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

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Getting Your Act Together!

By Jones Loflin

I will have the privilege of being a speaker at your WASBO conference on September 27, sharing insights from my most recent book, *Juggling Elephants?* This article titled "Getting Your Act Together" is intended to provide some initial thoughts to those who attend the session or anyone who may just be struggling with "getting it all done." *Juggling Elephants* is a simple parable about one man with a universal problem: too much to do, too many priorities, too much stress and too little time.

Ever said, "My life is a circus?" If so, you probably didn't express the thought in a positive way. All the activity, change and chaos are enough to make any of us anxious. Look a little closer at a circus, however, and you may just find that what we call "chaos" is really a well-organized event. The circus is successful because it has a well-planned lineup and its people have learned how to change quickly to keep things on track. Oh, if only the same could be said of many of us as we go through our daily and weekly performances.

One of my favorite lines from the book is shared by one of the Ringmasters who says *There is no shortage of acts for the circus*. Think about the last time you said to yourself, "I want to get everything done today." While that sounds like a noble goal, more often than not it's simply not realistic. There will always be more to get done than we can humanly accomplish. Hence the need to "plan our line up" to make sure the most important things get done. Remember, if you can't do it all, you'll have to pick and choose the right things (acts) for your lineup.

Next, move to the audience watching your circus. In a real circus, the owner would want the members of the audience cheering and clapping. Think about those in your audience-your spouse, children, boss, coworkers, friends and others. How are they responding? Are they thrilled? Bored? If they are less than enthusiastic, maybe it's time to bring a new act into your lineup that meets their needs or expectations.

Don't forget to look around. How are the performers doing in your circus? Is someone giving less than their best effort? If so, is there something you can do to help them more fully engage? Remember, *you can't do it all!* We have limits of time and energy. It is only when you recognize that if more is to get done; it will depend on others as much as you. Your role may be to train them to take on more responsibility so you can focus on other acts that need to be performed.

As things get hectic, don't dismiss the value of an intermission. All great performances have them, regardless of what it's called. It's important to give yourself the opportunity to evaluate how the performance is going in all the rings, give yourself some physical and/or mental rest, and see what's changing around you. That's one of the most important elements of the conference in September-yes, even more important than anything I will say.

Lastly, *Be the Ringmaster of your circus!* It's your responsibility to take conscious control of your circus. Sure, there are events or circumstances you can't control, but there are many of them over which you have the power to determine the outcome. If you can't control your actions, you can control your reaction. As John Steinbeck said, *Every man, woman and child comes from the circus refreshed, renewed and ready to survive.* That's my hope for all of you as you reflect on the message of *Juggling Elephants?* and enjoy your conference in September.

For more tips and ideas about utilizing *Juggling Elephants?* go to www.jugglingelephants.com.

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Changing to Meet Tomorrow's Challenges

WISCONSIN

A Message from the President
The Leadership Challenge

Tom Wohlleber
WASBO President

Many of us are finding it more difficult than in the past to fill leadership positions in our districts. The pool of applicants or quality of available candidates for leadership positions has, in many instances, diminished in recent years. While this situation is frustrating and results in many challenges, it also provides an opportunity to rethink or evaluate how leadership is viewed and defined in your local school district.

The initial step in addressing this concerning trend is to identify or attempt to understand the potential causes or reasons for the waning interest in school district leadership positions. Some examples include:

- The headaches associated with a leadership position aren't worth the compensation
- The position is simply not "doable" or manageable (scope of position, responsibilities or expectations)
- There is a lack of trust within the school district
- The district/organization has no vision or clear direction (lack of planning)
- There is a lack of support from the district for leadership positions (limited respect for professional development opportunities, lack of well-defined decision-making process and/or support of site-based decisions, lack of support for organizational change, lack of "team environment" within the district)
- The governing body and/or Superintendent are not effective leaders
- There is a lack of support from the community for the district and/or its leaders

The next step is to identify, evaluate, and implement potential strategies to address the lack of interest in leadership positions in your school district. Some examples of possible strategies include:

- Provide intern or trial opportunities to explore and experience leadership within your district
- Market and promote the positive aspects of serving in a leadership capacity
- Review the organizational structure and leadership positions within your district for appropriate scope and alignment of responsibilities
- Provide or advocate for appropriate compensation commensurate with position responsibilities and expectations
- Assess your district's capacity or willingness to support its leadership and make the changes needed to achieve the desired degree of support
- Provide resources for professional development opportunities for leadership positions that support the mission and direction of the district
- Model, again and again, good leadership practices and principles

Strategies should accomplish or achieve much more than just attracting candidates to your district for leadership openings. Strong leadership is a significant factor in determining institutional or organizational success. These strategies should also embrace a school district's core values/ beliefs and serve as a commitment towards and recognition of leadership roles in your school district.

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Exec's Reflections

That's Not What I Heard

Woody Wiedenhoeft
WASBO Executive Director

President-Elect Diane Pertzborn and I have just returned from the ASBO International's 2007 Eagle Institute, considered a premier leadership workshop. The Leadership Workshop was developed by The Dickinson School of Law, Pennsylvania State University and presented in Gettysburg, PA. Over four days the seminar focused on various aspects of leadership with multifaceted and conflicting views about exercising leadership effectively and ethically in a world of technological, cultural and social change.

Why were we presented conflicting views? Staff development comes in two basic components. Training is about reacting and direction. Education is about thinking, planning and values. We provide training for management when we deal with certainty and control. We educate when dealing with the leadership aspects of uncertainty, visioning, motivation, trust and change. Thus, we have inherent conflicting views in the world of leadership.

Another dichotomy we face in leadership education is the listening component. It became intriguing to me that when Diane and I would review the day's workshop, we had come away with different perceptions about what we had learned. Generally, this difference was about how we related to the style of the presenter. This becomes an important point for our WASBO leadership. It is widely accepted that an organizational vision must be extremely clear. However, because of how communication takes place, people hear the same message differently. A past mentor of mine reminded me, "It is not what we do, but how we do it" which has the most effect on people in the organization. WASBO now has approximately 750 members. As we develop and engage in leadership and professional development opportunities, we must recognize our differences in gender, age, background, experience and motivations. WASBO wants to continue our leadership education for WASBO members and we need to use presentation styles and experts that will best meet the needs of our membership.

Diane and I would like to thank WASBO members for sponsoring our work and related expenses at this great workshop.

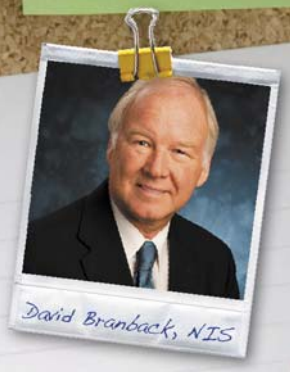
It is Dues Renewal Time for Membership Year July 1, 2007-June 30, 2008.

Renew your WASBO membership in minutes online at www.WASBO.com!

It is quick and easy. Go to www.WASBO.com and click on Renew WASBO Membership Dues. You will be prompted for your username and password. If you have not previously logged into the WASBO web site, it will be your first name and last name with no space and WASBO as the password. If you have forgotten your password; click on Forgot Password, and the web site will email your username and password. You can use a credit card, purchasing card, check or purchase order.
You can renew both WASBO & ASBO Dues.
Consider renewing your ASBO Dues for 3 years to save money on the ASBO dues increase which is effective October 1, 2007.
Don't miss out on the benefits of membership in your professional association!

Ready for the 07/08 school year?

Make sure GASB/OPEB is on your to-do list!



To-Do before January '08:

1. Determine if my district has a reportable liability.

2. Call or email David at NIS 800/627-3660 dbranback@nis-sif.com

3. Schedule GASB 45 Actuarial Valuation.

4. Establish Employee Benefit Trust.

5. Explore ways to reduce retiree medical insurance costs... HRAs, fixed dollar retiree premium contribution, new hire transition to defined contribution plan...

NATIONAL INSURANCE SERVICES

1.800.627.3660

IRS Issues Final 403(b) Regulations

By Martha L. Hutzelman, Esq.

On July 23, 2007, the IRS issued the final regulations for 403(b) tax-sheltered annuity plans. These regulations finalize rules proposed in November 2004 and provide the first comprehensive guidance issued for 403(b) arrangements in more than 40 years. Like the proposed rules, the 403(b) final regulations consolidate statutory changes, previous IRS rulings, and administrative practice into one set of guidance.

The 403(b) final rules apply to all types of 403(b) plans, including those which receive only salary deferral contributions.

Significant Changes from Proposed Rules

The final regulations include most of the clarifications and new rules that were in the proposed 403(b) regulations. A few significant changes from the proposed rules are described below:

Effective Date of Final Rules

The final 403(b) rules are effective as of January 1, 2009. Employers are permitted to follow the new rules now, if they so choose.

There are a few special effective dates for certain specific provisions in the final rules. When applicable, these special dates are noted below.

Written Plan Document

The final 403(b) retains the requirement that the employer must have a written plan document for its 403(b) plan. The written plan document must be adopted by December 31, 2008.

In lieu of having one comprehensive plan document, the written plan document may be composed of a compilation of copies of employee policies, annuity contracts, mutual fund custodial agreements, salary reduction agreements, and other similar materials. If this approach is taken, the employer must ensure that there is no conflict or inconsistency between the incorporated documents. The employer may not have a separate 403(b) plan document for each vendor offering funds under the 403(b) plan.

The written plan document must include eligibility rules, benefits available, applicable limitations, contracts available under the plan, and the time and form under which benefit distributions are made. The plan document must also allocate responsibilities between the employer, fund vendors, and any other parties to clearly delineate who is responsible for establishing and advising employees of plan eligibility criteria, coordinating plan loan limitations, and hardship withdrawal restrictions and advising participants of their rights and benefits under the plan. These responsibilities may not be allocated to employees and other plan participants.

The IRS expects to publish model plan provisions that public school employers may use to set up their written plan document.

Contract Exchanges (Referred to as Revenue Ruling 90-24 Transfers)

Currently, fund vendors permit 403(b) plan participants to transfer funds held in a contract that they selected under their employer's plan to any other contract offered in the marketplace. Under the new 403(b) final regulations, such fund transfers (referred to as "contract exchanges" under the final rules) will be permitted only if:

(a) the recipient contract includes distribution restrictions that are at least as or more stringent than those in the transferring contract and

(b) the employer has entered into an agreement with the vendor of the recipient contract that provides that the employer and vendor will provide each other with information on an on-going basis, including information about the participant's employment status, hardship withdrawals and plan loans.

The IRS has the authority at a later time to issue additional rules that may permit contract exchanges in other circumstances.

Plan Loans and Hardship Withdrawals

The final 403(b) regulations retain the provisions from the proposed rules that require 403(b) plan loans and hardship withdrawals to satisfy the same rules as those followed under 401(k) plans. For example, plan loans may not be made if the participant's total amount of outstanding plan loans exceeds certain limits. Hardship withdrawals may only be made upon determination that there is a financial hardship and salary deferrals must be suspended for the sixth-month period following the hardship withdrawal.

The final rules provide that 403(b) participant may not self-certify that these requirements are met. Thus, there must be a coordination procedure in place between the employer, the fund vendor and any other third party to ensure that the loan and hardship withdrawal rules are satisfied.

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Severance from Employment

Severance from employment is defined in the final rules as the date that the employee terminates employment with the employer. It is only at that date that an employee would be eligible to receive a 403(b) distribution, if no other distributable event applies. The employee may get a 403(b) distribution if he is still employed by another employer in the same controlled group or working for his former employer, just as long as he is not working as an employee for his former employer.

Universal Availability

The final 403(b) rules retain all of the rules included in the proposed regulations regarding universal availability. In general, if an employer offers the opportunity to make salary deferrals to one employee, he must offer that opportunity to all employees. The only employees that he can exclude are those that work less than 1,000 hours for the employer during the year and/or those who contribute less than $200 per year to the 403(b) plan.

As in the proposed rules, under the final 403(b) rules, the employer is required to provide a "meaningful notice" to all eligible employees at least once per year advising them of the availability of the 403(b) plan and how they can make a salary reduction election to begin making salary deferrals to the plan.

Under the final 403(b) rules, the employer can no longer exclude employees covered by a collective bargaining agreement from making salary deferrals under the 403(b) plan. This rule is effective as of the earlier of: (a) the date of termination of the collective bargaining agreements in effect on July 26, 2007 or (b) July 26, 2010.

Life Insurance

The final 403(b) rules provide that no new life insurance contract may be entered into under the 403(b) plan after October 26, 2007. Any life insurance contract entered into before that date must satisfy the incidental benefit rules, which limit the total amount of the participant's 403(b) plan assets that may be invested in life insurance.

Conclusion

The above listing summarizes some of the more significant changes included in the final 403(b) regulations, but which were not included in the proposed regulations. There are also significant rules included in the proposed rules that employers need to know in order to begin complying with the new rules.

Now that the final 403(b) regulations have been issued, school districts have the information they need to begin planning for compliance with these rules. Even though the effective date is not until January 1, 2009, it is important for districts to begin preparations now to make sure that they have time to make arrangements to be in compliance with the new rules by 2009.

Martha L. Hutzelman is an employee benefits / ERISA attorney who represents school districts and other employers sponsoring 403(b) plans. Ms. Hutzelman is with the Law Offices of Martha L. Hutzelman in New Albany, Ohio. For more information, please contact Ms. Hutzelman at (614) 775-9134 or (703) 282-3271 or mhutzelm@insight.rr.com. *This article is published for general information purposes and does not constitute legal advice.*

"The real art of conversation is not only to say the right thing at the right place, but to leave unsaid the wrong thing at the tempting moment."
Dorothy Nevill

Special Edition
July 2007

Internal Revenue Service employee plans news

PROTECTING RETIREMENT BENEFITS THROUGH EDUCATING CUSTOMERS

Internal Revenue Service
Tax Exempt and Government
Entities Division

A Publication of Employee Plans

The 403(b) Regulations Finally Go Final

On July 23, 2007, a momentous event occurred in the world of 403(b) tax-sheltered annuities, with the issuance (published July 26, 2007) of the first comprehensive **regulations** in 43 years. The regulations package reaches out beyond 403(b) to also provide guidance on 414(c) common control for certain tax-exempt organizations.

The general effective date is for taxable years beginning after December 31, 2008, with some notable exceptions. The portion of the regulations dealing with the grandfathering of incidental life insurance contracts applies to contracts issued up to 60 days after the publication date. Similarly, the new in-service contract exchange rules do not apply to a contract received in an exchange that occurred on or before 60 days after the publication date. Churches sponsoring 403(b)s and collectively bargained situations may experience a later effective date.

So let's explore the highlights of the regulations:

Existing IRS positions that have been acknowledged:

- 403(b)s that provide for vesting.
- Age 50 catch-up applies only after the 402(g)(1) (employee elective deferral limits) and 402(g)(7) (15 years-of-service catch-up) dollar limitations.
- The nonelective nature of post-severance contributions (up to 5 years).
- Meaningful notice is needed to satisfy universal availability for salary reduction contributions.
- Hardship distributions follow the 401(k) rules.

Brand new highlights:

- Requirement that a 403(b) program be maintained pursuant to a written defined contribution plan which satisfies 403(b) in both form and operation and contains all the terms and conditions for eligibility, limitations and benefits under the plan.
- Elective deferrals for 403(b) and 402(g) purposes are limited to contributions under a cash or deferred election as defined under 401(k).
- The good faith reasonable standard of Notice 89-23 for nonelective nondiscrimination is no longer maintained.
- Non-grandfathered contracts not subject to distribution restrictions may offer distributions only after severance of employment or upon the occurrence of an event such as after a fixed number of years, the attainment of a stated age under the plan or disability.

Additionally, the regulations provide that:

- Contribution amounts (in non-ERISA plans) must be transferred to providers within a period no longer than is reasonable for proper plan administration, such as transferring elective deferrals within 15 business days following the month in which these amounts would have been paid to the participant.
- Incidental life insurance, unless grandfathered, may not be part of a 403(b) plan.
- These plans may terminate and distribute assets with full rollover ability, as well as recognize the occurrence of an employment severance where an employee no longer works for an employer eligible to maintain a 403(b).
- In-service, plan-to-plan 403(b) asset transfers are limited to situations where the participant is an employee or former employee of the employer sponsoring the receiving plan.
- Church 403(b)(9) retirement income accounts will be expected to be maintained pursuant to a written plan which affirmatively states the intent to be a retirement income account.

Finally, the 414(c) regulation addresses aggregation to determine the employer for control group benefit purposes for all exempt organizations (not governments), except churches, based upon an 80% director or trustee common control test.

So, welcome to a new world for 403(b). Check out our updated **403(b) web pages** for guidance, publications, FAQs and other useful resources. ■

Announcement 2007-63 Clarifies the IRS' Position on the Elimination of the Schedule P (Form 5500)

In conjunction with the Department of Labor's July 21, 2006, *Federal Register* announcement mandating the electronic filing of the Form 5500, the IRS initiated certain other measures intended to reduce burdens and expenses on both the filing community and the involved regulatory agencies. Among those measures was the elimination of the Schedule P, *Annual Return of Fiduciary of Employee Benefit Trust*.

With the release of **Announcement 2007-63** on June 29, 2007, the IRS has announced that it will treat the plan's filing of the appropriate Form 5500-series return as "if the filing constitutes a return of the plan's employee benefit trust for purposes of §6501(g)(2)." Simply put, as of 2006 (or 2005 for Form 5500-EZ), the filing of a Form 5500-series return will replace the Schedule P as the triggering devise for purposes of §6501(g)(2). ■

Please share this Special Edition with your colleagues. To subscribe to our newsletter, please go to **www.irs.gov/ep**. All editions of the *Employee Plans News* are archived there. ■

IRS Issues Final Section 403(b) Plan Regulations

By Bob Simandl, Esq., Simandl & Murray, s.c.

Summary

On July 23, 2007, the IRS issued the final regulations under Code Section 403(b). These long-awaited final regulations provide guidance for retirement savings through annuity contracts and mutual fund custodial accounts for employees of public schools and tax-exempt organizations. These regulations, which were proposed in 2004, represent the first comprehensive guidance issued under Section 403(b) in 43 years. However, the differences between the proposed regulations and the final regulations are minor from an operational perspective.

Effective Date

The general effective date for these final regulations will be for taxable years beginning after December 31, 2008. Since most school districts offer 403(b) plans based on a calendar year, compliance will be required as of January 1, 2009.

Highlights

What follows are general highlights of the final regulations, including changes from the proposed regulations:

- A 403(b) program must be maintained pursuant to a written plan both in form and operation, and must included all terms and conditions relating to eligibility, limitations and benefits under the program.
- Neither loans nor hardship distributions will be left to the responsibility of the employee. The sponsoring employer, through the 403(b) plan, will determine whether or not to allow loans or hardship distributions. Hardship distributions will follow the same rules as for 401(k) plans.
- Distributions cannot be paid to participants unless that participant has severed from employment, experiences a financial hardship (if the plan permits hardship distributions), becomes disabled or attains age 59 ½.
- The exception in the proposed regulations permitting a 403(b) plan to provide for a transfer of assets to purchase permissive service credit (e.g., years of service) under a defined benefit governmental plan has been retained under the final regulations.
- "Universal Availability" requirement provides that if any eligible employee of an employer that sponsors a 403(b) plan is permitted to make elective deferral contributions into the plan, then all eligible employees must be permitted to make such elective deferral contributions.
- A 403(b) plan may still exclude non-resident aliens and those employees who normally work fewer than 20 hours per week from participation.
- Meaningful notice to all eligible employees as to their opportunity to participate in the 403(b) plan is necessary to satisfy the Universal Availability requirement.
- Governmental entities are still exempt from most non-discrimination requirements for employer contributions. Only the Universal Availability requirement and the maximum compensation limit must be followed for plans sponsored by governmental entities.
- Employer contributions to former employees are still permitted. However, such non-elective contributions for a former employee must not exceed the lesser of Section 415(c) dollar limitation or the former employee's annual compensation during his/her most recent year of service.

While these new obligations might not take effect until after the beginning of 2009, the IRS has made it clear that their intention is to enforce compliance now by targeting school districts through its Universal Availability Project. We believe that early preparation, as we have stated for the last year, is important to ensure that school districts not only comply with these requirements, but also efficiently meet their benefit goals for teachers, administrators and other staff members.

If you have any questions regarding this article, please do not hesitate to contact Bob Simandl at (262) 717-3171 or Bret McKitrick at (262) 717-3178.

Attend the Fall Conference to learn more about the 403(b) regulations. Attorney Kristi Cook will go over the regulations in her session, *The Brave New World---Impact of the Final 403(b) Regulations on Public Schools.* Ms. Cook, working with ASBO and the NTSAA developed a 403(b) compliance program for educational organizations and designs continuing education and compliance certification programs. She is the author of three columns that appear regularly in trade publications and has co-authored four books on 403(b) and 457 plans.

This will be followed by a Round Table Session where you can learn about the 403(b) services available through our Service Affiliate Members.

Controls, Security and Minimizing Fraud in Your Purchasing Card Program

By Bryan Barger, Senior Relationship Manager, Harris ePurchasing Solutions

As purchasing card programs move from "best practice" to "common practice"*, a critical component of a purchasing card program is the ability to place safeguards on your cards to make sure that purchasing is in sync with the district's policies. A purchasing card system should allow you to define how, where, and with whom the program is utilized. Program usage controls can be defaulted at the School District level, or limited at any level of the organization hierarchy down to the individual card level.

The WASBO Purchasing Card Program (partnering with Harris/BMO Bank) allows schools to predetermine spending and transaction limits for groups of cards or each individual card, eliminating the need for requisition and purchase order approvals, while enhancing security. These controls can mirror your organization's existing signing authority, thereby creating an electronic pre-approval for a purchase versus a manual sign-off process. Transactions authorized at the Point Of Sale (POS) will utilize the controls established by your district.

For the WASBO P-Card Program, the main program controls are the following:

Individual Account Limit

Each employee or department will be assigned a MasterCard account with a limit determined by your organization. The account tracks the cumulative transactions and is refreshed upon receipt of payment.

Monthly Spending Limit

Monthly spending limits permit organizations to establish predefined monthly limits for purchases and/or cash advances independent of the Individual Account Limit. This gives organizations further spending control over individual users.

Single Transaction

The single transaction dollar limit defines the amount of a dollar limit on an individual purchase. We recommend two methods of establishing authorization controls. The first would be to create card defaults based on the existing levels of signing authority in the organization. Multiple limits such as $500, $1,500, $2,500 and $5,000 would be established, and employees can be assigned to the appropriate level based on the various "job classifications" unique to the organization, mirroring the district's existing signing authority for their purchase requisitions.

Alternatively, the district can create a custom authorization hierarchy based on the functional unit, such as the Purchasing Department, Facilities, Fleet, etc. and define the limits for each area of the organization. Both of these options allow you to create custom controls while maintaining an organized structure for managing the cards.

Cash Advances

For each individual cardholder, the district can choose to allow cash access or block access entirely. The dollar amount of cash available for an individual withdrawal and the number of withdrawals can be limited if access is granted.

Daily Velocity Counters

Clients can designate the daily maximum number and amount of purchases and cash advances for each account.

Merchant Blocking

This feature provides the ability to limit or block purchases made by merchant category code (MCC). The company has the option of restricting card usage to specific merchant types such as hardware stores, computer stores, or office supplies.

Single Transaction Dollar Limit - MCC

A single transaction dollar limit can be set for specific merchant MCC category codes. The transaction limit will control the amount of an individual purchase within a category of supplier types. Utilizing this option allows the company to establish very high limits for categories, which are critical to the cardholder and lower limits for categories that are necessary but only for smaller transactions. As an example, a systems LAN administrator may have a limit of $10,000 in the computer store category. Because the administrator drives to the company's sites to service the computers, his card allows him access to gasoline, but the single transaction dollar limit is only $25.00.

Specific Supplier Blocking

Harris was the first bank to be able to limit purchases to specific vendors and locations or block expenditures by specific supplier and location. This feature was developed at the request of clients wanting to maximize arrangements on blanket orders and to allow high value transaction purchasing.

Country Blocking

Purchases and cash advance activity may be restricted by individual country. The district also has the option of amending these controls for a specified period of time to accommodate occasional non-standard orders. Modifications may be affected by having

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Appreciating What You Have

By Fred Kusch

How do you appreciate your staff? Do you make it a habit to do so? Showing awareness of your team's collective strengths and the need for individual success and growth will foster a higher commitment to and ownership of your organization's mission, vision, goals and values.

Acknowledging the effort, work and skills of all employees can have a significant impact on how they interact with each other, you and the customer. Additionally, a positive, appreciative workplace will enhance your ability to address employees' competency deficits and how they can improve their skills.

Simply put, a positive culture of appreciation will make the workplace an enjoyable, satisfying and productive one.

Consider the following simple ideas to create a culture of appreciation:

1. Avoid awards that set people apart from each other. For instance, programs for the top sales person only recognize one person. Could that person do the job without the rest of the team that delivers the product or service? The whole team should be recognized, don't you think?

   Not only is it important for the individual to be recognized, but those who helped in the success need to be appreciated for their efforts as well.

   When only one person is recognized, a culture of the individual becomes the focus. The work of many who made the success of one is largely ignored. It creates winners and losers.

2. Let employees set their own goals. You hired them because they were skilled and you believed they were right for the job. Why not simply tell them what outcomes you expect, then get out of their way and let them do their job?

   Help them understand how they help the team and the company. Acknowledge their contributions immediately.

3. Expect a mutually appreciative organization. Urge employees to acknowledge others regularly. Use your internal informal information network – newsletters, electronic message boards, etc. where you and colleagues can brag on one another.

Feeling appreciated makes one feel as though they belong. Belonging brings out a feeling of worth. Worthiness encourages confidence, and confidence builds one's competence. Building a culture of appreciation builds confident and competent employees.

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4. If you meet, let them talk. Give time for anyone who needs to be heard. Encourage folks to talk about real accomplishments for the week, month or quarter. If they don't do it, brag for them. Take the lead.

5. Focus on overall strengths. It is important to recognize people for what they do well and not just for specific achievements. It will be easier for them to hear bad news when it inevitably comes. Think of ways to recognize how their work contributes to the overall success of the team or organization.

6. Make everyone aware of the diversity of strengths and gifts each individual brings to work. Staff members can learn from one another if they know what each has to offer. Don't keep strengths a secret!

Feeling appreciated makes one feel as though they belong. Belonging brings out a feeling of worth. Worthiness encourages confidence, and confidence builds one's competence. Building a culture of appreciation builds confident and competent employees. Confident and competent employees build productive, healthy and profitable organizations.

To hear more from Fred Kusch, join us at the Fall Conference in Elkhart Lake, September 27-28, 2007.

JFK Associates, Inc.

Bringing Life to the Workplace

Fred C. Kusch, Jr.
President & CEO
JFK Associates, Inc.

Fred Kusch motivates and inspires organizations and individuals to find balance in life—making work more productive, family time more meaningful and life more enjoyable. He provides expert, practical counsel to organizations and audiences around the globe. He offers big-picture views of how to build morale and teams, develop people and leaders and enhance life and work.

Experience in Education:

Teacher
Principal
Superintendent
Professor
School Board Member

Experience in Business:

Senior Healthcare Executive
Business Owner

With the crushing demands of modern life and business, people more than ever are juggling to find time for work, relationships, family and themselves. JFK Associates helps organizations and individuals create a better work/life balance—a balance which leads to healthier employees, workplaces and bottom lines.

Here is a sampling of some of our programs…

Strategic Educational Leadership*
Specifically for School Professionals

Strategic Business Owner*⅄
Specifically for Business Owners and Executives

Leadership Lessons
Specifically for Managers and Professionals

1 on 1 or Group Coaching
Specifically for anyone looking for greater levels of satisfaction or success

*Graduate credits available from Viterbo University ⅄ CEUs available for CPA's

I hope to meet you at your Fall Conference on September 28

JFK ASSOCIATES, INC.
Bringing Life To The Workplace

500 Main Street, Suite 101
La Crosse, WI 54601

Testimonials

"We are very fortunate to have people of your caliber available to share their knowledge and skills."
Herbert J. Grover, Former State Superintendent
WI Dept. of Public Instruction

"Believe me, I don't look up to you just because you are tall. You and your message have helped me to become both a better leader and person."
Guy Jager, Food Industry Executive

for more info call 608.787.5771 toll-free 866.787.5771 or www.jfkassociates.com

BOOK REVIEW

Don't Flinch

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

Don't Flinch, written by Barry Alvarez with Mike Lucas, *Madison Capital Times* columnist, is Barry Alvarez's autobiography. Alvarez talks about the lessons that he learned from his mentors, the hurdles that he had to overcome as a young assistant and high school coach, and the challenge of taking over his own college program. *Don't Flinch* is 256 pages in length and describes the Alvarez journey from Burgettstown, PA to Madison, WI with stays at Nebraska, Iowa, and Notre Dame.

Don't Flinch goes beyond football, it's about family! The Alvarez family; wife Cindy, daughters Dawn and Stacy, son Chad, spouses and grandchildren. It's also about Cindy's parents and Barry's parents. It's about Cindy's commitment to the Gilda's Club, a cancer support organization in comedian Gilda Radner's memory for all ages of men, women and children. Both Cindy and Barry are actively involved in Madison's Gilda's Club.

Despite inheriting a losing Big Ten football team, Barry Alvarez never compromised his values, never flinched, and never stopped believing in his plan for success which he executed. By establishing a solid foundation, adhering to fundamentals and demanding toughness from his players, Alvarez became the architect of three Big Ten Championships and three Rose Bowl victories, two of which were back-to-back in the 90's. He built a football program that brought Wisconsin into national prominence and left as the school's all-time winningest football coach. In 2004, Barry Alvarez became just the 10th coach in Big Ten history to win at least 100 games at one conference school. Alvarez developed his plan for success based on western Pennsylvania style football and his exposure to three legendary college coaches, Nebraska's Bob Devaney, Iowa's Hayden Fry and Notre Dame's Lou Holtz. Barry Alvarez is now the Athletic Director at the University of Wisconsin.

Barry Alvarez learned fundamentals of football, playing, and coaching in Burgettstown, PA, a coal mining community. Alvarez said "I loved coaching Old Coal Miners games: two teams standing toe-to-toe and slugging it out. Very little passing. Both defenses are pounding each other pretty good. Nobody is moving the ball very much. And everything is played between the tackles." Alvarez's football philosophy was not about finesse, it was about field position, avoiding turnovers, foolish penalties, and mental errors. It was about moving the chains and getting first downs with your tailback. It was about shortening the field and getting into scoring position.

An Old Coal Miners game was a product of the western Pennsylvania environment. "That part of the state was once a melting pot for Europeans and a spawning ground for a generation of football coaches." Friday night football was so big. The games were played for entertainment and bragging rights among the miners and mill workers in those little communities." Many famous football coaches are from western PA: Bill Cowher – Crafton, Kirk Ferentz - Upper St. Clair, Dave Wannstedt – Pittsburgh, Marty Schottenheimer – Canonsburg, Marvin Lewis-McDonald, Mike Ditka – Aliquippa, Joe Walton - Beaver Falls, Bob Davies – Sewickley and Chuck Knox - Ellwood City.
Most of these coaches played tough, physical, hard-nosed football (Old Coal Miners game) that was ingrained at an early age.

The book includes the All-Alvarez Team, position by position.
Offense: Lee Evans, Chris Chambers, Lee DeRamus, Mike Roan, Cecil Martin, Ron Dayne, Brent Moss, Brooks Bollinger, Chris McIntosh, Joe Thomas, Dan Buenning, Cory Raymer, Joe Panos and Aaron Gibson.
Defense: Tarek Saleh, Erasmus James, Tom Burke, Mike Thompson, Don Davey, Wendell Bryant, Donnel Thompson, Pete Monty, Troy Vincent, Jamar Fletcher, Jason Doering, Jim Leonhard, Kevin Stemke and Matt Davenport.

The book also includes Barry Alvarez Biography as of June 2006, The Alvarez Era, Alvarez's Year by Year Coaching Record (16 Year Total - 118 wins 73 loses & 4 ties) and Alvarez Talking Points. Alvarez's mind set and attitude are best expressed in the following quote "I didn't take this job to get another job. I didn't have someplace else where I wanted to end up. Some guys want to be NFL coaches. Some guys want to be coaches at Penn State or Southern Cal. Some guys want to coach in their home state, or at their alma mater. But I didn't take this job to leave. I said from Day One, I wanted to do at Wisconsin what Bob Devaney did at Nebraska. I wanted to take a program that was down, build it up and sustain it. And today it's really touching and gratifying for me to hear these words: "Thanks coach, job well done."

Continued on page 24

WASBO Foundation
Fall Conference & Scholarship Golf Outing
September 26-28, 2007

The Osthoff Resort & Conference Center
Elkhart Lake, WI
Autumn Ridge Golf Course
Valders, WI

The WASBO Fall Conference
No clowning around...
...just great professional development!

Wednesday, September 26

Scholarship Golf Outing & Hutchinson, Shockey, Erley & Co. Cookout
Autumn Ridge Golf Course, Valders, WI

Thursday, September 27 - The Osthoff, Elkhart Lake

Opening Act - Maybe It's Time for You to Stop...Juggling Elephants? - Jones Loflin

DPI Help Desk

Breakout Sessions

- Comprehensive Facility Planning
- Getting Your Act Together
- New School Construction Series Session 4 - Effectively Planning a Referendum Campaign
- How Healthy are Your Finances?
- Building Trust with School Boards and the Community
- New School Construction Series Session 9 - The Construction Bid Process
- Act One - Starting School with Your Performers
- Getting Your P-Card Program Off the Ground
- District Wellness Policies - A Side Show or Main Event?
- School Security - Lessons Learned
- What Makes a Good District Web Site?
- OPEB: Understanding Act 99 and Selecting an Investment Advisor

Lunch Program - The Three Ring Circus at the Capital: The Assembly, the Senate and the Governor, John Forester, SAA

Are You a Survivor? Team Building Activity - Sponsored by PMA/WISC

Call 800-876-3399 to make your reservation at The Osthoff.

Friday, September 28 - The Osthoff, Elkhart Lake

Tour of the WASBO Web Site

FREE Health Assessments

Breakout Sessions

- Long Range Capital Projects Planning
- New School Construction Series Session 10 - The Construction Process
- Population Health Management - Using Performance Based Health Plans to Control Medical Claim Costs
- The Brave New World - Impact of the Final 403(b) Regulations on Public Schools
- Addressing Grievances & Legal Issues - EEO, Harassment, Etc,
- How to Make Your Money Work for You
- Choosing a "Wellness" Lifestyle
- 403(b) Regulations - What Options are Available to Assist you in Compliance

The Grand Finale - The Art of Being Positive - Fred Kusch

Contact the WASBO Office for Sponsorship & Volunteer Opportunities at the Golf Outing and Fall Conference.

To see complete program or to register online go to www.WASBO.com

Developing Leadership

A Commitment of Time and Attention

By Diane Pertzborn, Business Manager, De Forest Area School District

Diane Pertzborn
WASBO President Elect
Chair - Fall Conference Planning Committee

Educators spend a good deal of time talking about leadership, reading about leadership, defining leadership, and trying to develop leadership. We not only devote our time, we also spend money on speakers, travel, and materials. Imagine how many great leaders we would have across the state and in our profession if it was as easy as reading a book or attending a seminar. We all know it isn't.

Developing leadership takes more than that. Speakers who make their living promoting leadership will tell you that the odds of success are better if the audience is full of willing participants who are motivated and interested listeners. The audience will tell you that it helps to have a speaker who is full of passion and able to use words that inspire and teach. Well, I know that I am neither a good speaker nor a good listener. No matter how much passion I have for a subject, the ability to convey my thoughts and move others while in front of a room escapes me. My friends might say that I have been a successful leader from time to time, but those events seemed to result in us being grounded, ticketed, in the confessional, or looking at some embarrassing photographs. And as a member of the audience, well, have you ever sat and listened to a speaker with your body in the room and your mind miles away? I have. I am guilty of writing grocery lists and filling pages with to-do lists that only leave me exhausted and depressed. On those occasions, I might as well have stayed at the office. I know I missed many learning opportunities while I let my mind wander away and turned my focus to other things. But over time, I have learned that listening to speakers and making sense of the message demands my attention and concentration and requires me to have an open mind. Again not always so easy, but I found it was not impossible.

Woody and I just returned from the ASBO Eagle Institute seminar on leadership. Again, not everything fit well with my way of thinking but considering the expense and the effort that many people put into the development of this conference, I stayed on task and was affected by one point made on the last day. It was said that perhaps we need to face facts; not everyone should be encouraged to take a leadership role and not everyone can be turned into a leader in spite of the best efforts of careful planners, educated speakers, and an attentive audience. Leadership IS something special and it takes someone special to carry it off. You are probably a lot like me; you wonder if you have it or if you don't. I know I am not ready yet to throw in the towel and I hope you aren't either. I'm going to keep plugging away, keep trying to hone my leadership skills until some kind hearted soul touches me on the shoulder and tells me to give up.

Those of us who volunteer our time planning conferences for WASBO believe in our colleagues and have a sincere interest in helping others develop their leadership and professional skills. We believe that it is possible for you to get away, set aside your work, and make a commitment to your professional development. We believe that this downtime allows you to be free from distraction and enables you to be open to new concepts. Some of these concepts may involve learning new business practices; others are more complex and are intended simply to inspire your efforts to make your schools a better place for children. This year, the Fall Conference attempts to provide a mix of both.

We are fortunate to have Jones Loflin, author of the book *Juggling Elephants* as our keynote speaker. His "three rings" approach was incorporated into the theme of the conference as we present the concept of leading your district into a healthy state. By that we mean healthy financially, healthy for staff and students, and healthy for you. Just as we begin the conference with a high powered and accomplished speaker, we will close the conference hearing from Fred Kusch, a professional coach who will speak to us about the importance of our leadership role working with staff. By attending this conference, it is our hope that you will be better equipped and motivated to use your leadership skills. We hope you come away from the conference with an interest in fostering a wellness culture in your school district and a new perspective on both your leadership roles and your professional life.

When the best leader's work is done, the people say, "We did it ourselves."
Lao Tzu

Chad Trowbridge
WASBO Director

Director's Corner

How to Make Health Care Changes: A Strategic Approach

By Chad Trowbridge, Business Manager, Chippewa Falls Area Unified School District

Health insurance is no doubt one of the most sensitive areas in school business and probably the most difficult to change. Why? Most groups in the 1980's negotiated hard for better health care coverage, and most likely sacrificed competitive wage increases to get them. Since the inception of the QEO, most staff have been reluctant to change health benefits since they worked so hard to get them. The QEO calculation leaves very little if any dollars available for salaries. Many staff feel that they have bought good health insurance, and rightfully so.

So how do we change our plans to more reflect what is happening in the insurance marketplace? The days of 100% coverage of premium, no co-pays, little or no deductible, and essentially every health care service received is covered at 100% no longer exist. We all have seen premiums skyrocket over the past 10-15 years and have not been very successful in stopping them. We all know our health insurance plans need to change, but typically can't agree on why. Here are some suggestions on how to implement some changes.

First, establish a health insurance committee, consisting of bargaining unit negotiators, school board members, administrators, benefit administrators, and a consultant (if necessary). These are people who can facilitate change.

Second, start meeting on a regular basis to define the problem and establish an objective. An example of an objective is "Long Term Affordable Health Care". Provide education to the committee members of how health insurance works. How premiums are generated, how claims are paid, how administration costs are allocated, and how overhead costs are calculated. You might find that the key element behind all of the above mentioned are driven by your plan design. Look at utilization, and where your claim dollars are spent.

Third, develop strategies and action steps that you all agree on. Some examples are:

STRATEGY: The Insurance Committee will support the Wellness Committee & Wellness Activities throughout the District.

Steps:

1. Clearly define the role and responsibility of the District Wellness Committee.
2. Keep an open line of communication between the Insurance Committee and the Wellness Committee.
3. Promote the Wellness Committee and District Wellness activities.
4. Ensure that the work of the Wellness Committee coordinates with the district's Strategic Plan.
5. Analyze the effectiveness of the Wellness Committee.
6. Provide oversight to the Wellness Committee.

STRATEGY: The Insurance Committee will explore, analyze, and research health insurance plan designs to make recommendation for change.

Steps:

1. Review current plans; analyze and discuss strengths and weaknesses.
2. Based upon strengths and weaknesses, develop recommendations for areas of change.
3. Determine cost for addition/ deletion of various benefit options.
4. Review alternate plan options such as high deductible plan, HRA, HSA, etc.
5. Provide training to Insurance Committee on the details of HRA's, HSA's, etc.
6. Based upon all data obtained, make recommendation for changes to the current plan(s), and/or addition of plan options to take to the Board of Education, and Bargaining Units for approval and/or negotiation.
7. Develop timeline for implementation of approved changes.
8. Develop a plan to communicate and education staff about the plan changes.
9. Implement changes.

STRATEGY: The Insurance Committee will investigate, analyze and promote Consumer Managed Health Care initiatives or practices throughout the district.

Steps:

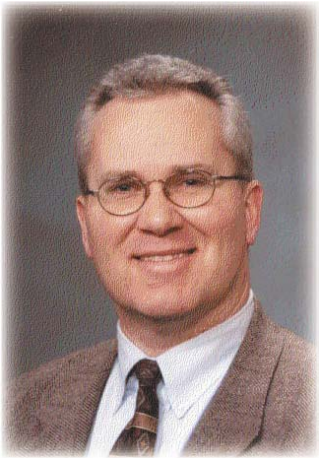
1. Review CMHC initiatives that are currently in place in the district.
2. Analyze the strengths and weaknesses of current CMHC initiatives and recommend areas for change.
3. Identify a list of possible CMHC initiatives that are being used in organizations in this area.

Continued on page 20

Legislative Update

The Conference Committee Process

Conference Committee: A committee consisting of members of both houses to work out their differences when the 2 houses pass different versions of the same bill.



John Forester
SAA Director of Government Relations

As the Conference Committee deliberations on the 2007-09 State Budget Bill continue, many SAA members have been inquiring about the conference committee process. The information below comes primarily from "The Legislative Process in Wisconsin," Wisconsin Blue Book 1993-94.

Resolving Differences: The Conference Committee

When the 2 houses pass different versions of a bill, they may be able to either adopt amendments that resolve their differences or one house may recede from an amendment that is objectionable to the other house. If they cannot reach agreement, one house may request a committee of conference.

Conference committee members are appointed by the presiding officer of each house, and senate conferees must be approved by that body. The rules do not require bipartisan representation. The partisan makeup of the committee usually depends on the type of bill being considered. If the measure had bipartisan support, it is customary to appoint a member of the minority party to the committee.

The Conference Committee for the 2007-09 State Budget Bill includes Senators Robson, Decker, Jauch and Scott Fitzgerald and Representatives Huebsch, Jeff Fitzgerald, Rhoades and Kreuser. Speaker Huebsch and Majority Leader Robson have reserved the right to appoint "rotating" members to the panel as it deliberates. Governor Doyle, or his representative, will play an important role in these deliberations, but will have no official standing or vote on any issue.

A conference committee report, which requires agreement of the majority of each house's representatives, will consist of the committee's recommendations to the legislature and may include one or more simple amendments or a substitute amendment to the bill. When either house takes up the conference report, the question is simply adoption or rejection of the report. A conference report cannot be amended. Approval of the report by roll call vote in each house constitutes final passage of the bill. Action on the report always starts in the second house so that the concluding vote will take place in the house in which the bill originated.

Under certain circumstances, a second conference committee may be required. When a conference committee cannot agree, a new one can be appointed, or if the legislature rejects the report of the first committee, but is still interested in passage of the bill, it may choose to select a new committee.

How to Make Health Care Changes: A Strategic Approach

Continued from page 18

4. Analyze CMHC's above to determine the practicality of using them in our district.
5. Develop a timeline for implementation of the approved additions to our CMHC initiatives.
6. Develop an implementation plan for CMHC's.
7. Communicate and promote the strategies for new CMHC's throughout the district.

Fourth, this process is not something that is going to happen overnight. Each of the strategies requires time to discover, time for all of the members to understand, and time for them to have the approval of the committee. Take the time to be patient; rushing into a change that is not properly planned can be dangerous.

Fifth, communicate your progress to your entire staff. Let them know what you are working on, what direction you are heading, and what sort of future changes they might be looking for.

Sixth, arrive at consensus. Establish memorandums of understanding that you can jointly take to the bargaining table.

Seventh, Educate. Provide workshops, seminars, in-service training, literature and resources that all of your staff can access.

Eighth, implement and adjust. Make the changes that you have agreed upon and make sure they work. Revisit them on a regular basis.

Ninth, don't stop there. Keep working as a group to prepare for change.

I don't believe there is a prefect recipe for changing health care coverage, but it seems that the more people you can have involved that can make a difference will help things move along. Most districts are not too far away from paying close to $20,000 per year for a family health plan. That seems like a large enough problem to me!

Director's Corner

A Changing Attitude

By Jeff Carew, Director - Wisconsin Office, PMA Financial Network, Inc./WISC

Jeff Carew
WASBO Director

A big change is on the way for the Wisconsin Investment Series Cooperative (WISC). After almost a year of evaluation, the commissioners have decided to change the banking partner. When the process began a new partner was imminent. The work and focus was on the impact the decision would have on the participant's business offices. On October 22 USBank will replace JPMorganChase, which has been the banking partner (under several different names) since the inception of the fund. As we prepare for this event, it has become abundantly clear to me why the commissioners deliberated so long. What I am also learning is that school business offices not only can handle these changes, but also have an attitude that embraces it.

School business offices seem poised for these major changes. Every part of these organizations probably have been reworked in the past couple of years. This "embracing change" attitude must be a result of the constant pressure districts are facing. Budget cuts, less staff, and higher expectations have paved the way for business offices to constantly evaluate operations and make changes. Therefore, they have gotten used to it.

In regards to this banking conversion, I have been saying that a year from now we will look back and say this was all worth it. It will be, but I think my comments are short-sighted. It has been overwhelming to see clients who view this, not as just a bank conversion, but also as an opportunity to evaluate account structures, streamline office procedures, and optimize technology.

Districts are teaching me that the actual change is not all that difficult. Their offices are constantly looking for better ways to do things. If the project they are working on moves toward improved practice, then they are on board. I am amazed at the overall positive attitude towards this transition. If the general public needs any assurance that their school business offices are on top of their game, I have several school districts they can contact.

The public sector has long been knocked for its inability or unwillingness to change. I think that perception is very misguided. I have not seen any resistence from members with this conversion. Furthermore, look at the overall business operations of school districts. Significant changes have been implemented in almost all departments. If changes haven't been made, they certainly are being examined. In our case, we looked at our banking relationship which has led to this conversion.

I know there are several districts that look at major operational changes as daunting, but I encourage you to seek out a peer whose office just orchestrated one. If you can transfer the positive attitude, the rest of changes will be embraced.

President's Message
Continued from page 3

How does all of this relate to WASBO? There appears to be a growing shortage of qualified school business officials applying as candidates in our state. We are beginning to reach a point where some school districts may start looking at other options to fill their vacancies. If the shortage of candidates becomes more critical, it could potentially lead to consideration of alternative certification requirements or possible waiver of certification requirements.

We must be proactive as an organization on several fronts to address this trend. Both as an organization and individually, we need to educate and promote to our elected officials and public, the importance of qualified individuals serving in local school district leadership positions (particularly those roles that comprise our membership). We also need to collaborate with other educational organizations in our state such as WASB, WASDA, the Department of Public Instruction, and higher education institutions that offer programs or degrees applicable to school district positions served by WASBO.

Finally, we must make strive to cultivate leadership from within our organization. This effort can be supported by continuing to provide quality and meaningful professional development opportunities, through our certification and mentorship programs, encouraging members to serve in leadership capacity within our organization, and through the valuable support of our service affiliate members.

Tom Wohlleber
WASBO 2007-08 President

"It took me a long time not to judge myself through someone else's eyes."

Sally Field

Controls, Security and Minimizing Fraud in Your Purchasing Card Program

Continued from page 11

the Card Program Administrator contact Harris' Corporate Clients Services Department electronically, by phone or online by utilizing our web-based data warehouse and administration module, Harris *details* Online. As we have uniquely developed all these controls on our own proprietary system, the company has full flexibility in instituting limits, offering companies the confidence that their risk exposure is minimized.

Combating Fraud

We take fraud very seriously and our functionality goes well beyond generating after-the-fact reports. Our security department is considered to be on the leading edge of program management and control, and has entertained on site visits from banks all over the world. We can provide details of fraudulent transactions by account, merchant type, merchant category code, merchant name, and fraud type. Our proprietary real-time capability makes it possible for us to detect and prevent fraud before it happens.

There is no liability for fraudulent use due to a lost or stolen card for your cardholders. In our years of card operation our experience reveals that employee abuse has been minimal to date. Through program controls such as specific supplier blocking, electronic oversight and management information reporting, excellent control can be maintained.

Wisconsin school districts can minimize liability in cases where the school did not benefit from the cardholder behavior (i.e., cardholder fraud or misuse) by utilizing the MasterCard Worldwide MasterCoverage Program. The MasterCard MasterCoverage® Program is one of the most important benefits of a Purchasing Card Program because it provides coverage in the event of card misuse by employees. While instances of cardholder misuse are rare, MasterCard has recognized that they can occur. Under the WASBO program with Harris Bank, the school district is covered for any charge that did not benefit the district up to $100,000 per employee. The insurance terms provide substantial time for the districts to respond to employee misuse. The district will automatically qualify for enrollment in this program, at no extra charge or deductible for the insurance.

**Source—2005 Purchasing Card Benchmark Survey Results - R. Palmer & M. Gupta*

Book Review - Don't Flinch

Continued from page 15

Don't Flinch is a highly recommended MUST - read book for not only Badger fans, but also professionals interested in motivation and management.

"We ourselves feel that what we are doing is just a drop in the ocean. But the ocean would be less because of the missing drop."

Mother Teresa

Erin Green
Director, ASBO International
Director of Business Services
Greendale School District

ASBO Update
Join Us In Toronto!

Please take this as a personal invitation to join me and our colleagues Sunday night, October 14th, 9:00 p.m., at the Loose Moose in Toronto (come on up for the night!), for a Blues Brothers Spectacular fun-filled event! Don't forget to pack your Blues Brothers clothes! This will be our joint candidate reception, for myself, Terry Haas from North Carolina, Paul Bobek from Iowa, and Brian Mee from Arizona. In order to make the most effective use of any campaign funds, we have decided to do a joint reception and avoid the large tabs for events. Besides, it's more fun!

Consider joining ASBO, or renewing your membership NOW for $135 a year for a three-year term before a dues increase takes effect in October. You can do so through the WASBO web site. Every vote will count in October 2008 and the larger group we can get together, the more chance of success! ASBO, under the leadership of John Musso, executive director, has re-loaded and is rocking. The staff there is second to none, so look for good things to happen. For example, much of the new IRS 403(b) regulation resources and information came from ASBO soon after the regulations were issued. Check out these resources at www.asbointl.org.

ASBO has made some great strides behind the scenes working on an international credential. Our work in growing our international sector is amazing. The UK alone is planning to add 10,000 school business managers in the near future. We are finding that sharing curricula for the certification may even be possible, as we work with Manchester Metropolitan University in the UK. We are also very involved with South Africa and South America. As we look to the future, India and China have to be considered as well. On that international note...

See you in Toronto!
Erin Green

ASBO Hosts the First Annual Virtual International Conference in April, 2007 from Washington DC/ UK/South Africa

From right to left: Ron Skinner, Associate ASBO Director; Ray Moorcroft, Director of the Centre for Educational Leadership, Manchester Metropolitan University, UK; Ray Simon, Deputy Secretary of Education, US; Erin Green, ASBO Director 06-08; Cameron Dugmore, Provincial Minister for Education in the Western Cape, South Africa; Ed Emond, ASBO Director from New Hampshire, 07-10; Chuck Linderman, ASBO Director from Pennsylvania, 07-10.

Custodial & Maintenance Summer Conference

Over 560 attended the Custodial & Maintenance Summer Conference held on June 20th at the Watertown and D.C. Everest High Schools. Attendees were offered a multitude of sessions to choose from, an opportunity to visit with vendors to check out the latest in products and equipment and networking with their peers from across the state. We would like to thank Watertown and D.C. Everest for hosting this year's conference. The date for next year's conference, which will be held in Baraboo, will be announced soon.

Custodial & Maintenance Summer Conference - Safety Room And the Winners Are...

D.C. Everest Safety Room Winners - Al Deeg, Scott Conrad, Dave Holt, Ken Schultz, Joe Tilton & Joe Bellomo (center left)..

Watertown Safety Room Winners - Dale Callan, Dan Zimmer, Deanna Glish & Chris Osowski with Linda Bellomo (left).

Thank you to Joe and Linda Bellomo and the "Parkview Crew" for holding the Safety Room Challenge at both Watertown and DC Everest.

In Watertown 33 teams competed in the Safety Room Challenge. Whitnall had the winning team - Dale Callan, Dan Zimmer, Chris Osowski & Deanna Glish. Bill Schmitz of Kenosha won as a Team of One.

In D.C. Everest 15 teams competed in the Safety Room Challenge. Kimberly had the winning team - Al Deeg, Scott Conrad, Dave Holt & Ken Schultz. Joe Tilton of Grantsburg won as a Team of One.

Congratulations to all of the winners! Our students are safer because of your diligence.

Vendors at Watertown Custodial & Maintenance Summer Conference.

Renew your 2007-08 WASBO membership and update your member profile at www.WASBO.com.

"You can't be brave if you've only had wonderful things happen to you."
Mary Tyler Moore

Strategies to Ensure School Buildings "Make the Grade" in Performance and Efficiency

By: Bob Schmidt, Vertical Market Leader, TRANE

School's out, but there's no break in sight for school business officials seeking strategies to maintain efficiency and ensure building systems are in top shape when students return in the Fall.

Even though any major needed repairs to resolve issues with HVAC systems might already be done or underway, the summer season is the time for officials to ensure that their facility management teams focus their efforts on problem prevention.

Update facility managers about summertime operation and maintenance (O&M) plans and their required tasks and procedures. Review the plan with HVAC service providers to identify any gaps or opportunities to improve efficiency.

Direct facility managers and service providers to pay particular attention to such key areas as:

- Summertime HVAC operation. Identify the best summertime operating settings for the HVAC system according to occupancy schedules. To conserve energy, cool only the spaces that are in use. However, do not turn off the HVAC system completely. Shutting down the system could result in moisture build-up that results in costly structural damage and indoor air quality problems. It is not necessary to run the HVAC at the same levels as when the building is in full use, just enough to control moisture.

- Taking precautions during construction. Summer is often the time when new construction or major renovation projects are undertaken. During such projects, take measures to make sure dirt and dust don't get into HVAC equipment. Consider any necessary adjustments during painting or cleaning projects. For example, during carpet cleaning, the HVAC system should be on and additional fans, ventilation and dehumidification should be running.

- Controlling humidity. The EPA recommends keeping relative humidity below 60 percent. Mold can lead to dust mites and cause illnesses to building occupants as well as structural damage. Have facility managers check the building envelope. Conduct repairs right away to avoid moisture from entering through window and door openings, seams, roofs or other openings. Consider humidity control equipment for HVAC systems as an investment that could save major costs in mold removal and cleanup.

- Ensuring Summertime IAQ. The summer months are important to maintaining IAQ. Many schools face problems with humidity and mold, which can be dangerous to the school building and to the health of students when they return in the fall.

  Older schools suffer the worst IAQ problems. The Environmental Protection Agency (EPA) has found that schools built during the energy crisis of the 1970s have some of the poorest air quality, because they were designed to retain warm air in the winter and cool air in the summer but have limited air circulation.

  A walk-through of the building can target any potential areas where further IAQ testing is necessary, such as mold assessment or testing for toxic contaminants. For more tips on IAQ, visit the EPA's "Tools for Schools" kit (http://www.epa.gov/iaq/schools/actionkit.html).

- Achieving energy efficiency. The U.S. Department of Energy's office of Energy Efficiency and renewable energy reports that an efficient O&M program can save school districts up to 20% in energy costs per year over similar buildings that do not have a program in place. Ask facility managers and service providers to outline and undertake measures during the summer to review and document last season's energy performance of building equipment and target areas for efficiency improvements.

  Ask for recommendations from facility managers and HVAC service providers on the range of solutions – including many simple measures – to improve efficiency in building operations and maintenance. Programmable thermostats, lighting sensors, and carbon dioxide sensors are some examples of controls that can improve the indoor environment while saving energy. Refer to Energy Star's Fifteen O&M Best Practices booklet (www.energystar.gov) for additional suggestions.

Finally, while undertaking longer term planning during the summer months, apply to state Performance Contract

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Strategies to Ensure School Buildings "Make the Grade" in Performance and Efficiency
Continued from page 28

programs to provide the financial resources to increase building system energy efficiencies with equipment upgrades and the installation of renewable energy technologies. Many times under such programs there are little or no front-end costs because qualified service providers, sometimes called an Energy Service Company (ESCO), guarantee the energy cost reductions to result from the capital improvements. In essence, the project's resulting energy cost savings fund the project itself.

With the proper planning and teamwork from their facility managers and building systems providers, school business officials can ensure that their school buildings will "make the grade" in terms of performance and efficiency not only during the summer --- but year-round as well.

For more information, contact: Bob Schmidt, Vertical Market Leader at TRANE in Madison by phone: 715-355-5942 or email: rschmidt@trane.com.

If you are interested in serving on a Goal Action Team, please contact WASBO President Tom Wohlleber at tomw@mcpasd.k12.wi.us or Executive Director Woody Wiedenhoeft at wwiedenhoeft@wasbo.com or 608-249-8588.

Ready, Set, RFP!

How to develop the right RFP and conduct a successful review for a major business system

By John Peretz

Budget constraints and outdated technology are two issues that School District Business Managers throughout the country deal with on a near daily basis. In order to run at optimum efficiency, a school district's major business system needs to be updated from time to time. If you're thinking about upgrading a major business system, you might want to consider the best way to write an RFP and conduct a successful review.

"School districts can minimize their risk by following a step-by-step approach to systems evaluation and selection," said Cynthia Curtis, president of Davidson Services, LLC, a vendor-neutral K-12 educational consulting company.

Your school districts need to evaluate its internal systems would be dependent upon several symptoms. These symptoms include a need for supplemental spreadsheets or databases to support information requests and decision-making; a need to manually manipulate information to get the reports you require; software vendors who are reducing or eliminating support; a need for more programming staff to produce required information; and multiple data sources can't exchange information such as General Ledger and Food Service systems.

"Having to manually work with data is time-consuming, tedious, and can take away valuable hours from busy staff that would be better spent on meeting customer needs," Curtis said. "An updated system can streamline processes and save your entire staff much-needed time. And that leads to a more efficient and effective operation."

Writing the RFP

School district business managers who have "made do" for years with an outdated information system can be hesitant to make such a major change. According to Curtis, this is due to a natural tendency to stick with what one knows, staying within their comfort zone.

"But if you're constantly working around the system, it's time to replace it," Curtis said. "New software solutions offer a whole range of benefits including greater functionality, more flexible reporting and improved data exchange with other systems."

Once you determine that it's time to look into a new system, there are some best-practice suggestions on how to approach the task ahead.

1) Focus on your Processes Although it's tempting, keep your initial focus away from technology. Instead, focus on your internal processes. How does your staff create and handle forms and documents? How could documents be streamlined between departments? For example, could human resources and payroll staff better coordinate personnel action forms? Identify any electronic spreadsheets or databases used to manage supplemental information that your current system doesn't store, such as information about new hires or vendors. Continue to ask why a certain step in the process is performed. Many times, you'll find out it's simply "always been done that way." Since most school districts upgrade their major business systems on average once every ten years, this is your chance to improve efficiency and process flow.

2) Document your Processes It is important to document each of your processes, especially those that cross departmental boundaries. This will help identify processes that are manual, duplicated or simply not necessary. Eliminating duplicated or manual efforts can save time and money during implementation of a new system. It also establishes a baseline for process-based training, as opposed to operational training.

3) Identify Unique Requirements Once processes are evaluated, an organization can quickly see the difference between an outdated process and a requirement that is truly unique and necessary. Most software vendors provide a basic set of administrative functions and capabilities. Identifying and documenting your unique requirements help you see the real differences between software products. Unique requirements should receive greater weight in the overall scoring and evaluation structure when selecting new software.

4) Provide Detailed Requirements in your RFP You'll need to evaluate the vendor proposals and costs received in response to your Request for Proposal, or RFP. Include precise instructions for the format and content of the responses and work with your procurement and legal staff to make sure proper terms and conditions are included in the RFP. It is especially helpful to provide an overview of the current system environment, including hardware, software, network connectivity and interfaces to other

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systems. Specifying user counts by application area and including the number of users at each district location will go a long way in getting an accurate cost assessment. Also include specific requirements for types of data and the number of years of historical data you will expect to be converted from your old system to the new one.

"Reviewing processes and defining detailed requirements is essential to writing an effective RFP," Curtis said.

The RFP should specify the goals and objectives of the project as well as a schedule of dates for vendor questions. A bidder's conference and proposal submittal should also be required. Ask each vendor to provide a reference list that includes contact information and a description of the services provided for each client. Vendors should be required to provide a specific number of K-12 education or public sector references as part of their proposal.

The Cost Question

Providing the vendors with a straightforward, but detailed, pricing format will help you compare software solutions on a fair and equal basis. Several pricing categories should be included in the cost section of a bidder's proposal, including:

- Software Costs – Ask for specific costs for the application software, operating system, database management system, and any third party software required to operate the system. Included in the proposal should be a specific price for each application "module," or functional area. Also found should be the software license structure used by the vendor. For example, concurrent user, per central processing unit (CPU), and so on should be provided. If the license is based on concurrent users, be sure the vendor provides a clear definition of "concurrent user," and that enough concurrent licenses are included based on district user counts.
- Hardware Costs – Make sure pricing is also included for the total hardware required to operate the proposed applications. Many vendors will support multiple hardware or operating system environments; instruct vendors to list those that are compatible with their solution. Hardware proposals should include costs for server(s) required to support the applications, database, and web access. Other hardware requirements such as dedicated servers for report writing or data warehouse tools, workstations for any third party design tools such as workflow, and peripherals such as printers (for reports and checks) or image or content data storage may also be included.
- Maintenance Costs – Ask for annual maintenance costs for each software and hardware component specified in the vendor's proposal. Vendors should include estimated yearly maintenance costs as well as a five-year period cost analysis for each component. Ask vendors to state their pricing model for maintenance costs, which is typically a percentage of the software list price.
- Implementation Service Costs – These costs typically include the hourly rates for project management, installation, configuration, data conversion, testing, training and support. Ask vendors to specify the estimated number of hours needed to implement the complete solution. Resumes and hourly rates of key staff members who will work on the project should be requested. Require vendors to list and identify any potential subcontractors, including their role and potential costs. Vendors should also provide the estimated number of trips for each of the proposed staff as part of an overall travel cost.

"We all know that cost is one of the most contentious issues related to approval of any new system," Curtis said. "School districts are continually asked to do more with less, and committing the funding for a major new information system requires accurate cost estimates and solid justification. A detailed cost assessment can be invaluable for project approval."

Conducting the Selection Process

Selecting a vendor is obviously a hugely important step in the implementation process. A structured and well-documented selection process is crucial to success down the road. Three key steps can make the selection process much easier.

Establish an Evaluation Committee

Assign key personnel to a proposal evaluation committee. Committee members will be responsible for evaluating and scoring vendor proposals based on a pre-defined scoring framework. Providing the evaluation committee with a clear overview of the RFP will make sure they understand the scoring criteria. The committee will identify recommended vendors for further consideration through vendor demonstrations based on scoring results. This committee will also make a final vendor recommendation and develop the required documentation for Superintendent and Board of Education review and approval of the selection process and its outcome.

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Include Vendor Demonstrations

After the initial evaluation of vendor proposals, select a "short list" of two or three qualified vendors. Request that each vendor provide the evaluation committee with a scripted demonstration of their solution to ensure they demonstrate the need functionality and create a "level playing field". Because every solution has its limitations, expect that most vendors will typically meet between 70 to 80 percent of a district's requirements. Demonstrations also provide a session for the district technology staff to review and discuss the underlying technology and design of the vendor's software. Scores from the vendor demonstrations will provide the Evaluation Committee the needed input to identify the recommended vendor for contract negotiations.

Include End Users in the Process

Invite as many end users of the new system as possible to attend the vendor demonstrations. Provide evaluations of the solutions that are demonstrated. This makes available valuable information to assist the Evaluation Committee in making its final recommendation and also helps build momentum and support for the new system.

Bumps in the Road

In addition to best practices, there are a number of pitfalls that should be avoided during the evaluation and selection process. Consider taking the following steps to avoid costly mistakes or delays.

1. **Establish a realistic, initial budget prior to soliciting vendor proposals.** School districts often secure consulting expertise to help build a business case, and initial budget, for the project. The business case includes the direct and indirect cost savings that a district can expect through process redesign, staff reallocation and utilizing the new technology. The projected budget represents the range of costs a district can expect during the procurement and implementation of new systems. These documents are critical in obtaining stakeholder support and project approval prior to issuing an RFP. The documents also establish a baseline for measuring results and controlling costs.

2. **Don't let the evaluation and selection process become a "technical decision."** The primary evaluation focus should be on selecting a system that effectively meets the district's functional needs, not on choosing the latest technology. While technology should be a component of the evaluation, assign a key functional staff member who represents a majority of the system end users to lead the Evaluation Committee. However, ensure the appropriate balance of functional and technical staff on the committee.

3. **Disregard price in the initial evaluation and scoring of vendor responses.** This will ensure the selection of qualified vendors is based on a scoring of functional and technical responses. Introduce costs as the second evaluation step – not the first – and determine whether the ratio of functional/technical score to overall cost would reduce the number of vendor's invited to demonstrate their solutions. Select the recommended vendors based on total scoring of proposals, costs and demonstration scores.

4. **Communicate early and often with key stakeholders and district staff.** During the evaluation and selection process, use every available avenue including newsletter articles and presentations at regular meetings. Both internal and external district stakeholders can establish the case for the new system and keep everyone up to date. Constant communication will help build support for the new project, eliminate any misconceptions regarding the rationale for the new system and prepare everyone for the implementation phase.

5. **Always be prepared to negotiate with the runner-up vendor.** Occasionally the recommended vendor will be overly confident of the win demonstrating limited flexibility when negotiating terms, conditions or pricing for the new system. Don't burn bridges prematurely with the runner-up vendor as this provides a negotiating leverage with the recommended vendor. You also retain the option to fall back to a vendor who might be more highly motivated to win your business.

6. **Don't think you have to go it alone.** Hiring experienced consulting resources to help guide the overall evaluation and selection process can minimize the strain on your own staff. Look for vendor-neutral consulting companies that have specific expertise in the K-12 education market. Make sure they are familiar with the likely vendors and products, and have a proven track record in negotiating terms, conditions and pricing that will favor your school district.

Implementing a new business system can have long-lasting, positive effects on a district. In most cases, it can

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eliminate waste, save the district money, and improve the various processes already in place. Armed with this information, you can make effective decisions and choose a solution that will meet the needs of your school district for many years to come.

"If you're tired of manually manipulating data and working around your existing system, most likely it's time for a change," Curtis said. "Your staff, and your entire school district, will benefit enormously as a result."

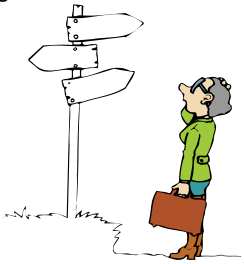
John Peretz is a nationally renowned author covering a wide range of K-12 technology integration issues. He received his degree from the University of Minnesota School of Journalism and lives in Colorado.

Welcome New Members

- **Jeff Belott**, *D.C. Everest School District*
- **Dan Blimling**, *Food Service Director, Racine Unified SD/Chartwells*
- **Kit Ellen Dailey**, *Communications Specialist, First Trust Portfolios L.P.*
- **Norman Davis**, *Buildings and Grounds Supervisor, Westby Area School District*
- **Dennis L Dobberstein**, *Transportation Supervisor, New London School District*
- **Laura Grossman**, *Comptroller, Dodgeland School District*
- **Neva Gruenenfelder**, *District Office Manager/Bookkeeper, Pecatonica School District*
- **Jodie M Hanson**, *Account Executive, Mortenson, Matzelle, and Meldrum*
- **Tina Kvitek**, *Administrative Assistant, Denmark School District*
- **Allan J Lantz**, *Account Manager, Trane*
- **Todd LeRoy**, *Superintendent, Jt. District #1, Silver Lake-Salem*
- **Terry Marcott**, *Supervisor of Maintenance & Operations, D.C. Everest Area School District*
- **John M. Mattern**, *Vice President, Harris N.A./Bank of Montreal*
- **Kathleen Ann Matthaidess**, *Finance Manager, Marathon County Special Education*
- **James Montgomery**, *H. S. Principal, Thorp School District*
- **Sandy G Nelson**, *Bookkeeper, Gale-Ettrick-Trempealeau School District*
- **Angie Seeger**, *School Nutritional Specialist, LaCrosse School District*
- **Tisha Templin**, *AA Business Services, Wisconsin Heights School District*

Employment Opportunities

Please go to www.wasbo.com and click on "Classifieds" for complete job posting information.



Thinking of a New ERP System?

See how five school districts share an ERP system for better results.

By John Peretz

When three smaller school districts in Wisconsin discovered they were all looking for an updated ERP system, they decided to really think out of the box. They contacted Roger Price, assistant Superintendent of the much larger Madison Metropolitan School District, to see if he was in the market for a new system as well.

As it turned out, he was. This is the story of how several school districts in Wisconsin joined forces to run a joint ERP system, and in the process, created the Wisconsin Schools Consortium.

Roger Price remembers getting the first phone call. "To be honest with you, I was skeptical, sharing a complete business system? But, we're so different," recalls Price.

Despite the uncertainty, Price and his staff saw the possibility and the savings associated with the merger.

Tom Wohlleber remembers that uncertainty well. Wohlleber, assistant superintendent and business manager of the 10 school, 5600 student strong Middleton-Cross Plains Area School District, helped present the idea of a shared solution to Price. He said he still could remember the look on the face of his longtime friend.

"I've known Roger for a long time – the delayed reaction was unusual," Wohlleber said. "You couldn't tell what he was thinking."

Whatever Price was thinking at first, his thoughts soon warmed to the idea.

A vision was sparked that day. Price became one of the founding members of the Wisconsin Schools Consortium. This group of five Wisconsin school districts pooled their resources to share the costs of an Enterprise Resource Planning, or ERP system, that now operates in five Wisconsin districts.

The process that resulted in the consortium began two years ago, as a bold but seemingly far-fetched idea. That idea is now a reality, and it has only begun to grow.

Wisconsin, a state better known for decentralization and independence of its various school districts, has proven that a multi-district ERP system can be a success.

A New Mind set

Bridging the size gap of the combined districts was not an easy task, The Middleton-Cross Plains Area School District, Verona Area School District, and Oregon School District serve about 14,000 students in small-town or suburban Wisconsin while Madison Metropolitan School District serves a much higher number of about 25,000.

"At our first meeting, I must admit, nobody knew if this could actually work," said Chris Murphy, business manager for the Verona Area School District in southwest Wisconsin.

"I mean, we really felt like having Madison was critical. They're the second largest school district in the state, and we knew they had more resources than our three districts. But we also knew we were bringing in our own insight and resources. We were just hoping that would be recognized as well." Murphy added.

Price and his staff found a new sense of flexibility and autonomy helped a lot. He said a new mind set in Madison had begun in the metropolitan school district. Decisions were no longer solely based on how things had been done in the past. Instead, district officials had become determined to make decisions based on what they found to be the best business sense for their school district.

"So we looked at it and said: 'OK, we're all pretty much running the same software.' And we knew the (old) system was being sunsetted, so maybe this does give us an opportunity," Price said.

The group decided the first step would be to document and identify the critical business processes used by each of the districts. To do this, the consortium enlisted the aid of Davidson Services, LLC, an independent consulting company with offices in Wisconsin. The company's references include various school districts across the country. Officials from each school district in the consortium met independently with Davidson consultants, to document current business workflow and to establish what new features would be most important in a new ERP system.

After the initial meetings, district officials found they wanted to explore three distinct options. First, they still wanted to look at the costs of having systems installed in each individual district. Second, they wanted to determine if a shared system hosted at one of the districts was, in fact, the best solution. Finally, they wanted to see if a commercially hosted solution made sense. Davidson Services assisted the districts by preparing proposals based on these parameters, including the "must-have" features identified in the initial meetings. Members of the

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consortium examined the results as independent districts and also as a whole.

The Bidding Began

Major software vendors representing K-12 solutions responded to bid requests to provide ERP software for the Wisconsin Schools Consortium. Responses were reviewed based on individual and group needs that were set forth by the four school districts. All four districts agreed on the top three vendors, although not in the same order.

Davidson Services were asked by district officials to contact the finalists and schedule demonstrations, while also creating a scorecard to fairly rank each presenter. Finalists were given a demonstration script to help guide the presentations.

After several days of demonstrations, a potential winner was selected.

"We ate a lot of bagels and pizza while participating in the vendor presentations," commented Andy Weiland, business manager for the Oregon School District. "I think we were all looking for the solution that best fit our own needs. But in the end, our top selection was unanimous."

Lawson Software won the bid.

The next step was determining the actual fixed cost over a five-year period.

"We were forewarned by Davidson Services that the software costs are just a fraction of the overall cost of the system," Weiland said. "We knew that, but when we compiled the spreadsheets it really crystallized the reality. Once we started to calculate the costs of project management, implementation, training, support, storage and back-up, we began to get a lot closer to our actual price."

At that point a tough decision needed to be made.

"We had to evaluate whether we would be better off maintaining individual systems or operating in a shared environment," Weiland said. "No one had ever done a shared environment in Wisconsin before, but it was clearly the most cost-effective solution."

Members of the Wisconsin Schools Consortium enjoy their new partnership. Clockwise from top left are Chris Murphy, business manager for the Verona Area School District; Roger Price, former assistant superintendent and business manager for the Madison Metropolitan School District; Tom Wohlleber, assistant superintendent and business manager for the Middleton-Cross Plains Area School District; and Andy Weiland, business manager for the Oregon School District.

Host of the Party

With the software and collaboration settled, one question remained: who would host the new ERP? Price, his Madison team and officials from the other school districts all volunteered.

After comparing costs and installation services, the consortium decided that a Managed Application Services, or MAS, provider would give the lowest total cost of ownership. Two providers were identified, and officials began a comparison of services and costs.

The consortium chose the Virginia-based company netASPx as the most cost-effective solution for hosting. In addition, they would be providing extremely strong application support for the ERP software.

The benefits of using an MAS provider were three-fold.

First, consortium members found, there was a minimized risk level. The group negotiated one price to cover all of the application and software patches and system upgrades – including any hardware needs – for a full five-year period. It also included nearly round-the-clock support.

Second, the consortium found an improvement in service levels. Information can be obtained at any time from within or outside the school district. All the districts have access to their own information anywhere an Internet connection is available. There is also a guaranteed 72-hour return to service in case of a catastrophic event.

Finally, a financial incentive was negotiated allowing the group to add other Wisconsin school districts to the group to lower costs for all members on a per student basis. This piece of the financial puzzle created an unusual incentive to add other school districts.

"The ability to bring in other school districts and lower our costs while giving them a stronger solution was really unique," Weiland said. "As business managers, we are supposed to think outside the box, but we don't get very many opportunities to do this on a broader scale. This one is really different."

Last year, the 21,000-student Racine Unified School District put out an RFP for a new ERP system. The four districts decided to respond to the proposal as their own group.

"We were new at this, but we all had a vested interest," Price said. "And we knew what the issues were, having just gone through the installation phase. We felt we picked the right solution. Why not extend it to other school districts?"

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Thinking of a New ERP System?
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Dennis Barkow, director of information services for Racine, felt the same way. "It was unusual to have colleagues suggest a solution," Barkow said. "They obviously had just gone through a huge process, and really were quite candid about what they found out. In the end, the fit was there, and it ended up saving us a lot of money as well as helped accelerate our installation."

Getting Boards on Board

The final hurdle, approval from the Board of Education in each district, had to be reached before the consortium was finalized, and Racine was allowed to join. The aid of Davidson Services was enlisted once again to define the operation and management practices for the unique partnership.

The Wisconsin Schools Consortium was officially formed after each district placed its signature on the agreement. They then began the ERP implementation and training phase. The phase is now almost complete with Racine due to go "live" this fall.

Together, the solution hosts more students than any other school district in the state, except Milwaukee.

Consortium officials are in active talks with other school districts in the state to expand the group, but will only do so if the fit is right.

"You know, we took something two years ago that most people thought could never be done," Murphy said. "And when it comes right down to it, even though our business processes might be a little different, we're a lot more alike than we are different."

Wohlleber agrees.
"We have the same state reporting requirements. We need current financial information. And we all absolutely require secure, safe and redundant record keeping," he said.

As for advice to other school district business managers, consortium members have plenty.

"First, look in your own backyard," Murphy said. "Make it a point to get to know other district personnel in your area, and in your state. Everyone knows someone. It's a starting point, a door opener. And don't be afraid to approach a larger school district – we were always a little intimidated by the larger district next door, but we found out that we all share the same issues, just on a different scale."

Members of the Wisconsin Schools Consortium work on the finer points of their new partnership with staff from Davidson Services and netASPx. Clockwise from back left are Chuck Odorizzi, president of Davidson Services; Tammy Liddle, payroll supervisor for the Oregon School District; Andy Weiland, business manager for the Oregon School District; Tom Wohlleber, assistant superintendent and business manager for the Middleton-Cross Plains Area School District; Tabatha Gundrum, director of human resources for the Middleton-Cross Plains Area School District; and Bruce Burfeind, netASPx project manager.

Wohlleber expanded on those points.
"I would say, try to find out when your colleagues are looking to replace a system," he said. "After all, we only really do this once every 10 or 15 years. Make sure you get a solution that can grow with you, and if you can get financial incentives included in the contract, it's all the better. We all know how hard it is to fight for money."

Price also offered a few tips.
"Make sure you get in with a good group of people, folks you can trust to hold up their end of the bargain," he said.

"We're successful because everyone knows they have to do their part. And we had a very good, vendor-neutral consulting group that helped us with the harder stuff, like doing the district process audits, writing the RFP and taking the lead in negotiations. And they wrote the joint inter-district operating agreement, something we had never done before."

Officials with the newest consortium member, the Racine Unified School District, are looking forward to their new ERP system.
"We'll really be glad once the system is up and running in the fall," Barkow

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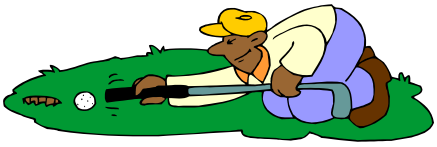
Short Shots



Are You Interested in Doing Interim Work? WASBO needs an expanded list of interim business officials due to the demand of districts looking for short term help. If you would like to be added to this list please forward your name, contact information, a resume, and any parameters regarding the type of interim work you would be interested in.

WASBO Room Block There are no remaining rooms in the WASBO room block for the ASBO International Annual Meeting and Exhibits in Toronto. However, it is not too late to register for the conference and get a room. Go to www.asbointl.org. Also, get a passport as soon as possible. You may want to ask for expedited service, which does cost a little more than the regular service.

Where Are They Now? Judy Weinstock - Barron to Sauk Prairie, Jeff Gross - Marshall to Menomonee Falls, Jim Kennedy - Menomonee Falls to Glendale-River Hills, Nancy Mair - Glidden to Marshall, Brian Dasher - Omro to West Bend, Jason Demerath - Oshkosh to Waukesha, Ric Ericksen - Campbellsport to Germantown, Gary Swalve - IL to Mapledale-Indian Hill, Candace Drury - Glendale-Maple Hill/Maple Dale-Indian Hills to IL, Amy Kohl - Plymouth to Whitnall, Brian Walters - student to Westfield.

ASBO Eagle Award WASBO has submitted Ted Kozlowski's nomination to ASBO International for the Prestigious Eagle Award by virtue of his winning the WASBO Zastrow Award.

Meet Your Fellow WASBO Member As promised, ***Taking Care of Business*** will profile WASBO members. This new feature is intended to help us better know our WASBO members. It will be a great way for all of us to learn about the excellence of our peers. It is also intended to be a catalyst for additional sharing and networking among peers. The members featured in each issue will be selected randomly. Woody will contact the selected members. The following is a list of tentative questions. Please feel free to provide feedback on the questions to make this a valuable feature of ***Taking Care of Business***.

- Tell us a little about yourself personally.
- Tell us a little about yourself professionally.
- Tell us a little about your current district/employer.
- What do you see as your district's/employer's most significant challenges?
- What recent accomplishment are you most proud of in your district/employer?
- What is your motto to live by?
- What is your one indulgence?
- If money was no object I would…?

The phone call is coming by August 24!

Dates to Remember

August 16-17 – New School Administrators and Business Support Staff Workshop at Holiday Inn in Stevens Point

September 26-28 – Scholarship Golf Outing and Fall Conference at Autumn Ridge Golf Course in Valders and The Osthoff in Elkhart Lake

October 12-15 – ASBO International Annual Conference and Exhibits in Toronto

November 8 – Taking Care of Business Seminar at the Radisson in Madison

Custodial and Maintenance Summer Conference Please send a special thank you to Dale Zabel and Dave Yelk at Watertown and Jeff Bellott at D.C. Everest for organizing and hosting our annual Custodial and Maintenance Summer Conference. We were made to feel very welcome and it showed with excellent attendance at both sites. Congratulations!

Thinking of a New ERP System?

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said. "We've had our share of ups and downs, and this is definitely going to help. I think the more districts can learn from each other, the better."

What's next for the Wisconsin Schools Consortium?

"Well, we're exploring different joint-purchasing opportunities," Weiland said. "We'll probably add another school district or two in the next year. But right now we're just glad the system is up and running – everyone is happy."

The Players

Roger Price is the former Assistant Superintendent and Business Manager of the Madison Metropolitan School District, a district with approximately 25,000 students.

Tom Wohlleber is Assistant Superintendent – Business Services for Middleton-Cross Plains Area School District, a suburban district with 5,600 students.

Chris Murphy is the Business Manager of the Verona Area School District, a rural district with approximately 5,000 students.

Dennis Barkow is the Director of Information Services of the Racine School District, an urban district with about 21,000 students.

Andy Weiland is the Business Manager of the Oregon School District, a rural district with approximately 3,500 students.

Chuck Odorizzi is the President of Davidson Services, the K-12 educational consulting company that provided the guidance and support for the Wisconsin Schools Consortium.

John Peretz is a nationally renowned author covering a wide range of K-12 technology integration issues. He received his degree from the University of Minnesota School of Journalism and lives in Colorado.

WASBO Calendar

Professional Development

August 16-17, 2007
- WASBO New School Administrators & Business Support Staff Workshop, *Stevens Point, NEW Holiday Inn*

September 26, 2007
- WASBO Foundation Scholarship Golf Outing, *Autumn Ridge Golf Course, Valders*

September 27-28, 2007
- WASBO Fall Conference, *Elkhart Lake, The Osthoff*

October 12-15, 2007
- ASBO International Annual Meeting & Exhibits, *Toronto*

November 7, 2007
- WASBO P-Card User Group Meeting, *Madison*

November 8, 2007
- Taking Care of Business Seminar, *Madison, Radisson*

November 14, 2007
- Facility Manager Certification Make Up Sessions, *Eau Claire and Watertown*

December 12, 2007
- WASBO/WASPA School Personnel Academy, *Madison, Sheraton*

January 23-25, 2008
- Wisconsin State Education Convention (WASB/WASBO/WASDA), *Milwaukee, MAC*

March 3, 2008
- Transportation & Bus Safety Workshop, *Wisconsin Dells, Kalahari*

March 3-4, 2008
- WASBO Facilities Management Conference, *Wisconsin Dells, Kalahari*

March 26-27, 2008
- WASBO Accounting Seminar, *Wisconsin Dells, Chula Vista*

May 20-23, 2008
- WASBO Foundation Spring Conference & Exhibits, *Wisconsin Dells, Kalahari*

Regionals

Each Regional Representative, meeting locations & directions are available at www.WASBO.com if predetermined.

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

Sept. 14, 2007	Luxemburg-Casco
Dec. 14, 2007	TBD
April 11, 2008	Jt. Leg. Mtg w/ NEWASBO, TBD 11:00 a.m. Start Time
June TBD	

Madison Area

Oct. 4, 2007	Middleton-Cross Plains
Nov. 1, 2007	Mc Farland
Dec. 6, 2007	Sun Prairie
Feb. 7, 2008	Middleton-Cross Plains
March 6, 2008	Mc Farland
April 3, 2008	Sun Prairie

Northeast

Meeting dates TBD

April 11, 2008	Jt. Leg. Mtg w/ NEWASBO, TBD 11:00 a.m. Start Time

Northwest - Meetings are usually held at Lehman's Supper Club in Rice Lake

September 12, 2007, October 10, 2007, November 14, 2007, December 12, 2007, February 13, 2008, March 12, 2008, April 9, 2008

Southeast - Meetings are from 9:45-11:30 am with lunch following.

Oct. 5, 2007	West Allis
Nov. 9, 2007	Waukesha
Dec. 7, 2007	Franklin
Feb. 8, 2008	Greenfield
April 18, 2008	Hamilton

Southwest - All meetings will be held at the CESA #3 office in Fennimore.

Oct. 12, 2007

West Central - Meetings are held the first Thursday of the month except January, May & July from 10 am - 1 pm at the Sparta Area School District Administration & Education Center, 201 E. Franklin St., Sparta

August 2, 2007, September 6, 2007, October 4, 2007, November 1, 2007, December 6, 2007, February 7, 2008, March 6, 2008, April 3, 2008, June 5, 2008

Go to www.wasbo.com and click on "Calendar" for updated meeting information, to register or get directions.

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

August 17, 2007 Antigo

Committee Meetings

Safety Committee

Oct. 10 (1:30 p.m.) - Madison, WASBO

Spring Conference Committee

August 30 (12:00 p.m.) - Wisconsin Dells

Transportation Committee

Sept. 20 (10:30 a.m.) - Madison, WASBO Office

ASBO Election Committee

Aug. 22 (1:00 p.m.) - Greendale SD

School Facilities Committee

Sept..18 (9:00 a.m.) - Madison

Board of Directors Meetings

Sept. 19, 2007 - Madison, WASBO Office
Dec. 5, 2007 - Milwaukee, PMA Office
March 12, 2008 - Ashwaubenon SD
June 11, 2008 - Madison, WASBO Office

Business Meetings

January 24, 2008 - Milwaukee
May 23, 2008 - Wisconsin Dells

Wisconsin Association of School Business Officials
4797 Hayes Road, Suite 101
Madison, WI 53704

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