of the entity for which work is being conducted or the entity actually doing the work. In the case of a school district, the injured party is either an employee of the district or not. Simple, right?

Whether it's a three-person shop or a construction firm with 125 employees, when ICs are involved, responsibility for determining whose WC policy will pay benefits is a function of whether the IC meets Wisconsin's statutory definition of an IC at the time of the injury.

Wisconsin Statute §102.07(8) contains nine criteria, all of which must be satis-

"It's not enough for a contract between a district and an independent contractor to state the independent contractor is an independent contractor, and not an employee of the district."

fied in order for an IC to not be deemed a district employee and ineligible for benefits from the district's WC policy. To be considered an IC and not an employee of the district, an individual or company must meet and maintain at all times, all nine of the following requirements:

1. Maintain a separate business;
2. Obtain a Federal employer identification (FEIN) number from the Federal Internal Revenue Service (IRS) or have filed business or self-employment income tax returns with the IRS based on the work or service in the previous year (a social security number cannot be substituted for a FEIN);
3. Operate under specific contracts;
4. Be responsible for operating expenses under the contracts;
5. Be responsible for satisfactory performance of the work under the contracts;
6. Be paid per contract, per job, by commission or by competitive bid;
7. Be subject to profit or loss in performing the work under the contracts;
8. Have recurring business liabilities and obligations; [and]
9. Be in a position to succeed or fail depending on business expenses and income.

What if?

Hiring an IC that does not meet all nine requirements could increase the school district's WC premium in two

ways.

First, at the time the district's payroll is audited by its WC insurance company, and if the district cannot provide certificates of insurance from the ICs verifying their WC insurance, the aggregate amount of the 1099 expenses paid to ICs will be added to the district's WC insurance policy, and likely placed into class code 9101. This class code carries a \$5.19 per \$100 of contract-value rate.

In other words, the district's WC insurance company will presume all ICs do not meet the nine tests unless proven otherwise.

Sounds harsh – and it is to some degree. However, that's more reason and motivation to collect certificates of insurance from the ICs with whom the district or CESA does business!

Second, if a non-compliant (uninsured) IC is injured and his/her expenses are paid by the school district's WC insurance policy, the district's experience modification factor could go up, and thus increase the district's future WC premium.

Who Determines Whether the Nine Tests are Met?

The payment of WC benefits arises out of the employment relationship. For any injury involving an IC, de-

termining the injured party's status (either a district employee or not) is initially determined by the WC claim adjuster and if disputed, eventually by an administrative law judge. At each level, the determination is based on the evidentiary facts relating to the nine-part statutory test. Eligibility for WC benefits from the district's policy is determined on a case-by-case basis according to the facts and circumstances at the time of injury.

Tips for Managing IC WC Risks

How can school districts or CESAs protect themselves from WC responsibilities associated with an injured IC?

1. Have a written contract with

- the IC. Include all the terms and conditions of the project, such as:
 - Stipulate that the IC firm must carry WC insurance and require proof of the policy (a policy declarations page or a certificate of insurance).
 - In almost all cases, the contract should also require the IC to purchase general liability, auto, umbrella policy, and professional liability insurance (depending on the scope of the work).
 - The school district should be named as an additional insured on all policies except WC and professional liability. The district should consult with its insurance agent when reviewing insurance requirements for ICs to determine the type of insurance and proper limits of

insurance.

2. Make sure the nine-part test is met and maintained by the IC.
3. Check with your insurance carrier to find out what it requires when the policy is audited as proof that a person is an IC rather than an employee. This will protect the district from an unanticipated policy audit premium charge.

Conclusion

Working with ICs is a fact of life, and making sure ICs are properly insured for WC is not only good business, but can protect the districts' bottom line in the long run. Review your district's policies and procedures for vetting and hiring ICs.



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TAX LEVY FOCUS: EQUALIZED VALUE GROWTH STATEWIDE

Wisconsin Policy Forum
For the full article, visit Wispolicyforum.org

New state figures show property values in Wisconsin rose last year by the fastest rate since before the Great Recession—a welcome reminder of the economic recovery. However, while some parts of the state have seen strong growth over the past decade, property values in parts of northern and central Wisconsin have yet to recover fully.

Also, the good news about the overall increase in property values is tempered by the fact that most of that growth comes from appreciation of existing properties. New construction in the state is growing slowly and is not contributing to rising property values the way it did before the Great Recession.

The growth in property values from new construction—or lack of it—matters for both taxpayers and elected officials, as the state uses it to limit property tax increases for local governments across Wisconsin.

While net new construction numbers continue to lag since the Great Recession, overall equalized property values have grown more steadily. From 2018 to 2019, equalized values grew by

"While some parts of the state have seen strong (economic) growth over the past decade, property values in parts of northern and central Wisconsin have yet to recover fully."

more than \$31 billion, or 5.72%, the highest growth rate since the 5.81% growth in 2007. According to the Department of Revenue, all 72 Wisconsin counties experienced a growth in equalized values for the first time since before the Great Recession.

Of the \$31.4 billion total increase in equalized values, \$22.6 billion resulted from market value increases, while \$8.8 billion was due to new construction. Residential property grew by \$24 billion, or 6.1%, which is the highest rate of growth since a \$31 billion increase (10.0%) in 2006. Commercial property increased \$5.7 billion (5.2%).

Residential parcels account for 71% of all property values statewide and commercial parcels for 19.9%. Combined, residential and commercial property values account for about two percentage points more of statewide property values since 2000, but their share of the total has remained relatively stable since the Great Recession.

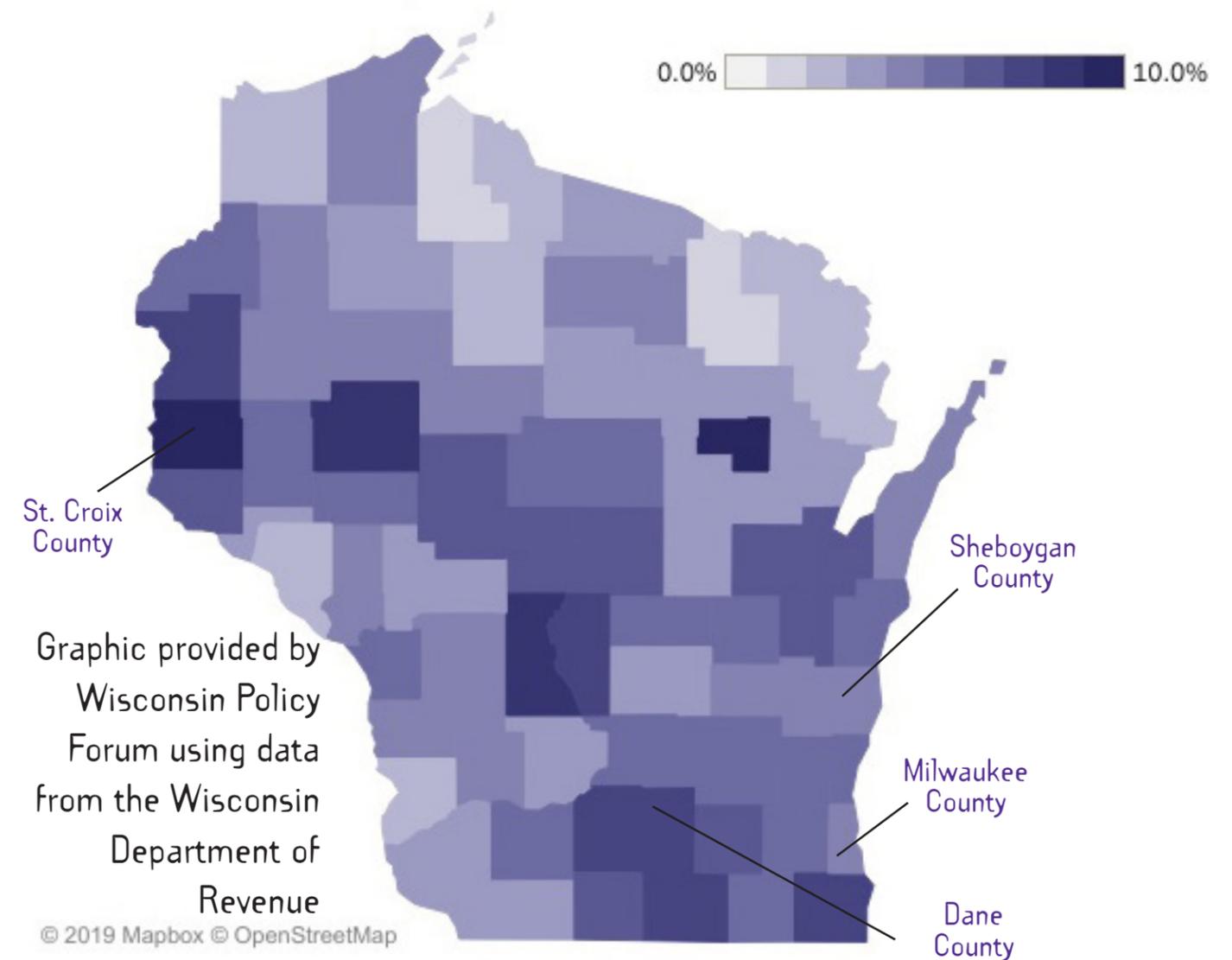
For the second straight year, Dane County (\$69.9 billion) led the state in equalized values (for more on this

trend, read Focus 2018 #15). Equalized values in 34 of Wisconsin's 72 counties grew by at least 5% between 2018 and 2019, but every county in the state saw at least a 1% increase. (See the Figure on the right) St. Croix and Sheboygan counties each surpassed \$10 billion in equalized values for the first time.

Despite statewide growth for six straight years, not every county has seen equalized values recover to pre-recession levels. For example, while Dane County (the state's fastest-growing county) surpassed its 2009 equalized value peak in nominal dollars in 2015, Milwaukee County's total of \$67.2 billion in equalized property values remains \$1 billion below its 2008 peak.

Thirteen counties had equalized values in 2019 that were still below their values from 2008, even without accounting for inflation. Besides Milwaukee County, this total includes two central Wisconsin counties (Adams and Green Lake) and 10 Northwoods counties (Vilas, Oneida, Price, Sawyer, Ashland, Iron, Burnett, Washburn, Forest, and Bayfield).

PROPERTY VALUES GROW STATEWIDE Equalized Values Growth, 2018 to 2019



Statewide equalized values have increased for six straight years, and the majority of the state's population now lives in a municipality or county where land is valued higher than ever before, at least in nominal dollars. That said, even in a strong period of economic growth, the increase in property values from net new construction remains below pre-recession levels.

THANKS FOR ATTENDING WASBO'S FALL CONFERENCE!

Thank you to everyone who attended WASBO's Fall Conference! We hope you found it illuminating whether you're new to the school setting or a seasoned professional.

This year's theme was "Be the Light: Illuminating the Future of Our Schools." Our first day of the conference kicked off with keynote Lucas Jadin, who helped shine a light on how attendees can be an effective leader even in the darkest moments. This followed by eight tracks of sessions on a diverse group of topics, including liability, Medicare, facilities certification, and post-employment benefits.

This year's Team Building activity was a big hit. It was Shark Tank-themed, where teams were tasked with developing and solving a school-related topic, such as referendums or transportation. The winning team — which consisted of Becky Galvin, of the Tomorrow River School District, Veronica Vanderhyden, of the Adams-Friendship Area School District, Chris Lokken, of Johnson Insurance, Michele R. Butler, of Cochrane-Fountain City School District, Rose Green, of Central/Westosha UHS, WASBO President Kathy Davis-Phillips, of the DeForest Area School District, and Troy Mar-



shall, of the Columbus School District — solved the problem of school nutrition with the "Feed Me App." The app helped kids make healthy choices when selecting what to eat for lunch. Troy Marshall, of the Columbus School District, was the district professional drawn from the winning team to receive a \$200 donation to his district. Thanks again to everyone who participated in Team Building!

We had a lovely time networking with all of our conference attendees on Thursday night for a little Casino-themed fun supporting the Kiel Lion's Club.

Friday morning kicked off with the



presentation of the 2019 Mike Roshar WASBO Shining Star Award and the Tina Hafeman Friend of WASBO Award. Jerrud Rossing, of the Monona Grove School District, was the recipient of the 2019 Mike Roshar WASBO Shining Star Award. Jerrud has successfully served as co-chair of the Fall Conference Committee for several years. Kevin King, of Skyward, Inc., was the recipient of the 2019 Tina Hafeman Friend of WASBO Award. Kevin established a more efficient system to share salary comparisons for 36 schools in the Madison region. WASBO congratulates both of our award winners, who were joined by their families during the ceremony!

Attendees were then joined by Anne Chapman and Betsy Mueller, of the Wisconsin Policy Forum on Friday morning. The pair's keynote led participants through a live demonstration of the Forum's new School DataTool, which is the organization's new resource for



Congratulations, Jerrud!



Congratulations, Kevin!



examining and comparing district data in Wisconsin. This important tool was released earlier this year and is available for all. It could be a great resource for all of Wisconsin's district professionals whether you are a business manager reviewing data for School Level Reporting, a facilities director providing benchmarking information for a presentation to your board or as a community member in your school district.

Friday session topics included new GASB 84 Requirements, ESSA School Level Reporting, preventing distracted driving and more.

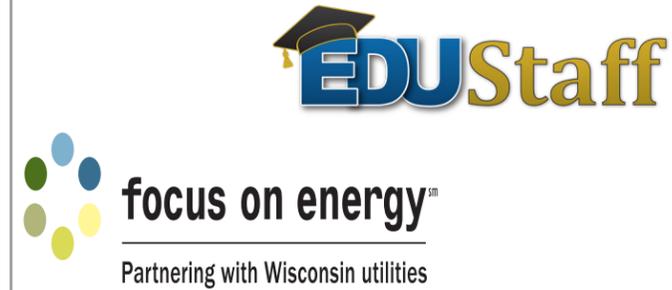
Thanks to our WASBO Fall Conference Planning Committee and to those who participated in the Fall Conference and our scholarship fundraisers. Please join us next year for the 2020 Fall Conference on October 15-16 and WASBO's Scholarship Fundraisers on October 14 in Eklhart Lake!



WASBO THANKS OUR FALL CONFERENCE SPONSORS



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**2019 Mike Roshar
WASBO Shining
Star Award
Winner**

The Wisconsin Association of School Business Officials presents the 2019 Mike Roshar WASBO Shining Star award to Jerrud Rossing, Director of Business Services, Monona Grove School District.

Jerrud was nominated by his colleague Wendy Brockert. He has successfully served as a co-chair of the WASBO Foundation Fall Conference committee for several years. Before his tenure as co-chair, he was an active committee member.

All of his nomination letters continually reference Jerrud's exemplary leadership, creative problem-solving and commitment to planning a successful Fall Conference. One letter notes that "Jerrud demonstrates the highest level of professional commitment and competency in his work. He is a person of high moral character who dedicates himself to responsibilities as an educational leader. His work ethic is exceptional. He is earnest, resourceful, reflective, methodical, dynamic and highly professional. Jerrud has earned the respect and regard of colleagues, school administrators and school board members."

Another noted that Jerrud's "courteous and easygoing personality make him a pleasant work partner...He is a quiet, thoughtful personality who contributes readily when needed to get things done. He has definitely helped make the Fall Conference successful for many years, and the WASBO organization is lucky to have him as a member."

Jerrud was honored at the WASBO Foundation Fall Conference in Elkhart Lake, Wisconsin.

This honor comes with a \$1000 professional development grant, sponsored by Quarles & Brady.

Congratulations, Jerrud!



**Jerrud
Rossing,
Monona
Grove SD**

**Nominations for awards will be
accepted until January 13, 2020.**

Find out more at wasbo.com/awards.



**2019 Tina Hafeman
Friend of WASBO
Award Winner**

The Wisconsin Association of School Business Officials presents the 2019 Tina Hafeman Friend of WASBO award to Kevin King, Financial Product Specialist, Skyward, Inc.

Kevin was nominated by Tad Wehner — of the Edgerton School District — and Tabatha Gundrum — of the Middleton-Cross Pains Area School District.

All of Kevin's nomination letters reference his active involvement in establishing a more efficient system to share salary comparisons for 36 schools in the Madison region. A common theme is Kevin's positive attitude and diligent problem-solving.

The results speak for themselves. Tad notes in his nomination letter that the Edgerton School District was able to use the evidence-based data supported by Kevin to accomplish a successful operational referendum. Since a significant component of the referendum included competitive compensation structures within the district, he said "the evidence-based data created by our regional relationship in collaboration with Kevin King enabled our organization to effectively communicate our desired results."

Tad states that "from our first meeting with Kevin and beyond, he embraced our regional inquiry and was engaged in solutions-based outcomes...to meet our regional objectives."

Kevin was honored at the WASBO Foundation Fall Conference in Elkhart Lake, Wisconsin.

This honor carries with it a \$500 donation in the recipient's name to a charity of the recipient's choice that benefits children in Wisconsin, as he has shown through his work within WASBO. Kevin has selected The Road Home Dane County to receive this donation.

Congratulations, Kevin!



**Kevin
King,
Skyward,
Inc.**

JOIN WASBO'S ONLINE COMMUNITY

**What
you're
missing**

**How do you pay
your school board
members?**

**Who do you use
to administer
Retiree HRA's?**

**What are you paying
your teacher subs
this school year?**

**Are your office
managers or
secretaries exempt
employees?**

**Log onto WASBO's
ConNetwork to find out
answers to all of these
questions and provide
your own feedback!**

Whether you're a new business administrator or facilities director trying to learn about the challenges of running a school or a seasoned professional wanting more details about a new program, WASBO's new ConNetwork is the place for you!

WASBO's new peer-to-peer system allows you to ask questions about any topic, from advice on hiring a school resource officer to salary information or the new GASB84 Requirements. It's also a great way to network and glean information from your peers! No matter your years of service to Wisconsin schools, ConNetwork offers you ways to both learn and share more information. WASBO's new peer to peer online community gives our district professionals the opportunity to connect while they share knowledge and advice with each other. That way, we're all working to improve the education of students across the state.

We debuted the new online community earlier this year, and many of our members have found it to be extremely beneficial. This includes Abigail Johnson, executive director of business services for the Eau

Claire Area School District. She recently asked a question about comparing districts' fund balance policies. Here's what she had to say about it:

"The Eau Claire School Board is in the process of reviewing the District's fund balance policy. They asked a lot of questions about what do other districts do. From an efficiency standpoint, I used the WASBO ConNetwork to reach out. I had responses from 12 districts that were both larger and smaller than ECASD," Johnson said. "Many of the Districts shared their policy and what the strengths and weaknesses and their recommendations were. It was super helpful for me to share the information with the Board and they plan to use some of the suggestions as they review the current policy."

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



Your students deserve the best. The best teachers. The best programs. The best facilities. Hoffman will help you create the best learning environment for your students to thrive and grow.

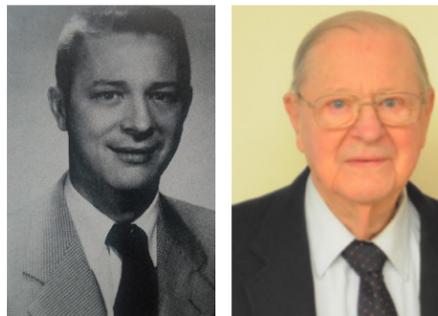
Your students deserve first-rate facilities.
You deserve a partner ready to make that happen.

Visit us at hoffman.net



In memory of Ray Hornig

We are saddened to announce that our friend and retired colleague, Raymond H. Hornig, or "Survey Ray," passed away on September, 14, 2019 in Roanoke, Virginia. Ray was a past president of WASBO, serving from 1989-1990.



Formerly of Oconomowoc, Wisconsin, Ray was a veteran of the U.S. Navy who served during World War II. He was a former teacher and coach in Rio and Oconomowoc, Wisconsin, before he transitioned to being a business manager in the Oconomowoc Area School District in 1969. He later served as the assistant superintendent for the district, retiring from that position in 1990 after 41 years in the field of education. Ray thoroughly

enjoyed teaching and the students he taught. In his retirement letter he wrote, "If I could live my life over, I would choose teaching again."

Ray was preceded in death by his wife Lois (Kuhn); his second wife Jean (Tennant-Rutherford); his sisters Loretta Hornig and Marie Wagennecht and his brothers John and Marvin Hornig. Ray is survived by his wife

Ruth Hodges-Hornig; brother Walter (Doreen) Hornig; daughter Constance (Ted) Hornig-Humphreville; son Kurt Hornig, friend Alfredo Sotomayor; step-daughter Robin (Mike) Barnhill; step-son David Bossert; step-daughter Wendy (Bryan) Emily; step-son Tim (Vickie) Hodges; step-son Jeff (Lisa) Hodges; step-daughter Kelle Long and step-daughter Melinda (Mike) Yeatts. He also is survived by a granddaughter Mae Humphreville; several nieces and nephews as well as numerous step-grandchildren and step-great-grandchildren. Our thoughts are with Ray's family, friends and all those that were touched by his legacy.

Thank you to Doug Johnson for contributing to this article.

In memory of Gerald O. Neinfeldt

We are saddened to announce that our friend and retired colleague, Gerald "Jerry" O. Neinfeldt, passed away on October 11, 2019 in Elkhorn, Wis., at the age of 81. Neinfeldt was the first Business Manager for the Elkhorn Area School District and was a WASBO member.



Jerry taught business education at Pittsville HS, Pittsville, WI during 1959-60 and moved back to Elkhorn in 1960 where he taught business education at Elkhorn HS from 1960-1967. He received a MS in Business Education from UW-Madison in 1967. He retired from his business manager position for 33 years until he retired in 2000 with a total of 40 years in education. Jerry had a special interest in singing and theater and performed in high

school and college productions and sang at numerous weddings and other local events.

He and his wife, Judy loved to attend musical productions, collect art and travel – particularly to Door County and Florida. They were proud of their children and grandchildren and their accomplishments.

Jerry is survived by his three children; Laurie (David) Brown of Janesville, Tim (Cheryl) Neinfeldt of Elkhorn, Jennifer (Jason) Yurs of Fort Atkinson, six grandchildren; Melanie (Gabriel) Kollmansberger of Ixonia,

Matthew Marzahl of Darien, Emily and Madison Neinfeldt of Madison, Victoria and Dawson Yurs of Fort Atkinson, one great-grandson, Wyatt Kollmansberger, sister, June (Bernard) Anderson of Janesville, sister-in-law, Joan Stockberger of Fort Wayne, IN, many nieces and nephews. Jerry was preceded in death by his loving wife of 49 years, Judy, his parents, Otto and Freda Neinfeldt, his in-laws, Elliott and Gladys Kehl, his sister Shirley Sirek, and his brothers-in-law Michael Sirek and Stephan Stockberger.

Our thoughts are with Jerry's family, friends and all those that were touched by his legacy.

Thank you to Bill Trewyn for providing the information.

WHAT KIND OF WORKPLACE CULTURE ARE YOU CREATING?

FIND OUT AT WASBO'S MIDWEST FACILITY MASTERS CONFERENCE!

WASBO.com/facilitymasters



MIDWEST
Facility Masters
CONFERENCE



Now more than ever, you are being called upon to be a leader in your school district. Attend the 2019 Midwest Facility Masters Conference to enhance your leadership skills with knowledge and networking.



Bowen



Ledvina

This year's theme is "What Kind of Workplace Culture are You Creating?" The conference will be held on November 4-5 at the Kalahari Resort and Conference Center in the Wisconsin Dells. It features career development and educational training for those responsible for facilities, operations, safety, risk management and school finance.

Think about your workplace culture by hearing from our two keynote speakers: Author Will Bowen and district professional WASBO member Joe Ledvina. In his keynote, called "Complaint Free Schools,"

Bowen will help attendees understand what's wrong with complaining, what is a complaint and what are the five reasons people complain? Bowen will shed light on positive leadership so we can build the best school districts we can. The next day Ledvina, in his keynote called "Making a Difference," will speak on how facilities directors can positively impact children and be good role models. You'll return to you district with many ideas for how you can improve your district's workplace culture.

The conference offers a plethora of

networking opportunities, where our district professionals can connect with vendors who specialize in flooring, management software, grounds equipment, maintenance, cleaning, roofing, energy, security and more, all in one place.

While you attend sessions on leadership, auxiliary services, maintenance, social media and energy efficiency, you have the opportunity to network with facilities, operations, safety, risk management and school finance professionals. Also, credit is offered for WASBO Facilities Manager Core (Module 3, Continuing Education Certifications and Illinois ASBO Facility Manager Certification.

For more information on the schedule or registration, visit our website at wasbo.com/facilitymasters.

We Thank Our Conference Sponsors to Date:

Focus on Energy • Nexus Solutions • Performance Services • Interstate Roof Systems Consultants, Inc. • Dude Solutions • INSPEC, Inc. • McKinstry Nicholas & Associates • PBBS Equipment Corporation • Premier Bleacher Repair • Stalker Sports Floors • STR-SEG • AluSpec Inc. • ARCON Associates, Inc. • CESA Purchasing Energy House • FGM Architects • Gewalt Hamilton Associates, Inc. • Illinois Energy Consortium Interface • Kraus-Anderson Construction Company • Lee Recreation • Magic Aire Midwest Alarm Services • Miron Construction • Perfection Property Restoration • Somerville Architects & Engineers • TEAM REIL Inc • WB Manufacturing • Wold Architects & Engineers • Frantl Industries Inc. • Strong Glass • SafetyFirst Playground Maintenance • GSF-USA • Upper 90 Energy

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 CONFERENCE**

WASBO.COM/FACILITIES

**EXHIBITOR REGISTRATION OPENS NOV. 12
 ATTENDEE REGISTRATION OPENS NOV. 20**



- Litigation
- Public Records
- Crisis Management
- Policy Development
- Residency, Open Enrollment, and Tuition
- Student Discipline
- School Finance
- Contract Nonrenewal
- Labor and Employment
- Transportation and Vendor Contracts
- Open Meetings
- Special Education
- Construction Contracts

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To learn more about how our School Law Team can assist you, please contact Chrissy Hamiel at chamiel@vonbriesen.com or Andy Phillips at aphillips@vonbriesen.com.

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Contact Kaitlyn Peters, Profesional Development & Member Services Corridinator at Wisconsin ASBO
 608.729.6631 | kaitlyn.peters@WASBO.com



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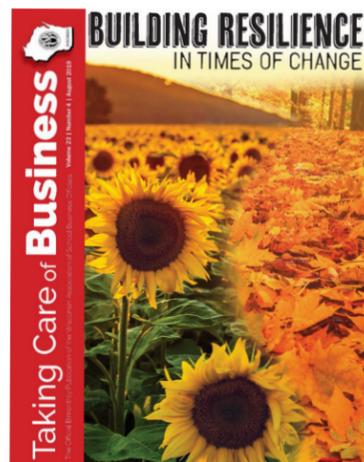


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Learn more at WASBO.com/advertise



SERVICE AFFILIATE CHECKLIST

Your contact for sponsorship, advertising, and newsletter submissions is Ryan Silvola, Ryan.Silvola@wasbo.com

- **Sponsorship Opportunities:**
 - Midwest Facility Masters Conference
 - Winter at a Glance
 - WASBO/WASPA School Personnel Academy
 - Wisconsin Federal Funding Conference
 - Facilities Management Conference
 - Transportation & Bus Safety Conference
 - Accounting Conference
 - Spring Conference
- Taking Care of Business articles are due November 15 for December issue.
- Advertise in Taking Care of Business.
- Update your profile and communication preferences at WASBO.com.
- Join a WASBO Committee.
- Mark your calendars! Exhibit hall registrations open November 12 for 2020 Facility Management Conference & January 8 for 2020 Spring Conference

WISCONSIN STATE EDUCATION CONVENTION
January 22-24, 2020 • Wisconsin Center • Milwaukee

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.



Visit WASB.org/convention to register.



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Find out more at WASBO.com/careers

Our Expertise.
Your Knowledge.

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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. Contact Kristin Hauser at 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.

For a school facilities mentor, contact Joe Ledvina at jledvina@lacrossesd.org or Dave Hoh at 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. 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.

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.

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.

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



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



2019-20 WASBO MEMBERSHIP

1,500 members and growing!

District Professionals: WASBO Supports You

Identify

Stay on the inside of school business with relevant news and publications.

- WASBO has you covered with our bi-monthly newsletter, Taking Care of Business. This publication features important and timely topics related to school business.
- Additionally, through the Wisconsin Education News email, we provide a daily synopsis of school-related news clippings from around the state.

Develop

Expand your network, skills, and knowledge at professional development events.

- School business is an ever-changing field, making professional development a continual need. You will grow alongside other high-achieving professionals at numerous professional development opportunities throughout the year.
- Regardless of your work background or degree, if you are new to the school business office you are sure to find the learning curve is steep. Little can prepare you everything the job entails. WASBO offers the Year of Success program. This six-conference package is 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.
- A mentorship program designed to provide 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 official's job description. This is accomplished by pairing new business officials on a one-to-one basis with experienced veterans.

Lead

Support leadership skills and achieve recognition with certification, award programs and participation.

- WASBO sets standards of excellence with our award and scholarship opportunities. The WASBO Facilities Manager Certification program provides a knowledge base for those who are facilities leaders to provide safe and healthful educational facilities in Wisconsin.
- Through a partnership with The National Alliance, WASBO offers the Certified School Risk Managers Program (CSRM). CSRM is a cohesive, unified education and designation program that builds risk management knowledge.
- The Wally Zastrow Leadership Academy provides practical leadership skills.
- Participate on one of WASBO's committees by serving and connecting with colleagues from across the state. Your professional growth will be enhanced because of your involvement.

ConNetwork

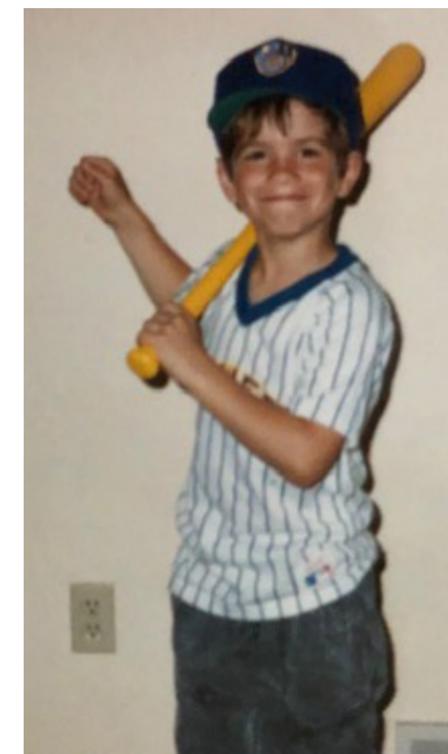
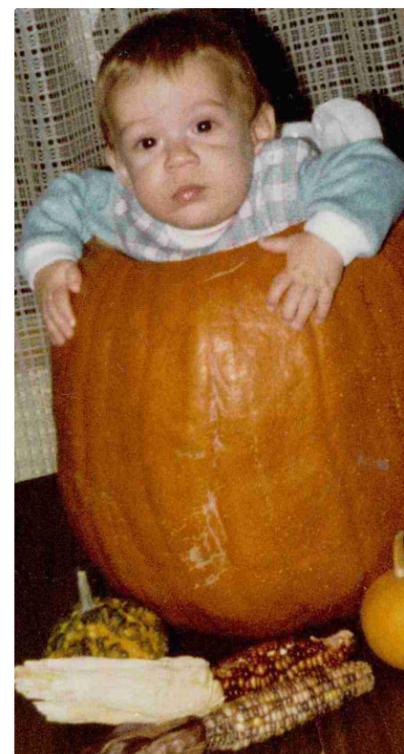
The ConNetwork Communication Forum is a resource for information sharing.

- Enjoy networking opportunities at WASBO conferences when you connect with school business professionals from around the state.
- Try out the community by using your current username (email) and password to access all things WASBO at www.wasbo.com. Then click on "Resources" at the top of the homepage and then ConnectWork.
- Find best practices and resources in school business management in the online Education Resource Center (ERC).



WHICH WASBO BOARD MEMBER IS IT?

BOO! BELOW ARE PHOTOS OF THREE OF OUR BOARD MEMBERS TRICK OR TREATING AS CHILDREN. WHO ARE THEY? THE ANSWERS MAY SURPRISE YOU!



WASBO WISHES EVERYONE A VERY HAPPY HALLOWEEN!

ANSWERS FROM LEFT TO RIGHT: BRIAN ADESSO, JOHN STELLMACHER AND MIKE KOLTES

CELEBRATING OUR NEW MEMBERS!

PLEASE REACH OUT AND CONGRATULATE OUR NEW MEMBERS

District Professionals

- **Carol Beyer-Makuski**, Business Manager Assistant/Accountant, School District of Waupaca
- **Steve Board**, Business Official, Richland School District
- **Guy Boardman**, Director of Buildings & Grounds, De Soto Area School District
- **Cary Brommerich**, Bookkeeper, Gale-Ettrick-Trempeleau School District
- **Ashley Dake**, Finance Manager, School District of Abbotsford
- **Stephanie Diermeier**, Project Coordinator, Energy Control & Design, Inc.
- **Carol Dufek**, Operations Supervisor, School District of South Milwaukee
- **Steven Eichman**, Manager of Facilities, West Allis-West Milwaukee School District
- **Lisa Garvalia**, Accounting Clerk/Payroll, De Soto Area School District
- **David Gregg**, Certified Maintenance Technician, CCSD #50 (IL)
- **Zain Heitz**, Buildings and Grounds Director, Oregon School District

- **Denise Lane**, Accounts Payable, School District of Ladysmith
- **Jon Nowak**, Director of Operations, Nativity Jesuit Academy
- **Mario Ortega**, Facilities Manager, School District of Beloit
- **Dan Van Vuren**, Buildings & Grounds Supervisor, Kickapoo Area School District
- **Ryan Verrier**, Elementary Principal, Fall River School District
- **Pamela Wielgosh**, Payroll/Accounts Payable, Chilton Public Schools
- **Malinda Wright**, Business Manager, 21st Century Preparatory School

Service Affiliates

- **Leslie Bootay**, Broker Relations Advisor, CM Regent Insurance Company
- **George Cullen**, Vice President, JP Cullen
- **Frank Damit**, Area Sales Manager, Per Mar Security Services
- **Sarah Dunn**, Director-Client Services, CG Schmidt, Inc
- **Kim Eparvier**, Education Facilities Coordinator, Hoffman Planning, Design &

- Construction, Inc
- **Daron Juneau**, Business Development, Complete Control, Inc
- **James Kilsdonk**, Commercial Manager, VP, Old National Bank
- **Eric LaRue**, Senior Account Executive, Canon Solutions America
- **Lisa Price**, Executive Assistant, Kraemer Brothers
- **Kyle Reynolds**, Account Executive, Interface
- **Travis Schroeder**, Architect, Ayres Associates
- **Rhett Surman**, Territory Manager, The Garland Company
- **Teresa Wadzinski**, Senior Project Manager & Associate, Eppstein Uhen Architects

Student Members

- **Daniel Arnold**, Social Studies Teacher, Walworth J1 School District
- **Tasha Naylor**, Bookkeeper, Lake Mills Area School District
- **Matthew Thomas**
- **Kari Timm**

MEMBER MOVES

CONGRATULATE WASBO MEMBERS ON THEIR NEW SUCCESSES

- **Nick Curran** from Director of Finance & Operations, Gresham School District to Shawano School District, Director of Business/HR
- **Sarah Duncan** from Business Manager, Fontana J8 School District to Director of Business Services, Clinton Community School District
- **Joan Hauser** from Account Manager, Shared Purchasing Solutions to Government Education Manager, NP-PGov
- **Wendy LaPointe** from Accounting Specialist, School District of Milton to Director of Finance, School District of Beloit
- **Sharon Llanas** from Comptroller, Palmyra-Eagle Area School District to Business Manager, Fontana J8 School District
- **Julie Marx** from Comptroller, Herman-Neosho-Rubicon School District Move to Comptroller, West Bend School District

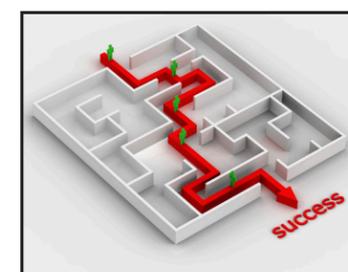
- **Dan McCrea** from Director of Business Services, Clinton Community School District to Chief Financial Officer, Janesville School District
- **Dave O'Mara** from Director of Buildings & Grounds, De Soto Area School District to Building & Grounds Manager, DeForest Area School District
- **Mike Stanch** from Owner, Stanch Lighting and Energy to Account Executive, Home Depot PRO

MEMBER RETIREMENTS

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

- **William Beachkofski**, Sales Engineer, Energy Control & Design, Inc.
- **Roger Dickson**, Chief Finance & Operations Officer, School District of New Berlin (June of 2019)
- **Louise Fischer**, Business Manager, Shawano School District
- **Steve Shulta**, Buildings & Grounds Director, Evansville Community School District

KNOW SOMEONE INTERESTED IN JOINING WASBO? HAVE YOU SWITCHED DISTRICTS OR COMPANIES? HAVE YOU RETIRED? CONTACT KRISTIN HAUSER AT KRISTIN.HAUSER@WASBO.COM FOR ALL YOUR WASBO MEMBERSHIP NEEDS!



WINTER AT A GLANCE
DEC. 3 | KALAHARI
WASBO.COM/WINTER

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

October

25-28

ASBO International Annual Meeting & Expo
National Harbor, Maryland

November

4-5

WASBO Midwest Facility Masters Conference
7 AM, Kalahari Resort, WI Dells
wasbo.com/facilitymasters

6

School Finance Puzzle
10 AM - 3:30 PM, WASBO office

11

Spring Conference Planning Committee Meeting
2 PM, conference call
wasbo.com/spring

13

WASBO CSRM: Handling School Risks
8:30 AM, WASBO Office
wasbo.com/riskmanagement

14

WASBO CSRM: Crisis Prevention and Response - Update Credit
8 AM, WASBO Office
wasbo.com/riskmanagement

15

Madison Area Regional Meeting
9 AM, Madison School District

Wisconsin Valley Regional Meeting
9 AM, Mosinee School District

Southeast Regional Meeting
12:30 PM, Muskego-Norway School District

20

Northeast/Bay Area Business Office Professionals Conference
8:30 AM, Fox Valley Technical College

December

3

ASBO SFO Study Group
7 AM, Kalahari Resort, WI Dells
wasbo.com/sfo

Winter at a Glance

7 AM, Kalahari Resort, WI Dells
wasbo.com/winter

4-5

WASBO-WASPA School Personnel Academy
Kalahari Resort, WI Dells
wasbo.com/schoolpersonnel

Northwest Regional Meeting

Nov. 4 at 10 AM, Lehman's Supper Club

6

Wisconsin Valley Regional Meeting
9 AM, Stevens Point Area Public School District

9

Spring Conference Planning Committee Meeting
2 PM, conference call
wasbo.com/spring

12

WASBO Board of Directors Meeting
9:30 AM, WASBO Office

West Central Regional Meeting

9:30 AM, Sparta Area School District Administration

13

Madison Area Regional Meeting
9 AM, Monona Grove School District

Northeast/Bay Area Regional Meeting
9 AM, Clintonville Public Schools

Southwest Regional Meeting

9 AM, CESA #3

Southeast Regional Meeting
12:30 PM, Greendale School District



January

7

School Facilities Committee Meeting
9:30 AM, WASBO Offices

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

21-24

Wisconsin State Education Convention
Wisconsin Center, Milwaukee

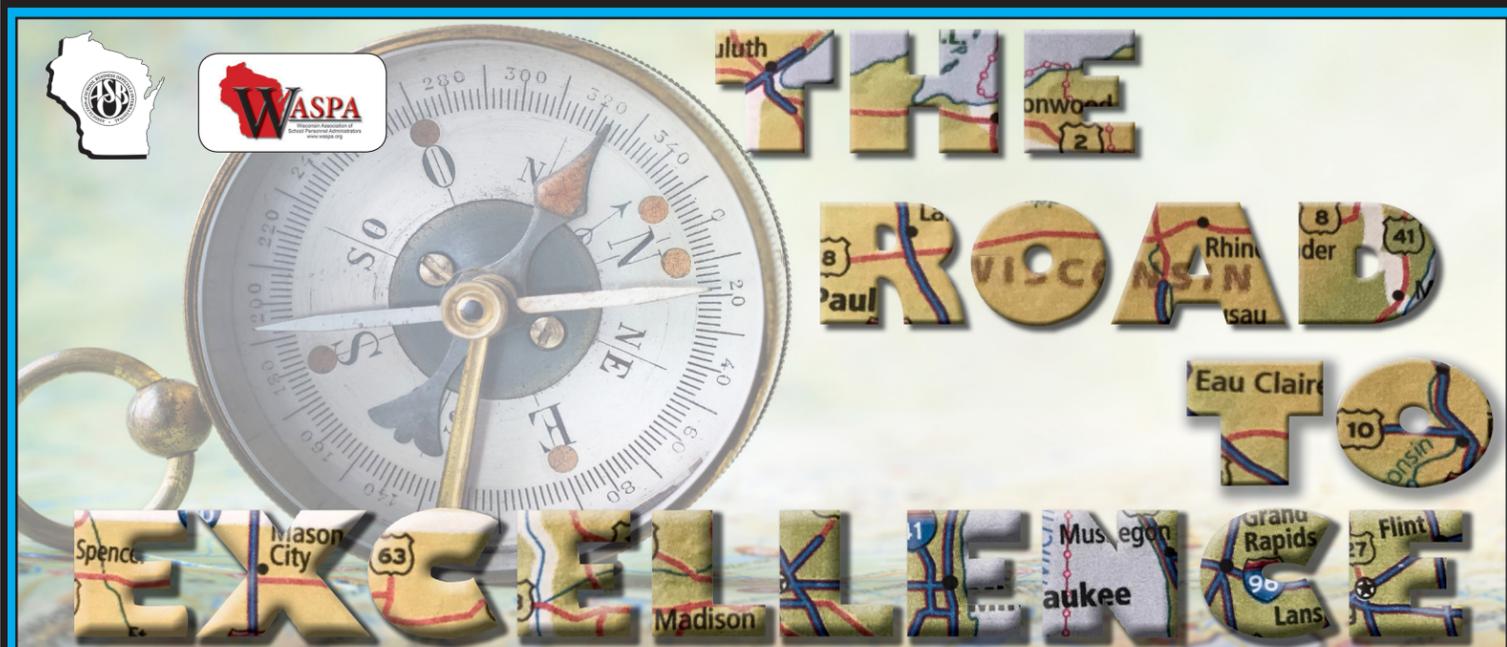
ASBO INTERNATIONAL MEETING DATES

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

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

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

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



WASBO/WASPA 15th Annual School Personnel Academy

Who Should Attend? Human Resource Directors, District Administrators, School Business Managers, School Board Members, and School District Employees in Supervisory Roles

Register at WASBO.com/schoolpersonnel

Full conference registration is as low as \$355 for multiple attendees from your organization! Early bird rates available through Nov. 20!

Conference Schedule

Wednesday, December 4 • 7:45 AM - 4:30 PM

(Registration at 7:30 AM; Networking Social from 4:30-6 PM)

- Understanding the Alphabet Soup of Medicare
- Applying Evidence-Based Budget Strategies to OPEB Planning
- Supporting Workplace Well-Being Individual and Organizational Approaches
- Staffing Roles & Responsibilities
- The Small School Tickler
- Protecting Students from Staff Sexual Abuse
- Interactive Employee Conversations and Legal Compliance
- Fringe Benefit Compensation - When is a Gift Card Not a Gift?

Thursday, December 5 • 7:15 AM - 3:45 PM

- Vetting Clinic Options to Ensure the Health of Your Employees & Your Budget
- Strategies to Reduce Your Healthcare Costs and Improve Your Benefit Plan
- Lessons of a Lobbyist
- Slips, Trips, and Falls... But Wait, What Does Our Contract Say?
- LGBTQ+ Attorney Panel

Featured Speakers

- Associated Benefits and Risk Consulting: Bret McKittrick, Al Jaeger & Andy O'Halek
- Boardman & Clark, LLP: Rick Versteegen
- Community Insurance Corporation: Jodi Traas
- Gallagher: Matthew Friedman & Sheila McCarthy
- Key Benefit Concepts, LLC: Linda Mont
- Lewis Law Office, LLC: Julie Lewis
- LifeMatters: Phillip Chard
- Middleton-Cross Plains Area School District: Erin Wheeler
- Nekoosa School District: Lynn Knight
- Pecatonica Area School District: Jill Underly
- Richland School District: Rachel Schultz
- R&R Insurance Services: Liz Johnson, Michelle Froehlike & Brian Bean
- School Administrators Alliance: John Forester
- School District of Cudahy: Jim Heiden
- Strang, Patteson, Renning, Lewis & Lacy: Shana Lewis
- von Briesen & Roper, s.c.: Andy Phillips & Chrissy Hamiel
- WEA Trust: Melanie Schoenemann & Greg Nelson
- Wisconsin Association of School Boards: Roger Price
- Wisconsin Association of School Business Officials: Mike Barry
- Wisconsin Association of School Personnel Administrators: Vickie Adkins

December 4-5
Kalahari Resort & Conference Center
Wisconsin Dells

Sponsorships are still available!

Thank you to our sponsors to date:

Gold: PMA Financial Network, LLC/
Forecast5 Analytics
Bronze: Hays Companies

Come a day early on December 3 & attend

Winter at a Glance
wasbo.com/winter

OR

SFO Study Group
wasbo.com/sfo

Register at WASBO.com/schoolpersonnel



Wisconsin Association of School Business Officials
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