



Wisconsin
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Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 16, Number 1 - February 2012



Larry Dalton

WASBO Honors Larry Dalton as the 2012 School Business Official of the Year

Lawrence Dalton, Director of Finance and Business Services at the School District of Onalaska, was recognized at the 2012 Joint State Education Convention by the Wisconsin Association of School Business Officials (WASBO). Dalton is the winner of the 2012 WASBO School Business Official of the Year in acknowledgement of his service, time, expertise, and leadership in WASBO.

Larry was nominated by his Superintendent, John Burnett, who had this to say about him, "Larry understands the importance of establishing strategic plans for future success of the district and also has the ability to translate planning into reality." Larry also received praise from his colleague, Janet Rosseter from the School District of La Crosse on behalf of the West Central Regional. "His attributes are in perfect alignment with the selection criteria for this prestigious award. Larry's humble, quiet, yet powerfully effective leadership is admired by all who know him." Community member, Colleen Dixon, President, Minds in Motion Bike Tour, noted, "We are proud to have Larry Dalton as a friend and supporter of the Minds in Motion Bike Tour! We know that he is there any time we need help or have questions." Dalton was chosen based on his

leadership in schools, commitment to professional development, active participation in his profession, and role in his community.

This award carries with it a \$500 cash award, sponsored by Hutchinson, Shockey, Erley & Co., to be used for activities or resources that contribute to professional development at Larry's discretion. Dalton also has the honor of presenting a \$1500 scholarship, sponsored by Liberty Mutual, to a 2012 graduating senior from the School District of Onalaska.

In Larry's comments at the WASBO Business Meeting he noted that "he has learned so much from his regional, his colleagues and vendors over the past twenty-two years. It has been a joy working with people who have a passion for education and want to do what is best for students."

Congratulations, Larry!



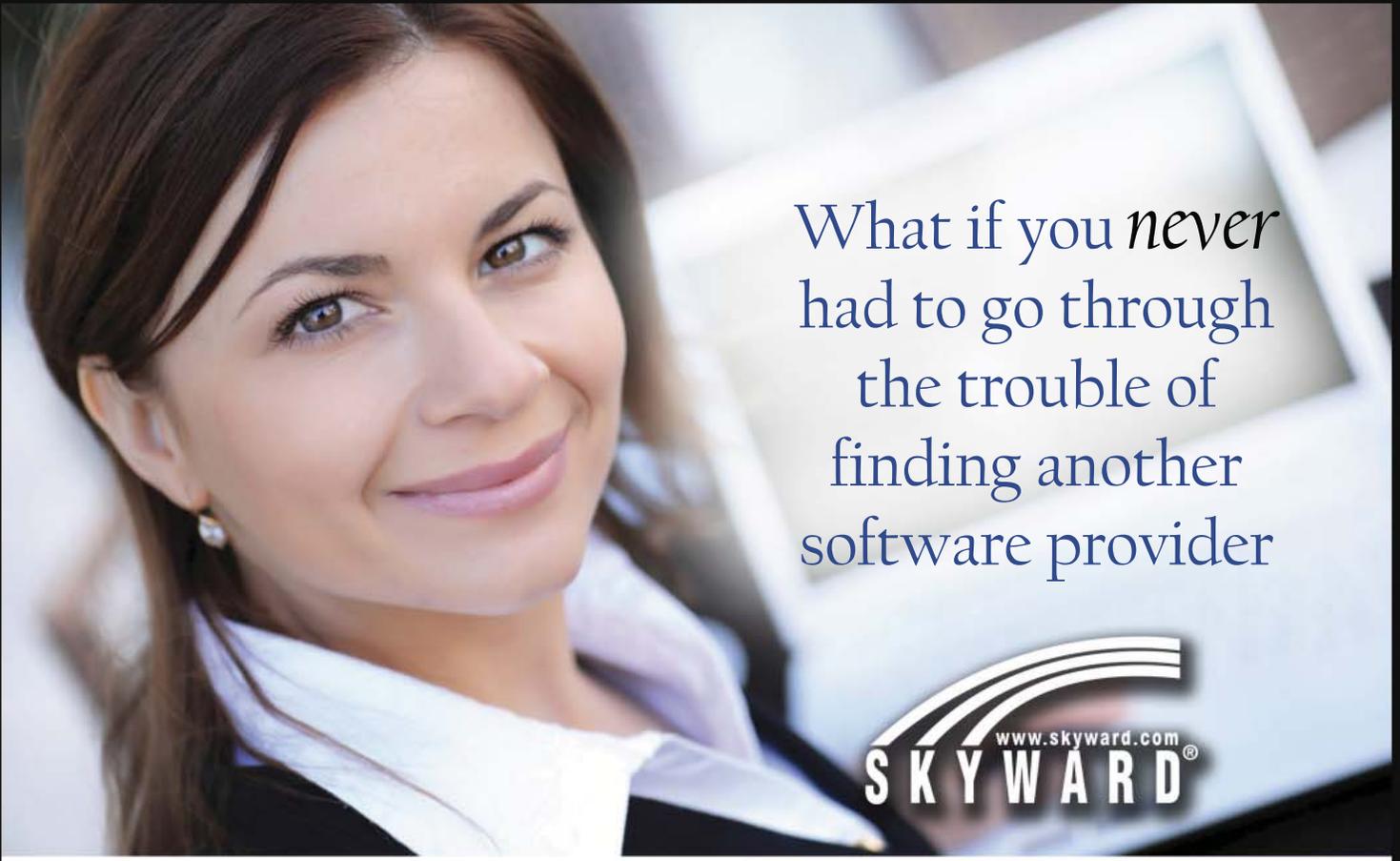
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WASBO Vision - To be the most influential Wisconsin organization for state and national school business management and leadership.

WASBO Mission - To provide professional development, to foster a network of support and to advocate for funding that ensures outstanding educational opportunities for all children in Wisconsin.



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Editor: Woody Wiedenhoef

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President's Message

A Word From Your President

Collaborating for Success

By Wendy Brockert, Business Manager,
Lake Mills School District

It is hard to believe my year as President is more than half over. I appreciate the time and work the current Board of Directors does for our organization as well as the efforts of many other WASBO members. The WASBO Board met on December 14, 2011, and continues to address WASBO initiatives. The Accounting Committee has helped WASBO by updating the publications, "The Glossary of Wisconsin School Finance Terms and Acronyms" and "Roles and Responsibilities of the School District Business Office." The Committee is also working with David Carlson of WASB to update "The Budget Cycle Book." In the future, the Accounting Committee will also update the "Handbook for Evaluation & Improvement of Business Support Staff Functions." WASBO appreciates the time and commitment this group has provided.

Another initiative we have been addressing is statewide negotiations. Keith Lucius continues to provide leadership for our Statewide Negotiations Steering Committee. The committee met in December, and one outcome from the committee is exploring ways to share contract information. Examples include post employment benefit language and employee handbook language. A sub committee is meeting to discuss methods to gather the data.

The Board's final business item at the December meeting was the first review of the WASBO, Inc. and WASBO Foundation budgets for 2012-13. We begin the budget process in December so that the Board is able to present a budget at the Spring Conference in May. In preparing the budget, the Board uses the strategic plan as a guide to determine where we want to go. The board is reviewing the progress of all of our initiatives, including completion of



Wendy Brockert
WASBO President

some of them. The budget is a direct reflection of the strategic plan and initiatives.

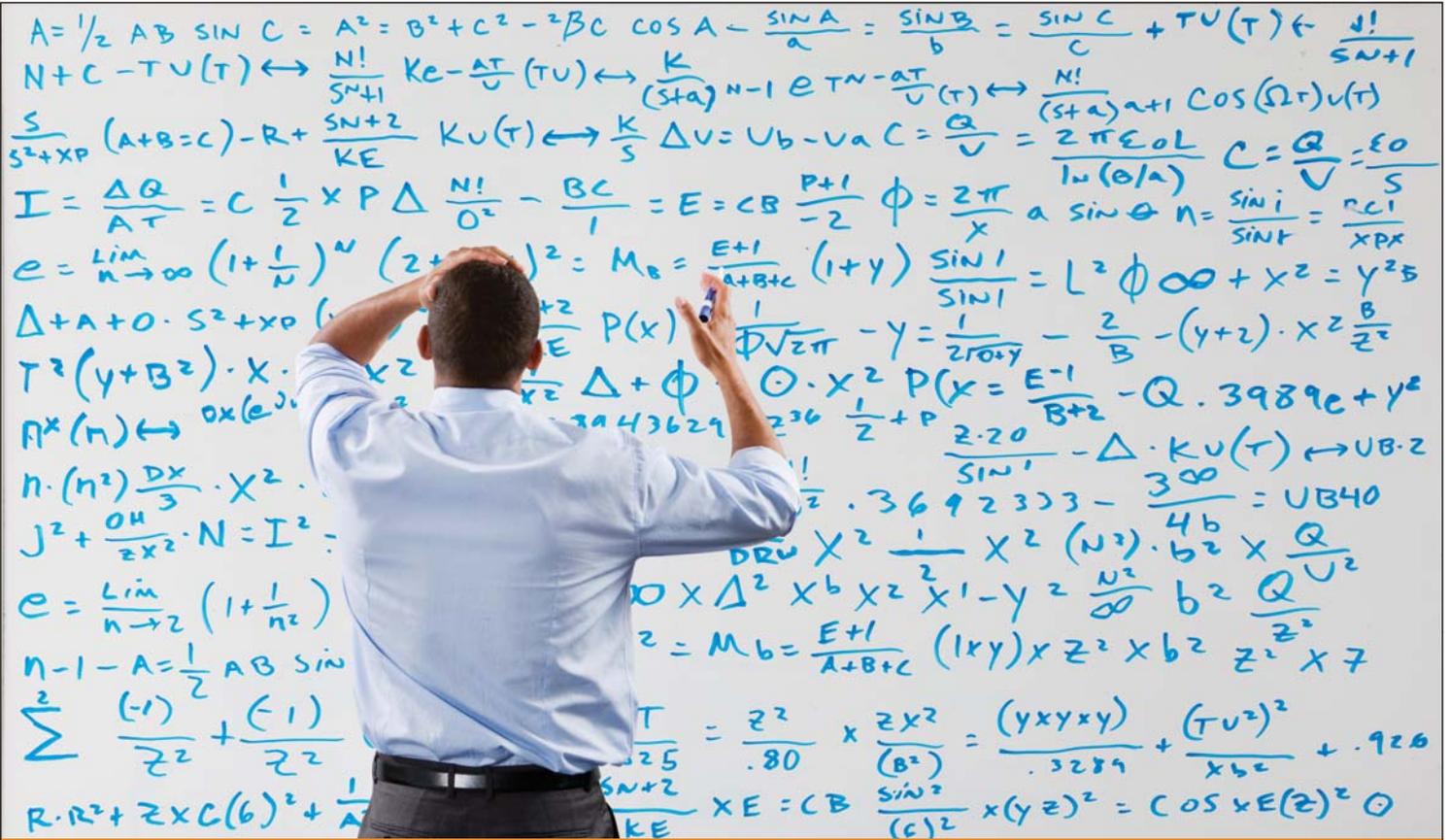
WASBO has surveyed the Service Affiliate members just as we surveyed the WASBO District Professional membership. The Board received the survey at its December meeting and will review the information at its meeting in February. The information from this survey will be used to help WASBO provide the services these members hope to gain from being a part of our organization. The Board would like to thank the Service Affiliate members who took the time to complete the survey.

At the January WASB/WASDA/WASBO State Education Convention we had the pleasure of honoring Larry Dalton as School Business Official of the Year. Larry has truly been a leader in his district and is well deserving of the award. The Board also honored Maggie Gagnon, recipient of the Shining Star Award. We thank Maggie for the time she devotes to her regional and to the Spring Conference. Congratulations to both Larry and Maggie.

At our January Business Meeting our membership passed the second reading of the constitution which changed our leadership structure. We will now begin to elect a treasurer for a 3 year term beginning with this Spring's election. Every three years we will elect a Treasurer. In 2013 and each year thereafter we will elect a Vice President for the WASBO Board. The Immediate Past President will also serve on the Board. I have the pleasure to continue on the WASBO Board for the 2012-13 year as Past President.

As you can see, the last few months have

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Executive Director's Report

Presented January 19, 2012 at the Semi-Annual Business Meeting

By Woody Wiedenhoef, Executive Director, WASBO

W A S B O Professional Recognition Program

WASBO is honoring Larry Dalton as the

Woody Wiedenhoef

2012 Business Official of the Year (sponsored by Hutchinson, Shockey, Erley & Co.) Larry is the Director of Finance and Business Services at the School District of Onalaska. We are also honoring Maggie Gagnon as WASBO's 2012 Shining Star (sponsored by Quarles and Brady, LLP). Maggie is the Business Manager at the Freedom Area School District.

WASBO Professional Recognition Program Nominations Due March 1, 2012

WASBO has many deserving candidates for award nominations. Recognize them by nominating them for one of the following WASBO awards.

- 2012 Wallace E. Zastrow Award – Sponsored by Wisconsin Investment Services Cooperative (WISC)
- 2012 New School Business Official of the Year – Sponsored by Key Benefit Concepts
- 2012 Facilities Manager of the Year – Sponsored by Johnson Controls, Inc.
- 2012 Business Services Award – Sponsored by Robert W. Baird & Co.
- 2012 Friend of WASBO
- 2013 School Business Official of the Year – Sponsored by Hutchinson, Shockey, Erley & Co.
- 2013 Shining Star Award – Sponsored by Quarles & Brady, LLP

Criteria and the online nomination process can be found at www.wasbo.com/awards.

We encourage each WASBO Regional to submit a nomination.

Growth and New Initiatives

Attendance at seminars and conferences continues to grow.

- Federal Funding Conference - WASBO collaborated with WCASS and the DPI to provide this new conference that had over 350 attendees in November and is scheduled for a repeat conference February 27-28th.
- WASB/WASBO School Finance Conference - WASBO is partnering with WASB to provide School Board members with a School Finance Conference on March 3, 2012.
- Certified School Risk Manager (CSRM) - The implementation of the new CSRM Program has been a success. Eighteen WASBO members will be honored at the Spring Conference for passing stringent tests to achieve certification.
- Investing in Wisconsin Public Schools - WASBO, WASB and WSPRA have come together to develop an exciting new tool to comprehend the variables, stakeholders and nuances of financing Wisconsin's public schools. This interactive, hands on activity will take you through a process of self-discovery to lay a foundation for understanding Wisconsin school finance. You may find this exercise useful when communicating with board members, district staff, community members, parents and the business community. Please contact the WASBO office if you are interested in using this tool.
- Year of Success Program – This

initiative was started at the New School Administrator and Support Staff Conference in August to help members who are new to the school business office stay on top of important timelines and deadlines and be in touch with the resources they need through the DPI School Finance Team. A track was included at the Fall Conference and an additional day of training was offered in November. Tracks will also be included at the Accounting Conference and the Spring Conference. The program's goal is to aid new members in being successful throughout their first year.

The Statewide Negotiations Steering Committee

focus has taken a different direction with the passing of Act 10. The committee is discussing how to collect data from school districts as we implement Act 10.

WASBO Publications

– The WASBO Accounting Committee, led by Ken Mischler, has updated the "Glossary of School Finance Terms" and "What Does the Business Office Do?" This latter publication is now titled "Roles and Responsibilities of the School District Business Office." The "Glossary of School Finance Terms" is now titled "Glossary of Wisconsin School Finance Terms and Acronyms." We thank the Accounting Committee for the excellent work on these documents. The Accounting Committee's future goals are to update new "Budget Cycle Handbook" to reflect recent legislative changes and update the "Handbook for Evaluation & Improvement of Business Support Staff Functions."

State Accountability Design Team

- This year WASBO was an active

Continued on page 6

participant in the State Accountability Design Team. Stay tuned for the final School Accountability Standards, which should be announced before the end of the school year.

Wisconsin K12 Collaborative Purchasing Network (WCPN)

WASBO is working with the Governor's office, the DOA and several CESA's to develop more efficient cooperative purchasing techniques. The WCPN has met three times and presented at the Joint State Education Convention. They will also be making presentations at the upcoming Accounting Conference and the Annual Spring Conference.

ASBO International Board of Directors

– We expect that Tom Wohlleber will be joining the ASBO Board starting January 1, 2013, as he is running unopposed for a Director position. Tom is planning to run for President-Elect in 2015. Erin Green has just finished her term as ASBO Past President. Her contributions to ASBO and WASBO have been significant. Please let Tom and Erin know how much we appreciate their energy that is devoted to both WASBO and ASBO. Fundraising for Tom's candidacy and WASBO member participation on ASBO committees is provided through the Spring Conference Silent Auction. For our members who are participating on ASBO committees we offer Professional Development Grants to assist in covering travel expenses to attend meetings.

Professional Development & Networking Opportunities

– WASBO committees have put together timely programs to provide you with information you can use today and help you plan for tomorrow. Please take the time to thank the members of these committees for their planning efforts. If you would like to participate on one of these committees, please contact the WASBO office. WASBO continues to provide a

free one-year WASBO membership for people who attend a conference or seminar for the first time and have not been a WASBO member previously. If you know someone who could benefit from WASBO, invite him or her to join you at the next conference. There are five professional development opportunities planned for the next four months. For complete program information, dates, locations and to register go to www.WASBO.com.

WASBO Professional Improvement Committee

– The re-writing of the curriculum for training mentors, addressing the PI 34 process for new Business Officials and providing for an improved induction program will be finished during this school year. WASBO will then provide training for mentors and protégés. Watch for information on the training process over the next several months. This service will be extremely helpful for our newer Business Officials who are entering the profession.

Get Involved – WASBO gets things done through the work of our committees and membership. Please consider enhancing your own professional development by joining a WASBO Goal Action Team or committee.

p-Card – This purchasing card program was established to offer a service to districts of all sizes by providing a no fee program that offers rebates to every district. This cooperative program with other ASBO Affiliates continues to grow. Please consider the use of a p-Card in providing improved operational effectiveness and savings in your school district.

Student Scholarships – Our next fundraising opportunity will be at the Spring Golf Outing as part of the Spring Conference. We are again pleased to offer four high school student

scholarships for Wisconsin graduating seniors thanks to our scholarship fundraisers and the following sponsors: MetLife Resources, EMC Insurance Companies, SchoolDude.com, Stalker Flooring, National Insurance Services and Miron Construction. These scholarships require applicants to interview their superintendent, business manager or bookkeeper regarding the effects of revenue limits on their district. We appreciate the time you offer students to assist them in their scholarship application. If you have a graduating senior this spring, encourage him or her to apply by March 1, 2012.

We also provide the Dr. Bambi Statz Academic Scholarship to WASBO members enrolled in a school business management masters program. This scholarship is funded by Ehlers. We also thank WISC for providing a scholarship for the Zastrow Award winner, Liberty Mutual for providing a scholarship for the Business Official of the Year recipient and Indiana Insurance for providing a scholarship for our President to award to a student in her district.

Democratic Process – WASBO members continue to collaborate with other associations, agencies and governmental units when appropriate alignment with the WASBO Vision and Mission occurs. WASBO is very active in the School Administrators Alliance (SAA) in the development of a Legislative Agenda. WASBO Past President Keith Lucius chairs the SAA Legislative Committee. WASBO members are meeting and conferring on a regular basis with legislators, the Governors Office, the Department of Administration, the DPI and other governmental agencies and educational associations. The power of a vital Vision and Mission becomes apparent. Remain active and influential.



Meet WASBO's Candidates for Treasurer

Phil Frei,
Deputy District Administrator
Sun Prairie Area School District



My name is Phil Frei, and I grew up in Fond du Lac where I attended public schools. After high school, I obtained a BBA from UW-Oshkosh and an MSE from UW-Whitewater. I was fortunate to begin work as the business manager in the Auburndale School District where I quickly learned you don't want a master key to all the buildings unless you want desperate phone calls on nights and weekends. Auburndale was a great school district to learn from, and I enjoyed my two years there. I then moved to Southwest Wisconsin where I was the business manager at River Valley School District. Again, it was a wonderful district with many quality teachers and staff. My leaving River Valley opened the door for Jeff Mahoney to get his first job (pro or con depending on your viewpoint of Jeff). For the last fourteen years, I have been at Sun Prairie Area School District as the Deputy District Administrator for Business and Operations. Sun Prairie is a growing district, and we have added 2,500 students in my 14 years. With the growth, has come several referendums (\$150M+) and construction projects including three new schools and seven additions. Being a business manager in small districts and a large district has given me a deeper understanding of the different roles of a business manager. With that written, there is no perfect size district to work in as each has its own challenges.

I have been married twelve years to Sandy. Sandy has been a teacher for many years and keeps me focused on how the decisions we make at the district office, aka "the bunker," will play out in the "real" world. We have two children who are in 5th and 3rd grade. It is also helpful to have a parent's perspective on the school district. We spend most of our time at home doing homework or at our cabin in Spring Green.

WASBO has been very helpful to me over the last twenty years. It is a great resource to gain information and to meet peers throughout the state. I was on the WASBO Board from 2002 to 2005. After a few years away from the Board due to school building projects, I feel it would be a good time to give back to WASBO.

Jeanne Stahl
Business Manager
Hayward Community School District



Hello to all! My name is Jeanne Stahl, and I am the business manager at the Hayward Community School District. Serving on the WASBO Board of Directors was one of the highlights of my school business management career. My three year term as a director, which ended in June of 2011, went by very fast. It was exciting to have been a part of the process of increasing opportunities for our members, such as the certification program for School Risk Managers.

My experiences in education have been varied. After high school, I actually started out going for my degree in elementary education. After three years in the program, I realized that jobs in elementary education at that time were scarce. So I switched directions

and received my bachelor's degree in accounting. Through the years, I have been a special education secretary and a payroll clerk for a regional education agency in Iowa and an accountant in the private sector in Illinois. I was recruited by a former boss to be a business manager in a school district in Michigan in 1987, and that hooked me into school business. It was during that time that I pursued my Master's Degree in Education for the School Business Official. When, after 13 years in Michigan, the opportunity arose to accept a job in my home state of Wisconsin with the Eau Claire Schools, I took it. I am now serving the district from which I graduated high school.

On a more personal note, I have two sons and a daughter, who one by one eventually moved to Wisconsin from Michigan. I joyfully became a grandmother when my daughter had a daughter. When I married my husband in 2002, my family expanded to include two sons, two daughters-in-law, and four more grandchildren. As some of you already know, my older son, Mark Worthing, has followed in my footsteps and is the business manager in Edgerton. I enjoy the opportunities to share with and learn from him.

Our profession is one of which we can all be proud. I am continually impressed by the willingness of the members of our group to share and help each other grow. Because of this, we all are able to get more out of our organization than we put in. To me, this group is like few others, with the rapport that extends between members. Our conferences provide exceptional offerings and the ability to bond with our service affiliates. Our committees provide us with great resources. I would be honored to have the opportunity to serve our organization as the next Treasurer.



Meet WASBO's Candidates for Director

Alayna Burger
District Accountant
Superior School District



Hello fellow WASBO members, my name is Alayna Burger, and I am the District Accountant for the School District of Superior. Yes, I said Superior; way up north!! I obtained my Bachelor's Degree in Accounting in 2008, and I have been with the Superior District ever since. When hired, I was encouraged to obtain my Masters, and I agreed. In 2011, I obtained my Master's Degree in School Business Management. I am currently working on my Professional Development Plan. I am not going to lie, when I was hired at the Superior District, I thought, "what did I just get myself into?" I came from working in a public/for profit sector to a public/non-profit/fund/government accounting sector. What a huge learning curve, but I will be honest, I love what I do! I am always up to new challenges and it has been a great journey so far into my profession.

On a personal note, I have been married for 12 years and have one son and one daughter who are both elementary students. We are very busy with hockey, as they both play! Who said hockey is just a winter sport? Education has always been important to me and I will encourage the same to my children. I feel my children are getting the best education and I am very proud they are students of the School District of Superior.

I have been a WASBO member since 2008, and I would love to be more involved in this organization. WASBO's mission and vision are what I strive for in my professional life. I want to become an influential school business official while focusing on educating 'our' children. I am eager to continue to learn and I feel being on the WASBO Board will only help me continue my journey on becoming a proficient Business Manager in the future.

If elected, I believe I can contribute my vision to further grow WASBO. I would love to be more involved and to give back to the WASBO organization. Your consideration this spring will be greatly appreciated. Thank You!

John Stellmacher
Director of Business Services
School District of Hartford Jt. 1



It has been a challenging year for most of us as we adapt to a "new normal" in K-12 Public Education in Wisconsin. But with great challenges in our profession also come great opportunities to focus on what we do well and redefine the ways we approach things we could do better. I have been very fortunate during my five years as a business manager to have several wonderful mentors within WASBO, and now have the added bonus this past year of sharing the school business management profession with one of my best friends and father.

Change is never easy and though we now have "tools" to help balance our

budgets, those tools often give us a choice of multiple undesirable options. I've learned that regardless of what profession, or what challenge you are facing, the solution always involves great communication, and that is why I believe a strong and vibrant WASBO organization is so important.

Many of us face unique circumstances in our home districts. Each of the three school districts that I have served (Barron, Waupun, and now Hartford) have a unique set of stakeholders who help shape the community and local school system. We are asked to do more than ever with less and to demonstrate to the community that we are providing "value added" for the resources that we are given.

I am running for the WASBO Board because I believe I have a great deal of energy to share in helping WASBO reach its potential as an organization. We have made some significant breakthroughs in recent years with the peer to peer portal and through the development of additional and more meaningful conference experiences, and I hope to continue that effort as a member of the WASBO Board in working to establish more "value added" for our members in their professional growth and development.

With retirements and a changing profession, we have a number of new faces throughout the state, and I believe as a board member that I can engage new members of the organization to take on a greater level of involvement. Each of us who have taken or sought out an opportunity to take a leadership role in WASBO had a mentor or mentors within the organization that challenged us to participate and add a new perspective to the profession. I have served on the Joint Convention Committee and am now co-chairing the

Continued on page 9



Meet WASBO's Candidates for Director

committee with Dave Van Spankeren. We are working to greatly expand the committee's membership. I have also taken a leadership role in helping to facilitate the School Finance Puzzle workshop and have worked with colleagues throughout the State on the School Administrators Alliance (SAA).

I believe each of these experiences has given me an opportunity to learn and share with many within our organization and have helped me develop ideas and a passion for how we can move our organization forward. Thank you for your consideration and best wishes for a safe and successful spring!

Andy Weiland
Business Manager
Oregon School District



I would like to take this opportunity to present myself for your consideration when voting for the WASBO Board of Directors.

I currently serve as the Business Manager for the Oregon School District. I have been in this capacity since the Fall of 1999. Prior my move to Oregon, I served as the Assistant Superintendent for Administrative Services at DeKalb Community Unit School District #428 in DeKalb, Illinois for 5 years.

Over twenty years ago, I happened upon the school business management profession by chance. It was during my

3rd year of college at UW Whitewater when I decided that while I enjoyed accounting, it was not what I wanted to do for the rest of my life. I explored Pre-Law and Education but was not sold on any one occupation. Then at a family gathering on Father's Day in the Spring of 1990, I had a conversation with my uncle who was an associate principal at the time and had a friend who was the Business Manager of his school district. That friend had shared that THE program for School Business Managers in Wisconsin was based at Whitewater. The next day I met Dr. George Gray from UW Whitewater and signed up for School Business Management graduate classes as an undergrad for the next semester. I am truly grateful that I went to that Father's Day gathering in 1990 and that my uncle shared what he did. That one event truly changed my life by providing a professional direction and purpose that I find invigorating to this day.

On a personal note, I've been married to my wife Anne for close to 18 years. We have two wonderful boys Ben (14) and Jack (12) who are great kids, good students and love sports. Most of our weekends are either filled with basketball, baseball or soccer games. Anne serves as an ESL teacher at the McFarland School District. In my spare time, I enjoy traveling, playing basketball, and biking. I have served as President and Secretary of the local Oregon Rotary Club and enjoy tutoring middle and high school students in math.

I'm originally from Baraboo, and my wife Anne is from Prairie du Sac. We both enjoyed living in DeKalb but with the expected arrival of our second son and the desire to move closer to our family, I applied to the Oregon School District in the summer of 1999. We have proudly called Oregon home ever since. Prior to

my stint in Northern Illinois (where there were many more Packer Fans than one would expect), I had the opportunity to work as an Administrative Intern in Monroe, Wisconsin. During my time in Monroe, I was able to participate in both MASBO and WASBO. There was something truly unique about these organizations. A "we are in this together" feeling was pervasive with everyone I met. Regardless of the leadership of the future WASBO Board, I hope that our organization continues to grow that collaborative spirit which makes Wisconsin that special place that my family and I came home to over a decade ago.

Over the last several years, I have become more involved with WASBO by presenting at the Joint Conference in Milwaukee and with the current Investing in Wisconsin Public Schools mapping initiative. We are at a challenging time in Wisconsin for public education. We are at an even more challenging time in the public education profession in the United States with competition and threats coming from multiple fronts. With these challenges come choices, risks and opportunities. I feel that I can contribute to our organization's leadership so that public education in Wisconsin continues its strong heritage.

Thank you for your consideration.

**"It is choice not chance
that determines your
destiny."
- Jean Nidetch**

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Meet WASBO's Candidates for Director

Dale Zabel
Director of Facility Services
Kettle Moraine School District



My name is Dale Zabel, and I have been nominated to serve on the WASBO Board of Directors. For the past seven years I have had the opportunity to serve on the School Facilities Committee as co-chair. This gave me great insight into how the WASBO organization works. During my time as co-chair I was involved in bringing the Facilities Committee to new levels. For example, we expanded the Facilities Manager Certification Program and added the Midwest Facility Masters Conference. This enabled us to offer hundreds of sessions on a multitude of topics.

I have worked in the education field for 17 years, with 14 years as a Facilities Director. I also owned my own business in the private sector for 12 years. This experience has given me the unique perspective to come up with practical solutions to the challenges that we face in the ever-changing world of education.

Being a member of WASBO for the last 14 years, I believe it's important for you to give back to the organization that is always there to assist you. You learn to appreciate this when you are a young fledgling in your job in public education. Whatever you give to the organization you get back tenfold. Professional organizations are there

for the membership to use as a network of knowledge in their career. What it comes down to is that I am thrilled at the opportunity to contribute to the organization because I feel strongly that WASBO has been beneficial in enhancing my career.

From a personal perspective I've raised five children. I know the importance of the family atmosphere and I also carry this into my professional career. Being a director is sometimes like raising a family. Decisions must be made. I believe you need to take everyone's point of view into consideration before arriving at the final outcome. I have the vision to see where I'm going and the ability to explain it to others so they understand it. I am open minded, a good listener, I know my limitations and the limitations of those around me and at times they are both tested. I also believe in lifelong learning, which is why I support WASBO and their efforts to provide professional lifelong learning opportunities.

Working in the field of education and also the private sector has taught me that giving back to my local community is very important. I've been involved in organizing school events, coaching, fundraising for major community projects to enhance the betterment of the community. One example is the fitness center at the local high school to teach kids the benefits of physical fitness and well-being. Another example is the development of major athletic facilities to encourage team sports because they teach rules that we use to navigate everyday life. We do not live in a vacuum. We have to interact with people every day and we need to learn the power of being positive and trusting other people's actions. This is the essence of what an organization, such as WASBO, is about.

In closing, I would like you to consider me for a WASBO board member because I am a firm believer in educating our children, promoting our profession, not "reinventing the wheel," sharing our knowledge amongst our colleagues, forward thinking and learning from our past experiences. I would like to make a contribution to an organization that is always moving forward in its mission to enhance the development of the professionals that work within the education system.

"Leadership and learning are indispensable to each other."

~ John F. Kennedy

President's Message

Continued from page 3

been very busy and celebratory. WASBO members continue to work on our many initiatives throughout the year. Usually the May Business meeting includes a report regarding what WASBO has accomplished and what direction WASBO wants to go the following year. Our association's members should be very proud. As I reflect on our organization we have done many positive things for the children of Wisconsin. My theme this year is Collaborating for Success. Collaborating is one reason we have been successful. Thanks again for your involvement and collaboration.



WASBO Recognizes Maggie Gagnon as 2012 Shining Star

Business Manager Association) regionals."



Maggie Gagnon, Business Manager at Freedom Area School District, was recognized at the 2012 Joint State Education Convention by the Wisconsin Association of School Business Officials (WASBO). Gagnon is the winner of the 2012 WASBO Shining Star Award in acknowledgement of her service, time, expertise and leadership in WASBO.

After being hired as the first ever Business Manager at the Freedom Area School District in 2004, Gagnon has had to define the responsibilities of the Business Department. According to District Administrator, Lois A. Cuff, "Freedom Area School District is in excellent financial condition" and "her [Gagnon] expertise and understanding of all the financial tasks, Federal, State or Local has given me a sense of security and stability...she has become my right hand in managing the finances of this school district."

Gagnon was nominated by her WASBO Northeast and Bay Area Regional colleagues in recognition of her leadership in planning the Annual WASBO Spring Conference and participation in both of their WASBO regional groups. The nomination notes that her, "positive attitude is contagious throughout the NEWASBO (Northeast WASBO) and BABMA (Bay Area



"Prior to that date [July of 2004] Freedom Area School District did not have a Business Manager's position... When Maggie was

placed into this position it was her task to carve out the Business Manager's tasks and domain."

In Maggie's comments at the WASBO Business Meeting she reflected, "There is joy in being involved. So much of who we are is our relationships. That is what is important...getting to know other people."

This award carries with it a \$750 cash award, sponsored by Quarles & Brady, LLC, that is designated for Maggie's professional development.

We look forward to Maggie's continued involvement in WASBO and congratulate her on this recognition by her peers!

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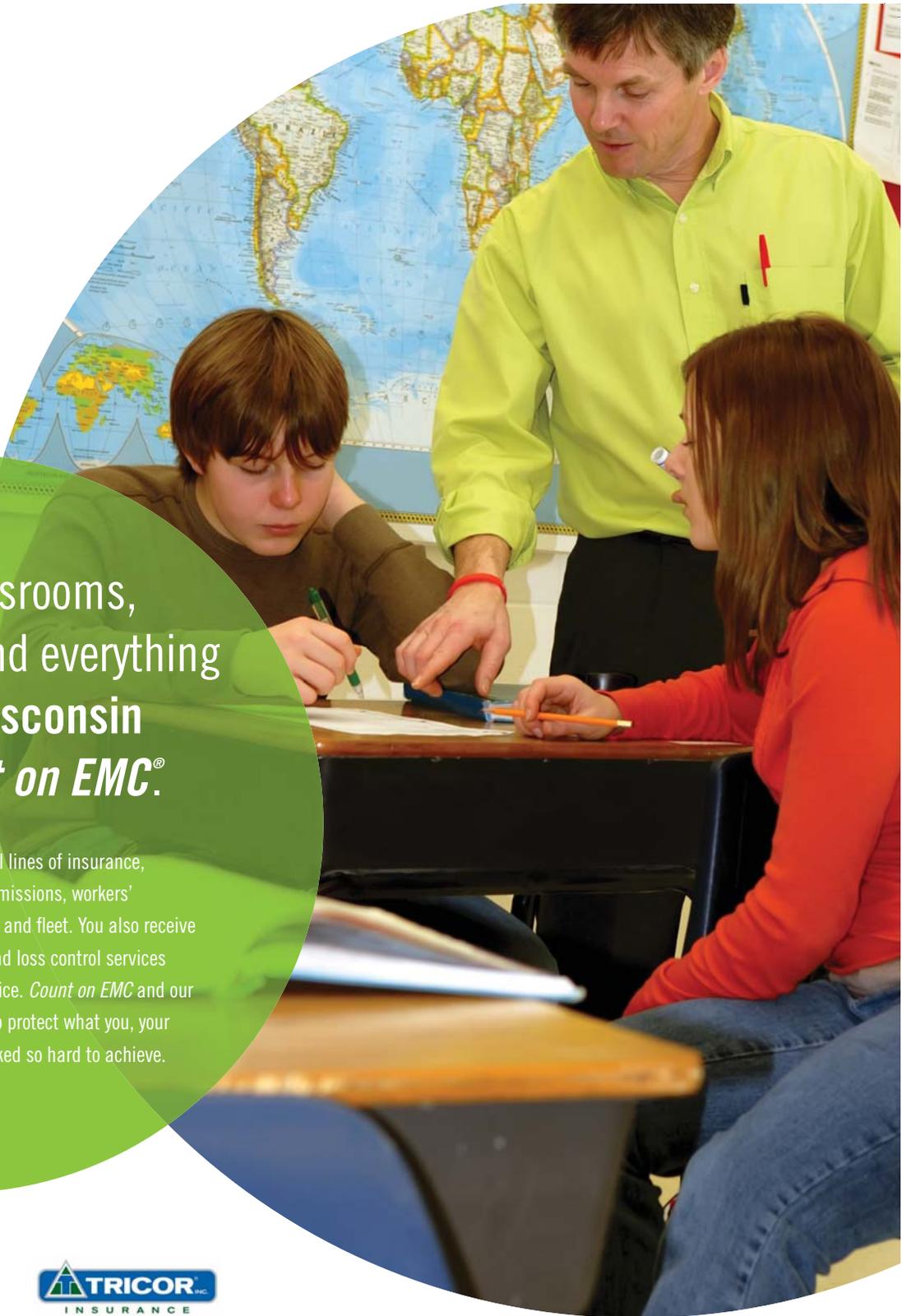
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Ted Hayes

Concerns Regarding Appliances in Schools

By Ted Hayes, Senior Risk Manager, M3 Insurance Solutions for Business

Submitted by the WASBO Safety & Risk Management Committee

Throughout the school year, I am contacted by a number of schools asking if it is acceptable to allow teachers and other staff members to use small appliances in the classroom. It is important to remember that there are a number of cost, general safety and fire safety concerns that your school must address including:



Cost to operate the appliance

Over the course of a school year, a small appliance may cost your school \$20-\$30 in electricity. Larger appliances such as refrigerators and window air conditioners may cost the school between \$50-\$75 in electricity. Multiply these costs by the number of classroom appliances in your school and you will determine that the costs add up quickly.



Fire safety concerns

If you allow various appliances in your school, they must be Underwriters Laboratories (UL) approved. This still will not prevent the appliance or its electrical components from being damaged and starting a fire somewhere down the road – a potentially dangerous proposition if appliances are left plugged in during weekends or vacation times. Additionally, small appliances such as fans could be knocked over presenting a serious fire exposure if the motor were to overheat.



Trip and fall concerns

Electrical cords may be strung in walking areas presenting a significant trip and fall exposure.

The best safety recommendation is to ban all outside appliances from coming into the school or classroom setting. There are schools that allow an approved appliance to be used in the classroom, but only after it has been inspected and approved by the maintenance department – a monumental task for any school. Cold weather and winter holidays can attract even more electrical appliances such as decorative holiday lights, coffee warmers and portable heaters.

Schools should not permit light-duty household decorative lights in the school. When lights are strung from ceiling tile grids or thumb-tacked to bulletin boards, the insulation can become damaged and cause electric fires.

Portable heaters are typically designed for occasional use in small residential spaces and are not appropriate for constant operation in large settings such as classrooms. Schools contain literally tons of paper which can pose a serious fire safety hazard when found in close proximity to heaters.

The school district should check its insurance coverage, which may have specific requirements concerning electrical appliances.

If your district has been trying to reduce energy costs, mention energy savings in your policy. Some school districts have been applying a fee for a teacher to bring in a classroom appliance – between \$20-\$75 to help defer utility costs.

Require that the use of microwave ovens or appliances in the classroom be related to the curriculum and that they be used only under teacher supervision.

Use a request form to require prior approval from the principal or other administrator before employees may bring microwaves, coffee makers, space heaters or other appliances to school for personal use. The application should emphasize that adult supervision is required, as personal appliances such as coffee makers and microwave ovens can cause serious injuries to students when hot liquids are spilled.

Limit appliances to teacher lounges where student access can be controlled. Even if they allow such appliances, districts should be clear that they are not responsible for loss or damage to personal property.

Require that all appliances are inspected by your maintenance department to ensure that they are working properly.

Only allow appliances that are UL listed.

Always maintain at least 36" of clearance between the appliance and any combustible products such as wood or paper.

Ensure that the appliances will only be used where students will not have access or contact with the appliance - this is especially important around small children.

Unplug all appliances when not in use, during the weekends and vacation times.

As you can see, the potential serious life safety concerns associated with allowing the use of outside appliances by staff members is great; the required safety components are monumental. The best and safest option is to simply develop a concise policy that bans the use of appliances in the classroom.

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John Forester
SAA Director of
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Legislative Update

37 Districts Face Possible Voucher School Expansion

By John Forester, Director of Government Relations,
School Administrators Alliance



Last week, the SAA received updated analysis of the provisions in last year's biennial budget (Act 32) related to

private school voucher expansion (the so-called voucher school expansion loophole). These provisions could subject as many as 37 school districts around the state to taxpayer-funded private school voucher programs within their boundaries.

As you may remember, these budget provisions, adopted without public hearing or public debate, established four criteria and stated that if a district met all four criteria, then all income-eligible children residing in that school district would be able to participate in a private school voucher program. The four criteria are: 1) District property value per member is no more than 80% of the statewide average; 2) District shared cost per pupil is no more than 91% of the statewide average; 3) District is eligible to receive high poverty aid; and 4) District is located in whole or in part in a second class city.

Location provides the most permanent of the criteria (if a district does not meet the location criteria, they will not face voucher school expansion), the application of which yields 37 school districts located in whole or in part in a second class city. These 37 districts are: Altoona, Appleton, Bristol #1, Chippewa Falls, Deforest, Eau Claire, Elmbrook, Fond du Lac, Freedom, Green Bay, Hortonville, Janesville, Kenosha, Kimberly, Kohler, La Crosse, Madison, McFarland, Menasha, Middleton-Cross

Plains, Milton, Monona Grove, North Fond du Lac, Onalaska, Oshkosh, Paris J1, Racine, Sheboygan, Sun Prairie, Verona, Waukesha, Waunakee, Wauwatosa, West Allis, West Salem, Winneconne, and Central Westosha Union High School.

Racine met all four criteria last year. The law provides that DPI determines eligibility for the private school voucher program every other year. And even though Racine does not meet all four criteria this year, once a district is in the program they are always in.

The districts now closest to becoming "choice eligible" are Green Bay and Menasha, both of whom meet 3 of 4 criteria and only miss on the criteria regarding shared cost per pupil (less than 91% of the statewide average). Both are relatively close, with Green Bay at 93.5% and Menasha at 93.2% of the statewide average this year.

This new analysis is not only important; it is very timely as well. As you may recall, in the face of mounting opposition to the voucher school expansion provisions, Governor Walker and Republican legislative leaders agreed to pass the budget and then follow up with a "trailer" bill removing the voucher school expansion provisions for all communities except for Racine. This trailer bill (Senate Bill 174) passed easily in the Senate but remains stalled in the Assembly with the legislative session nearing its end.

Clearly, this new analysis makes it that much more important for Assembly Republicans to honor their promise to the citizens of the state of Wisconsin. Speaker Fitzgerald, it's time for the Assembly to pass Senate Bill 174 and

close the voucher school expansion loophole. Governor Walker, as the leader of your party, and as a party to the agreement to enact this legislation, it's time to rally your party leaders and honor your promise to the people of Wisconsin.

In recent weeks, the SAA and the WASB have issued legislative alerts asking school administrators and school board members to urge their Assembly representative(s) to take action on SB 174.

If you haven't done so, please contact your Assembly representative(s) and urge him or her to take action on SB 174. This is particularly important if you are represented by Assembly Republicans.

Thanks for listening, and thanks for all your efforts on behalf of Wisconsin school children.



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Learning Lessons from Tragedy (8:00-9:30) Bob Severson was the Chippewa Falls School District Safety Director when the Chippewa Falls School District's buses were involved in a tragic accident on I-94 on October 16th, 2005. Bob will share lessons learned by a district from this horrific experience. He will address how the district's current emergency/crisis response plan has changed as a result of this occurrence and how that experience and the changes that resulted can positively affect and impact everyday bus situations in school districts. He will offer guidance on how you can develop an emergency/crisis response plan dealing with bus accidents in your district.

Mitigating Insurance through Effective Risk Management (9:45-10:30) This session will highlight how to mitigate worker's compensation and liability losses ultimately reducing insurance costs. Review claims trends and loss history. Discuss school district's limits of liability, insurance coverages and other insurance considerations.

Bridging the Behavior Gap Between the Bus & the School (10:30-11:30) How can we develop successful bus drivers who build relationships and create a positive climate? How can we help drivers enforce district-wide behavioral expectations, respond proactively to inappropriate behaviors, and acknowledge positive behavior? This session will highlight a Positive Behavioral Interventions and Supports (PBIS) framework for supporting drivers in managing behaviors on their bus. Two school districts who have collaborated with bus contractors to integrate school behavioral practices on the buses will share their experiences and strategies.

Positive Behavior Supports for the Bus Drivers (12:30-1:15) Many schools are implementing universal behavior programs that teach students appropriate behaviors in all settings. Bus drivers transport all children, even those with challenging behaviors; come learn strategies to promote a positive atmosphere on your bus. This presentation will provide information about specific disabilities and strategies to prevent and reduce behavior incidents.

McKinney Vento Homeless Education Law and Transportation (1:30-2:15) The McKinney-Vento Homeless Assistance Act (Subtitle B-Education for Homeless Children and Youth), reauthorized in January 2002, ensures educational rights and protections for children and youth experiencing homelessness. Local Educational Agencies (LEAs) must provide students experiencing homelessness with transportation to and from their school of origin upon request of parents, guardians, or the LEA Homeless Liaison. This session will give information about the McKinney Vento law including who is eligible, discuss what the law requires from LEA's, who is responsible, and strategies for implementing these requirements. There will be time at the end to discuss different scenarios and for Q&A.

Q & A Roundtable with the WASBO Transportation Committee (2:15-3:30) Bring your questions and best practices to share.

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Saving for Retirement: What Can Employers Do?

By Dawn E. Helwig, Jeffrey M. Higgins, William Most, Janet McCune and Allen J. Schmitz, Milliman

Reprinted with permission. Insight, May 31, 2011

Employers who want to provide their employees with more than nominal retirement benefits face a daunting realignment of those promises. Many of the challenges facing employee



benefit programs are outside of employers' control. Longevity is increasing faster than the age of retirement, creating longer retirement durations. Interest rates are low, reducing the performance of employees' retirement investments—particularly bonds, which are a cornerstone of financing as employees approach and enter retirement. Equities have rallied since the lows of 2009, but they remain volatile and unpredictable for long-horizon investing.

All of this happens against a background of increased employee responsibility for managing retirement funds, putting complex and challenging decisions in the hands of those who may be simultaneously least prepared to make them but most affected by them. As fewer people come to count on defined benefit (DB) plans, there are open questions about whether defined contribution (DC) programs can carry the growing retirement load. These challenges are exacerbated by the cost of retiree medical coverage and long-term care insurance (LTC).

While the challenges are significant, there are several promising ideas for addressing them including DC plan optimization, increased participant education and guidance, behavioral incentives, and the possibility of layered longevity plans. None of these will solve the problems alone. Inevitable social and economic shifts will change what retirement looks like in 21st century America, particularly with regard to healthcare costs, which are an area

of growing concern. Nevertheless, employers who sincerely want to help provide for the retirement of loyal workers need to be examining every possible way to make their retirement benefits work in today's complex retirement landscape.

Employees face challenges in saving enough for retirement

For a wide variety of reasons, including the decline of unions, regulatory changes, recognition on the part of employers that DB plans can be expensive and risky, and an increasingly mobile workforce, employer-managed DB retirement plans are a shrinking part of the retirement picture. Today, DC plans make up an overwhelming share of new retirement savings plans. For employers, DC plans are generally less risky, less complex, and less expensive to manage. For employees, DC plans are often less complex and usually give them more control over their investments and more freedom to switch employers but also more risk that the money may be spent elsewhere or invested in a way that doesn't guarantee long-term security.

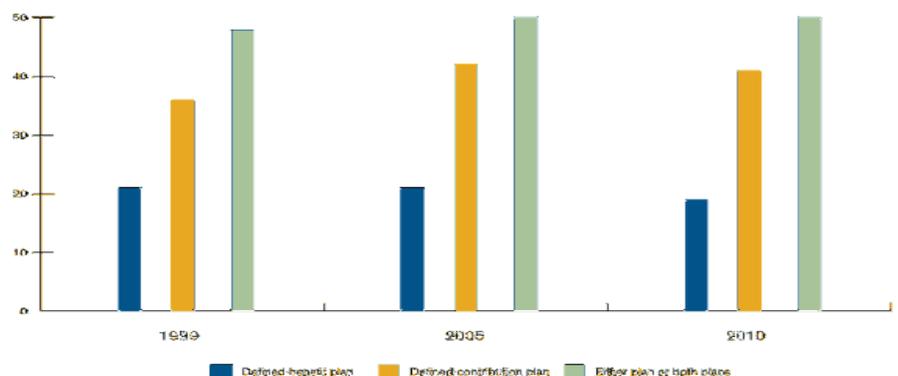
In today's complex retirement environment, the freedom conferred by DC plans can seem like a mixed blessing. While financially savvy employees who invest time and thought into managing their retirement accounts can do well, many employees do not fit this picture. In fact, large numbers of workers do not have the knowledge, expertise or, frankly, the degree of interest necessary to effectively manage their retirement investments. Even those employees who take an active role in managing their retirement accounts face growing complexity in adequately preparing for and navigating retirement.

The rule of thumb for retirement savings is that one can live comfortably in retirement with 80% of the income enjoyed during working years. This has one thing going for it: it's simple. But the world of retirement is not simple, and it's getting less so.

- People are living longer, requiring them to have more capital going into retirement.

Continued on page 19

Rate of participation in retirement plans, private industry, 1999–2010



Source: Bureau of Labor Statistics

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- Potentially high inflation can deteriorate the value of retirement assets.

In the face of these many challenges, it is almost inevitable that employees will begin to retire later. Rather than retire as soon as possible, many workers will choose to do the opposite—to keep generating income and keep their employer-sponsored health insurance, even if it means working longer. There is serious discussion afoot about raising the ages at which people can begin drawing partial and full Social Security benefits.

Whether or not that happens, we can expect older workers to compete with younger workers for jobs even more intensely than they do today. Even if employers continue to show a preference for younger, less costly workers over more experienced but more expensive older workers, the workforce is likely to become increasingly multigenerational as the stakes for retirement get higher.

Most employers who offer retirement benefits want those benefits to be adequate and effective. That means employers need to look deeply at their offerings and find ways to optimize retirement savings and investment to help employees save enough and invest it well.

What employers can do—and where barriers remain

Optimization of plan design is a key part of achieving an effective retirement program. One of the simplest optimizations is automatic enrollment. The Pension Protection Act of 2006 made it easier for employers to enroll employees in 401(k) plans, allocate predetermined levels of salary to those plans, and even invest those funds in preselected investments determined to be appropriate for retirement savings.

Growing numbers of DC plans are using automatic enrollment to increase employee participation. For employees who are not interested in managing their retirement savings themselves, such arrangements can greatly increase plan participation. It frees those employees from having to make decisions about how much to contribute and what to do with those savings. There are requirements for informed consent and restrictions around where funds can be invested, which adds a measure of protection for employees who take a “hands-off” approach.

Plans can also be designed with automatic deferral increases as salaries increase, helping to ensure that employees are putting away an appropriate proportion of their wages. And these kind of behavioral incentives can and should be supplemented with increased participant education and guidance, so that employees can make smart planning decisions, understand risks, and better manage their financial future both during their working and retirement years.

One way to help employees save enough is for employers to increase their contribution match rates and for employees to continue contributing at a consistent rate. Yet few employers can afford extravagant matching

plans. During the recent economic downturn, a large number of employers reduced their matching rates or eliminated matching altogether, at least temporarily. Additionally, while many see matching as an incentive for increased employee participation in retirement plans and increased savings, research is inconclusive in this regard. At least one paper¹ concluded that match rates have little to no effect on employee savings rates under automatic enrollment. Employer matching provisions should be carefully designed so that it is sustainable for the employer over the long term yet effective at helping employees reach their goals. Increased employee education may help accomplish this goal.

One problem with using an employer-matched 401(k) plan as the only form of retirement benefit is that there are always some employees who cannot or will not contribute. Some may start too late, or they may stop later in their careers because of high personal expenses such as dependents' college tuition. When they are not contributing to their plans, these individuals get no matching contributions and thus no employer-provided benefit. In addition to optimizing the match rate, an employer could add a profit-sharing contribution, or shift some of the match to a profit-sharing contribution, so that all employees have at least some retirement benefits.

Employers are also looking to provide employees more enhancements and more benefit options with their 401(k) accounts. Some are beginning to offer managed funds and target-date funds that help relieve some of the management burden and longevity risk faced by employees today. Even better, a custom model portfolio can be designed with an appropriate “glide path” toward retirement, automatically

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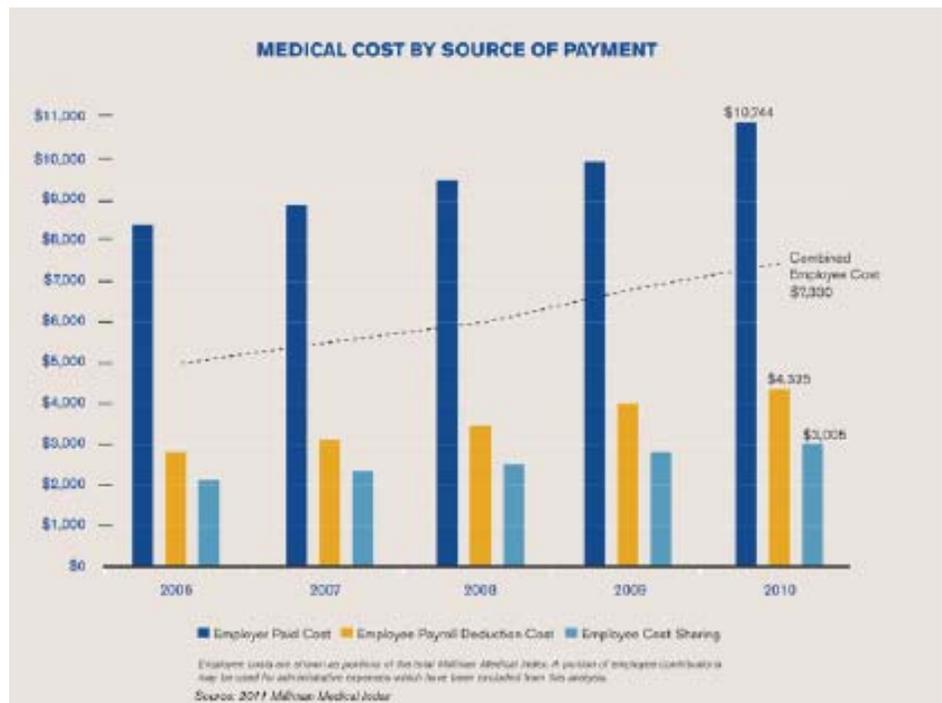
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increasing the proportion of low-risk mutual funds and bonds as the employee approaches retirement. Others are choosing to add annuities as part of the range of investment options, giving employees an alternative income stream in retirement. Offering a Roth feature in a 401(k) plan is another option, providing tax-free distributions. For certain employees, particularly those who have high incomes as they approach retirement, Roth accounts can be a valuable option.

Retiree medical and LTC benefits

The history of retiree medical benefits mirrors that of pensions. Social and regulatory changes have caused significant shifts in how employers and retirees fund medical coverage. But unlike DC plans, which are a relatively viable means of funding retirement costs, retiree medical coverage is in crisis. With healthcare costs representing a mounting portion of retirement spending, this crisis threatens the retirement landscape as a whole. Many employers eliminated retiree medical coverage when the Financial Accounting Standards Board (FASB) changed the accounting requirements for retiree medical plans in 1993. Many government employers still fund retiree health costs, but that, too, may cease due to a 2007 Government Accounting Standards Board (GASB) accounting requirement similar to the 1993 FASB rules. Some employers continue to pay for or subsidize medical insurance for retired employees. However, the rising cost of healthcare—particularly for older individuals—has resulted in huge rises in insurance premiums, which has in turn caused many employers to shift costs to workers or cut retiree medical insurance coverage altogether.



Workers are faced with less-than-ideal choices. Once their term of employment ends, their employer-provided health insurance will typically end, as well. If they are under 65, they must rely on funds from health savings accounts, purchase expensive insurance in the private market (difficult even with the subsidies provided by some employers), or go uninsured—a very risky proposition for an aging population. Once they reach 65, they have access to Medicare, but out-of-pocket costs for those insured solely by Medicare continue to grow. And recent legislative changes have greatly diminished the prospects of once-popular Medicare Advantage plans.

LTC insurance faces challenges, as well. Like all things healthcare-related, the need for and cost of LTC are growing with a longer-lived population. Just as awareness of the need for LTC insurance is growing and more and more people are signing on, insurers are increasing premiums, reducing benefits, and even leaving the LTC market altogether. Before insurers realized that their solvency projections for LTC products were not in line with

reality, attractive premiums led many employers to offer subsidized LTC insurance as part of their retirement benefits. As premiums grow and bottom lines contract, fewer employers can afford to fund LTC insurance. Workers bear the costs, and more of them may choose to put off funding potential LTC needs in favor of more immediate items.

What can employers do in the face of the looming retiree medical and LTC crises? In some ways, their hands are tied. They have little control over longevity, health costs, insurance premiums, and similar underlying factors. Some employers have chosen to implement wellness programs that could help people reduce medical costs in retirement by staying healthier—losing weight, quitting smoking, and so on. However, few studies have shown that these frequently expensive programs provide hard-dollar returns. Insurance subsidies can help, but they need to be undertaken with a clear understanding that costs are not likely to go down in the future and that providing a substantial subsidy will be expensive.

Continued on page 32



*Ken Mischler
WASBO Director*

Director's Corner

What Does the Business Office Do?

By Ken Mischler, Director of Business Services, Manitowoc Public School District

The other day, my daughter said that some of her classmates asked her what her father does for a living. She responded that he is the business manager of the Manitowoc Public School District. They then asked what a business manager does. Her response was he manages the money and finances of the District. That is very true, but the scope is much broader.

The role of the business office is hugely complex. The duties of the business office require accountability to many different interested parties such as the superintendent, board of education, administrators, teachers, other staff and vendors. There is very little acknowledgement of the demands of the business office and its staff.

Recently the WASBO Accounting Committee was given the assignment of revising the document titled "So What Does the District Business Office Do?" A small sub-committee was put together. On December 7, 2011, Gary Kvasnica (Kimberly), Patty Sprang (Mishicot), Lynn Knight (Nekoosa), Deb Pelegrin (Little Chute), Gene Fornecker (DPI) and I met in Kimberly to review the document because it had not been updated since 2004, and many of the roles and responsibilities of the business office listed in the document were outdated. We were told that a number of school districts use the document to explain business office staffing needs and job duties.

What I thought was going to be a three-hour meeting, turned into an all-day affair. Why did it take all day? The answer is simple. The business office has an enormous amount of

responsibility. It is hard for an outsider to understand all the tasks and duties that a school business office is accountable to perform or assist in performing. The name of the document has been changed to better explain what the document is and is now called, "Roles and Responsibilities of the School District Business Office."

What the sub-committee found was that the old "So What Does the District Business Office Do?" document was missing many components of the business office duties including some duties and responsibilities that did not exist in 2004, such as state Medicaid reporting. In addition, some key responsibilities were missing such as accounts payable management.

The roles and responsibilities of the business office document were divided into the following sections:

- Accounting and Reporting
- Auditing
- Budget and Financial Planning
- Cash Management
- Debt Management
- Facility Construction and Management
- General Management
- Human Resources Management
- Information Technology and Data Management
- Payroll Management
- Purchasing and Accounts Payable Management
- Risk Management
- Other Related Services

I know that the roles and responsibilities of the school business office differ in every district. However there are an enormous amount of similarities between districts. Size does not seem to

matter in the roles and responsibilities. The sub-committee came up with a total of 151 bullet points in the revised document. I am sure that we may have missed some of your job duties or responsibilities that are critical in your school business office. I apologize for that. After I counted the number of bullet points, I guess we should have made it an even 150 because business managers like nice round numbers.

Some of the roles and responsibilities of the business office are as follows:

- Utilize Wisconsin Uniform Financial Accounting Requirements (WUFAR) as the financial accounting system for the school district.
- Keep the superintendent and board of education informed of the financial condition of the school district.
- Direct and/or assist school district personnel in the planning and preparation of the district budget.
- Set tax levy determined by state statutes.
- Communicate effectively with public, school board and school staff.
- Assist in the development, design, implementation, and communication of benefit plans (Health, Dental, Vision, Life and LTD insurance including fully insured vs. self-funded plans.)
- Assist in negotiating total compensation packages.
- Prepare payroll deductions and corresponding deposits and reports in a timely manner and in accordance with legal and regulatory requirements such as TSAs, Section 125 plans,

Continued on page 27



Roles and Responsibilities of the School District Business Office



In a time when cutbacks and downsizing have become commonplace, it is predictable that people look to make cuts in areas that are away from the classrooms and in departments that perform services that are not commonly known by much of the staff and the general public.

This may be helpful in future deliberations.



Wisconsin Association of School Business Officials
 4797 Hayes Road, Suite 101, Madison, WI 53704
 608.249.8588 www.WASBO.com

Roles and Responsibilities of the



Accounting and Reporting

- Utilize Wisconsin Uniform Financial Accounting Requirements (WUFAR) as the financial accounting system for the school district.
- Require that the accounting procedures comply with the requirements of the Governmental Accounting Standards Board (GASB) and the Financial Accounting Standards Board (FASB).
- Maintain an effective system of internal controls.
- Recognize revenue and expenditures in the appropriate accounting period.
- Utilize modified and full accrual accounting in accordance with generally accepted accounting principles for classifying fund and receipt accounts.
- Reconcile bank statements on a monthly basis.
- Ensure that a sequential system for check numbers is maintained.
- Establish and maintain a fixed asset accounting system.
- Prepare accurate periodic financial reports for all stakeholders.
- Maintain a chart of accounts in accordance with district needs.
- Continuously monitor the accounting system and make adjustments as necessary.
- Utilize an encumbrance system of accounting.
- Process financial transactions on a timely basis.
- Follow proper procedures for the acceptance of donations and gifts and assure that expenditures are made in accordance with the purposes and requests of the donor, when appropriate and legal.
- Manage an effective district wide system of internal control, accounting, and auditing of student activity funds.
- Adhere to the standards for financial accounting and reporting for shared service arrangements, when applicable.
- Assist in the process of securing financial professionals for capital improvement financing projects.
- Assist in the development of post retirement benefits.
- Complete and file Medicaid cost reporting.
- Maintain accounts receivable records including billing.
- Manage scholarship trust funds.
- Submit accurate financial reports to the Wisconsin DPI.
- Keep the superintendent and board of education informed of the financial condition of the school district.
- Monitor federal grants including filing claims, time and effort monitoring, maintenance of effort (MOE) and indirect costs.
- Assist in the developing, managing and reporting of the school calendar.
- Manage student reporting for enrollment and membership purposes.
- Manage open enrollment, tuition waiver and tuition records.
- Maintain and report census for DPI reporting.
- Assist in the collection of fees for programs, food service, etc.

Auditing

- Assist in the process of securing an external auditor.
- Facilitate the external audit process.
- Review and respond to the audit findings and management letter. Develop corrective action plan if applicable.
- Prepare financial statements which may include management discussion and analysis (MDA).
- Adhere to all legal and contractual requirements and submit to all interested parties including the superintendent, school board, public, and appropriate state and federal agencies.
- Identify and monitor weaknesses in internal control.
- Facilitate actuarial study for post retirement benefits.



Budget and Financial Planning



- Direct and/or assist school district personnel in the planning and preparation of the district budget.
- Prepare the budget document in accordance with prescribed timelines.
- Adhere to all legal and contractual requirements for the development of the budget.
- Recommend a budget and periodic budget amendments to the superintendent and school board.
- Ensure that budget amendments are approved by the school board and publish in a timely manner when appropriate.
- Operate an accounting system which monitors school expenditures and verifies that expenditures are made in accordance with budgeted expectations.
- Monitor budget throughout the year.
- Periodically communicate and inform the school board, the staff, the community and others about budgets and their changing status.
- Present budget at annual meeting or budget hearing.
- Serve as a resource to the district-level and/or building-level decision making committees.
- Reconcile available resources and expected revenues with the fiscal needs of the school district.
- Monitor classification of fund balance allocations.
- Prepare multi-year budget projections when appropriate for financial planning.
- Calculate current state funding formulas to include revenue limit and equalization aid.
- Prepare enrollment forecast.
- Analyze the impact of pay as you go vs. annual required contribution (ARC) for post retirement benefits.
- Set tax levy determined by state statutes.

School District Business Office

Cash Management

- Implement cash handling procedures and internal controls over all cash handling locations.
- Develop and monitor monthly cash flow projections.
- Develop, implement, and monitor the cash investment program, in compliance with the board-approved investment policy and requirements of state statutes.
- Adhere to all legal requirements regulating bank depository bids and contracts.
- Ensure district investment assets are collateralized.
- Monitor and maintain banking services.



- Maintain an up-to-date inventory record of property, facilities, furniture, and equipment owned and/or used by the district.
- Assist in planning for facility referendums.
- Attain, analyze and recommend bids for construction and management facility projects.
- Maintain energy conservation programs.
- Evaluate maintenance and custodial staffing needs per facility.

Debt Management

- Identify need for both short-term and long-term capital financing, including lease/purchase of real property.
- Identify cash flow needs, determine investment vehicle, seek bids or quotes and secure appropriate financing for short-term borrowing.
- Assist in long-term borrowing referendums.
- Adhere to all legal requirements for issuing and servicing long-term general obligation bonds.
- Assist with district participation in the bond rating process.
- Provide information to the community relating to bond issues.
- Determine compliance with arbitrage requirements.
- Submit continuing disclosure requirements.



General Management

- Review business office structure, processes and procedures.
- Formulate an organizational structure for the management of school business operations, where applicable and if required.
- Follow all local policies as well as state and federal laws and regulations in the operations of school business.
- Develop and maintain business procedure manuals for all school business operations.
- Administer school elections as required by law.
- Maintain a system where specific tasks are carried out effectively and efficiently.
- Use technology and other methods to improve productivity of staff.
- Update Board on emerging trends that have a financial impact on district (national health care, post employment benefits)
- Assist in recurring and non-recurring referendums.
- Work with legal counsel.
- Communicate effectively with public, school board, school staff and media.
- Support the mission and goals of the school district.
- Promote principles of team building and collaboration.
- Exhibit ethical behavior in all actions.
- Assist in the meeting of the organization's goals and strategic plan.
- Adhere to record retention laws.
- Assist in development of policies.
- Collaborate with other organizations such as school districts, CESAs, municipalities and counties, etc.



Facility Construction and Management

- Maintain long-term facility improvement plan.
- Analyze financial impact of school facility maintenance and construction program.
- Adhere to the appropriate procurement and contract laws.
- Adhere to all local, state, and federal facilities regulations (ADA, environmental, architectural, engineering, etc.)
- Determine school facility needs of the district by utilizing pupil projections, demographic studies, educational requirements, facilities requirements, and financial projections.
- Coordinate sale and acquisition of real property in accordance with state and federal laws.
- Attain outside professional consultants (project managers, architects) in specialized areas.
- Prepare a comprehensive plan for the management of school facility maintenance, operations, and security programs including police liaison officers.
- Monitor the school facility maintenance, operations, and security programs, and make adjustments as needed.
- Manage community use of school facilities and generate rental fee invoices.



Human Resource Management

- Prepare job descriptions and evaluation instruments of business operations personnel.
- Provide appropriate staff development for business services.
- Select and maintain approved vendors for 403b and 457 plans.
- Select and maintain approved vendors for Section 125 plans.
- Assist in the development, design, implementation, and communication of benefit plans (health, dental, vision, life and LTD insurance including fully insured vs. self funded plans.)



- Comply with federal labor laws including FMLA.
- Assist human resource department with staffing needs of the district.
- Assist with recruitment, recommendation, and assignment of personnel.
- Assist in the development, design, implementation, and communication of compensation plans.
- Monitor staff-to-student ratios.
- Assist in wellness management.
- Assist in developing total compensation packages.

Information Technology and Data Management



- Assist in the development of a long-range plan for district technology.
- Maintain management information systems that will adequately maintain data to meet federal, state and other mandated requirements.
- Maintain hardware, security, and information for efficient collection, storage, and utilization of district data.
- Assist in evaluation and acquisition of technology.
- Adhere to legal requirements for records management.
- Submit statewide student information for Individual Student Enrollment System (ISES) and coursework completion.
- File, process and manage ERATE.
- Assist in the development of a long-range plan for district data management.



Payroll Management

- Learn, maintain, evaluate and update payroll system.
- Develop a schedule of salary payments and process payroll accordingly.
- Communicate payroll information to staff.
- Prepare payroll deductions and corresponding deposits and reports in a timely manner and in accordance with legal and regulatory requirements such as TSAs, Section 125 plans, state and federal taxes and Wisconsin Retirement.
- Ensure compliance with all payroll laws and regulations.
- Maintain salary, leave and absence data.

Purchasing and Accounts Payable Management

- Manage a comprehensive purchasing and supply management program that fulfills the educational goals, instructional needs, and service requirements of the school district.
- Adhere to the legal requirements for competitive procurement of property, facilities, supplies, and equipment.
- Assist in determining the supply and equipment needs of the school district.



- Maintain efficient procurement system for requisitioning, purchasing and paying for supplies, materials and equipment.
- Coordinate the preparation of specifications for supplies and equipment with budget requirements and the needs of users.
- Properly dispose of obsolete and surplus district property.
- Continuously monitor the purchasing and supply management programs and make adjustments as needed.
- Maintain credit/purchasing card practices and procedures.
- Submit bills to Board for payment approval.
- Confirm receipt of goods and services and submit payment for invoices on a timely basis.

Risk Management



- Determine risk management needs of the district.
- Employ insurance consultant to assist the district in risk management needs.
- Maintain and update the implementation of a district-wide safety program.
- Assist with district-wide security and emergency management plan.
- Assist with coordinating district police/security operations, when applicable.
- Adhere to legal requirement for insurance coverage.
- Maintain district's property and liability, fleet, loss, errors and omissions, unemployment, workers compensation and student accident insurance.
- Assess current insurance coverage and recommend any changes consistent with district needs.
- File insurance claims when appropriate.

Other Related Services



- Administer and monitor food service operations and make adjustments as needed.
- Follow federal and state guidelines of the free and reduced meal program.
- Monitor school bus maintenance and replacement program for district-owned buses.
- Administer and monitor student transportation program that adheres to all legal requirements and make adjustments as needed.
- Manage printing /copying operations, as appropriate.
- Maintain textbook inventories as required by state law, when applicable.

This document was developed by the
WASBO Accounting Committee.
 January 2012



Don Mrdjenovich

Staying Well Connected

By Don Mrdjenovich, Retired WASBO Executive Director

An interesting phenomenon has been observed over a long period of time and is often referred to in formal research and more informally in the media. It has to do with contradictory perceptions. For example, it is not unusual to read findings from surveys that indicate that while voters may be very critical of congress or their state legislatures, they feel that their own representative is doing a good job. Another common survey result is that while the majority of those surveyed may think schools are generally doing a poor job of educating children, they think their own school is doing a good job. One more example to make my point. While many national charities may be viewed as being poorly managed and wasteful, local charities, like food pantries, are viewed as doing a great job locally with reasonable overhead costs.

I believe the reason for the persistence of the phenomenon is easily explained. The closer we are to institutions and individuals, the more we feel connected. The more we feel connected, the greater the sense of having some control or involvement. It may be the thought that we have a choice to support or not support. We can cast a vote or directly express a concern to a teacher or principal, or decide about making donations. We feel we are a part of something and therefore more directly involved in its success or failure. The farther away we get from our institutions and individuals, the more difficult it is to feel connected or have a positive perception.

While ASBO International is an important organization, it doesn't compare to WASBO in the influence and importance it holds for those who are WASBO members. Likewise, the overall quality of Wisconsin's public schools are not as significant to us as those in our own communities. I think the message we get from this

is that those who serve in the public schools must continue to strive to make positive connections with our local communities.

In these current times, when we are experiencing so much negativity directed at our teachers and other school employees, it is most important that we devote an extra measure of our time and attention to public relations and communications. We never want to see the time when the majority of our taxpayers feel disconnected from their public schools. Demographics are not in our favor with an ever increasing number of taxpayers having no direct contact through children or grandchildren enrolled in our schools. Too often disconnection leads to disregard and disrespect for the good work being done by those who serve in the public sector. Does your school district have a written plan to address public relations and communications? This may be a good time to develop one or revisit the one you have. Stay connected.

Director's Corner

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- taxes, Wisconsin Retirement.
- Maintain efficient procurement system for requisitioning, purchasing and paying for supplies, materials, and equipment.
- Maintain district's property and liability, fleet, loss, errors and omissions, unemployment, workers compensation and student accident insurance.
- Administer and monitor food service operations and make adjustments as needed.

As I reviewed the list of roles and responsibilities of the business office, I came to the conclusion that the

business office does a lot. I know there are days when you plan certain tasks to be performed during a particular day and you do not get to any of them. It is no wonder; the list of duties of the business office is long.

I recently read a statement that "a business manager is a generalist, being involved in hiring, firing, purchasing, compliance with government laws, administering insurance, payroll, and whatever comes under their wing." Based on the list of roles and responsibilities that the business office is accountable for, there is no way the business manager can be just a generalist. The roles and responsibilities

of the business office are extremely important to the organization and the business office needs to be the expert in many of these areas.

I don't think my daughter's description of what I do for a living will change. However, the roles and responsibilities of the business manager and the business office are much more. The business office staff should take pride in their roles and responsibilities because they are critical to the school district organization. We often hear the statement that "you need to run the school district like a business." The answer is we do. Just ask Gary, Patty, Lynn, Deb, Gene and me.

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Kristine N. Seymour

Specialty Benefits: A Win-Win for Employers and Employees

By Kristine N. Seymour, President, Humana Wisconsin Commercial Market

Employers all over the country are struggling with the rising costs of health care. It is becoming increasingly challenging for businesses to provide benefit packages that enhance employee satisfaction, and still allow employers an edge in a competitive labor marketplace. Struggling to provide basic medical coverage, employers, however, often overlook the benefits of providing specialty benefits like dental and vision, accidental, disability insurance, etc.

Specialty benefits can be a great solution to manage employee satisfaction and strengthen their benefits packages without adding astronomical bills to health care costs. Combining traditional insurance benefits with added offerings allows companies to offer more options, and meet their employees' needs for choice and flexibility.

What are Specialty Benefits?

Specialty products often include both group and individual policies. These ancillary benefits are often not very expensive and are elective/voluntary. Based on their needs, employees can pick and choose the benefits they want from the portfolio. Products consist of, but are not limited to, dental and vision insurance, group term life insurance, individual term life insurance, universal life insurance, whole life insurance, disability income and accident insurance.

Why Specialty Benefits?

Employers are trying to rein in health care costs, which can be difficult to do while trying to increase employee satisfaction. According to a 2006 study of Employee Benefits Trends, 39

percent of employers ranked providing a wider array of voluntary benefits as either "extremely important" or "very important." Employees, consistently, cite health care coverage as a number one benefit to look for when considering a job offer. In such a scenario, adding specialty benefits enhances a company's edge in recruitment efforts and can act as a great vehicle to improve employee productivity and satisfaction.

Specialty benefits are a win-win for employers and employees:

- They provide value-added benefits and more options to employees
- They help businesses stay competitive in the talent marketplace, by offering ancillary benefits without adding too much cost
- Employers may make these benefits available to employees for elective purchase, which allows employees to select benefits best suited to their own needs.
- These benefits offer convenience, as employees can simply manage these through work coverage.
- And they offer security, as employees may not buy these ancillary benefits on their own and expose themselves to uninsured risks.

From Retail Shopping to One Stop Shopping

Another area of education for businesses could be the shopping experience itself. Traditionally, employers have had different carriers manage different benefits, simply

based on where they got the best prices. However, companies are now exploring the advantages of having one carrier manage all their health benefits, including basic health care, dental, vision, wellness programs, life, disability, and other voluntary products.

One factor behind this growing trend of one-stop shopping is the administrative simplicity it provides. By having one carrier manage all benefits, businesses lessen the administrative burden, thereby allowing them to focus more on keeping up with their increasing workplace demands.

Secondly, businesses realize the true potential of 360-degree view of the employees' state of health. With all benefits integrated under one carrier, it is easier to design preventive and wellness-focused programs because of the increased access to greater employee medical history information. Integration enables an insurance carrier to strengthen the risk assessment capabilities, and better mine data and track indicators that warn of potential health incidents. While historically, large carriers might not have offered ancillary benefits, the marketplace has changed dramatically in the past few years. Large carriers are now offering robust portfolios that can help employers manage benefits conveniently.

In Conclusion

Businesses want choice and flexibility for their employees, but at an affordable price. Supporting the addition of voluntary specialty products allows businesses to provide those benefits to employees.

Employees need access to quality benefits. Voluntary benefits address these needs as employees move

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Specialty Benefits

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towards consumer-directed health plans and must supplement their own coverage. These benefits also complement employers' existing benefits program, and because the employees can pay for them, these benefits provide an opportunity to obtain reasonable coverage at an affordable cost.

Voluntary benefits are increasingly becoming a central component of overall benefits strategies and represent a great opportunity for employers and their employees.

To learn about Humana's innovative solutions for managing the rising cost of health benefits, talk to your broker or consultant, or contact Humana Wisconsin at 1-800-825-9900 or www.humana.com.

Kristine N. Seymour is president of Humana's Commercial market in Wisconsin. She oversees the strategic planning, direction, growth and management of all Commercial and Specialty Benefits business in Wisconsin.



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Difficult Fiscal Times Require Streamlining “Procure to Pay” Process: p-Cards for Schools - Now More Than Ever

For most school districts, a purchasing card (p-Card) program should be a requirement, not an option. The tool of choice to streamline your procure-to-pay process for all types of expenditures is the p-Card. Expenditures like business supplies, instructional supplies, maintenance, food services, transportation, utilities, text books, professional development, travel, insurance, and the like are exactly what p-Cards were designed to handle. They create economies of scale and effectively reduce many individual transactions, into one monthly payment, while maintaining a strong record of each transaction improving the internal controls of the district.

P-Cards are quickly becoming a necessity for school districts. They provide the flexibility and conveniences to truly manage all types of procurements and travel expenses by shifting the traditional check writing processes to a card-based transaction and payment process. This reduces purchasing and payable workloads, minimizes delivery cycles (and in some cases reduces or eliminates shipping charges) and basically improves supply management.

The Illinois ASBO - Wisconsin ASBO p-Card partnership helps school districts embrace the process to move to the next level of efficiency/effectiveness with:

- Cost savings that are real/measureable/significant
- Customization to fit the desires/needs of the school district (not the card company)
- Management via the internet 24/7 at no cost
- Dedicated live program support

Every school business manager who currently employs multiple steps and numerous departments to process purchase orders, invoices and vendor payments generates overall per transaction costs between \$75-\$200. This is demonstrated in industry research literature and school district cost savings analysis. The result of using p-Cards can produce an average of 68% cost reduction. This efficiency is accomplished by replacing costly requisitions, purchase orders and reconciliation procedures with current technology that improves reporting, transparency of cardholder usage and individual card controls customized to the needs of the school district and its employees.

Not to be overlooked, is the fact that school staff (business office, teachers and others) can concentrate more on the core activities of teaching and learning rather than on ancient and out-dated practice and procedure just because “we have always done it that way.”

Where the use of “credit cards” gives employees more spending power and discretion than many who deal with public funds accountability are comfortable with, school districts, through the use of current best practice p-Card services, can actually extend purchasing authority to more employees and levels of the organization without losing control of the budget or other internal controls. This is because each card can be set-up with restrictions defined by the school district based on:

- Single transaction limits
- Number of daily transaction limits
- Merchant category codes
- Geographic locations

- And more

If you are serious about keeping within board approved budget parameters and spending policies, check out the Wisconsin ASBO p-card program partnership with Illinois ASBO. The bottom line is this switch to p-Cards for more of your purchases will help employees at all levels perform their jobs more effectively. Please visit our website at www.wasbo.com/pcard. Go to the section (Helpful Links) and click on “Learn more and get your paperwork started” to download the user friendly documents and checklist of application process and follow the simple directions. Your district will soon be in the world of state-of-the-art current best practices of procurement—time saved—money in the bank!

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Saving for Retirement: What Can Employers Do?

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The federal government is providing a measure of relief. Assuming all goes as planned, state health insurance pools resulting from the 2010 healthcare reform bill may provide a measure of relief by making less expensive health insurance available in the private market. To “tide over” retirees in the gap between retirement and Medicare eligibility, that same bill authorized a one-time reimbursement of healthcare costs for retirees not yet eligible for Medicare but still covered by employers’ health insurance. Future solutions to the retiree health care challenge will likely have to be similarly broad in scope to be effective.

Looking ahead

Some aspects of retirement funding can be influenced by employers; others cannot. Whether it comes down to new products, new policies, or increased employee education, there are many options for optimizing retirement benefits even in today’s challenging climate. What all employers can and

should do is conduct a serious analysis of their benefit offerings.

With all the complex questions involved, this is not an area in which instinct will suffice. What should the default automatic contribution levels be, given a company’s industry, demographics, and types of employees? What matching rates will help employees save enough without breaking the employer’s budget? What additional products and plan features could put employees on an appropriate glide path to retirement? It is critical to answer these questions based on evidence rather than intuition.

Given that the main purpose of offering retirement benefits is to attract and retain workers, it is critical to provide benefits in a way that is sustainable. A layered longevity plan is one potential way to ensure that people do not outlive their retirement balances for an uncertain duration—due to the fact that no one knows their precise

longevity. In the layered longevity plan scenario, employers would fund a DB plan that is specifically designed for longevity protection. The longevity plan would come into effect later than today’s retirement plans (e.g., age 80) and would provide lifetime income throughout the duration of an uncertain longevity horizon. Because fewer employees would live long enough to claim benefits compared to traditional DB plans, longevity plans would be less expensive to fund. Longevity plans are not allowed today because employer-provided retirement benefits are required to come into effect no later than age 65.² If the regulations change, the combination of an optimized DC plan for the bulk of retirement with the security of a longevity plan could provide a very attractive retirement solution.

Interestingly, such a scenario would represent a reversal of the historical pattern. DC plans began as a supplement to DB plans and later became the rule

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Saving for Retirement: What Can Employers Do?

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rather than the exception. This solution would have DC plans as the main retirement funding model with limited DB plans for longevity protection. The retirement funding challenges facing the aging U.S. population cannot be solved by employers alone, but they cannot be solved without them, either. Creative thinking and an analytical approach are both required if employers are to play a leadership role in the retirement landscape of tomorrow.

1. *The Impact of Employer Matching on Savings Plan Participation under Automatic Enrollment, Beshears et al., 2007, <http://www.som.yale.edu/faculty/jjc83/aematch.pdf>*
2. *Of course there remains the possibility of deferring these benefits until age 70, something that may not be permitted by all plans.*

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Orvin R. Clark, EdD, RSBA

Book Review

“How to Have Confidence and Power in Dealing with People”

Les Giblin, Author

Review by Orvin R. Clark, EdD, RSBA, Chair, Graduate Council, Educational Leadership Department, University of Wisconsin - Superior

How to Have Confidence and Power in Dealing with People

was written by Les Giblin. Les Giblin, a recognized expert in the field of human relations, has devised a method for dealing with people that can be used when relating with anyone: parents, teachers, bosses, employees, friends, acquaintances and strangers.

How to Have Confidence and Power in Dealing with People is 164 pages in length, divided into six parts, fourteen chapters and full of short stories and quotations. Each chapter has a summary of chapter highlights. The last chapter outlines an effective plan of action for your personal human relations program. The following points from each chapter will identify means to improve your human relations:

Part One Making Human Nature Work for You

Chapter One – Your Key to Success and Happiness

- It is a proven fact that from 66 to 90 percent of all failures in the business world are failures in human relations.
- So-called personality problems, such as timidity, shyness and self-consciousness, are basically problems in dealing with people.
- Learn the underlying principles involved in dealing with people and you won't need gimmicks.

Chapter Two – How to Use the Basic Secret for Influencing Others

- We are all egotists.
- We are more interested in ourselves than in anything else in the world.
- Every person you meet wants to feel important, and to amount to something.

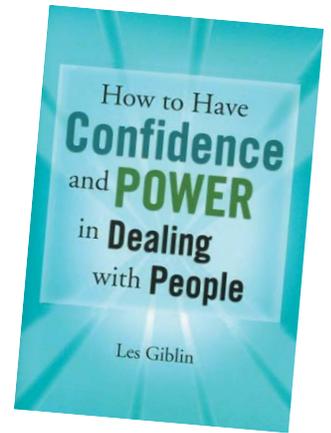
Chapter Three – How to Cash in on Your Hidden Assets

- Don't underestimate “small courtesies” such as being on time for appointments. It is by such small things that we acknowledge the importance of the other person.
- Remind yourself that other people are important and your attitude will get across to the other person.
- Don't lord over other people, or attempt to increase your own feeling of self-importance by making other people feel small.

Part Two How to Control the Actions and Attitudes of Others

Chapter Four – How You Can Control the Actions and Attitudes of Others

- Whether you realize it or not, you control the actions and attitudes of others by your own actions and attitudes.
- Act or feel hostile and the other fellow reflects this hostility back to you. Shout at him, and he is almost compelled to shout back.
- Act confidently and the other person has confidence in you.



Chapter Five – How You Can Create a Good First Impression on Other People

- In dealing with people, if you start off on a note of formality, the meeting will be formal. Start off on a note of friendliness and the meeting will be friendly.
- When you meet someone for the first time, the impression you make is very likely to determine how he regards you in the future.
- Negative opinions create a negative atmosphere.

Part Three Techniques for Making and Keeping Friends

Chapter Six – How to Use Three Big Secrets for Attracting People

- The real secret of an attractive personality is to offer other people what they desire.
- Use the Triple A Formula for attracting people:
 - Acceptance,
 - Approval, and
 - Appreciation.

Chapter Seven – How to Make the Other Fellow Feel Friendly-Instantly

- Don't wait for a sign from the other fellow. Assume that he is going to be friendly, and act accordingly
- Assume the attitude that you wish

Continued on page 37

STAND OUT FROM THE CROWD



What Is SFO Certification?

ASBO International's Certified Administrator of School Finance and Operations (SFO) program recognizes school business officials who demonstrate a combination of experience and education and who have demonstrated a mastery of the knowledge and skills required to be an effective school business leader. The SFO program has five parts: eligibility, code of conduct, exam, annual renewal, and recertification.

Why Apply?

During these turbulent economic times, employers can afford to be very selective in who they hire. SFO certification demonstrates that you have the skills, knowledge, and ability to help lead your school district out of economic distress. Acknowledged anywhere in North America, certification is also portable, giving you the leading edge on your competition.

Congratulations New SFO Certificants!

The results are in and ASBO International congratulates the individuals who have earned their certification.

Visit the ASBO Website and use **SFOsearch**—the new SFO Public Registry—to locate professionals in your state or province who have earned their certification.

Applications Accepted Year-round—Submit Today.
www.asbointl.org/certification

SFO
SFO

the other person to take. Act as if you expected him to like you.

- Use the magic of your smile to warm up the other person.

Part Four

How Effective Speaking Techniques Can Help You to Succeed

Chapter Eight – How You Can Develop Skill in Using Words

- Both success and happiness depend in large measure on your ability to express yourself.
- Use “Happy Talk.” Remember nobody likes a Gloomy Gus or a prophet of doom.
- Eliminate kidding, teasing, and sarcasm from your conversation.

Chapter Nine – How to Use the Technique That a Supreme Court Justice Called “White Magic”

- Look at the person who is talking.
- Appear deeply interested in what he is saying.
- Ask questions.

Chapter Ten – How to Get Others to see Things Your Way ... Quickly!

- Let him state his case.
- Pause momentarily before you answer.
- State your case moderately and accurately.

Part Five

How To Manage People Successfully

Chapter Eleven – How to Get 100 Percent Cooperation and Increase Your Brain Power

- If you want other people to help you, and go all out, you must ask for their ideas as well as for their brawn.
- Use the principle of multiple management, giving each

member of the team a voice in how the team is to operate.

- Set up your own brain trust; make use of the ideas, suggestions, and advice of other people.

Chapter Twelve – How to Use Your Miracle Power in Human Relations

- Sincere praise miraculously releases energy in the other person, perks him up physically, as well as giving his spirits a lift.
- Give others credit for what they do. Show your appreciation of what they have done by saying “thank you.”
- Be generous with kind statements. Gratitude is not a common thing. By being generous with gratitude you make yourself a stand-out.

Chapter Thirteen – How to Criticize Others Without Offending Them

- Criticism must be made in absolute privacy.
- Make the criticism impersonal. Criticize the act, not the person.
- Ask for cooperation-don't demand it.

Part Six

Your Human Relations Work Book

Chapter Fourteen – A Plan of Action That Will Bring Success and Happiness

- The positive attitude will bring success.
- Write down your objectives.
- Develop a Human Relations Program for:
 - Work
 - Home
 - Social Life

Identify two or three problems and define the steps to resolve; review techniques and methods used by others in solving similar problems to get started. Les Giblin provides a Self-Analysis Check List to assist in developing your self-improvement program.

It's your *Human Relations Workbook* to finish...improve your human relations and thereby get more happiness and success out of life.

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16th Annual WASBO Accounting Conference Program

March 21	Session I	Session II	Session III	 New to the Business Office/DPI
8:30-9:30	Employee Handbook	Debt Refinancing & Refunding	Vendor Net & Purchasing Best Practices	DPI Finance Team Website - Spring at a Glance
9:45-10:45	National Health Care Reform Timeline	E-Rate	Contracted Services versus Employees	Maintenance of Effort
11:00-12:00	OPEB Discrimination Testing	Cooperative Programs for Health & Property Insurance	SBS Reporting & Charges	Budget Adjustments, Fund Balance Practices and the Importance of Fund Balance
12:00-1:00	WASBO Updates and Lunch Co-sponsored by Robert W. Baird & Co., Inc.			
1:00-2:00	Alternative Benefits in a Post Union World - OPEB	National Health Care Reform Timeline (repeat)	Common Audit & Monitoring Issues with Federal Funds	Funds 21 (Special Revenues), 60 (Student Activities) 80 (Community Services), 41 (Sinking Fund Levy) and 99 (Coop Arrangements)
2:15-3:15	Alternative Benefits in a Post Union World - (Other) Active Employees	Risk Management & the Certified School Risk Manager Program (CSRMP)	Procurement Using Federal Funds	Debt Service Management
3:30-5:00	DPI Spring Workshop			
5:00-7:00	Networking Reception - Sponsored by Community Insurance Corporation & PMA Financial Network			
March 22	Session I	Session II	Session III	
8:30-9:30	Year End Adjusting Entries & Transfer Between Funds	HRA's & HSA's	Presenting Your Budget to the Public	
9:45-10:45	Bookkeeper Roundtable - Year End Issues: Receivables, Monthly Statements, Accounts Payable, Efficiency & More	403b, 457, Roth and TSA Plan Administration	Pupil Activity Funds	
11:00-12:00	Understanding Your Audit Report	Unemployment	Accounting for Charter & Virtual Schools	
12:00-1:00	Lunch and Announcement of Collaborating for Change Contest Winner			
1:00-2:00	Banking Issues and Collateralized Assets	Wisconsin Retirement System (WRS) Part 1 (2 hour session)		
2:10-3:10	What Can WASBO Do for You? WASBO Services	Wisconsin Retirement System (WRS) Part 2 (continued)		

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Conference attendees will select the winners to be announced at Thursday's lunch.



Register at www.WASBO.com/accounting or call 608.249.8588



Elizabeth Kane

IEQ Task Force Completes Work

2009 Wisconsin Act 96 - Indoor Environmental Quality in Schools

By Elizabeth E. Kane, Assistant Director, School Management Services, Wisconsin Department of Public Instruction

Wisconsin Act 96 addressed important health and safety issues in the promotion

of positive learning environments for the school children of Wisconsin. Quality environments also help decrease the potential for long and short term health problems for both students and staff.

A special committee, the Indoor Environmental Quality (IEQ) in Schools Task Force, was established in compliance with Act 96. The task force brought together 17 representatives from a number of areas specifically listed in Wis. Stat. 118.075(2) that were determined to have an interest in serving and the ability to contribute expertise to the task force regarding indoor environmental quality in public and private schools. The task force was to make recommendations for the development of a model management plan for maintaining indoor environmental quality in schools. Following the submission of the report

from the task force, the Department of Public Instruction (DPI) was to establish a model plan and practices, considering the recommendations of the task force. As directed by Act 96, the final model plan has been developed and has been posted to the DPI website at <http://dpi.wi.gov/sms/ieqhome.html>.

The model plan document is set up as a template that districts/schools may choose to use or adapt as their own. The section headings in the document however, reflect the recommendations of the IEQ Task Force and should be addressed in each plan. The law does not require use of any particular template or format for an IEQ Management Plan. Districts and schools are free to develop their own plans, or use existing plans, procedure handbooks, or policy documents to demonstrate compliance with the planning and implementation requirement.

Current law requires each public school district and private school participating in the Milwaukee Parental Choice

Program or the Private Parental Choice Program to provide for the development of an IEQ management plan by May 1, 2012 and the implementation of an IEQ management plan by February 1, 2013. Private schools new to the Choice programs have until October 1 of the first year of operation in the program to develop a plan and until the beginning of the second year of operation to implement the plan.

It was a pleasure to work with the task force members throughout this process. Pulling together the ideas and opinions of 17 people is not always an easy task, but the expertise, willingness to work together and understanding of what it might take for a district or school to meet the directive of Act 96 was commendable and invaluable to the development of the plan. Thank you to the task force and to those who have the responsibility of maintaining a safe and healthful environment for the school children of Wisconsin.



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Lake Buena Vista, Florida

2012 Annual Meeting & Expo

October 12-15, 2012

Phoenix Convention Center
Phoenix, Arizona

2013 Annual Meeting & Expo

October 25-28, 2013

Hynes Convention Center
Boston, Massachusetts

2014 Annual Meeting & Expo

September 19-22, 2014

Gaylord Palms Resort & Convention
Center
Kissimmee, Florida

2015 Annual Meeting & Expo

October 23-26, 2015

Grapevine, Texas

2016 Annual Meeting & Expo

September 23-26, 2016

Phoenix, Arizona

2017 Annual Meeting & Expo

September 22-25, 2017

Denver, Colorado

2018 Annual Meeting & Expo

September 21-24, 2018

Orlando, Florida

2012

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- Victor Hugo



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Application Deadline March 1, 2012

Over Communicating with Simplicity

Making it Easy for Others!

By Mark Towers, Principal, Speak Out Seminars, LLC

The title says it all. Getting your message through to others is about communicating in a simple fashion. It is also about making the time to over communicate (repeat yourself if necessary) so that others easily comprehend. The “how-to’s” in this article can be applied to all modes of communication. Here they are:

1. Communication is a bad word; it means many things to many people. Understanding is a better word. Superb communicators simplify things by “cutting the fluff” out of messages. As Miles Davis, the magnificent jazz musician, once noted, “I am always looking for what I can leave out.” People want oatmeal from you . . . not caviar. Deliver it so true understanding can occur.
2. Research shows that an adult needs to hear or see something at least six times before he/she “gets it.” Real learning is a function of repetition. You do not need to be a robot and repeat everything, but make the effort/time to ensure your message gets through. As a dynamic leader once told me, “I always look for ways to say or write the same thing in a different fashion. I like to find a short mantra and continually tweak it. This concept has been my key leadership principle over the past twenty years.”
3. Recent research on neuromarketing (a combination of brain research and marketing research) indicates that we all have three distinct brains . . . the old brain, the middle brain and the new brain. The old brain is the reptilian brain that sits on top of the spine. The middle brain evolved next and

it handles our emotions. The new brain then evolved and it handles our thinking.

Neuromarketing research indicates that “the buying button” is in the old brain. In a nutshell, people are most influenced (and activated) by simple, unique, visual and emotional messages . . . not complicated jargon. So use the KISS (Keep It Simple Sweetheart) method by crafting a story that is short, positive and has a message. Think of your favorite teachers over the years; undoubtedly, they were the best story tellers. Make it your passion, too.

4. Research from Yale University has shown that these are the ten most powerful words to use in advertising, brochures and written material:

You, Results, Love, Easy, Proven, Money, Save, New, Discovery, Health

Note how each of these words is “other-centered” and focuses on WIFM . . . What’s In It For Me? As the old joke goes, WIFM is everyone’s favorite radio station—people are tuned in at all times. The overall point here: Terrific communication is never about being egocentric. It is about serving others by focusing on them.

5. In his best-selling book, **Megatrends**, John Naisbitt coined this term in 1982: “High Tech—High Touch.” He said that the proliferation of computers and technology (high tech) must be accompanied by people skills (high touch) or people will become alienated and simply become extensions of a machine.

What a prophetic statement! The advent of more electronic equipment has sped things up and has become both a curse and a blessing.

Here’s what you must keep uppermost in your mind: Face-to-face beats the telephone and the telephone beats email. See email and texting as notification . . . not communication. Nothing yet has replaced the power of human touch. Let’s hope nothing ever will.

Historians regard Abraham Lincoln as the best leader America has ever had. He is best noted for his outstanding communication skills. Yes, he knew the importance of making it easy for others to “get their arms around his messages” by over communicating with simplicity. It is my invitation and my request that you use the information in this article to do the same.

Mark Towers is the Principal of Speak Out Seminars, LLC. Reach him at mark@speakoutseminars.com or 817-431-4744.

On the Move

- **John Stangler** from Oconomowoc to Pewaukee
- **Brian Dasher** to Merrill

Retirements

- **Marcia Soerens** from Cedar Grove
- **Steve Swanson** from Brodhead

ASBO Intl. New Members December 2011

- **Maria Putzer**, SD of North Fond du Lac
- **Arba LeClair**, Gibraltar Area SD

ASBO Intl. Membership Milestones

- **Brian Adesso**, SD of Manawa, (5 years)
- **Ronald Olson**, SD of Monroe (5 years)
- **Jerry E. Dudzik**, Hartford Union High School (20 years)



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People, Not Plans

Why a Dynamic Workplace Culture is More Productive Than Strategic Planning

By Mark Towers, Principal, Speak Out Seminars, LLC

Lots of money is invested in strategic planning every year, but does it pay off? The fact is, dynamic, "let's pull together and get things done" workplace cultures are what win in the long run.

A dear friend, client, and dynamic leader once said to me, "I've been a leader in the not-for-profit and profitmaking sectors for over 35 years. I've spent countless hours in strategic planning sessions, drinking coffee, constructing mission statements, setting goals, and striving to get a grip on the future. I've come to believe that it's better to bet on people than it is on plans. We do a minimal amount of planning these days. We've got the right people in the right seats on the bus, and I feel terrific as we face the adversity that consistently comes our way."

This comment on culture caught my attention. Creating and sustaining a dynamic workplace culture is incredibly important. Here are some hows and whys to bear in mind.

Culture is Created

A workplace culture is to a person like water is to a fish. We all want to work at a place that is challenging, meaningful, and upbeat. This entails a "principles from the top down and decisions from the bottom up" approach to managing folks. People support what they help create.

Jack, a seasoned mid-level manager, put it this way: "I tell my people they may not always have a vote, but I will give them a voice on any matter that I can. Treating people like I would like to be treated in regard to feeling in on things and not micromanaging pays nothing but high dividends."

Culture is Consistent

A magnificent workplace culture is a by-product of consistent behavior. A steady hand on the rudder of any organization creates consistency. Consistency creates stability, and stability enhances teamwork. As this cycle repeats itself, the organization gets stronger over time.

As a young entrepreneur told me, "I did not build this company to flip it. To flip is to flop. I work many 12-hour days just to keep this place afloat, and I will always do so!" His consistent actions speak volumes, and his company continues to do well.

Culture is a Story

Culture is your brand. People continually tell stories about their colleagues and create folklore about where they work. When they do this, they are adding to the organization's collective memory. This is a good thing. It creates a sense of identity and belonging—a sense of community for which human beings yearn. Smart leaders make ample time during celebrations for story-telling.

"Stories keep us alive," one woman observed. "In my department, we have story-telling hour over coffee at the end of each month. Both failures and successes are shared. We applaud one another. It keeps us all rowing in the right direction."

Culture is Modeled

Do not forget that you are the culture. Finger-pointing is never good. Model the behavior you expect of others. A front-line worker said, "There are always going to be lower-level gripes in any place of employment. I simply overlook them. I won't gossip—ever."

Being a low-maintenance employee raises your chances of being deemed essential in the organization, not just valuable. Never speak negatively about your culture; it pays no dividends. Tony Hsieh, Zappos.com's CEO, sums up the importance of culture in an organization: "To the individual, character is destiny. To the organization culture is destiny." As you study the culture he and his folks have developed, you will note that they are focused, flexible, fast, friendly, and fun.

These are valuable traits, but each workplace culture is unique. Do not try to replicate the culture of another organization. Study other cultures, learn from them, and then blaze your own trail. Build your culture patiently, attend to it, and never see it as automatic or tied to extra-heavy doses of strategic planning.

See your organization's culture as an ever-evolving organism that adapts effectively over time. When you do so, people will not only want to come. They will want you to stay.

Mark Towers is the Principal of Speak Out Seminars, LLC. Reach him at mark@speakoutseminars.com or 817-431-4744.

"Leadership is solving problems. The day soldiers stop bringing you their problems is the day you have stopped leading them. They have either lost confidence that you can help or concluded you do not care. Either case is a failure of leadership."

~ Colin Powell

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Welcome New Members

December 2011 - January 2012

District Professional Members

- **Bob Berry**, Director of Transportation, Mayville SD
- **Craig Chafer**, Maintenance Supervisor, Birchwood SD
- **Steve Guthrie**, Facilities and Operations Supervisor, Port Washington-Saukville SD
- **Mark Hansel**, Engineering Services Coordinator, Appleton Area SD
- **Jim Heinemann**, Director of Buildings and Grounds, Hayward Community SD
- **John Hinrichs**, Buildings & Grounds Supervisor, Deerfield Community SD
- **Kathy Johnson**, Payroll/HR Benefits, Wittenberg-Biramwood SD
- **Angela Oleson**, Finance Director, Green Bay Area SD
- **Tim Svendsen**, Business Director, DPI/Centers for Blind and Deaf

Service Affiliate Members

- **Brady Foley**, Project Manager, Kraus-Anderson
- **Jason Rentmeester**, Project Manager, Kraus-Anderson
- **Gary Zifko**, Senior Project Manager, Kraus-Anderson
- **Suzzan Bowden**, Support, Kenwood Communications
- **Mark Chudecke**, HVAC Applications, Chudecke & Associates, LLC
- **JoAnne Coughlin**, Branch Manager, Honeywell Building Solutions
- **Jim Cross**, Marketing Manager, Valley Aquatic Solutions
- **Jim Erickson**, Producer, RJF Agencies
- **William Faltz**, Manager, Wisconsin Surplus Online Auctions
- **David Foler**, Business Development Manager, Inspec, Inc.
- **Kristine Granneman**, Sales Manager, Unisource World Wide
- **Brent Kauth**, Edutrak Software
- **Scott Moseman**, District Market Manager, Graybar
- **Eric Shinnors**, Sales Manager, UniFirst Corporation
- **Elizabeth Smith**, Sales Manager, xpedx
- **Bob St. Arnold**, Producer, RJF Agencies
- **Betty Stacks**, General Manager, MidAmerican Building Services
- **Lindsay Weiskittel**, Senior Grants Associate, National Heritage Academies

Student Members

- **James Tiffany**, Student, UW Superior

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For On the Move, Retirements and ASBO Membership go to page 41.

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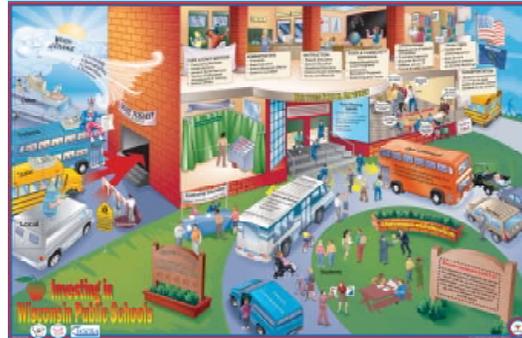
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Investing in Wisconsin Public Schools

The Wisconsin Association of School Business Officials (WASBO), Wisconsin Association of School Boards (WASB) and Wisconsin School Public Relations Association (WSPRA) have come together to develop an exciting new tool to comprehend the variables, stakeholders and nuances of financing Wisconsin's public schools. This interactive, hands on activity will take you through a process of self discovery to lay a foundation for understanding Wisconsin school finance.



You may find this exercise useful when communicating with board members, district staff, community members, parents and the business community.

The tool "Investing in Wisconsin Public Schools" utilizes a blended learning and engagement methodology suited for stakeholders at all levels. The learning objective examines the basic revenue and expense elements of education's financial scorecard allowing participants to explore the measures of success and how all stakeholders can affect the financial well-being of schools. The key themes include:



- Who are our stakeholders? What do they contribute to schools and what do they expect of schools?
- What are the various sources of public school funding (revenues)?
- What are the various expenses of public schools?
- What are the ramifications of not having sufficient revenues? And what are the methods for dealing with these ramifications?
- How are stakeholders (community) affected by the efficiency of public education?
- What are the common "outcomes of education" and how are they impacted by the school funding mechanism?
- How would you approach balancing a budget?
- What actions or support can you provide to help ensure our schools provide a quality education amidst balancing a budget?

As a trained facilitator you will learn about:

1. **Small group settings** – preferably in cross-functional groups of six to ten people allowing participants to hear and learn from one another;
2. **Visualization or Storyboarding** of complex issues – to allow group members to link issues to graphic images and form a common language and understanding;
3. **Wisconsin School Finance specific data** – that supports the Storyboard metaphor;
4. **Socratic Dialogue** questions that allow group members to offer opinions, comments and insights in a nonthreatening atmosphere;
5. **Learning Exercises and Simulations** that put group members in different scenarios to enhance understanding and recognition;
6. **Facilitation** – the process is one of self-discovery as opposed to instruction and delivery of the "right" understanding.

The process provides no answers. Instead, Investing in Wisconsin Public Schools presents very targeted and provocative questions on core organization issues, challenging participants to think...often driving each person to address unpleasant but nonetheless vital systemic and environmental realities. Successful implementation of the Investing in Wisconsin Public Schools map process requires well trained facilitators. WASBO will offer a half day of training followed by lunch on March 2nd.

Investing in Wisconsin Public Schools was developed by the collaborative efforts of:

Join us to learn the skills needed to be a great facilitator for Investing in Wisconsin Public Schools.



For more information, please contact WASBO at 608.249.8588.

Facilitator training will be held in Madison on Friday, March 2, 2012 at 9:00 a.m. For more information or to sign up, contact the WASBO office at 608.249.8588.



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Kalahari Conference Center, Wisconsin Dells

February 28-29, 2012 (Viterbo Credit)

Facilities Management Conference

Kalahari Conference Center, Wisconsin Dells

February 29, 2012 (Viterbo Credit w/ Facilities Conference)

WASBO Transportation & Bus Safety

Workshop

Kalahari Conference Center, Wisconsin Dells

March 2, 2012

Investing in Wisconsin Public Schools

Facilitator Training

Madison Area

March 3, 2012

WASB-WASBO School Finance Seminar

Holiday Inn, Stevens Point

March 21-22, 2012 (Viterbo Credit)

WASBO Accounting Conference

Chula Vista Conference Center, Wisconsin Dells

May 22-25, 2012 (Viterbo Credit)

WASBO Spring Conference & Exhibits

Kalahari Conference Center, Wisconsin Dells

June 20, 2012

WASBO Custodial & Maintenance

Conference

Nicolet High School

July 25, 2012

WASBO Custodial & Maintenance

Conference

Kimberly High School

Committee Meetings

School Facilities Committee

April 17, 2012, 9:30 am, WASBO Office, Madison

August 7, 2012, 9:30 am, WASBO Office, Madison

Safety & Risk Management Committee

April 17, 2012, 12:00 pm, WASBO Office, Madison

August 7, 2012, 12:00 pm, WASBO Office, Madison

Spring Conference Planning Committee

March 20, 2012, 6:00 pm, Chula Vista, Wisconsin Dells

Midwest Facility Masters Planning Committee

March 8, 2012, 10:00am, WASBO Office, Madison

April 19, 2012, 10:00am, WASBO Office, Madison

May 10, 2012, 10:00am, WASBO Office, Madison

June 7, 2012, 10:00am, WASBO Office, Madison

July 19, 2012, 10:00am, WASBO Office, Madison

August 16, 2012, 10:00am, WASBO Office, Madison

September 6, 2012, 10:00am, WASBO Office, Madison

October 4, 2012, 10:00am, WASBO Office, Madison

Fall Conference Planning Committee

February 23, 2012, 10:00am WASBO Office, Madison

WASB WASDA WASBO Convention Planning Committee

March 22, 2012, 3:00pm, Chula Vista,

Wisconsin Dells

April 27, 2012, 1:00pm, Crowne Plaza, Madison

Business Meetings

May 24, 2012 - Wisconsin Dells, Spring Conference

Board of Directors Meetings

April 19, 2012

Manitowoc

June 13, 2012

Madison

Regionals

Check www.WASBO.com for more information.

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

May 11, 2012 (Sturgeon Bay)

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

March 2, 2012 (Stoughton), April 13, 2012 (Lodi)

Northeast - Meetings start at 11:00 a.m.

April 13, 2012 (Fond du Lac), May 11, 2012 (Manitowoc)

Northwest - Meetings start at 10:00 a.m. at

Lehman's Supper Club in Rice Lake.

March 7, 2012, April 4, 2012, May 2, 2012

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

April 13, 2012 (Hamilton)

Southwest - Meetings start at 12:30 pm. at CESA #3

April 18, 2012

West Central - Meetings are from 10 am - 1 pm at

the Sparta Area SD Administration & Education Center
March 1, 2012, April 5, 2012, May 3, 2012, June 7, 2012

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

March 9, 2012 (Auburndale), April 13, 2012 (Merrill),

June 15, 2012 (Rhineland), August 17, 2012 (Antigo)

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