



# Taking Care of Business

*"By the end of the decade, the Wisconsin Association of School Business Officials shall be the most influential organization on significant Wisconsin school business management issues."  
WASBO Vision*

A Bi-Monthly Publication of the Wisconsin Association of School Business Officials - Volume 8, Number 6 - December 2004

## WASBO JOINS PROCUREMENT CARD PROGRAM



After careful study, the Wisconsin Association of School Business Officials Board of Directors voted unanimously to join with the Illinois and Indiana ASBO's to make procurement cards available to Wisconsin's school districts. Oregon and Arizona may also be joining soon. The major reason behind the Board's decision is to assist all school districts by creating an opportunity for them to significantly reduce the work load in the business office and save time and money. This service to school districts will not produce any significant income to WASBO. The WASBO Board has determined that only the actual cost for administering the program be recouped when rebates are realized. The sole purpose in WASBO's involvement is motivated by its mission to contribute to the efficiency of business operations in these times of scarce resources.

By joining with Illinois and Indiana, there is an economy of scale that no individual school district could realize. Therefore, districts would not have to pay fees, and even small school districts would qualify for rebates on their purchases, something not now possible in the vast majority of Wisconsin's school districts. However, rebates and the elimination of fees are secondary to the major savings in reducing the time, labor and paperwork currently required in most districts.

Research indicates that more than half of the purchase orders are for amounts less than \$500, sixty-eight percent are less than \$1,000. Fulton County Georgia, a district of 70,000 students recently went to a P-card program. By giving each school just two cards, they

reduced the number of PO's from 60,000 to 30,000. How significant is that? Here is an example of what the experts have to say. "The average cost of processing a purchase order manually is between \$75 and \$200. Automating procurement reduces the cost to between \$10-\$40 . . . The Return-On-Investment (ROI) for eProcurement is amazing." Deloitte Consulting. The key is to get PRO-cards into the hands of people generating small purchases which result in PO's of less than \$1,000.

Safeguards and checks and balances are built into the program and can even be customized to the satisfaction of individual school districts. Central control is

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Editor: Don Mrdjenovich

## A Message from the President

*"Participation is the Reward"*

What may be most special about the holiday season is that it provides each of us the opportunity to reflect back on the events of the past year, to look beyond our own needs, offer thanks for what has been provided and to focus on others whether they be loved ones, family, friends or the men and women serving to make this world a better place.

With the current year well underway and moving ever so quickly, your Board leadership team has also taken the opportunity to meet, reflect on the past year and start to formulate plans for 2005-06. As we continue to focus on WASBO's vision for the future, the issue of sustainability continues to enter into the mix. How does WASBO continue to assure that it is relevant to the needs of future generations of school business officials, continue to attract new members, and to provide for future leadership? As at the national level, several factors will continue impact WASBO's future. As indicated in an article from ASBO International, a major concern facing most all associations throughout the country is the concept of "volunteerism". Competing for member's time has become increasingly more difficult as we are confronted with more demands and choices for professional, family and leisure activities. WASBO continues to stand out among its peer associations with a most willing and active membership. However, the willingness of the membership to participate cannot be taken for granted.

Throughout the last two years, we have been reminded that a significant part of our "vision for the future" success lies in the strengths of our committees. Those who are willing to give of their time, lead and/or participate in committee work not only will contribute to moving our vision forward, but also will provide individual rewards that cannot be found in any other professional environment.

That is why this year we have focused on identifying, creating, and increasing the focus on the rewards for participating in WASBO activities. Not only are the timely workshops and seminars important, but also more important is our need to connect and build upon each other and our experience, knowledge and expertise.

To that end, the leadership team will be discussing plans to increase the committee involvement in the strategic planning process and to allow for active communication with the Board on a regular basis. We will also discuss paths to leadership within the organization, support for participation in other association roles, the benefits available through our retiree's experience and expertise as well as other ideas.

When the Legislature convenes in January, we can expect to hear more proposals for tax freezes, the proposed constitutional amendment called "TABOR", "revenue limits" and the "QEO" among other issues. However, these are not times to fall back but to step forward and be counted on these issues. These can also be some of the most exciting times to be involved in WASBO as we move toward becoming the



Mark Van Der Zee  
WASBO President

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Don Mrdjnovich  
WASBO Executive Director

## Exec's Reflections Indecision

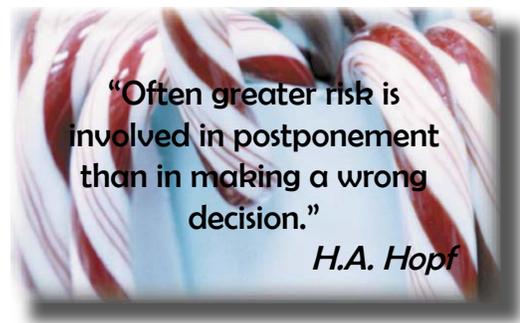
Deceased comedian Jerry Clower would not have realized it, but he helped me to help others make decisions when it appeared we were not going to move forward from a state of doubt induced "paralysis". If everything that went into the decision making process were

clearly understood by all and the outcome could be precisely defined to everyone's satisfaction, the process would be much more efficient and less time consuming. How often is that the case? When we work with Boards of Education or committees of any kind, it too often seems that there is never enough information to satisfy everyone. That, unfortunately, often leads to delay and frustration. "Let's table it for further study and consideration." is quite often the end result. In itself, that is not necessarily a bad decision. On the other hand, time moves on and a repeat performance can easily kill a decision that could have or should been made on a timely basis.

So how did Jerry Clower help me? This is the story as best as I can recall it. A bunch of good old boys went out at night to hunt raccoons. In addition to their guns and hounds, they carried a jug of white lightning. Early on they heard hounds baying in the distance with that distinctive, "we have one treed." When the boys got there the hounds were doing their best to climb the tree and get at the critter who had taken refuge in the top branches. Setting aside their immediate inclination to see who would be first to shoot the critter down, they deferred to an appeal from their most experienced hunter. He reasoned, "Boys it's early. If we shoot that critter now when we are so close to town, our womenfolk will know we got one and expect us home early and our fun will be done. Besides, we sure got a lot left in the jug." The boys agreed with the logic that there was a lot of night and white lightning yet to be enjoyed.

That decision made, they asked for a volunteer to climb the tree and shake the critter down. None stepping forward, they handed the jug to the youngest addition to the group and told him to take a few swigs while they tied the hounds. He proceeded up the tree and when he reached the top the critter jumped on his head and proceeded to scratch and claw him mercilessly. Much to his surprise and dismay, the critter in question turned out to be a wildcat. His screams of "wildcat" drew flashlight beams from all around the tree as well as appeals for him to "move right", "move left", "get out from behind that branch", "drop lower, I can't get a clear shot." And so it went on until it reached the point where pain, fear, frustration, the screeching of the wildcat and the limits of human endurance caused him to yell out, "Please, just commence to shooting, one of us needs relief!"

Maybe Jerry Clower's story can be of assistance when, "One of you needs relief." In the words of John Henry Newman, a religious leader, "Nothing would be done at all if man waited until he could do it so well that no one could find fault with it."



### A Message from the President

*Continued from page 3*

most influential organization on Wisconsin school business management issues.

I look forward to continuing the journey with you as we embark on a new year.

On behalf of the Board, "Best wishes for a most joyous holiday season!"

*-Mark Van Der Zee-*



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*Allées Piétonnières by Jean-Pierre Stora, 1995*



# BOOK REVIEW

## A Simple Way to Success

By Orvin R. Clark, EdD, RSBA  
University of Wisconsin-Superior

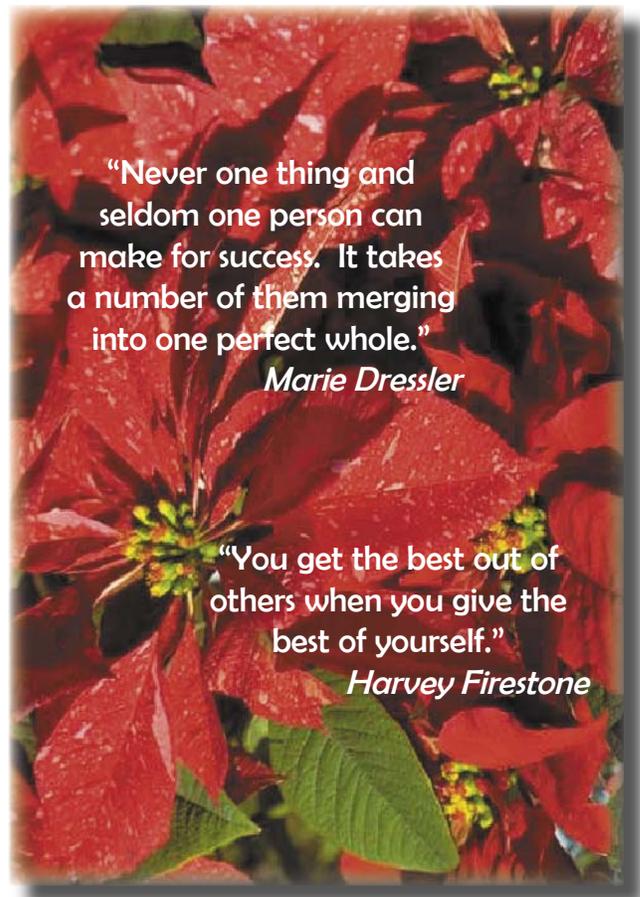
*The Simple Way To Success* was written by Larry Winget, one of America's top motivators and business humorists. *The Simple Way to Success* is a humorous book of valuable insights and ideas on how to achieve more of your personal potential. He uses quotes from many famous and some not so famous people to emphasize his point of view on various topics. The book is 205 pages in length divided into 33 short chapters; reading this book is an excellent investment of your time.

*Success is simple.* It's about following principles that are profoundly simple. Principles that are so simple that most of us overlook them, simple principles, that when followed, will allow you to achieve the level of success you desire. Some of the principles are:

- **Take Responsibility-** *"We are all self-made; but only the successful will admit it".* Earl Nightingale
- **Have Vision-** *"Whatever the mind can conceive and believe it can achieve."* Napoleon Hill
- **Have Goals-** *"You are never going to make it as a wandering generality; you have got to become a meaningful specific."* Zig Ziglar
- **Live With the Setbacks-** *"Opportunity rarely looks like opportunity. Often opportunity arrives incognito, disguised as misfortune, defeat, and rejection."* Denis Waitley
- **Be The Right Kind of Person-** *"Always do right...this will gratify some people and astonish the rest."* Mark Twain
- **Be Smarter-** *"It's what you learn after you know it all that counts."* John Wooden
- **Have Enthusiasm-** *"If you aren't fired with enthusiasm, you will be fired with enthusiasm."* Vince Lombardi
- **Smile-** *"Smile it don't cost nothing!"* Henry L. Winget (Larry's dad)
- **Lighten Up-** *"Blessed is he who has learned to laugh at himself, for he shall never cease to be entertained."* John Powell

- **Be Positive-** *"It's not your aptitude but your attitude that determines your altitude."* Jesse Jackson
- **Keep It In The Right Perspective-** *"The essence of genius is to know what to overlook."* William James
- **Have Balance-** *"Life has to have balance in order to be successful."* Larry Winget

*So what is success?* Larry Winget found through his personal experience that success is more than money and more than cars and "stuff". He found that success starts with who you **are**, not what you **do**, or what you **have**. "Success is a journey not a destination. It is the joy and inner peace you have in the presence of suffering. It is being thankful for what you have while you pursue having more. It is health, family and love. It is the excitement of looking good and not dwelling on the bad. It is balance between all areas of your life"; i.e., (family, health, career, social, financial, intellectual, & spiritual).



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# Wellness Wisconsin Style

By Erin Gauthier-Green, MBA, RSBA

**T**he number one killer of men and women today is heart disease—an ailment that is almost entirely preventable by a combination of healthy lifestyles and appropriate medication. Do people care enough to make some changes in their lives?

How do we go about changing an entire culture that is based on the idea that those with good health insurance coverage can live a less-than-healthy lifestyle because their good “insurance” will shield them from problems?

Or how about this idea: because school districts suffering under revenue caps for 10 years have been holding salaries down, they owe it to their employees to pay for health insurance plans that cost, in some areas, twice as much as the average health plan?

These are the kinds of challenges that the Greendale School District in Wisconsin tackled along with the Wisconsin Education Association (WEA), the Greendale Education Association (GEA), and the American Federation of State, County and Municipal Employees (AFSCME).

## Getting Healthy

Knowing that the days of public support of high-cost health insurance plans may be numbered, the district officials, the GEA, and the AFSCME decided that it was time to promote personal responsibility for health and to address the 50% increase in health costs that Greendale has experienced during the past three years.

During the summer of 2003, union and school officials rolled out the Rx: Health! program, a comprehensive staff wellness program designed to lower insurance costs over the long haul. The program was developed with advice

and support from the WEA Trust and local health providers, such as Aurora Health, a major provider of health care and hospitals in the area.

The program is presented as a contract. Staff members who sign on are expected to

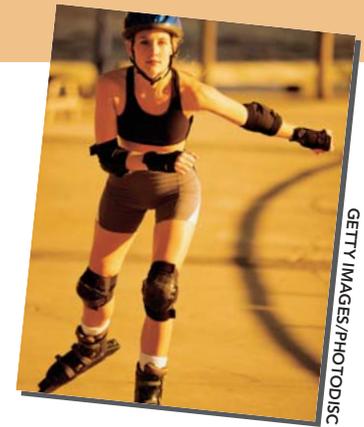
- exercise at least three times a week and report it to a district logging site;
- have all age-appropriate health screenings;
- refrain from using tobacco products;
- participate in the WEA chronic disease program, if needed;
- take an on-site blood lipid panel screen; and
- take the WEA health risk survey.

Staff who sign on receive a 1% discount on their premium co-payment, lowering it from 13% to 12%. This discount amounts to approximately \$200 per year per employee.

The district implemented the entire program with about \$6,000. Ninety-five percent of the GEA members signed on, paying \$12.50 for the blood screen and \$10.50 for a pedometer—half the cost. (The district picks up the other half.)

The support structure for the program included:

- Pedometers and walking route maps;
- Presentations by two national speakers about the importance of fitness;
- Monthly speakers on topics such as women’s and men’s health issues, coping for caregivers, and mental health issues (these presentations were funded by the WEA and Aurora Health);
- Weekly on-site Weight Watchers meetings;
- Smoking cessation programs;
- Exercise room access and on-site exercise classes;
- Review of staff member’s workstation for ergonomic issues;
- Partnerships with the Greendale



GETTY IMAGES/PHOTODISC

health department and parks and recreation department on community wellness initiatives; and

- More fresh fruit, vegetables, smoothies, and full-meal options for lunch.

In the short run, costs may rise as the district helps people cover the cost of the health tests and stabilize health problems. But in the long run, we all must do that to avoid a complete meltdown of the health care system in this country.

## Role Models for Health

What results have we seen? Since the fall of 2003, district staff members have lost a total of 690 pounds. They have used 39 fewer sick days this year than last—a 7% reduction. Staff members feel energized and are performing better.

We hope other districts in Wisconsin and around the nation implement similar programs. We are working with the WEA to develop a program to reward districts that make this effort. Our district is pooled with other districts in the state to share the costs of health care. So, in the long run, discounting health care costs for schools that take the plunge would make sense, as it will help the performance of the group.

Educators are notorious for putting others first, and themselves last. Finally, they can do something for *themselves*, and in the process, everyone wins! After all, America’s educators are the role models for teaching the next generation how to live healthy lives. ■

Erin Gauthier-Green, MBA, RSBA, is director of business for the Greendale (Wisconsin) School District. She can be reached at [egauthier@greendale.k12.wi.us](mailto:egauthier@greendale.k12.wi.us).

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Jeff Mahoney  
WASBO Director

# Advocacy

## The Birth of a New Committee

As the 2004-2005 strategic plan was being developed by the board of directors and committee chairs a new sibling was added to the current family of standing committees. This new committee was named "Advocacy." The name may be the perfect fit for the youngest and newest

family member based on why it was created. Based on today's educational climate, specifically related to the fiscal constraints, this newest member must help its family learn how to deal with the lack of funding, and increasing requirements from government agencies. Additionally, the community and taxpayers provide their own pressures for more services with no increases in taxes or fees.

To deal with today's climate, "Advocacy" has a mission to help its members focus on why we are in business - the kids. WASBO's Mission states,

*The mission of the Wisconsin Association of School Business Officials is to provide professional growth opportunities for its members, to work for adequate funding and to advocate for educational opportunities for the children in the State of Wisconsin.*

Advocacy's parents (Chair Jeff Mahoney, Jerry Dudzik, Jeff Avery, Andy Licata, Pat Blackaller and Sandy Jacobson) have developed a few appropriate goals for Advocacy for this infancy stage.

1. To provide training to our members on how to advocate to community members, local officials and state officials on behalf of children. This will be accomplished through sessions at our Spring Conference and other learning opportunities.
2. To provide information through the WASBO newsletter, about our role as not only business managers, but as advocates for children.

3. To respond to issues that members feel need to be addressed by our state organization and bring those issues to the SAA.

Advocacy will grow and will be there to support the future of our most important resource - kids.

### Taking Care of Business Seminar

What does business want from its public schools? What private business practices work in school districts? What does the legislature have to do to dig Wisconsin out of its deficit while continuing to support K-12 education? How can you improve your PR with your business community? Wow, are there a lot of new laws out there that school business administrators need to know about. How did the School Administrators Alliance do in the last session of the legislature? As the old saying goes, "You had to have been there." Put this seminar in your November 2005 calendar when we again look to Taking Care of Business.



Representative Debi Towns, a former school business administrator and a current member of WASBO addressed the luncheon. She will continue to be an informed voice on education issues and work on legislation that will benefit the schools. However, she emphasized that we all need to be realistic and expect only modest additional resources in the next biennium. Rep. Towns was recently appointed to chair the Assembly Education Committee.



LR Scott Brown, newly appointed District Administrator in McFarland, Linda Wickstrom, PR & Marketing Manager, Elmbrook, Mary Pat Pfeil, Director of Community Relations, Wauwatosa, and Marge Crawford, Deputy Administrator, CESA #1. This panel offered several practical ways that school districts can improve their public relations with the business community and take advantage of their support and resources.



John Forester  
SAA Director of  
Government Relations

## Legislative Update

### ***TABOR Proponents Attack Schools for Levy Increases***

Predictably, when figures released December 1<sup>st</sup> showed a 7.3 percent increase in school property taxes, the largest in a decade, proponents of the Taxpayers Bill of Rights (TABOR) jumped on it as

In fact, if you combine the \$244 million school property tax increase with the \$39.6 million (less than 1 percent) increase in equalization aid for 2004-05, you get a 3.8% increase in those “general” revenues.

School officials also note that in addition to a reduction in the level of state aid, schools are coping with dramatically rising costs for health insurance, transportation and energy. They add that school critics conveniently overlook the fact that the largest school property tax increase in a decade comes on the heels of the smallest school spending increase in a decade – just 3.1 percent in 2003-04.

### ***SAA Legislative Committee Meets to Adopt Agenda***

The SAA Legislative Committee will hold its second meeting of the 2004-05 school year on Monday, December 13<sup>th</sup> at the Stoney Creek Inn in Wausau. The primary objective of this meeting is to finalize the 2005-06 SAA Legislative Agenda. The Committee will also discuss other current political/legislative issues.

The SAA will forward the 2005-06 SAA Legislative Agenda, as adopted by the committee, to all SAA members before the holiday break.

evidence that public schools cannot control their spending and Wisconsin needs TABOR to protect the taxpayers.

Assembly Speaker John Gard promised that Assembly Republicans will pass a property tax levy freeze and push for a state constitutional amendment to limit taxes and/or spending in the 2005-06 Legislative Session.

Veterans of the school finance scene believe the state’s retreat from two-thirds funding in the 2003-05 budget explains the 2004-05 property tax increases. State Senator Michael Ellis (R-Neenah) said, “As the state goes south on participating (in paying for schools), the levy has to go north.”

## National Notes

ASBO International Executive Director Anne Miller currently chairs an education association interest group. At a recent meeting of the ASBO Affiliate executive directors she shared some of the insights gleaned from a meeting of the group with Washington policy analysts who were asked to predict what might happen in the congressional session. The presenters came from both conservative and liberal points of view. Some of their predictions are as follows:

- No significant changes in the NCLB statutes.
- No new money.
- Look for high school testing.
- Impacts on high schools will come in changes in the Carl Perkins legislation.
- The tax code people will be looking at the possibility of limiting deductions for state and local taxes paid and at municipal bond exemptions.
- Headstart will be given over to more state control.
- Voucher legislation did not fair well in states that put it to a vote.
- A new rural/urban coalition is being formed to address Average Yearly Progress concerns as they relate to NCLB.
- There will be much bipartisan support for more applications of standards and accountability.
- There will not be any significant changes in IDEA legislation beyond those recently adopted by Congress.



*Sandy Jacobson  
WASBO Director*

## Director's Corner P-cards - The Real Story!

We've all heard the sales pitch – "Use procurement cards for purchasing and save time and money!" Sounds good, but I have to admit that giving out credit cards to employees made me just a little bit nervous. What kind of controls would we have over purchases?

How would the board approve the expenditure? What happens with the encumbrance process? Won't the cardholders make unauthorized purchases? What if they lose the receipts? What if they lose their cards? These were all questions that came up as we looked at making purchasing cards a part of our lives. And I have to say, I was a little skeptical about the outcome.

The fact of the matter is that you really can save time and money and streamline your purchasing process by using p-cards. You can eliminate the purchase order processing, matching invoices and purchase orders, check writing and reconciling outstanding checks with your bank statement at the end of the month. Payments are no longer late. There are fewer calls from vendors looking for payments. Checks don't get lost in the mail or written to the wrong vendor. There's also less paperwork, less filing and less administrative time spent in approving orders for small dollar amounts.

As you look at developing your own purchasing card program, there are some things to consider:

1. What is the cutoff amount for getting prior approval before making a purchase?
2. Who will receive cards?
3. Will you have individual cards or department cards?
4. What will the credit limit be?
5. What will the procedure be for turning in monthly statements and receipts?

Our program started out pretty small. We began with 20 purchasing cards. In our district, teachers have to have prior approval for items purchased over \$100.

They prepare a requisition and have their principal sign it and then they can make the purchase. At each board meeting, the board receives a detailed list of purchases made on the cards which looks similar to the list of vouchers that they usually receive.

The management of the cards is all done on-line. You can set up new cards, cancel old ones, and change credit limits with the on-line software. All of the cards have their own individual credit limits. You can limit the number of purchases per month or the dollar amount of an individual purchase. You can even pick the merchant categories that you want them to purchase from. But be careful with this option. I thought I was being very clever when I eliminated 'casinos' from the list of acceptable merchants. Unfortunately, I forgot that WASBO typically has a conference each year at The Ho-Chunk Conference Center and *Casino*. Well... guess whose credit card got rejected!

I'm looking forward to increasing the use of our p-cards. I know there are a lot of ways that we can use them that haven't been explored yet. I know that using p-cards will not completely eliminate the use of purchase orders and requisitions but if we can eliminate the majority of small orders, it will go a long way in streamlining our purchasing process. Skyward is currently working on an interface program that will download the information from the on-line software directly into the expense accounts so you won't have to do any data entry. That would be a huge timesaver.

If you were thinking about trying p-cards but wanted to start out small, then the new WASBO program is the place to start. There are no fees for the cards and no minimum purchase amount. It's very easy to get started (although you do have to have your school board approve the program.) I guarantee that once you start it, you'll wonder what took you so long.

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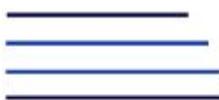
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Implementation and training of services takes about 35 minutes, with continued support provided through a toll free “800” number. ***Your school maintains complete control over all services that are offered.***

Take advantage of this risk-free, no obligation service and add benefits to your school district without adding extra costs! Contact **MWI** @800-782-8161 ext. 26 or email [rwaelti@wi.rr.com](mailto:rwaelti@wi.rr.com)

## WASBO Considers Purchasing Card Program

maintained. Customized reports can be requested from the P-card provider. It is a win-win for school districts and vendors. With P-cards, all bills are paid quickly, but the district only needs to cut one check or do an electronic transfer once every billing cycle.

P-cards look and operate similar to credit cards but they do not carry a revolving line of credit. Usage and authorization parameters can be reviewed and managed via the internet by district administration. They control what can be purchased, where, and the limit amount per transaction. Cardmember spending limits can be established for each card. Each school district can make its own determinations of card distribution, authorized purchases and limits. For example, the head maintenance person may have a card to use at specified hardware and supply sources with a determined amount. The district will receive an itemized report of purchases, Unauthorized purchases may be blocked or the purchaser, who has signed for the card and knows of its restrictions, can be made subject to discipline or dismissal.

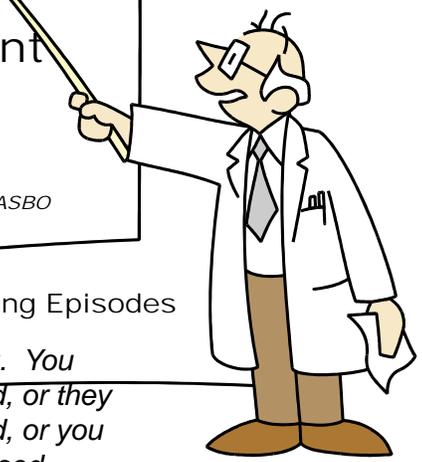
A series of regional information sessions will be scheduled to introduce the program. The program will also be featured at the annual WASBO Accounting Seminar which will be held in Wisconsin Dells on March 16-17, 2005. An introductory brochure is currently being prepared for distribution.

## Another in a Series of Management Short Courses

By Professor Wilhelm WASBO

### Managing Confusing Episodes

1. *You are reporting. You become confused, or they become confused, or you all become confused. Most people have been there.*
2. *Since that is the case, clarify the source of the confusion. Either it is you, them, or both. We can all relate to confusion. It abounds.*
3. *Take the responsibility for the confusion even when you aren't. It will make them feel better and will enhance your credibility. Remember your objective is to communicate, not determine who is responsible for the lack of it.*
4. *When you find yourself in a hole, stop digging.*



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After the Board Approves the Budget



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Robert J. Simandl  
Partner

Gardner Carton & Douglas

On November 16, 2004, the Internal Revenue Service issued proposed regulations for Tax Shelter Annuity Plans qualified under Section 403(b). The regulations, the most significant IRS advice since the Audit Guidelines were issued by the IRS for 403(b) plans, impose significant new restrictions and responsibilities on tax shelter annuity plan sponsors. Even though school districts may view themselves merely as a “funding conduit” for tax shelter annuity plans, the offering of the 403 (b) plan causes the school district to be the “plan sponsor.” Therefore, the responsibilities under the proposed and temporary regulations are applicable to school districts that make a 403(b) plan available to its employees.

The proposed regulations are generally effective for tax years beginning on or after December 31, 2005. However, with (1) the significant involvement we have seen over the past years of the Associations in setting the terms and conditions of the 403(b) plans, and (2) the upcoming negotiations for teachers’ contracts right around the corner, now is the time to update the 403(b) plan for the district and make the changes necessary for legal compliance.

The key requirements under the regulations that impact all school districts are:

1. Written Plan Document Requirement. While we have suggested that a written plan document be in existence for 403(b) plans for quite some time, the regulations now make clear that the 403(b) plan must be maintained pursuant to a written plan document. We encourage districts to formalize their tax shelter annuity plan process in a plan document and incorporate the vendor contracts into the plan to reflect the detail associated with overall compliance.

## Section 403(b) Proposed Regulation: Additional Compliance Responsibility on School District to Maintain Preferred Treatment of Employee Deferrals

2. Nondiscrimination Rules and Testing Required. Before the regulations were issued, school districts were granted a reprieve from the nondiscrimination testing requirements for 403(b) plan. This is no longer the case. Districts must carefully review any administrator-only 403(b) plan to avoid the disqualification of the plan and the consideration of such amounts as employee deferrals. **This is an issue that needs to be addressed promptly to avoid negative tax implications to the school district and to meet the requirements of Wisconsin law regarding administrative “packages” in relation to the wages and benefits of collectively bargained employees.**
3. Universal Availability. The question of whether districts are required to offer 403(b) plan participation to substitute teachers has long been disputed. Under the requirements of the Internal Revenue Code, employees who “normally work fewer than twenty (20) hours per week” are permissible exclusions from 403(b) plan participation. In the past, substitute teachers were routinely excluded by category. However, under the regulations, substitute teachers will need to be included in the scope of eligible contributing employees unless they normally worked less than twenty (20) hours per week. Therefore, long-term substitutes and substitutes who work for the district on a continuing basis, such that the “normally work” requirement is met, will need to be permitted to participate in the 403(b) plan.
4. Distributions from Plans. The distribution requirements in place for 403(b) plans are once again confirmed as being a part of the overall plan compliance obligations of the plan sponsor. While the contract may set forth distribution requirements to satisfy the minimum distribution requirements, attention must be given to early distributions which may occur under the 403(b) plan. The limitation on early distributions for 401(k) plans will now also apply to tax shelter annuity plans. In addition, for

*Continued on page 18*

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SIRMC was formed through the coordinated efforts of Nick Alioto, Larry Krebs, and Dan Van De Water. SIRMC hired a consultant, Risk Management Strategies (RMS), to serve as its advisor in risk management, providing bidding services and professional guidance and perspective.

Currently, Acuity Insurance, an A+ rated, Wisconsin-based carrier with one of the lowest cost ratios in the industry, is SIRMC's workers' compensation carrier. In our opinion, Acuity provides one of the best and creative dividend structures available today, with dividends weighted by five-year loss ratios as well as current-year ratios.

Community Insurance Corporation, a trust division of the Wisconsin County Mutual Insurance Corporation, provides the liability coverage that encompasses the traditional "Errors and Omissions" or "School Board Liability" coverage. Boiler and Crime coverages are also bid regularly. Community Insurance Corporation, insuring public entities in Wisconsin only, earned an A.M. Best rating of B+ after only 3 years in operation, which is unusual, compared to the typical ratings by A.M. Best that are assigned after 5 years of operation. CIC insures most Wisconsin counties, many municipalities, and 130 school districts, including SIRMC's "30" very successfully.

CIC is known for its aggressive pre-claims management work (to manage an incident before it's a "claim"), comprehensive loss control services and training, broad coverage policies, specialized attorneys to handle complex issue areas like special education, employment law, and has earned a fine reputation in the industry. As CIC is a "trust", it does not answer to stockholders. Profits are returned to the trust.

The liability coverage has been designed specifically for school districts, with a \$5 million dollar per occurrence coverage with no annual aggregate limit (allows for an unlimited number of \$5 million claims) and excess limits may also be purchased beyond the \$5 million. An added feature is that even the School Board Legal Liability coverage is "occurrence" based, not "claims made", ensuring that there are no gaps in coverage. This provides additional peace of mind for districts.

While districts have many choices in selecting carriers, this is one way that's available to hire the "experts" to assist us in managing an area that can be troublesome and expensive.

*One Satisfied Customer---Erin Gauthier-Green, Greendale School District*

For more information contact:

Kathy Johnson, Risk Management Strategies

3254 Stonecreek Dr., Madison, WI 53719, Phone 608-663-9032, [www.RMStrategies.net](http://www.RMStrategies.net)

## Section 403(b) Proposed Regulation

403(b) plans that allow for hardship distributions (i.e., distributions which may be permitted where an employee has a “immediate and heavy” financial need which cannot be satisfied from other sources) require active involvement by the district. Distributions which do not meet the requirements for a “hardship” threaten the preferential tax benefits of the 403(b) plan. Again, this is an important part of the agreement to be entered into between the district and the vendor for purposes of determining overall legal compliance.

### 5. Severance from Employment and Distributions.

With “retire/rehire” situations still alive in Wisconsin, the regulation provision which addresses the definition of a “severance” from employment for purposes of accessing 403(b) funds is an important consideration. The regulations now provide that a severance from employment means that the employee ceases to be employed by the employer maintaining the 403(b) plan. In a retire/rehire situation, on the return of the employee to the district for work, no future distributions may be taken from the 403(b) plan until the employment relationship ceases. The failure to cease such distributions on rehire threatens the qualified status of the plan.

While many of the changes in the rules are technical in nature and the above discussion only touches on a few of the highlights, the vast majority of compliance issues can be addressed efficiently under a comprehensive 403(b) plan review for the district. The review will need to include:

1. Preparation of a 403(b) plan document for the district which incorporates the vendor contracts as a part of the overall document for compliance;
2. Confirmation with vendors of compliance with the various changes in the law for 403(b) plan operation;
3. Implementation of annual discrimination testing to determine compliance with the nondiscrimination rules for administrators and employees alike;
4. Preparation of a hold harmless and indemnification agreement and salary reduction agreements to reflect the requirements of the law on employee deferrals and impose upon employees the responsibility to confirm for the district their

compliance with the obligations on deferrals and distributions.

These steps are required to prevent the district from being mired down in a multitude of compliance responsibilities and, more significantly, to avoid the financial impact of noncompliance with the legal obligations associated with 403(b) plan sponsorship.

For additional information you may contact Bob Simandl in Milwaukee at Gardner Carton & Douglas LLP at (414) 223-5702.

Watch for more information on this topic in early January as part of Business Briefs, an online series of topics.

## Employment Opportunities

*Please go to [www.wasbo.com](http://www.wasbo.com) for complete information about current listings.*



### A Message from the Membership Committee

The WASBO Membership Team has begun a drive to recruit all non-member Districts. While WASBO is represented well all over the State, there are many non-member districts. Many of these tend to be small districts who may lack a School Business Official. In those cases we will recruit the superintendent. Superintendents may find the Viterbo college credit program for licensure of interest, as well as the depth and breadth of timely topics. We also hope to concentrate on pulling in more Buildings/Grounds/Facilities Managers with the appeal of the new Facility Manager Certification program offered at conferences, which enhances and tunes up their skills and provides professional recognition.

Each time you meet with a service provider, vendor, or consultant, ask if they are WASBO members. If not, ask them to join! Direct them to the WASBO website. Consider having your business office, buildings and grounds and tech staff join as well. Professional development will be the key in the coming years as we all do more with less, and moving to the next level.

*Erin Gauthier-Green, Greendale  
Membership Committee Chair*

# People to People Announces Fall 2005 School Business Officials Program in Russia

People to People Ambassador Programs is coordinating a delegation of school business officials who will travel to Russia October 28-November 6, 2005. Delegates will visit institutions and schools, and meet with professionals. The exchange will include extensive discussions on public policy parameters; financial resource management; human resource management; property acquisition and management; information management; and ancillary services.

The School Business Officials Delegation is being led by Bert Huszcza, past president of the Association of School Business Officials. Huszcza is looking forward to sharing this opportunity for professional and personal growth with colleagues from the United States and Russia. "I encourage school business officials to pursue this rare and exciting opportunity," he said. "Delegates can play a role in defining the themes for discussion, and will be able to both share and gain insights through the exchange."

Delegates will visit two primary areas — Moscow and St. Petersburg — experiencing Russia's culture and heritage along the way. Ambassador Programs has been conducting educational programs for professionals in some of the world's most fascinating destinations for more than 40 years. The delegations allow professionals to exchange information with their overseas counterparts, while forging the bonds of international friendship.

Program details and a registration form are available by calling 1-877-787-2000 or e-mailing [info@ambassadorprograms.org](mailto:info@ambassadorprograms.org). More information on People to People Ambassador Programs can be found on the Web site, <http://www.ambassadorprograms.org>.

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# ASBO in Cincinnati



Nick Alioto tells his audience why he would like to serve on the ASBO Board of Directors.



Mike and Judy Garty, Betty Mrdjjenovich and Mark and Lisa Van Der Zee brave the rain and wind to get to the convention center.



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- Bill Stuart

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## Short Shots



**Shining Star** Congratulations to Diane Pertzborn who will receive the WASBO/Quarles & Brady Shining Star Award. The award is intended to recognize those who have demonstrated outstanding leadership and contributed to the association by serving on WASBO's committees or in other leadership capacities. Diane is a member of the WASBO Board of Directors and heads up the Professional Development Committee which is responsible for planning the Fall Conference. A plaque and a check for \$750 will be presented to Diane at the Business/Luncheon meeting at the Joint Convention in Milwaukee.

### **WASBO Professional Development Grant**

Congratulations are also in order for Joel Green, the first recipient of a WASBO Professional Development Grant. The grants are intended to help support qualified WASBO members who serve on ASBO International Committees. Joel serves on the Professional Development Committee of ASBO International.

**Business Briefs** Plans are currently underway to offer a series of programs using the Media Site Live technology now available from WASDA. Topics of interest to school business officials will be broadcast live and can be received on your PC for immediate viewing or stored for viewing at a later time. The programs will be 15 to 20 minutes in length and designed to be both concise and informative. This new initiative was suggested by the Board of Directors as a means to reach all school districts, especially those who may not find it convenient to attend distant meetings. Watch for a program calendar in the near future.

**Pcard Update** We are in the process of drafting the contractual agreements and school board resolutions which will be needed to participate in the program. Viroqua, Beloit and Mc Farland will pilot the enrollment process. Interested districts can get on board soon thereafter. We will keep you informed. A series of informational presentations is being planned.

## Welcome New Members



- **Nelson Edmonds**, Student, UW-Whitewater
- **Robert Ferguson**, Business Manager, Menominee Indian School District
- **Rick Ketter**, 21<sup>st</sup> Century CLC Project Director, Ripon School District
- **Veronica VanDerhyden**, Business Manager, Wautoma School District
- Creative EduSystems, **Dr. Jonnie Gallinger**, Executive Director
- Rinderle Door Co., **Rick Rinderle**, President

### *Short Shots Continued*

**Interest Group Meetings** Representatives of the SAA, WEAC and WASB have been conducting a series of meetings to identify a common agenda of educational issues that can be supported by all of the associations. Representatives from the Governor's office recently met with the group relative to educational policy issues. The Governor may also wish to meet personally with the representatives as he prepares his budget for the next biennium.

**Where Are They?** Mike Barry, Pewaukee to Oconomowoc. Recent Retirements - Doug Johnson, Oconomowoc and Bob Peck, Oak Creek-Franklin.

**Free Money:** There isn't any, but thank you for reading the newsletter.



**"The whole is the sum of its parts, so be a good part."**

**Nate McConnell**

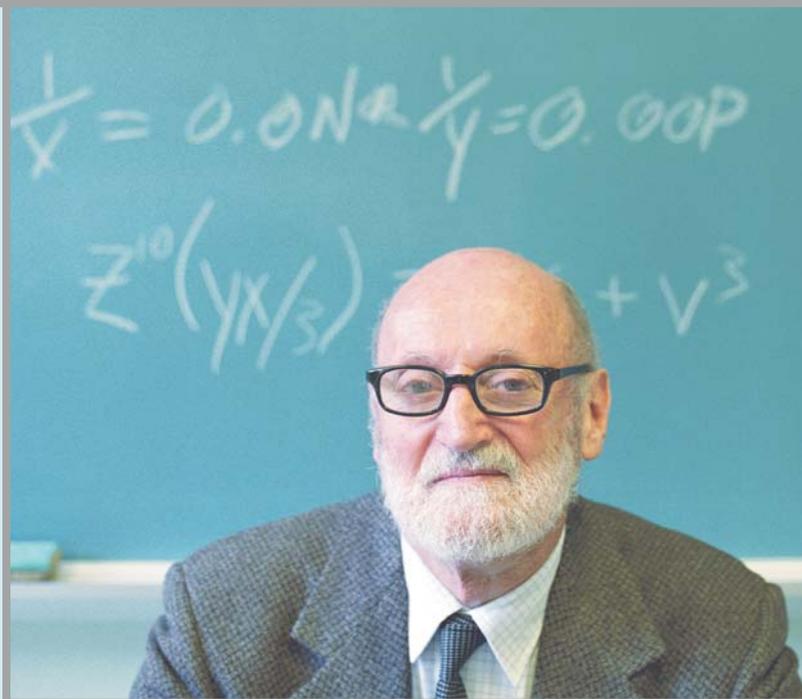


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Wisconsin schools better than Wausau. With our A(Excellent) A.M. Best rating and depth of experience, we can help lower your district's cost of risk. To learn more about the Return-To-Work Grant Program and the WASB Insurance Plan, contact Mark Meeks, Wausau Insurance, 715-847-8120.

*Wausau and the WASB are offering the second edition of this safety and return-to-work planning CD-ROM. It's free for our school plan customers!*



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# WASBO Calendar

## Professional Development

January 19-21, 2005

WASB/WASDA/WASBO Joint  
Convention  
*Midwest Airlines Center - Milwaukee*

February 22-23, 2005

WASBO Facilities Management  
Conference  
*Ho-Chunk Convention Center - WI Dells*

March 8, 2005

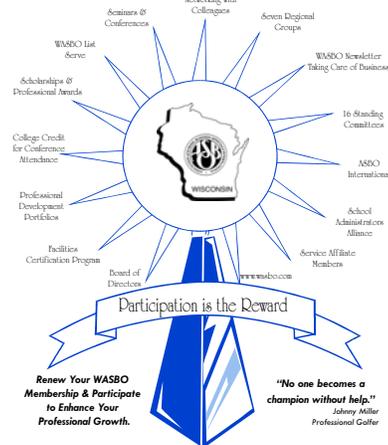
WASBO Transportation & Bus Safety  
Workshop  
*Ho-Chunk Convention Center - WI Dells*

March 16-17, 2005

WASBO Accounting Seminar  
*Ho-Chunk Convention Center - WI Dells*

May 18-20, 2005

WASBO Foundation 58th Annual Spring  
Conference & Exhibits  
*Marriot Madison West - Middleton*



## Regionals

Bay Area - Meetings start at 9:00 a.m.

December 17 CESA #7 in Green Bay  
March 18 Shawano-Gresham  
June 17 Seymour

Northeastern/Fox Valley

February 11 (Fond du Lac SD), April 8 (TBD),  
June 17 (Jt. Mtg. w/ Bay Area)

Northwest - Meetings are usually held at

Lehman's Supper Club in Rice Lake  
December 8 (Eau Claire-CESA 10), February  
9, March 9, April 13, June 8

Southeastern - Meetings are from

9:45-11:30 am with lunch following.  
December 17 - Whitnall,  
February 11 - Cudahy, March 11 - New Berlin,  
April 22 - Hamilton

West Central - Meets the first Thursday  
of every month except January, May and July.

Meetings are held from 10 am - 1 pm at the Sparta  
Area School District Administration & Education  
Center, 201 E. Franklin St., Sparta

Wisconsin Valley - Coffee at 9:00, Meeting  
at 9:30.

December 3 - Wausau, February 11 - D.C.  
Everest, March 11 - Auburndale, April 8 -  
Waupaca, August 19-Stevens Point

Madison - Meetings are held at the Middleton-  
Cross Plains District Office.

December 17, February 24, April 22



## Board of Directors Meetings

December 16 - Madison  
January 19 - Milwaukee  
February 17 - Madison  
March 15 - Wisconsin Dells (Strategic  
Planning Meeting w/ Committee Chairs)  
May 20 - Middleton  
June 10 - Madison

### Business Meetings

January 20, 2005 - Milwaukee  
May 20, 2005 - Middleton

## Committee Meetings

### Membership Committee

January 7 - Madison (10:30 am)

### School Facilities Committee

January 20 - Milwaukee (10:00 am)  
February - Wisconsin Dells  
July - TBD

### Spring Conf. Planning Committee

December 16 - Madison (10 am)  
January 20 - Milwaukee (3-4:30 pm)  
Dates in February, April & May TBD.

### Safety Committee

March 2 - Madison (1:30 pm)

### Technology Committee

January 20 - Milwaukee (7:30 am)

### Transportation Committee

December 9 - Madison (10:00 am)  
January 19 - Milwaukee (1:00 pm)



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