



Wisconsin
Association
of
School
Business
Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 17, Number 3 - June 2013

Inside This Issue

President's Message.....	3
Executive Director's Report.....	5
Legislative Update.....	7
WASBO Award Recipients.....	8
ASBO Update.....	11
WASBO Scholarship Recipients.....	12
New WASBO Board Members.....	14
What is an SIF and How Can It Help Me?.....	15
Thank You Spring Conference Sponsors...16	
Audit Preparation: Start Preparing for Your Audit Now!.....	21
Spring Conference Pictures.....	23
President Elect's Corner: Is This Really Happening?!.....	24
Past President's Corner: What an Adventure.....	25
2013 Facility Manager Certification Recipients.....	25
Hold Harmless Agreements.....	26
2013 CSR Designees.....	29
WASBO Sends Help to Moore, OK.....	29
Mistakes.....	30
Oct. 1, 2013, Deadline for Providing Health Insurance Marketplace Notice: DOL Updates Model COBRA Notice.....	31
Gifts from the Heart.....	33
Ten Ways to Be More Intentional in Your Workday.....	35
The Danger of Masked Productivity.....	35
School Tax Elections: Testing Messages and Targeting Voters...36	
Interest Rates Trend Higher.....	39
Heightening Your Resilience: Words of Wisdom.....	41
Dear Colleague Letter Supporting Tax Exemption for Municipal Bonds....42	
Book Review: <i>Negotiating with Giants</i> ...45	
Pay PCORI Fees by July 31.....	46
Canada Geese Go to School.....	47
Welcome New Members/On the Move...48	
Get Involved in WASBO.....	50
Stay Connected.....	51
Upcoming Events.....	Back Cover

WASBO Honors Gary Kvasnica with Wallace E. Zastrow Award



*Betty Zimdars (WISC),
Janice DeMeuse
(WASBO President)
and Gary Kvasnica*

Gary received high praise in his letters of recommendation for the Wallace E. Zastrow Award, and WASBO is delighted to honor him with this award.

There were some common themes among the letters submitted on Gary's behalf. His work ethic and dedication to service resonated. Robert S. Mayfield, Kimberly Superintendent, praised Gary's "leadership and collaboration with a broad network of colleagues," adding that "Gary is always a step ahead of the coming financial challenges with a myriad of solutions to consider." Mayfield said that "it is one thing to put together a budget, it is another to articulate and carry it through. I find it rare to have an administrator as personable and articulate as Gary." He noted that Gary is able to take complex financial concepts and present them to teachers, community members, media and board members in pragmatic terms, with an emphasis on serving students and community. His superintendent and board members pointed out Gary's leadership and collaboration in helping keep the district's finances in line with its strategic plan. Kimberly is a low-

spending, high performing district, and Gary's creative, progressive approach was cited as a factor for success.

Gary's most recent initiative involves incorporating LEAN continuous improvement practices into his department, improving their proficiency by eliminating over 7,000 accounting entries per month.

In addition, Gary is service minded and is a leader in his professional organization and local community service organization. He helped develop a local chapter of the Kiwanis Club that has raised hundreds of thousands of dollars for the community.

Maggie Gagnon, Business Manager for Freedom Schools, pointed out that Gary has been a great contributor to WASBO. "If you have a question or need help with something, he is always there to answer it for you. His attendance at our regional meetings is invaluable as he always poses questions that make you walk away wondering how you are going to change/do that in your own district."

She added that "one of the best qualities about Gary is his ability to make people laugh. The stories he shares are wonderful and you will never leave a conversation with him without having at least one moment when you chuckled

continued on page 7

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.



You educate. We insure.

Molding the leaders of tomorrow — that's education. It's about giving students the time and attention they need to learn. Don't waste time worrying about finding insurance that meets the budget. Leave that to us.

Our flexible pricing solutions help you provide great benefits to your employees — always at a great value. And if your needs change, don't worry. We're constantly coming up with services like our new focused networks that work for any district.

With benefits from the Trust, you can be confident to keep your best teachers on staff. Let us worry about insurance. You can focus on what you do best — education.



How can we help you? Give our Education Service Team a call:
608.661.6633 • education@weatrust.com

**WASBO 2012-13
Board of Directors**

Janice DeMeuse - President
Lynn Knight - President Elect
Jeanne Stahl - Treasurer
Wendy Brockert - Past President

Directors At-Large

Robert Avery
Jay Clark
Jill Collins
Kenneth Mischler
Rob Nelson
Dave VanSpankeren
Andy Weiland
Dale Zabel
Betty Zimdars

**Executive Director
Woody Wiedenhoef**

Taking Care of Business is issued bimonthly by the Wisconsin Association of School Business Officials. Send address changes to:
Taking Care of Business c/o WASBO
4797 Hayes Road, Suite 101
Madison, WI 53704
P 608.249.8588 F 608.249.3163
wasbo@wasbo.com
www.wasbo.com

WASBO Inc. and the WASBO Foundation do not endorse or stand behind any claims or products advertised in Taking Care of Business.

Publication Policy: Taking Care of Business is distributed by the Wisconsin Association of School Business Officials. The ideas and opinions expressed do not necessarily represent the beliefs and policies of WASBO or its members. Neither WASBO nor any of its members or representatives accepts liability for the contents or use of the articles appearing in this newsletter. Materials that appear in Taking Care of Business may not be reproduced in any manner without written permission.

Editor: Woody Wiedenhoef

© 2013, Wisconsin Association of School Business Officials (WASBO)



President's Message

A Word From Your President

Preparing Today for Tomorrow's Challenges

By Janice DeMeuse, Business Manager,
Luxemburg-Casco School District



*Janice DeMeuse
WASBO President*

I cannot believe we are near the end of another school year. My year of serving as your WASBO president is rapidly drawing to a close. As I begin to reflect on a year that has gone by very quickly, I urge every one of you to become more involved in WASBO, whether at the regional or committee level or running for a leadership role on the WASBO Board. This has been an amazing year of learning and growing for me personally.

Several board positions are changing after the June Board meeting. Finishing their three-year director terms of office are Jill Collins, Dave VanSpankeren and Betty Zimdars. Wendy Brockert, Past President completes a total of seven years (director and leadership) on the Board. Thank you for your service. It has been a privilege to serve on the Board with all of you. Welcome to new members President-elect John Gahan and directors Kathy Davis, Jason Demerath and Kent Ellickson. New officer and directors joined the Board for the June meeting to assist with the transition.

Another successful Spring Conference has come and gone. We were able to raise over \$16,500 through golf and bike ride activities for WASBO scholarships. The silent auction events also earned more than \$10,400 for support of candidates for ASBO office and WASBO members serving on ASBO committees. The Spring Conference committee and WASBO office staff did their usual fantastic job of organizing the event. Thank you to everyone who was involved in planning and delivering another great networking and learning opportunity for attendees.

One of the most gratifying parts of Spring Conference for me is awarding scholarships to deserving students. The committee

always has a difficult choice to select from among the many active seniors. This year scholarships were awarded to the following students:

- Taylor Hayes from Pardeville - \$4,000 WASBO Foundation Scholarship sponsored by Met Life.
- Christopher Van Scyoc from Green Lake - \$4,000 WASBO Foundation Facilities Management Conference Scholarship sponsored by Stalker Flooring and School Dude.com
- Dave Finnemore from Westosha Central - \$3,000 WASBO Foundation Scholarship sponsored by BMO/Harris Bank
- William Marshall from Kickapoo - \$3,000 WASBO Foundation Scholarship sponsored by EMC Insurance Companies
- Doniell Erickson from Fond du Lac - \$1,000 WASBO Foundation Scholarship sponsored by National Insurance Services and Miron Construction
- Newton Smerchek from Luxemburg Casco - \$3,000 President's Scholarship sponsored by UnitedHealthcare
- Nick Farley from Ashwaubenon - \$1,500 Business Official of the Year Scholarship sponsored by Liberty Mutual
- Lucas Mader from Kimberly - \$1,000 Zastrow Award Scholarship sponsored by WISC
- Erin Timm, Business Manager from Wisconsin Heights - \$1,000 Dr. Bambi Statz Academic Scholarship sponsored by Ehlers

Spring conference is when several WASBO professional recognition awards are given to deserving recipients. This year we presented awards to:

Continued on page 7



“Don’t let clients
compromise on data
compromise coverage.”

Joel Pesch, Milwaukee Branch Commercial Underwriter

An incident of data compromise can have a negative impact on your clients’ credibility and profits. You can help protect them by adding EMC’s data compromise coverage to their insurance program. It’s just one of the many reasons policyholders *Count on EMC*®.



Milwaukee Branch: 800.236.1800 | Home Office: Des Moines, IA

www.emcins.com

© Copyright Employers Mutual Casualty Company 2011 All rights reserved



Woody Wiedenhoef

Executive Director's Report

Are We Prepared to Compete in the New Paradigm?

By Woody Wiedenhoef, Executive Director, WASBO

I wish to send a big THANK YOU to WASBO members who have been informing their legislators and their community members of the impact of the dramatic anti-public education legislation contained within the proposed state budget. That energy has been well spent. After understanding the local impact of the proposed legislation, numerous school boards have taken action against much of the proposed legislation. Newspapers statewide have written editorials asking legislators to change the proposed legislation. The combined efforts have paid some dividends. Charter legislation has been removed. Revenue limits and state aids have increased somewhat, but more initiative is needed. However, the private school voucher and charter school issues are not dead. It is obvious educational public policy decisions are charting a new course. The elected officials in power may have compromised because of the feedback we have provided, but they have not given up on their ideological vision.

The trend of privatizing public education is not new. The Friedman Foundation and the Heritage Foundation have espoused this vision for decades. ALEC has been writing sample legislation for a number of years. The basic principle of public funding providing free public and appropriate equal educational opportunities for all students has been diminished in numerous legislative actions throughout the country. There is no reason to believe voucher advocates will be satisfied until education is totally privatized and funded with public

tax dollars. When Governor Walker commented on the latest compromise related to private school vouchers, he pointed out that more changes will be attempted in the next biennial state budget, bringing the state closer, step by step, to the privatization vision.

The paramount question for us to answer today is: how do we provide service which gives our customers reasons for choosing "our" school district? What are the necessary tools and resources we need to compete in this new environment? We know schools will need to amplify their efforts to prove that they are providing an excellent education for our students. We can predict that Pre K-12 education will look very similar to our university system—where most parents will shop around for what they feel is the best fit. We will need to be very clear about the advantages that public schools provide our students. We will need public school strategies that engage students in ways that the private schools cannot. Those strategies will then need to be communicated to the public.

We do have one very powerful principle that will help public schools—public accountability. The basic principle that citizens want tax recipients to be accountable will be a public school advantage. This principle is a disadvantage to private schools. The culture of openness is not a private sector attribute.

If we are relegated to having vouchers expand in our state, then the diverted public dollars need to bring commensurate accountability requirements to private voucher schools. These private entities should be required to accept all students,

teach all students and meet the same standards. They should be answerable for the same accountability practices and testing requirements. They should be required to assess their teachers and principals in the same manner as public schools. They should be publicly accountable for spending their funds. They should be included in the open records law and open meetings law. Public money means having the same responsibilities as public schools to keep us informed. It requires extra time and effort to meet public accountability requirements. To accept anything less than a level playing field is a slap in the face to Wisconsin's outstanding professional educators. It falsely discredits the Wisconsin public education system.

The Wisconsin public school system has the culture that citizens believe in. The combination of our continuous improvement culture with public accountability will be what causes the public school paradigm to survive and thrive. As we move towards using public funds for private schools, citizens will demand data, facts and results, not anecdotal stories.

As Abraham Lincoln stated, "you can fool all of the people some of the time, and some of the people all of the time, but you cannot fool all of the people all of the time." We can feel confident in this basic life principle. Public education will survive in this new paradigm. Regardless of the outcome of pending legislation, we need to choose not just to survive, but to thrive. This is our opportunity to step up to the next level and be THE choice, not just a choice. The students are counting on us!



The smart choice for educators

WPS SchoolSelect Plans help keep members healthy and costs down

In many school districts, school board members want a health plan that does more than just pay claims—they want one that promotes health and wellness so that the teachers and support staff can focus on healthy lifestyles while the claims and premiums stay low.

Enter the WPS SchoolSelect Plans. With free access to an online health center, health risk assessments, care management, health care utilization analysis, the *Your Health Matters* blog, and more, school districts across Wisconsin now have the tools to protect their employees' health *and* their budgets.



To request a quote on a WPS SchoolSelect Plan, contact your local agent or call 608-223-5970 and reference "schools."

25858-021-1302

©2013 All rights reserved. Wisconsin Physicians Service Insurance Corporation.



John Forester

Legislative Update Regroup, Reposition, and Fight On

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



The SAA anticipates that both the Assembly and Senate will debate and pass Assembly Bill 40 (State Budget Bill) the week of June 17th. For now, it appears that the deal struck last week on the K-12 education portion of the budget bill is holding. However, we remain watchful because voucher advocates have been working the halls of the Capitol and conservative talk radio, trying to make the deal worse for all Wisconsin school children.

I want to thank you all for your advocacy efforts in support of the children you

serve during this budget session. Your efforts had tremendous impact on the budget adopted by the Joint Finance Committee last week including removal of the special needs vouchers and charter school proposals, as well as ensuring a \$150 increase in per pupil resources (even though the challenges facing school districts and the state's improving revenue picture warrants a larger per pupil increase for schools).

In fact, I believe the SAA has done some of its best work ever as a political organization in this session. But of course, that all pales in comparison to the prospect of statewide voucher expansion, no matter how small the enrollment caps are in this budget

plan.

The day after the Joint Finance Committee adopted its version of the budget, an SAA member emailed me and said, "It appears the SAA has sustained some losses. What's next?" Without even thinking, my response was, "We regroup, reposition and fight on."

Let's continue to fight for everything that is good in public education. Let's fight for all the reasons we made education our life's work. **But, most importantly, let's fight for the futures of the children we serve.**

WASBO Honors Gary Kvasnica with the Wallace E. Zastrow Award

Continued from page 1

and often have a full belly laugh." Those who attended the spring business meeting can confirm this as he had the audience laughing throughout his comments.

In addition, Gary has served WASBO as a Board Member and a conference speaker and is an active member of the WASBO Accounting Committee.

We are proud to have Gary as part of WASBO and congratulate him as the 2013 Wallace E. Zastrow Award Recipient.

President's Report

Continued from page 3

- Gary Kvasnica, Kimberly School District — Zastrow Award
- Joe Marquardt, New London School District — New Business Official of the Year
- John Williams, Fond du Lac School District — School Facilities Manager of the Year
- Gretchen Thomes, Sheboygan School District — Business Services Award
- Tina Hafeman, WASBO office — Tina Hafeman Friend of WASBO
- Jerry Landmark, DPI — Tina Hafeman Friend of WASBO

"Friends" this year and that the name has been changed from Friend of WASBO Award to the Tina Hafeman Friend of WASBO Award. If you would like to see a video of Tina's surprise award presentation you can find it at <http://bit.ly/tina-video>.

I had the opportunity to attend the Ohio ASBO state conference in April. It is organized very similar to our conference including breakout sessions on health care reform and other pertinent topics. I felt like I was attending our conference as I listened to discussions about the lack of state funding and expansion of school vouchers.

The June Board meeting was held in Madison on June 11. Some of the topics we discussed included strategic planning, Payrol / HR certifications and our fund balance policy.

This is my last article as president. I want to take this opportunity to thank you for your support and encouragement this year and to offer best wishes to your new president, Lynn Knight.

You will note that WASBO has two



Honoring Excellence in Wisconsin's School Business Officials



New School Business Official of the Year Joseph Marquardt



We are happy to present the 2013 New School Business Official of the Year award to Joseph Marquardt from the School District of New London. Joe served as a business education teacher before becoming the Director of

Business Services in December 2010. According to his recommendations, he has continued to serve in a teacher role – to the board of education, during administrative retreats, and to the school staff. He has introduced innovations in school operations which have provided savings of over \$650,000 to the district. Joe recognizes WASBO as a resource and asset, and gives back to the organization as a committee member. We are proud to recognize Joe as WASBO's 2013 New School Business Official of the Year and congratulate him on a superb start to his career in the business office.



School Facilities Manager of the Year John Williams

=SFI=
Stalker Flooring Inc.
New London WI

Our 2013 School Facilities Manager of the Year is John Williams from Fond du Lac School District. John's



recommendations cited his leadership in the schools, in the profession, and in the community. He led a successful referendum campaign in 2006 for capital improvements and technology, and is well respected in his leadership role. In addition, John was in the first group to receive the Facility Managers' Certification from WASBO, and

also has received the Certified School Risk Managers (CSR) designation. He hosted a WASBO custodial conference in Fond du Lac and has been a regular at other WASBO conferences. John also serves on the WASBO Safety and Risk Management Committee. We are delighted to recognize John as WASBO's 2013 School Facilities Manager of the Year.



Business Services Award Sheboygan Area School District - Gretchen Thomes

WASBO is happy to present the 2013 Business Services Award to Sheboygan Area School District, represented by Assistant Superintendent Gretchen Thomes. The district joined with the county and city of Sheboygan in an independent health clinic to provide free or reduced cost services to employees. The InHealth Clinic is available to insured employees of the city, county and school district, with full-time nurse practitioners, medical assistants and chiropractors. The return on investment after six months is approximately \$53,000, with the potential for savings up to \$240,000 annually. We commend Sheboygan Area School District and Gretchen on this innovative approach to addressing employee health benefits. Congratulations on being chosen for the WASBO Business Services Award.



Robert W. Baird & Co.



Friend of WASBO Award Renamed Tina Hafeman Friend of WASBO Award

The last thing I like to do is write about myself or put my picture in the newsletter. So I will fight the urge to “forget” to include the picture, and take this opportunity to share how grateful I am to have so many friends in WASBO.



When someone asks me what I like about my job my response is the people. I am fortunate to work with the most dedicated and hard working group of people I know. I use the term “work with” instead of “work for” because not only do I work with Woody, Jeanne, Deb, Áine and Kristin, I work with all of you who volunteer countless hours. You work on professional development to better the profession, advocate for resources and policies to ensure the best education possible for all of Wisconsin’s children, and share through your network of colleagues. There are very few work environments that offer that kind of opportunity. All of my time with you on committees, the Board of Directors or one-on-one has taught me many things about leadership, creativity, relationships and having fun. I have certainly gained as much if not more than I have given. I have tremendous respect for the job that you do in your districts. You work long hours, often with little appreciation. You give up nights with your families to serve your communities. You work with limited resources to do the best for kids. You are expected to be an expert in so many areas. As the years have gone by I have seen your job become more and more challenging. Yet, you keep doing it. All of you make it easy to work “with” WASBO.

Who knew when I started stuffing envelopes for my father-in-law, Don Hafeman, at home with a house full of kids that I would still be here. When he retired as WASBO’s Executive Director and Don Mrdjenovich was hired, I told people he inherited me. With Don Mrdjenovich I started the WASBO office and worked half time for WASBO. Having staff allowed members to leave some of the detail stuff to us and use that energy to start building the association. Every time a member stopped in we acquired a new box. After eleven wonderful years and a lot of growth with Don, he retired and the WASBO Board gave us Woody. We have continued to grow with all of the new initiatives brought forward by you, our members. Only today we are fortunate to have an awesome team of Jeanne, Deb, Áine and Kristin. They too are dedicated, hard working, creative and fun! They care about WASBO and the things we do to support you as you do your job to educate children.

WASBO has given me the opportunity to learn each day and with every new endeavor. Most importantly, WASBO has given me hundreds of caring, compassionate, dedicated friends. Thank you!

P.S. I also know that if so many of you can work so hard to keep a secret to do something nice for me it would be best to keep you all as friends. From nominating me, to keeping me in the dark, to bringing my entire family in on the surprise - it is very clear that this is a very capable group of people. The alternative to having you as friends could be dangerous!



Tina Hafeman Friend of WASBO Award ~ Jerry Landmark

WASBO is pleased to present the 2013 Friend of WASBO award to Jerry Landmark, the Director of the School Financial Services Team at the Department of Public Instruction. Jerry has been a School Finance Consultant and served as the Director of the DPI’s Residential Schools. He also served as an Administrative Assistant for former Representative Jeannette Bell. His school experience goes back to his time as a junior high school social studies teacher. Jerry received this award for the many professional improvements he provided for Wisconsin schools in his school finance work. Many of these were technical or dealt with matters of efficiency.

However, Jerry’s initiatives to develop collaborative outreach between the DPI and WASBO members are what most enhanced the culture of leadership and professional networking between the two organizations. Jerry mentored all of us through his working examples of networking. This proactive collaboration has enabled WASBO members and the School Finance Team to deal with the significant changes in how we educate children and operate our schools. Thank you, Jerry, for always being there to help us with school finance questions, whether at conferences, Regional meetings or just personally, one on one. You helped all of us to become better school business officials.

We are proud to be Jerry Landmark’s friend and even prouder that Jerry has been a Friend of WASBO. WASBO thanks you, Jerry, for serving us so well.

What's Better Than Great Service from NIS? **Full Service.**

Now, you can rely on one source for your employee benefits from National Insurance Services, Inc., the public sector experts Wisconsin School Districts have known and trusted since 1969.

- Self-Funded and Fully-Insured Health Insurance
- Dental and Vision Insurance
- Life and Disability Insurance
- Tax-Advantaged Retiree Benefits and Payouts
- HRA and FSA Plans
- Onsite Medical Clinics
- Employee Benefit Trusts
- And More

Call us any time for your complementary consultation! We look forward to introducing our Wisconsin districts to this new suite of benefits.

800.627.3660

www.NISBenefits.com



Stephanie Laudon
Regional Vice President
slaudon@NISBenefits.com



Bill Enright
Director of Medical and Dental Insurance
benright@NISBenefits.com



Ken Zastrow
Market Development
kzastrow@NISBenefits.com

NATIONAL INSURANCE
SERVICES
Client Focused. Solution Driven.



ASBO Update

By Tom Wohlleber, Assistant Superintendent - Business Services,
Middleton-Cross Plains Area School District



Tom Wohlleber
ASBO International
Director

Thank you to everyone who generously donated and participated in the Silent Auction at WASBO's Spring Conference in Green Bay! Your support is greatly appreciated!

Oregon and Washington.

The Institute for Administrative Management (IAM) in the United Kingdom and Association of Business Managers in Victorian State Schools (ABMVSS) in Australia have recently signed affiliation agreements with ASBO.

2013 Annual Meeting & Expo

Registration is now open for ASBO's 2013 Annual Meeting & Expo (AM&E) in Boston, Massachusetts. In addition to Boston being one of the most popular venues for the AM&E, this conference promises to provide exceptional professional development as well as important information and strategies to address current issues such as health care reform and sequestration. The following are several of many reasons to attend this year's AM&E:

- Engage with top executives in school business management
- Expand your network of peers
- Develop skills that empower you to budget effectively despite the unknowns
- Build confidence in your ability to communicate effectively in high-stakes situations
- Discover creative solutions to common challenges that build efficiencies and reduce costs

ASBO has developed a tool to help build your case to attend the AM&E. This tool can be found at: <http://www.asbointl.org/AM/Template.cfm?Section=AnnualMeeting&Template=/CM/ContentDisplay.cfm&ContentID=7868>

Certificate of Excellence in Financial Reporting (COE) Program

The COE program reviews the accounting practices and reporting procedures used by school districts in their Comprehensive Annual Financial Reports (CAFR). The School District

of Kettle Moraine and Gateway Technical College were the 2012 COE program recipients from Wisconsin. Congratulations to these two entities for their commitment to excellence in financial reporting! I would like to challenge more Wisconsin school districts to participate in this valuable and well-recognized program.

Why should you participate in the COE program?

- **Credibility** — Validate your school entity's commitment to fiscal integrity.
- **Confidence** — Show your community your high-quality financial reporting.
- **Savings** — Achieve a better bond rating by disclosing what's requested for credit evaluations.
- **Transparency** — Share financial information above and beyond what GAAP requires.
- **Recognition** — Celebrate your achievement with your superintendent, school board, community, and the financial marketplace.
- **Feedback** — CAFRs are reviewed by professionals from governmental accounting and auditing in the fields of consulting, certified public accounting, and school system financial management.

More information on the Certificate of Excellence in Financial Reporting Program can be found at: <http://www.asbointl.org/AM/Template.cfm?Section=CertificateofExcellenceinFinancialReporting&Template=/CM/ContentDisplay.cfm&ContentID=5516>

Please contact me if you have any questions or would like to provide feedback or suggestions regarding ASBO.

I continue to be amazed at the support provided by my colleagues in WASBO and ASBO when students and their families are impacted by a major tragedy such as the recent tornado that struck Oklahoma. Oklahoma ASBO has established a Tornado Relief Fund to assist affected schools and students. More information on how to donate or help can be found on page 28.

ASBO International has launched the Global School Business Network (GSBN) pilot program. The Global School Business Network is a private online network that allows school business officials to leverage their most powerful resource, each other, to exchange information, ask questions, and solve problems in real time. Building on ASBO International's ConnectEd online networking platform, the Global School Business Network will allow members to communicate, network, and problem-solve with peers from one's own state to around the world. It also offers members access to online content, including industry news, blogs, reports, and other resources. Access to the global network will be a new, no-cost, benefit to state affiliate members, plus affiliates will be able to create affiliate specific groups and "microsites" to allow online professional networking at the state/province/country level. Pilot program affiliates include ABMVSS (Australia), Alabama, Alaska, Alberta, Arizona, IAM (United Kingdom), Maryland/DC, Minnesota,

Recognizing Excellence in Wisconsin's Students 2013 WASBO Foundation Scholarship Recipients



\$4,000 WASBO Foundation Scholarship Taylor Hayes, Pardeeville High School

Sponsored by 

Taylor has been accepted into UW-Madison's School of Nursing pilot program for new freshmen, based on academic record, extracurricular activities, and a strong commitment to a future in nursing. Only 20 to 25 students were accepted into the program. Taylor was a three-year member of Student Council, served as treasurer one year, and was a two-year member of the National Honor Society. She also was a peer tutor for students with learning disabilities. Taylor participated on the cross-country and track teams for four years, the dance team for two years, and the cheer team for one year. She earned varsity letters in each sport, and qualified for state in both cross-country and track. Taylor's volunteer work at Tivoli Residential Care Facility inspired her to pursue a career in nursing. She also plans a double major in Spanish and will work toward a Certificate in Global Health. Congratulations to Taylor and best wishes for a successful future.



\$4,000 WASBO Foundation Facilities Management Conference Scholarship Christopher Van Scyoc, Green Lake High School

Sponsored by  and 

Christopher graduated third in his class, and founded the Students Against Drunk Driving chapter at Green Lake High School. His proudest achievement has been producing a statewide public service announcement, Life After Death, about the consequences of distracted driving; and working with the Governor's office and Senator Luther Olsen's office to pass resolutions declaring May as Youth Traffic Safety Month in Wisconsin. He also spearheaded a shoe drive for Soles for Souls, collecting over 600 pairs of shoes to be distributed around the world. He is an accomplished runner, competing at state for cross country and track. As a musician, he qualified for state in vocal solos and African drum ensemble events. Chris will study business administration at UW-Madison, with hopes of a career in a non-profit public service group. We congratulate Chris and wish him the best as he pursues his goals.



\$3,000 WASBO Foundation Scholarship William Marshall, Kickapoo High School

Sponsored by 

Billy grew up on a small farm near Viola, Wisconsin. While at Kickapoo High School, he held many leadership roles including Class President for three years, FFA President for two years, 4-H President for three years, and a team captain in football. Billy served as a National FFA Delegate and a Wisconsin Youth Ambassador for the NRECA. Other accomplishments include eight varsity letters, three national appearances in FFA Career Development Event contests, and football all-conference lineman of the year for two years. Billy volunteers in his community and church and works with students competing in Special Olympics. Billy will attend Iowa State University in Ames, majoring in Agricultural Business. Congratulations to Billy and all the best for a successful future.



***\$3,000 WASBO Foundation Scholarship
David Finnemore, Westosha Central High School***

Sponsored by   Harris Bank

David was a member of the National Honor Society and graduated in the top 10% of his class. David was a three-sport athlete throughout high school, playing four years of football and basketball and two years of baseball and golf. He earned seven varsity letters and was co-captain of the basketball team for both his junior and senior years. He was recognized as a finalist for the WIAA Scholar Athlete award and was also recognized on the all-area basketball team. David was active in a variety of school and community activities, including serving as a leader in the Freshman Mentoring Program for three years, volunteering with his church youth group, and coaching youth basketball. David will attend the University of Wisconsin – Whitewater to major in Finance. We congratulate David and wish him the best for the future.



***\$1,000 WASBO Foundation Scholarship
Doniell Erickson, Fond du Lac High School***

Sponsored by   **and** Building Excellence

Doniell was a member of the Youth Leadership Fond du Lac program and was involved in many school activities including Key Club, Student Council, Student Senate and as an Ignition Mentor. She was a member of the National Honor Society and represented her class at Badger Girls State. She founded a Random Acts of Kindness group at her school. Doniell plans to attend Lawrence University in Appleton, and eventually pursue a doctorate in bacteriology and virology with the goal of working for the Center for Disease Control or the Center for Biosecurity. We congratulate Doniell and wish her the best as she continues her education.



***WASBO Foundation Business Official of the Year \$1,500 Scholarship
Presented in Honor of Keith Lucius, 2013 School Business Official of the Year
Nick Farley, Ashwaubenon High School***

Sponsored by  Liberty Mutual™

Nick was a member of Student Council and DECA, and was involved with Link Crew as a mentor to incoming freshmen. Nick received his school's Academic Letter and Community Service award. He has played baseball and lacrosse as well as four years of high school football. Nick plans to attend the University of Wisconsin - Oshkosh and enroll in its athletic training program. WASBO joins Keith in congratulating Nick and wishing him the best in his future.



***WASBO Foundation - Zastrow Award \$1,000 Scholarship
Presented in Honor of Gary Kvasnica, 2013 Zastrow Award Recipient
Lucas Mader, Kimberly High School***

Sponsored by  WISC
Wisconsin Investment Series Cooperative

Lucas was a four-year member of the Key Club and a three-year member of the National Honor Society. He graduated with Summa Cum Laude honors and was on the honor roll every term of high school. As a member of Promisemakers, Lucas pledged not to do alcohol or drugs while in high school. He also was a member of Free3, a group raising awareness of the effects of drugs, tobacco, and alcohol. Lucas participated in cross country and tennis, plays piano, and serves for a number of community groups and volunteer projects. Lucas will attend UW-Madison to study Elementary Education. Congratulations to Lucas and best wishes in his endeavors.

Recognizing Excellence in Wisconsin's Students 2013 WASBO Foundation Scholarship Recipients



***\$3,000 WASBO Foundation President's Scholarship
Presented in Honor of WASBO President Janice DeMeuse
Newton Smerchek, Luxemburg-Casco High School***

Sponsored by  **UnitedHealthcare**

Newton was a three-year member of the National Honor Society, served as Vice President, and graduated third in his class. Newton participated in football and wrestling for four years in high school, and was a two-year state wrestling champion. He was a member of the Social Studies Team for three years, and also participated in FFA and 4-H. Newton will attend Central Michigan University to study Education Administration, and will be on its wrestling team. Congratulations to Newton on what is certainly a bright future.



***Dr. Bambi Statz \$1,000 Academic Scholarship
Erin Timm, Wisconsin Heights School District, UW-Whitewater***

Sponsored by  **EHLERS**
LEADERS IN PUBLIC FINANCE

This scholarship is designated for someone working on a Master's degree in School Business Management and earning their 08 license. It was named in honor of Dr. Bambi Statz who retired as the Coordinator of UW-Whitewater's School Business Management Program. Erin currently is enrolled in the Master of Science in Education School Business Management program at the University of Wisconsin – Whitewater, and will complete her 08 Licensure as well. Erin earned her undergraduate degree in Management and Human Resources from the UW-Madison School of Business. She currently works as a payroll/AP administrative assistant for the Wisconsin Heights School District. In her application, Erin explained that her passion lies in the education field, and she intends to "pay it forward" through inspiring and assisting others who wish to build a career in school business management. Her wish is "to contribute towards opportunities for many more students to have an education that will be one of their building blocks to success." We are delighted to present this scholarship to Erin and offer our support as she pursues her goals. Congratulations!

New Directors and President-Elect Elected to WASBO Board



John Gahan
Assistant Superintendent
Pewaukee School District
Southeast Regional
Position: President-Elect
Term: July 1, 2013-June 30, 2014



Kathy Davis
Business Manager
Cambridge School District
Madison Area Regional Group
Position: Director
Term: July 1, 2013 - June 30, 2016



Jason Demerath
Director of Business Services
School District of Fort Atkinson
Madison Area Regional
Position: Director
Term: July 1, 2013-June 30, 2016



Kent Ellickson
Director of Business Services
Sparta Area School District
West Central Regional
Position: Director
Term: July 1, 2013 - June 30, 2016



What is an SIF and How Can It Help Me?

By Marty Suchorski, President, Oasys® LLC

Recently the Wisconsin Department of Public Instruction's (WDPI) decision to require

Marty Suchorski all school districts in the state to switch from their chosen Student Information System (SIS) to Infinite Campus was cancelled. The Joint Finance Committee of the Wisconsin Legislature voted to cancel the requirement and instead placed a requirement on the WDPI to develop a better data collection solution. This decision is pending approval by the Assembly, Senate and Governor. The Joint Finance Committee recognized that many districts were outraged by the loss of functionality, increased cost, and additional training requirements that would be incurred had this mandate been implemented. Districts have vastly different needs in a SIS based on variables such as district size and student demographic make-up, and districts have chosen their SIS vendors with care based on the individual needs of the district.

Assuming that districts may once again choose their own SIS vendor, a decision on how to upload data to the WDPI will be made. No decisions have been finalized yet. However, one very popular and commonly used solution by other states is SIF, or School Interoperability Framework. Developed by educators and educational technology providers, SIF is a technical blueprint that lets K-12 software applications interact and share data seamlessly. SIF is platform independent and vendor neutral, meaning districts can continue to use whichever SIS vendor they prefer, including "best-of-breed" vendors for specific segments of their Information System. SIF provides real-time data collection, so districts and the state can both have timely access to all

data. And, the cost to implement SIF is significantly lower than the cost that would have been incurred to migrate all districts to a single SIS vendor.

SIF provides for continuous data validation, resulting in fewer errors and data redundancy. SIF is flexible, and can be used by districts of any size. Because SIF results in data being uploaded to the state, it reduces the reporting burden on district staff and results in more efficient use of staff time.

Advantages of SIF – School Interoperability Framework:

Efficiency

- Allows for full functionality from chosen vendor
- Flexible
- Vendor and platform neutral
- More efficient use of staff time
- Reduced burden on districts for state reporting
- Improved timeliness of data
- Real-time access to critical information

Cost Savings

- Save money by using existing systems and infrastructure
- Maintains vendor competition resulting in better pricing
- Reduced support costs
- Reduced time needed to manage multiple data sources
- More efficient use of staff time

Accuracy

- Reduced redundancy of data and reduced data errors
- Reduced compatibility issues
- Continuous data validation

SIF is not the only method that can be used to share data between districts and the WDPI, but it is a common and widely tested method. SIF is currently being used successfully by 10 states.

If you have any questions about how SIF can work for Wisconsin, please contact me at marty@oasys-llc.com.

ASBO MEETING DATES

2013 Annual Meeting & Expo

Oct. 25-28, 2013 - Hynes Convention Center - Boston, MA

2014 Annual Meeting & Expo

Sept. 19-22, 2014 - Gaylord Palms Resort & Convention Center - Kissimmee, FL

2015 Annual Meeting & Expo

October 23-26, 2015 - Grapevine, TX

2016 Annual Meeting & Expo

September 23-26, 2016 - Phoenix, AZ

2017 Annual Meeting & Expo

September 22-25, 2017 - Denver, CO

2018 Annual Meeting & Expo

September 21-24, 2018 - Orlando, FL



WASBO 66th Annual
Spring Conference & Exhibits
Conference & Scholarship Golf Outing Sponsors



Platinum Sponsors



Gold Sponsors



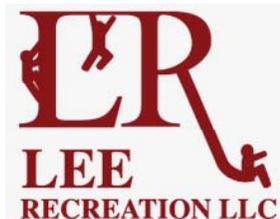
Silver Sponsors



Bronze Sponsors



Friend Sponsors



Is your insurance provider
a phone number or a partner?

Personal service. That's the
strength of our Community.



Community Insurance Corporation provides liability insurance coverage for cities, towns, villages and school districts. We offer broad coverage, designed to specifically meet the needs of Wisconsin public entities under ONE single liability policy form to include:

- General Liability
- School Board Legal Liability
- Auto Liability
- Public Officials Errors and Omissions

Unlike other insurance companies that provide coverages based solely on price and are not heard from again until renewal time, we work directly with our clients in partnership to control their insurance costs through a unique risk management and aggressive claims philosophy. And because we are local government, we always keep the end goal of saving taxpayer dollars in mind.

Take control of your insurance needs with Community Insurance Corporation. It just makes sense.



To learn more, please contact Kim Hurtz, Aegis Corporation,
1.800.236.6885 or kim@aegis-wi.com

Upcoming Events

Save with Professional
Development Coupons
WASBO.com/coupons

Professional Development

WASBO New School Administrator & Business Support Staff Conference (Year of Success)

August 13-14, 2013, Holiday Inn, Stevens Point (Viterbo Credit)

WASBO Fall Conference

October 3-4, 2013 - The Osthoff, Elkhart Lake (Viterbo Credit)

ASBO International Annual Meeting & Expo

October 25-28, 2013 - Hynes Convention Center, Boston, MA (Viterbo Credit)

Midwest Facility Masters Conference & Exhibits

November 14-15, 2013 - Kalahari, WI Dells (Viterbo Credit)

Winter at a Glance (Year of Success)

December 3, 2013, Marriott Madison West, Middleton

WASBO/WASPA School Personnel Academy

December 4-5, 2013, Marriott Madison West, Middleton (Viterbo Credit)

WASB-WASDA-WASBO State Education Convention

January 22-24, 2014, Wisconsin Center, Milwaukee (Viterbo Credit)

DPI-WASBO-WCASS Federal Funding Conference

February 24-25, 2014, Kalahari, WI Dells (Viterbo Credit)

WASBO Facilities Management Conference

March 13-14, 2014, Kalahari, WI (Viterbo Credit)

WASBO Transportation & Bus Safety Conference

March 13, 2014, Kalahari, WI Dells

WASBO Accounting Conference

March 19-20, 2013, Marriott Madison West, Middleton (Viterbo Credit)

WASBO Spring Conference

May 20-23, 2014, Kalahari, WI Dells (Viterbo Credit)

Scholarship Fundraisers

Fall Golf Outing

October 2, 2013 - Autumn Ridge Golf Course

Certified School Risk Managers (CSRM) Courses (Viterbo Credit)

School Safety from A to Z (Designation Update Credit)

September 18, 2013 - Wisconsin School Leadership Center, Madison

Fundamentals of Risk Management

October 7, 2013 - Holiday Inn, Stevens Point

Handling School Risks

October 8, 2013 - Holiday Inn, Stevens Point

Measuring School Risks

November 4, 2013 - Holiday Inn, Stevens Point

Funding School Risks

November 5, 2013 - Holiday Inn, Stevens Point

Administering School Risks

December 3, 2013 - Holiday Inn, Stevens Point

Visit WASBO.com
for future WASBO Professional
Development & Networking!



6th Annual
MIDWEST
Facility Masters
CONFERENCE

November 14-15, 2013
 Kalahari Resort &
 Conference Center
 Wisconsin Dells, WI

SAVE the DATE

Career Development and Educational Training for those responsible for Facilities, Operations, Safety, Risk Management and School Finance.



**Let's Get Personal
 It's All About You,
 Your Skills and Abilities**

Personal Accountability

Individual accountability, the alternative to victimhood, is the first requirement for individual and organizational success. Accountable people recognize the impact of outside factors on them and their situations. They also understand that the choices they make about those outside factors are often more powerful and have more impact on them than the factors themselves.

When it comes to leadership & personal accountability, Jim Bearden, CSP, speaks from experience. From College Class President to Marine Officer to President of the Bearden Resource Group, Jim has been leading people for over 40 years.



Jim Bearden

*Now, more than ever, you are being called upon to be a leader in your school district. Attend this conference to enhance your leadership skills with **Knowledge & Networking.***

General Sessions

- Personal Accountability, Jim Bearden, CSP
- Idea Exchange: Sharing Challenges and Solutions

Learn from Peers and Industry Experts about

- Auxiliary Services
- Best Practices in School Facilities
- Leadership
- Learning Environment
- Operations
- Safety, Security & Risk Management
- SchoolDude User Training & Lab
- Technology, Social Media & Communication
- Unfunded Mandates

Registration and Sponsorship

Exhibitor Registration Open July 1, 2013
 Attendee Registration Coming July 2013
WASBO.com/FacilityMasters

Limited scholarships are available.

Hosted By



In Participation With



For information on registration or sponsorship opportunities call 608.249.8588.



Debby Schufletowski



Dan Walker

Audit Preparation: Start Preparing for Your Audit Now!

By Debby Schufletowski, School Business Specialist, Robert W. Baird & Co. and Dan Walker, Partner, Wipfli LLP

With the end of the fiscal year quickly approaching, audit time will be here before you know it. There are many things a district can do now to make the audit process smoother, more efficient and potentially more cost-effective.

so if you're not sure how to run or interpret a balance sheet report, be sure to ask for help.

week before the audit, as it can be quite time-consuming.

- **Review last year's audit and management letter** – The recommendations from your district's 2011–2012 audit provide a starting point for your 2012–2013 audit.
- **Review the auditor's journal entries from previous fiscal years** – If there were errors or unresolved items in previous years' entries, make sure they are corrected for this year. Reviewing previous journal entries may also point to 2012–2013 claims that can be resolved before the auditors arrive.
- **Make sure cash is reconciled** – Cash reconciliation (all district bank accounts) should be done monthly, so if you're behind, take time now to get caught up. Any discrepancies will be harder to find – and resolve – when under the time constraints of audit preparation.
- **Review your balance sheet** – If asked, could you justify the entirety of your balance sheet? (Are all of your liabilities reasonable, like dental and health care? Have all of the receivables from last fall been cleared upon receipt?) This is an important document to your audit,

- **Identify rejected accounts and previous errors on the district's annual report** – Correcting rejected accounts now can expedite the annual reporting and audit processes. It's worth checking if your financial software allows you to make a test run with current year data. Make the necessary adjustments for reclassifications and clean up all audit errors for your annual report with adjustments.
- **Review current year financing activities** – If the district issued new debt or entered into a new lease, have all of the documentation available.
- **Review WUFAR coding with your auditors or DPI** – If you're unsure if something is coded correctly, ask now and avoid the summer rush.
- **Miscellaneous revenue and expense** – Most items in miscellaneous revenue and expense accounts are usually reclassified to more appropriate accounts by the auditor. Go over these accounts and use the WUFAR manual to reclassify what you can before the audit.
- **Journal entry backup** – Make sure you have support and backup for adjusting journal entries made throughout the year and at year-end.
- **If you haven't already, start your GASB 34 fixed asset inventory entry now** – Don't save this until a

- **OPEB benefits and pension benefit actuary studies** – Make sure all of your actuarial studies are current for the current year audits. These need to be redone every 2-3 years, depending on your district size. Having current studies completed at the start of the audit is very helpful.
- **Review salaries and benefits charged to Fund 27** – Make sure that individuals charged to Fund 27 are appropriately licensed.
- **Review changes to salaries and benefits** – Have available all documentation related to changes in salary schedules and employee benefits. This would include changes to post retirement benefits as well.
- **Review open purchase orders** – If there are any POs you can liquidate, do it!
- **Contact others involved** – Preparing for an audit can be time-consuming. Remind those involved of the coming audit and their responsibilities. Colleagues who are new will appreciate the heads-up. Attempt to avoid vacations of anyone involved in the audit process for that week.
- **Create an audit folder** – As you identify items the auditor will need, put them in an audit folder (either hard copy or electronic). Then, when the audit is nearer, you only need to pull out the folder and fill in the gaps. Some of the documents

Continued on page 22

you should include are the original budget, revised budget, time and effort paperwork, board minutes, grant claims and both 2011-2012 and 2012-2013 receivable and payable documentation. Auditor requests from last year should also be addressed, including special educators' licenses, teacher contracts, legal bills and invoices for maintenance services.

- **Prepare the materials in advance** – Your auditors will likely forward you a list of items and documents they need. Consider gathering these materials ahead of time so they are available on audit day. When this practice was recently applied by one Wisconsin district, their auditor replied enthusiastically, "It's like Christmas!"

The course of an audit may not always run smoothly, but preparing ahead of time can make the process easier and more efficient for everyone.

Service Affiliate Checklist

- Renew your Membership for July 1, 2013-June 30, 2014 at WASBO.com/renew
- Sponsorship Opportunities at WASBO.com/sponsor
 - New School Administrator & Business Support Staff Conference
 - Fall Conference
 - Midwest Facility Masters Conference
 - WASBO/WASPA School Personnel Academy
- Call for Presentations at WASBO.com/present
 - Transportation & Bus Safety Conference due September 15
 - Facilities Management Conference, Accounting Conference and Spring Conference due September 30
- Exhibitor Registration Open for Midwest Facility Masters Conference at WASBO.com/facilitymasters
- Taking Care of Business Articles due July 31 for August issue - send to Tina at hafeman@wasbo.com.
- Advertise in Taking Care of Business - contact Aine at calgaro@wasbo.com.
- Update your profile and Buyer's Guide categories at WASBO.com
- Join a WASBO Committee

WASB/WASBO School Budget Cycle Handbook

- Comprehensive handbook written by experienced, Wisconsin school finance experts.
- Understand the school district budgeting process – from strategic planning to preparation, presentation, administration and evaluation.

Visit WASB.org for complete information.



Congratulations to 2013 Spring Conference Booth Theme Winners

1st Place

Key Benefit Concepts

(Receives free exhibit booth for 2014 Spring Conference)

2nd Place

A'viands

(Receives free golf hole sponsorship for 2014 Spring Golf Outing)

3rd Place - Tie

Rinderle Door and

General Communications

(Receive free golf registration for 2014 Spring Golf Outing)

WASBO 66th Annual Spring Conference in Pictures



WASBO Past Presidents and Guests



Mark Pepera, ASBO Director



Betty Zimdars, Howard-Suamico SD, was presented with the ASBO Meritorious Budget Award by ASBO Director Tom Wohlleber



President's Recognition Dinner



Biking the Bay Trail for Student Scholarships



Golfing for Student Scholarships



Exhibitors Raced for Excellence!



Nine Scholarships were Presented



Networking, Networking, Networking



Susan Graham Balzar, Kettle Moraine SD, was presented with the ASBO Certificate of Excellence by ASBO Director Tom Wohlleber



President Janice DeMeuse welcomed President-Elect Lynn Knight to her year as President in 2013-14 and honored Past President Wendy Brockert



2013 Recipients of the Facilities Manager Certification



2013 Recipients of the Certified School Risk Manager CSR Designation



Learning, Learning, Learning



Over 60 Professional Development Sessions





Lynn Knight
WASBO
President-Elect

President-Elect's Corner

Is This Really Happening!!!

By Lynn Knight, Business Manager, School District of Nekoosa

I'm sure I'm not the first President-Elect to feel the pit in his/her stomach and I know I won't be the last to feel this way. But seriously.....IS THIS REALLY HAPPENING!!!

All kidding aside, I am extremely honored to be serving as your next President of WASBO. As I was looking at the names of the past presidents I realize that I have some very large shoes to fill. I hope that I live up to the task. I will do my best to honor the position and give my all. So let's get to work!

First of all, I would like to thank our current President, Janice DeMeuse. Having the opportunity to work with Janice this past year has been invaluable. Janice has the ability to look at issues from all angles and after thoughtful reflection, presents her views to the membership in a clear and concise manner. I am very thankful to have Janice to lean on in the next year.

At the Spring Conference I had the opportunity to focus and talk about WASBO's strategic plan. So much work has been done up to this point already! Now it's time to put it all together in a formal document. My hope is that once the document is created, it will be a working tool for future board members as well as a guide for the entire membership.

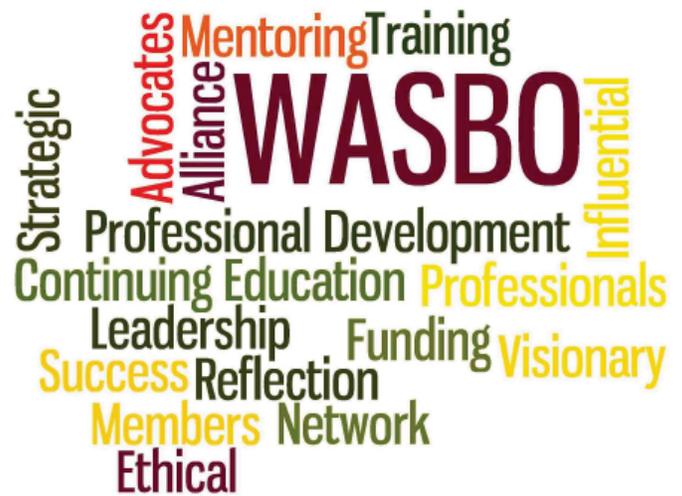
So how did this "formal document" all come about? Part of the incoming President's job is to review the strategic plan, review where we've been, and plan where we are going. This task typically begins at the April board meeting,

and individuals who are responsible for completing that goal. The board is hoping to have the strategic plan document ready to share with the membership within six months. So as you can see, we have a lot of work to do and I'm counting on the membership to help us out!

During our last April board meeting in Manitowoc, we began by reviewing the mission statement, the vision statement, and the belief statements. After a lively discussion it was determined that all of the statements continue to represent WASBO's effort so they were left as is. Have you ever heard the saying "You don't know where you're going if you don't know where you've been"? That's how we approached the strategic plan. We reviewed past membership surveys, past service affiliate surveys, past board evaluations, past strategic plan documentation, and WASBO's historical information that was compiled by the WASBO staff. All of this information and the vision, mission, and belief statements were included in formulating the shell of the strategic plan. From all this information, three elements of WASBO were consistent and became the basis for our strategic plan: professional development, advocacy, and networking. All three of these elements are also stated in our mission statement.

Once draft goals were developed and written, we took them to the membership at the Spring Conference. We asked the membership to rate the goals and to comment on anything we were missing. To be sure we captured all of the membership, the survey was also e-mailed to the membership. Our next step is to review the surveys and finalize the goals which will include activities to meet that goal, a timeline,

Another task for the President-Elect is to think of a theme that represents WASBO and the work that we have done or plan to do. This is a much more stressful task than it appears! After a lot of thinking and reflecting on the past and future, I felt that in some ways public education was being taken



for granted. And that's ok. None of us are in public education for fame, glory, or wealth. We're here for our kids. We're here to be sure they have the best learning experience of their lives. We're here to help them be successful. So our theme for the next year will be "Public Education – Where Success Begins."

I'm looking forward to a very busy 2013-2014!



Past President's Corner

What an Adventure

By Wendy Brockert, Business Manager, Lake Mills Area School District

Wendy Brockert
WASBO
Past President

Thank you for your support, involvement and dedication to WASBO. I am completing my seventh year on the WASBO Board. It is amazing when

I look back at all of the activities our organization has accomplished over the last seven years. Woody has been very good of reminding us each year of what we have accomplished. Some of the changes include a growth in our membership, conference offerings and ASBO involvement. We have also added Peer to Peer, Investing in Wisconsin Public Schools and

revamped Mentor Program to name a few. We have many opportunities for our members and many reasons to be proud. My time on the WASBO Board may have come to an end, but my involvement in WASBO is not over. I look forward to networking with you and continuing to grow professionally.



2013 Facility Manager Certification Recipients

Jeff Belott
Supervisor of Maintenance
D C Everest

Brian Bodenstein
Maintenance Director
Highland

Mike Bos
Supervisor of Buildings & Grounds
Waupun

Robert Crawley
Custodian
Muskego-Norway

Mark Dahlberg
Maintenance Director
Solon Springs

Dan Dahlquist
Director of Buildings and Grounds
Onalaska

Paula Deden
Supervisor
Wilmot UHS

Richard Fechter
Buildings & Grounds Custodial
Supervisor
Menomonee Falls

Tony Goodenough
Facilities Coordinator
Saint Veronica

Jeff Grunwald
Facilities Manager
Swallow

Carol Harris
Business Manager
River Ridge

Bryan Holman
Transportation/Facilities Director
Fall Creek

Jeff Jacobson
Director of Facilities Services
Beloit

Greg Johnson
Maintenance Team Supervisor
Altoona

Brian Jones
Director of Operations & Maintenance
Richland

Mike Nowak
Custodian
Muskego-Norway

Dan O'Brien
Project Manager
Racine

Gary Olsen
Director Building & Grounds
Burlington

Robert Pirk
Operations Supervisor
Racine

Jessica Schroeder
Environmental Health & Safety Team
Manager
CESA #10

Jamie Scofield
Director of Buildings and Grounds
Grafton

Brad Stacey
Director of Buildings and Grounds
Waterloo

Veronica VanDerhyden
Business Manager
Adams-Friendship



Hold Harmless Agreements

By Marty Malloy, Area Vice President-Client Development, Arthur J. Gallagher Risk Management Services, Inc.

Submitted on Behalf of the WASBO Safety & Risk Management Committee

Marty Malloy

The use of hold harmless agreements is an effective method to reduce risk for a school district. However, if used in a manner which seems to indicate that the school district is only interested in protecting its own interests and does not show concern for students or parents, they can become a public relations problem.

I have attached two sample forms actually used at a school district.

Form 1 (at right): This form is used for field trips and other events involving

students and/or parents. This form is well drafted, because it takes the emphasis off the hold harmless portion of the agreement. It emphasizes the safety of the student during the activity. It also offers general information about the activity itself. Note the statement on the bottom of the form: "Thank you for your time and effort to help us make this a safe activity!" It puts the emphasis on safety and happens to include a hold harmless agreement.

Form 2 (below): This form is used for non-student participation events. This could include outside groups using the

school's facilities. Its focus is clearly to protect the district.

I like this dual approach; a form for student activities that focuses on safety that includes a hold harmless agreement and a separate form for non-student activities that focuses on protecting the district.

Finally, these are just sample forms from one school district. Please remember, hold harmless agreements are legal documents. You should have any legal document reviewed by counsel before the document is used.

FORM 2

HOLD HARMLESS AGREEMENT

_____ hereby agrees to protect, defend, indemnify and save harmless and reimburse _____ School District _____, its Board, officers, agents and employees (hereinafter referred to collectively as _____ School District _____) from and against any and all loss, claims, lawsuits, liability, expenses and attorneys' fees and costs of any kind and nature whatsoever, which _____ School District _____ may incur arising out of or in connection with any claimed damage to, loss or destruction of property of the School District or of others or because of claims, demands, lawsuits, actions, settlements, or judgments whatsoever for bodily injury, sickness or disease, including death, sustained by any person resulting from or in connection with or by reason of the use of said _____ School District _____ by me or my guests or invitees, or those of any organizations for which an agent has signed this Agreement, including any such claim or proceeding based in whole or in part on any alleged negligence, strict liability, contribution, indemnity or other allegation against said _____ School District _____ except the sole and exclusive conduct of _____ School District _____. The party intends this indemnification to be given its broadest application to all claims.

Dated this _____ day of _____, 20_____.

Signature

Form 1
School District
ASSUMPTION OF RISK/ PERMISSION TO PARTICIPATE

(District staff member completes this portion of the form)

Staff/volunteers chaperoning this activity _____

One of the following methods will provide transportation for this activity: (check \checkmark one below)

- Approved District (circle one) **bus van car** driven by district staff or approved volunteer
- Private vehicle: driven by (circle one) **district staff approved volunteer parent volunteer**
- District is not providing transportation. Parents to make their own transportation arrangements
- Other (e.g. – walk, metro bus, transportation by another agency)

(Parent/Guardian completes this portion of the form-Please PRINT OR TYPE)

As a parent or guardian of a student requesting to voluntarily participate in a school district approved field trip/activity, I hereby acknowledge that I have read, understood and agreed to the following:

I hereby give my permission for _____, who attends _____,
(Student's name) (School)

_____ to participate in a field trip on _____ for the purpose of _____
(School) (Date) (Field Trip/Activity)

Student's address: _____ City _____

Student's home phone # _____ Date of birth: _____

Please list medical conditions, medication information or allergies school district/staff member should be aware of:

In the event of an emergency, I wish the following person(s) to be notified in case I cannot be contacted:

_____ Phone #: _____
(Alternate family member/guardian) (Work/home)

I understand that the school district will make every reasonable effort to provide a safe environment. I hereby consent to my child participating in these activities.

Signature of parent/guardian

Date

Work phone

Home phone

Waiver of Liability

I acknowledge that this activity entails known and unanticipated risks which could result in physical or emotional injury, paralysis or death, as well as damage to property, or to third parties. I understand that such risks simply cannot be eliminated without jeopardizing the essential qualities of the activity and hereby agrees to protect, defend, indemnify and save harmless and reimburse [District Name] its Board, officers, agents and employees (hereinafter referred to collectively as the School District) from and against any and all loss, claims, lawsuits, liability, expenses and attorneys' fees and costs of any kind and nature whatsoever, which School District may incur arising out of or in connection with this activity.

I certify that my child has no medical or physical conditions, as noted above, which could interfere with his/her safety in this activity and I authorize qualified emergency medical professionals to examine and in the event of injury or serious illness, administer emergency care to the above named student. I understand every effort will be made to contact me to explain the nature of the problem prior to any involved treatment.

In the event it becomes necessary for the school district/staff member to obtain emergency care for my child, neither the staff member nor the district assumes financial liability for expenses incurred because of the accident, injury, illness and/or unforeseen circumstances.

Signature of parent/guardian

Date

Thank you for your time and effort to help us make this a safe activity!

WASBO Certified School Risk Managers Program



Register at WASBO.com/riskmanagement

Curriculum & National Designation provided by



THE NATIONAL ALLIANCE
for Insurance Education & Research



Who Should Attend?

Risk managers, facility managers, business managers, safety personnel, HR personnel, insurance providers and agents who work in school risk management.

Courses Available Online and In Person

Viterbo Credit Available
Contact the WASBO office for more information

Fundamentals of Risk Management

October 7, 2013, Stevens Point, Holiday Inn

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

Handling School Risks

October 8, 2013, Stevens Point, Holiday Inn

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

Measuring School Risks

November 4, 2013, Stevens Point, Holiday Inn

Learn the mechanics of developing, forecasting, and trending losses to be used in determining insurance program retentions and deductibles.

Funding School Risks

November 5, 2013, Stevens Point, Holiday Inn

Examine various loss funding techniques, including guaranteed cost programs, deductibles and retention programs, pools, and transferring risk through contracts.

Administering School Risks

December 3, 2013, Stevens Point, Holiday Inn

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

Certification Update Credit

School Safety from A to Z

September 18, 2013, Madison, Wisconsin
School Leadership Center

Understanding the vast amount of risks a school undertakes on a daily basis is not an easy task. The risks range from understanding how to respond to crises related to disgruntled students and the public all the way to environmental issues such as a staph infection outbreak. This course will address safety from the inside out so you can proactively approach risk and avoid the costly consequences of reacting to incidents and accidents.



School Nutrition Made Easy

Specializing in providing schools with customized food service management solutions to **REDUCE COSTS** and **INCREASE PARTICIPATION.**

Purchasing Power • Staff Development • Leadership Training
Nutrition Education • Financial Expertise

Great People - Great Food

888-872-3788

www.aviands.com



A'viands
FOOD & SERVICES MANAGEMENT

If You Would Like to Help Oklahoma Schools

If you would like to send a donation, please mail funds to:

OkASBO School Tornado Relief Fund
14121 S. 248th East Ave.

Coweta, OK 74429

You may also contact the OkASBO office at 918.279.0301.

2013 Certified School Risk Managers (CSRM) Designees



Michael R. Anderson, CSRM
Risk Manager
Ansay & Associates, LLC

Susan A. Balzer, CSRM
Chief Business Officer
School District of Kettle Moraine

Joseph B. Bellomo, CSRM
Director, Facilities Safety Coordinator
Waunakee Community School District

Michelle L. Brown, CSRM
School Business Manager
Trevor-Wilmot Consolidated School District

David A. Elliott, CSRM
Supervisor of Buildings/Grounds/Safety
Menasha Joint School District

John E. Gahan, CSRM
Assistant Superintendent
Pewaukee School District

Jeffrey W. Mahoney, CSRM
Business Manager
School District of McFarland

Beth M. Matysik, CSRM
Area Vice President
Arthur J. Gallagher

Jill M. Montee, CSRM
Workers Compensation Specialist
Racine Unified School District

Timothy A. Patterson, CSRM
CSR
Ansay & Associates, LLC

Diane N. Pertzborn, CSRM
Director of Business Services
DeForest Area School District

Jessica L. Schroeder, CSRM
EHS Program Manager
CESA 10

Patty L. Sprang, CSRM
Business Manager
School District of Mishicot

John B. Stangler, CSRM
Director of Buildings & Grounds
Pewaukee School District

Leah J. Theder, CSRM
Finance Manager
School District of Phillips

Noel A. Tordsen, CSRM
Supervisor of Financial Services
Wausau School District

Thomas E. Wohleber, CSRM
Assistant Superintendent
Middleton-Cross Plains Area School District

Dale C. Zabel, CSRM
Director of Facility Services
School District of Kettle Moraine

WASBO Sends Help to Moore, Oklahoma

On May 20, 2013 the community of Moore, Oklahoma was struck by an EF5 tornado. Homes and businesses were destroyed and lives were lost. WASBO members Sandy and Doug Malliet felt the pain of this community and Doug remembered a tornado experience he had in Barneveld, Wisconsin years ago. They chose to volunteer their time and trailer to travel to Moore with supplies for the Moore Public Schools. We sent out a call to the WASBO membership and they answered with boxes and boxes of school supplies and over \$1,000 in cash donations, including an elementary school penny drive.

The Oklahoma State School Boards Association (OSSBA) served as the collection point for the Moore School District. The district sustained damage

to 30 of their buildings, affecting 20,000 students. The damage included the destruction of two schools and the district office.

Doug and Sandy left the WASBO office on June 13 and arrived at the OSSBA on June 15. This was later than planned since they had to spend a night north of Kansas City with car trouble. Due to the late arrival there was no help unloading but they accomplished the task in 45 minutes - wow! They arrived home about 1:30 am on June 16.

We have heard words of appreciation from our colleagues in OkASBO and know the supplies will be put to good use.

Thank you to all who helped make WASBO's participation possible.



Nancy Liverseed (Columbus SD) & Kristin Hauser (WASBO)



Derek Draeger
(Miron Construction)



Jeanne, Aine & Deb
(WASBO) and Ann Broske
(WEA Trust)



Doug and Sandy loaded and ready to leave WASBO Office. Two more stops and then off to Oklahoma!



Oklahoma drop off!



Mistakes

By Don Mrdjenovich, Retired WASBO Executive Director

If you have never made one, stop here. If you have, you can get on the

Don Mrdjenovich bus with the rest of us, assuming you have not already been thrown under the bus because of some one else's mistake. As I watch our government in action, I see an increasing tendency to use spin to cover up mistakes. The usual outcome results in no one being held accountable, or some lower level person taking the fall. How we handle our mistakes is a true measure of our character.

In the real world we all make mistakes. In those instances, we either pass the character test or we don't. It seems that there are two kinds of mistakes, those classified as "honest" and the others, fall into a number of classifications. Honest errors are best classified as unintentional. Those are the kind that most of us experience. They are

also the kind we can overcome if we assume responsibility, take corrective action, and most importantly, don't repeat them.

In our work environments we have no choice but to manage mistakes, both our own and those made by others. We don't like to have to deal with either, but we can't avoid it. We are judged by others on how we handle both. In the case of our own, it is always best to be truthful and forthcoming, followed by an explanation of how we plan to take corrective action. We are also judged by how we address the mistakes of others.

If the mistakes made by our colleagues are not of a criminal nature or purposefully harmful, it is seldom productive or helpful to add to the problems created by joining in a chorus of condemnation or criticism. In a healthy organization colleagues ask themselves how they can help solve

the problems or repair any damage that may have been created by others. We need to be reminded that unless we are negatively motivated, we don't make mistakes on purpose, nor do our co-workers. No form of satisfaction is gained by making mistakes.

Mistake management, (I just made that up), is not taught, but it is soon learned on the job. While the mistakes you encounter may vary significantly in scope and importance, if you are a team player, it is your job to set about helping to correct or mitigate the damage. Let others cast the stones. In a recent Brewer ball game I watched three multi-million dollar players watch a pop up fall within easy reach. None offered a "my bad" signal, but the team carried on. I believe it was Vince Lombardi who said, "Never carry failure forward." Good advice for all of us, on the field or in the office.

"Everybody gets so much information all day long that they lose their common sense."

~ Gertrude Stein

P B B S
EQUIPMENT CORPORATION

YOUR BOILER ROOM EXPERTS

ENGINEERING | CONTROL UPGRADES | VESSEL REPAIR | SERVICE

- Boilers – Cleaver-Brooks, Raypak, Columbia
- Hot Water Heaters – Armstrong, Raypak
- Controls – Cleaver-Brooks, Autoflame, Hays Cleveland
- Burners – Cleaver-Brooks, NatCom, Webster, Limpsfield

24/7 Service Available
800-236-9620 | 262-252-7575

pbbs.com



"Adopt the pace of nature: her secret is patience."

~ Ralph Waldo Emerson



Michael Julka



Andrew DeClerc

October 1, 2013, Deadline for Providing Health Insurance Marketplace Notice:

DOL Updates Model COBRA Notice

By Michael Julka, Partner, Boardman & Clark LLP and Andrew DeClerc, Associate, Boardman & Clark LLP

Reprinted with the permission of Boardman & Clark LLP

The opening date for Wisconsin's federally facilitated health insurance exchange is fast approaching. Enrollment for coverage through the exchange is scheduled to start on October 1, 2013, with coverage for individuals who enroll slated to begin on January 1, 2014. The exchange, which is also being referred to in recent guidance as the "Health Insurance Marketplace," is the centerpiece of the Patient Protection and Affordable Care Act. It is designed to provide individuals and employees of small businesses with access to affordable coverage through a competitive private health insurance market. In addition, certain qualifying individuals will be eligible for premium tax credits to assist in the purchase of coverage through the Marketplace. This article discusses a mandatory notice that employers, including school districts, must provide their employees regarding the Marketplace, as well as changes to the Department of Labor (DOL) model COBRA notice that are designed to provide information regarding the Marketplace to COBRA qualified beneficiaries.

Mandatory Employer Notice to Employees Regarding the Health Insurance Marketplace

To promote the Health Insurance Marketplace to the public, the Affordable Care Act requires most employers, including school districts, to provide their employees with a written notice providing details regarding their

coverage options. The DOL recently updated its guidance regarding this notice and set a compliance deadline of October 1, 2013 (which corresponds with the beginning of the open enrollment period for the Marketplace).

The required notice must provide employees with specific information regarding the Marketplace. In particular, it must:

- Inform the employee of the existence of the Marketplace, including a description of the services provided by the Marketplace, and the manner in which the employee may contact the Marketplace to request assistance;
- Provide information regarding eligibility for a premium tax credit if the employer plan's share of the total allowed costs of benefits provided under the plan is less than 60% of such costs; and
- Notify the employee that, if coverage is purchased through the Marketplace, the employee may lose the employer contribution (if any) to any health benefits plan offered by the employer and that all or a portion of such contribution may be excludable from income for Federal income tax purposes.

The notice requirement applies to any employer that is covered by the Fair Labor Standards Act, which means that it applies to school districts. The notice is required even if the school district does not offer a health plan to its employees. The notice must be provided to each employee, regardless

of plan enrollment status (if applicable) or of part-time or full-time status. School districts are not required to provide a separate notice to dependents or other individuals who are or may become eligible for coverage under the plan but who are not employees.

The DOL has provided two model notices, which school districts may use to meet the notice requirement:

- Model notice for employers who offer a health plan to some or all employees, available at <http://www.dol.gov/ebsa/pdf/FLSAwithplans.pdf>.
- Model notice for employers who do not offer a health plan, available at <http://www.dol.gov/ebsa/pdf/FLSAwithoutplans.pdf>.

As noted, the deadline for complying with the notice requirements is October 1, 2013. (Originally, the deadline was scheduled to be March 1, 2013, but the effective date was delayed to provide employers with additional time for compliance.) Current employees will have to be provided with the notice before October 1, 2013. Employees hired on or after October 1, 2013 will have to receive the notice at the time of hire. For 2014, the DOL will consider the notice to be provided at the time of hire if it is provided within 14 days of an employee's start date. The notice is required to be provided:

- Automatically, free of charge;
- In writing in a manner calculated to be understood by the average employee; and

Continued on page 32

- In a way that is likely to result in full distribution, such as in-hand delivery or first-class mail.

The notice may be provided electronically if the requirements of the DOL's electronic disclosure safe harbor are met (see 29 C.F.R. § 2520.104b-1(c)). Regardless of the delivery method, school districts should adequately document their compliance with the notice requirement.

When distributing the notice to employees, school districts should be prepared to answer questions regarding the coverage they offer employees, including whether that coverage meets the minimum value and affordable coverage standards under the Affordable Care Act. The DOL's model notice includes space for information regarding the coverage offered by the employer, as well as a box to check to indicate whether the coverage meets the minimum value and affordable coverage standards. The notice informs employees that, if coverage does not meet those standards, they may be eligible for a premium discount for coverage purchased through the Marketplace. (Under the Affordable Care Act's pay-or-play rules, if a school district's employees are eligible for a premium discount because they are not offered coverage that meets the minimum value and affordable coverage standards and they purchase coverage through the Marketplace, the school district may face a penalty.)

Updated COBRA Notice

In addition to providing guidance on the Health Insurance Marketplace notice requirement, the DOL has also issued an updated model COBRA election notice that includes new provisions regarding the Marketplace. COBRA will continue even after the Marketplace is established, but it is

possible that individuals who qualify for coverage through COBRA might prefer to purchase coverage through the Marketplace. For example, an individual who qualifies for a premium tax credit may opt to seek coverage through the Marketplace rather than COBRA if the premium tax credit makes coverage through the Marketplace a more affordable option. The purpose of the revised model COBRA notice, therefore, is to make those who qualify for COBRA aware of coverage options available through the Marketplace.

The revised notice also includes several additional revisions related to health care reform. For example, it revises the information regarding preexisting condition exclusions to be consistent with the Affordable Care Act's prohibition on such exclusions. The revised notice also eliminates the discussion of the Health Coverage Tax Credit, which will expire at the end of 2013.

As with the earlier model, in order to use this model election notice properly, the plan administrator must complete it by filling in the blanks with the appropriate plan information. Use of the model election notice, appropriately completed, will be considered by the DOL to be good faith compliance with the election notice content requirements of COBRA. The new COBRA model election notice is available here: <http://www.dol.gov/ebsa/modelectionnotice.doc>.

A redline version of the new notice (showing the changes) is also available: <http://www.dol.gov/ebsa/modelectionnoticeredline.doc>. For school districts that use their own custom COBRA election notice, this redline version may assist in updating that custom document. (Many plans choose to start with the DOL's model,

and then customize it to address plan-specific details or to clarify certain items not addressed in detail in the model.) These updates are not mandated by the DOL's new guidance, but making the changes is still advisable to keep custom notices consistent with the contents of the DOL model.

Disclaimer: Boardman & Clark LLP provides this material as information about legal issues and not to give legal advice. In addition, this material may quickly become outdated. Anyone referencing this material must update the information presented to ensure accuracy. The use of the materials does not establish an attorney-client relationship, and Boardman & Clark LLP recommends the use of legal counsel on specific matters.

For more information contact Michael Julka, partner, mjulka@boardmanclark.com or associate, Andrew DeClercq, adeclercq@boardmanclark.com, 608.257.9521.

"I can live for two months on a good compliment."

~ Mark Twain

"Wise sayings often fall on barren ground, but a kind word is never thrown away."

~ Arthur Helps



Margo Smith

Gifts from the Heart

By Margo Smith, Business Manager, Northland Pines School District

I was recently skimming through the April issue of the *Wisconsin School News* when a familiar name caught my eye. The article, entitled "Tell Your Story," gave an account of how three districts connected with and built strong relationships with their communities. One of the featured districts was White Lake, a small district 22 miles east of Antigo. This brought back memories of the many basketball games I attended in the tiny White Lake gym, which had a row of four bleachers on each side for fans, and a stage that held a small but outstanding pep band at each game. At that time, this small school may not have had the newest or best of facilities. But there was something about the atmosphere; one of community pride and support. Tasty concessions and

other touches added by the community and staff were evident.

I was happy to see that White Lake passed a \$3.5 million referendum to build a community recreation center; no small feat for such a small community. The facility, like ours here at NPSD, is beautiful. What really caught my eye, however, was the picture of the community members who worked together and donated 90 cords of hard maple for the gym floor. It must be pretty special for the White Lake community to see a child or grandchild play on a floor that resulted from true gifts from the heart. Priceless, I would venture.

The White Lake example is a shining one that underscores how the school needs the community and the community needs the school. When the two work in tandem to help and support one another, magical things happen.

The Northland Pines School District benefits tremendously from the multi-use of the District facilities. When students, community members, business owners, and parents share an attitude of common ownership and mutual enrichment the life lessons taught are multi-faceted.

What better way to teach a child than to immerse them in a culture where sharing and multi-generational activities occur on a daily basis? Our kids mentoring kids from China, area racers taking time to talk about fitness and nutrition, or walkers coming to use the gym with grandchildren after lunch are three examples. How about when moms or dads come in to talk to the kids and share a lunch or talk to a classroom?

Regardless of the type of support, whether with donations, time, or skill, the school community draws life from each of its members.

As work begins on the upcoming 2013-14 budget, pages of numbers will be produced to ensure another year of carefully allocated monetary resources for our school community.

What won't show up on a statement of profit and loss are the numerous gifts from the heart that bind this school and community together. Whatever you do for the district, know that it is appreciated. Lessons of service and gifts from the heart will stick in the minds of our kids long after graduation.

"Right is right, even if everyone is against it, and wrong is wrong, even if everyone is for it."

~ William Penn

Say "Yes" to Dual Benefits

When you renew with your affiliate ASBO, check the box for ASBO International Membership. With one payment, you can participate in both organizations—doubling the tools, resources, and colleagues you can call on to help you in your everyday responsibilities. Together, we can effectively manage resources to give every child the power of education.

With the increasing responsibilities and fewer staff, the help and expertise that I gain through ASBO membership is priceless.
Peter Willcox Sr., RSBA, White Bear Lake Area Schools (MN)

 Association of School Business Officials International www.asbointl.org



WASBO Fall Conference

October 3-4, 2013

The Osthoff Resort &
Conference Center
Elkhart Lake, WI

Get Award-Winning Results!

Getting the Blue Ribbon

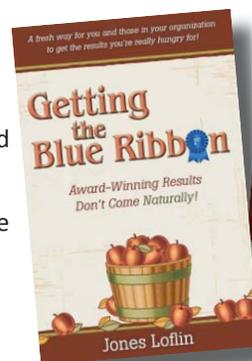
Ever feel like you spend your day rushing from one thing to another and rarely do anything well? Are you struggling to accomplish what would REALLY accelerate your success at work and in your personal endeavors? Maybe it's time you set your sights on a blue ribbon.

In this humorous and thought-provoking message, Jones Loflin offers four practical tools to use to ensure that what needs to get done gets done and is done well. Topics addressed include:

- Identifying new skills, behaviors and attitudes needed to achieve greater success
- Creating an environment where the right things get done
- "Pruning" those areas that are growing out of control
- Celebrating success when you achieve your "blue ribbon"

Attend this Keynote on October 3 to receive your free copy of **Getting the Blue Ribbon!**

*Jones Loflin's skill in helping individuals and organizations achieve greater success is known internationally. His gift of communication combined with his wit and enthusiasm create presentations that are illuminating and unforgettable. Jones is co-author of the award-winning book, **Juggling Elephants** and his message will help you and your school district or organization get the results they are really hungry for.*



Jones Loflin

Scholarship Golf Outing

Wednesday, October 2, 2013
Autumn Ridge Golf Course
Supporting WASBO's Student
Scholarship Program



*Don
Mrdjenovich
WASBO Executive
Director, Retired*

Perspectives on Education

Don Mrdjenovich served as WASBO's Executive Director for 11 years following a long career in education as a teacher, principal, business manager and superintendent. Listen as he shares some of the lessons he learned along the way and his thoughts about the future of education.

Learning Opportunities in These Areas:

- Human Resources
- New Administrator and Support Staff (Year of Success Program)
- Best Practices/Money Saving Ideas/Innovative Solutions
- Facilities Certification Core Module 3 (Environmental Health and Safety)
- Facilities Certification Continuing Education Sessions
- Writing Your Professional Development Plan

Registration coming soon!
WASBO.com/Fall
608.249.8588



Jones Loflin

Ten Ways to Be More Intentional In Your Workday

By Jones Loflin

- **Use a timer.** Decide how much time you want to focus on a task and then use a countdown timer to monitor the time. It will be amazing how quick you move as you see the time slipping away.
- **Build your day around two to three “A” priority items.** Determine the environment necessary to accomplish these items. Consider almost anything else a “weed” until you accomplish these priorities.
- **Communicate your plans to your team.** Whether that team is your family or a staff of 20 people, let them know what you are focusing on, and why it’s important to them that you complete it. Enlist their help in working on the items—or have them guard your efforts.
- **Shut down your email inbox.** Nothing derails productivity like looking up to see an incoming email. Research shows that after simply reading the subject line of an email it takes over 75 seconds to return your mind to the level of concentration it was experiencing prior to the interruption.
- **Take a walk.** Ever notice that some of the best ideas come to you while you are not focusing on a specific task? If you are in a brainstorming or “thinking mode,” get moving to ignite your creativity. Be intentional about being creative.
- **Remove distractions—or remove yourself from the distractions.** Refrain from putting something on your work area that is in need of completion if you will see it while you are trying to focus on something else. Your eyes (and mind) will constantly be returning to it.
- **Develop routines to handle the “other stuff.”** I have specific times in my day/week that I handle administrative tasks. I don’t have to worry that I’ll forget them—so my mind is free to focus on the task at hand. This could include checking email or responding to voice mail.
- **Ask questions to assist in prioritizing.** Ask, “What is the task that I could undertake that would best move my team, department or business forward?” Or, “What is the task I could complete today that would give me the strongest sense of accomplishment when it is done?”
- **Reward yourself.** The most neglected source of motivation to stay focused is rewarding yourself for something done—or done well. It doesn’t need to be anything large or lengthy. Simply stopping 10-12 seconds to reflect on what you have done is energizing.
- **Take care of yourself as an individual.** You may beat the odds for awhile, but eventually a lack of “intentionality” about your physical, emotional, mental, spiritual or financial well-being will catch up to you. Many workplace “issues” arise out of individuals simply not seeking to get award-winning results in taking care of their “non-work” needs.

“You are growing something every day. What grows and how it grows is up to you.”

~ **Getting the Blue Ribbon**, page 10

The Danger of Masked Productivity

By Jones Loflin

In a training program last week, one of the participants made an interesting analogy. We were talking about the false sense of security we get when we are busy but not really getting to those things that are most important. His comment was, “It’s like masked productivity.” What a strong visual image!

We “mask” our true lack of productivity in many ways. We plow through emails, take care of simple tasks and check lots of items off our list. We say “Yes” to every meeting, rationalizing that we need to be there, instead of attempting

to communicate to the meeting planner that we really need to be working on something else—and will follow up with them to get the information from the meeting.

We also mask productivity in our personal lives. We take way too long on tasks that really aren’t all that important, but we tell ourselves they must be done. And we are sometimes guilty of masking true quality time with our families by just being in the same house with them.

To help me evaluate whether I was

truly productive during the day on my highest priorities (and to plan better for tomorrow when I don’t like the answers), I’ve started making a list of some of the questions I use for reflection at the end of the day. They include:

- If someone silently followed me around today, what would they have seen as my top 3 priorities?
- Where did I spend more of my time today... on the things that drained me or energized me?
- What short term goals did I move closer to achieving today? Did I even think about them?

Continued on page 41



Don E. Lifto



J. Bradford Senden

School Tax Elections: Testing Messages and Targeting Voters

By Don E. Lifto, Senior Vice President, Springsted Incorporated

J. Bradford Senden, Managing Partner, The Center for Community Opinion

Just one year after a painful election loss and budget reductions measured in the millions, a suburban Midwestern school district found itself back on the top ballot seeking approval for an increase in property taxes to help fund school programs and head off a second round of draconian cuts.

The political stakes were high for the school board and superintendent; the stakes were even higher for the more than 13,000 students whose education futures hung precariously in the balance.

Anticipating a substantially larger voter turnout in the upcoming election, district officials needed to probe—more precisely than in the past referenda—exactly what demographic groups would most likely go to the polls and support the tax proposal. Message testing and voter targeting became critical components in building a foundation for success.

Message-testing and voter-targeting strategies have been paramount in consumer research and marketing for decades. Traditional direct-mail marketing strategies—transformed in recent years by exponential advancements in technology—now slice and dice with the precision of an executive chef, measuring ingredients with such exotic tools as “neural networking” and “regression analysis.” These new technologies

allow marketers to predict with greater accuracy than ever who will buy their products and services and what message will resonate with consumers.

Frustrated with the slow pace of adopting these sophisticated strategies in the political arena, Hal Malchow chides in *The New Political Targeting* (Washington, DC: Campaigns and Elections Magazine, 2003), “While commercial marketers stepped boldly into the sunshine of information and knowledge, political marketers have remained mired in the shadows of instinct and misinformation” (p. 6).

In this particular case, the district’s leaders were determined to come out of the shadows by harnessing the power of more sophisticated survey and analysis methodologies.

Peeling Back the Onion

Harnessing that power begins by exploring the response benchmark questions included in a scientific, random-sample community survey completed for the district as part of its preparation for a return to the ballot. This exploration involves processing responses using the classification tree features of SPSS for Windows; a widely used software tool for statistical analysis.

This analytical tool was developed to make it easier to better identify groups, discover relationships between groups, and predict future events. In such an analysis the software is asked to evaluate one question by exploring the response among the demographic variables available in the survey.

In one district’s survey, the uninformed

benchmark question presented voters with the following:

The [XXXXX] School District will ask voters to approve an increase in its existing operating levy this fall. The proposed referendum will raise \$9 million in new funding for the district. This will result in a property tax increase of approximately \$230 per year for a home with an assessed value of \$240,000, which is the average assessed value of a home in the district. This increase translates into a cost of \$19 per month. Would you favor or oppose such an increase?

The analysis software had access to all the demographic characteristics of the voters interviewed as part of this survey. This classification tree told us that the greatest difference in voter response is found among men and women. As is true in most tax elections, women are more supportive of the district’s proposed tax increase.

The second section in the classification tree told us that the area of the district in which the voter lives is important. For example, men living in one area are more supportive than other men in the district, whereas women in two key areas are less supportive than women in the rest of the district.

After the presentation of the uninformed benchmark question, the voters being interviewed were given detailed information about a tax proposal the district was considering. Each voter was then asked the following informed benchmark question:

Now that you have heard some information about the district’s need to ask for an increase in

Continued on page 37

its operating levy, I want to see if this information has changed your opinion. One reminder first: the average assessed value of a home in the district is \$240,000. Would you favor or oppose such an increase knowing that it will raise \$9 million in new funding for the district and result in a property tax increase of approximately \$230 per year—or \$19 per month—for a home with an assessed value of \$240,000?

The classification tree generated from the responses collected after information had been presented is very different. Gender is no longer the most significant demographic characteristic. Now a voter's age is the most important factor. Age has replaced where men live as the most important factor among male respondents. Gender is important among younger voters, with women much more supportive of the district's tax proposal after information had been presented.

Among voters older than 48, the area of the district is important. Even after information has been presented, the district's proposal had very little support among older voters in a large area of the district.

Exploring the responses to benchmark questions helps a campaign for a district's proposal focus and target its voter-contact efforts. In one example, the campaign may need to do more than just provide information to the older voters in the district. Depending on the number of voters in this group and their voting history, the campaign will need to develop a unique approach to this "microtarget" group.

Researchers can also use classification tree analysis to test how different types of voters respond to statements in support of the district's tax proposal.

In one survey, for example, voters were asked to strongly agree, agree, disagree, or strongly disagree with the following statement: "Investing in the quality of the local public school is essential if we are to maintain a safe, thriving, and vibrant community."

Overall, voters overwhelmingly agreed with this statement, with 92% strongly agreeing or agreeing. Generating a classification tree from these responses, however, revealed significant differences in intensity based on geography and age. The number of voters strongly agreeing with this statement was higher in three of the five areas of the district.

In those geographical areas, agreement with this statement was more intense, among voters younger than 66. Therefore, making this statement as part of an argument for the district's tax proposal will have its greatest impact among younger voters in these areas of the district.

One of the most common advocacy arguments in school referenda is the contention that investing in quality schools enhances the value of homes and businesses within the district. Rather than simply relying on faith as to whether such an argument might work in any school district, it can be tested scientifically.

We can determine the best audience for this idea by applying classification tree analysis to the responses collected when voters are asked to agree or disagree with the statement: "Investing in the quality of the local public schools will protect the value of every home and business in the community."

The classification analysis makes it clear that age is an important factor in determining which voters will have the strongest positive reaction to this

statement. In one particular survey, voters 38 years or younger were more likely to strongly agree with this statement than are voters older than 38.

The area of the district in which the voter lives is also important among older voters. In a large section of the district, it was found that older voters were slightly more likely to strongly agree with this statement than are the older voters in the rest of the district. Of some concern, however, was the fact that almost as many older voters in these areas said they disagreed with this statement as those who say they strongly agree with it.

The presentation of this statement in these areas produces both a positive and negative reaction; therefore, the campaign in support of the district's proposal must target younger voters with the presentation of this idea.

Research to Practice

As the number of school-age families continues to shrink and voters are increasingly tightfisted with their hard-earned dollars, passing new school taxes is becoming more difficult. The politics of talk radio and the impact of a variety of instant-messaging technologies also contribute to an increasingly difficult landscape. This election context is one that is unlikely to respond well to the strategies of the past.

Hal Malchow's exhortation to step out of "the shadows of instinct and misinformation" and into the "sunshine of information and knowledge" is demonstrated by the survey and message-testing strategies outlined here. Analyzing the feasibility of the tax proposal with a well-designed, scientific, random-sample survey and then using sophisticated analytics to test voters' responses to arguments and

School Tax Elections: Testing Messages and Targeting Voters

Continued from page 37

elements of the potential tax proposal provide the district and campaign with the information a knowledge needed to communicate effectively.

In the case of this suburban school district, a devastating loss was followed one year later by a very successful campaign and two ballot questions that succeeded at the polls. The analytical tools described in this article were part of the foundation for moving forward with data-driven planning and effective campaign strategies.

Portions of this article originally appeared in *School Business Affairs*, published by the Association of School Business Officials International. Republished with permission of ASBO.

Don E. Lifo, Ph.D., is senior vice president and director of the Public Education Group at Springsted Incorporated, a public finance advisory and consulting firm based in St. Paul, Minnesota. He is co-author of *School Finance Elections: A Comprehensive Planning Model for Success*, 2nd edition. Email: dlifo@springsted.com

J. Bradford Senden, Ph.D., is managing partner for the Center for Community Opinion, which specializes in survey research and data preparation needed to win tax elections. He is co-author of *School Finance Elections: A Comprehensive Planning Model for Success*, 2nd edition. Email: brad@communityopinion.com

*"Tomorrow is always fresh,
with no mistakes in it."*

~ Lucy Maud Montgomery

*"If you fell down yesterday,
stand up today."*

~ H.G. Wells

Springsted presents School Finance Elections

A Comprehensive Planning Model for Success

Friday, August 2, 2013

9:30 a.m. to 4:00 p.m.

School Finance Elections: *A Comprehensive Planning Model for Success* is a workshop based on the book of the same title authored by our presenters, Don Lifo and Brad Sanden. The workshop's content represents a marriage of research and successful practice, emphasizing systems and strategies, rather than specific campaign tactics, and allowing school leaders to elevate their thinking to a more comprehensive and long-range vision of election planning.

This workshop will be beneficial to school districts planning an initial debt issuance or revenue cap, or to those coming back for another try after a lost election. It will also feature invaluable strategies in preparing for and conducting a school finance election.

For more information, contact:

Lisa Rybak at: 651-223-3033 or lrybak@springsted.com

Registration includes the program, lunch, materials and one copy of *School Finance Elections, 2nd Edition*, per team.

Location:

Miron Construction
10700 Research Drive, Suite 100,
Wauwatosa, Wisconsin 53226



Springsted



NEED A FLAT ROOF REPLACED?

THEN CONTACT THE SPECIALISTS

We've been installing flat roofs for over 26 years and are licensed, insured and bonded. Trust your next roofing project, including new construction, to our experts. Get started with a free, professional estimate now.



920-452-8399

www.precisionroofinginc.net





Jerry Dudzik

Interest Rates Trend Higher

Reprinted with permission from Springsted Market Update, June 2013

By Jerry Dudzik, Vice President, Springsted Incorporated

April/May 2013 Review and Recap: Interest Rates Trend Higher

Interest rates for longer-dated US Treasury bonds rose steadily in April and accelerated their increase in May. The increase has not been distributed evenly across the yield curve, however. Rates on one-week to two-year maturities have hardly moved at all. The benchmark 5, 10 and 30-year US Treasury rates were up 27, 27 and 24 basis points respectively for the month of May, and are up by between 1/3% and 1/2% over their level last year.

Tax-exempt rates rose during the month of May by between 10 and 20 or more basis points. This continues the trend that began in the first quarter of the year. Bloomberg data shows that the average general obligation municipal bond maturing in 5 years has seen a 1/4% rate increase in the past month, while 10 and 30 year maturity municipal bonds have seen a nearly 1/2% increase in rates. Regardless of the change in rates, the absolute level of rates continues to be low compared with longer term historic levels.

The one bright spot for borrowers continues to be short term variable rates. They rose in mid-April to nearly 20 basis points as a result of tax related municipal bond mutual fund sales. They have since declined to near single digit levels in late May.

The State and Local Government Securities (SLGs) window, which closed in December and reopened in February, closed again in May. At this time it is not expected that the SLGs window will reopen until a budget deal is reached between Congress and

the White House. That isn't expected soon, so it may well be until September or later that the SLGs window remains closed. This has a material effect on advance refundings, since a refunding escrow must now be funded with open market securities. Selection of the open market securities generally needs to comply with IRS issued "safe harbor" regulations to have a valid refunding escrow. This adds a new level of uncertainty to the financial viability of some refunding issues at a time when there is already a concern about interest rates rising further.

On the positive side, April and May bond sales produced good results for issuers. Competitive sales continue to attract multiple bids with both tax-exempt and taxable public finance bonds receiving strong demand. While rates may be higher over the past couple of months, the absolute level of rates continues to be very low and many refunding bonds continue to be issued. As an example, in the midst of the current rate increases, Springsted has successfully sold numerous refunding bond issues, of which three (two advance refundings, one current refunding) were competitive sales for clients that while the rates received were higher than projected, still resulted in overall debt service savings of nearly 10% of the total amount of refunded debt.

June/July 2013 Preview:

The underlying cause of increasing rates is a combination of better economic news in the United States, especially in the housing market, where single family home prices are rising in most areas and fewer mortgages are "under water." This improves consumer confidence and encourages spending. Evidence of this is seen in strong auto sales for

the first four months of the year.

Despite the low overall level of interest rates, the supply of tax exempt bonds is not excessively large. June and July are bond payment months, with a significant amount of funds being distributed to investors. Much of this money will be reinvested in tax exempt bonds, helping keep rates low in view of the continuing relative low supply of bonds being brought to market.

Other economic reports, including unemployment, continue to show mixed signals. For example, while the overall unemployment rate is declining gradually, the percentage of total people working is at a multi-year low. This indicates that there are more and more people who have simply given up looking for employment. Part of this is attributable to people turning 65 and being eligible for Medicare. For the past 18 months, the AARP estimates that around 8,000 people turn 65 each day. Other estimates (Pew Research Center) indicate that 10,000 people a day turn 65. This will continue for just under the next two decades. Regardless of the actual number, this is a transformative event that will have significant effects on future government budgets, independent of economic performance.

One of the effects of sequestration is being observed in Build America Bonds (BABs). A number of BABs issuers are actively seeking to use the reduced federal subsidy payments mandated by sequestration to invoke the extraordinary redemption clauses of the BABs. With the overall decline in interest rates, it is often the case that a refunding of BABs using tax exempt bonds will result in overall savings when compared to the net cost of the

Continued on page 40

BABs, after accounting for the federal interest subsidy. The ability to use this extraordinary redemption feature will depend on the actual language in the documents and whether or not the BABs have a "make whole" provisions in their documentation or not.

Where Do We Go From Here?

The effects of sequestration appear to be less than projected immediately prior to sequestration becoming effective. It is likely that the financial effects of sequestration will increase over the summer as more of the cuts mandated will take place.

Reports from a number of states show that income tax receipts are exceeding projections resulting in increasing budget surplus amounts. This is also occurring at the federal level, where the projected fiscal 2014 deficit is

substantially lower than was projected just a few months ago. The downside to this is that pressure on Congress and the White House to resolve budget issues decreases and the opportunity to make longer term adjustments to spending may be squandered.

An item to watch closely this summer will be the ability of Detroit and other cities to deal with possible bankruptcy filing and how that may affect the psychology of tax exempt bond investors. As has been stated many times before, uncertainty is the bane of bondholders and there are few things more uncertain than the effect of a municipal bankruptcy filing on debt obligations. A bankruptcy by a large municipality such as Detroit would present a challenge to investors who have not likely experienced anything like that previously.

For more information you may contact Jerry Dudzik at jdudzik@springsted.com

Information in this report is the personal view of the author at the time of writing and subject to change. This material has been distributed for educational purposes only, and should not be considered as investment advice or a recommendation for any particular security, strategy or investment product. The material is based upon information we consider reliable, but its accuracy and completeness cannot be guaranteed.

"A genuine leader is not a searcher for consensus but a molder of consensus."

~ Martin Luther King, Jr.

Are you paying for services you don't need?

Districts around the state are *saving money and staff time* by taking advantage of our *no-cost* value-added 403(b) services to administer their plan. With fewer resources, this is the time to eliminate inefficient and redundant services.

We can help.

133 districts are now using our sample plan documents.

42 districts are using us as their sole 403(b) provider.

Last year, **19** districts transitioned to our sample plan documents and **10** districts transitioned so far in 2013.

6 districts dropped their TPA as a result of the transition.

More than **250** districts had plan reviews in 2012.

Save time and money. Call **1-800-279-4030** to set up an on-site plan review with Scott Thomas, our expert in 403(b) plan administrative solutions. Or, visit weabenefits.com.



The 403(b) retirement program is offered by the WEA TSA Trust. TSA program securities offered through WEA Investment Services, Inc., member FINRA.



Heightening Your Resilience: Words of Wisdom

By Mark Towers

In the dictionary, resilience is defined as an ability to recover from or adjust easily to change or misfortune. The ability to get on with life following a setback, mishap or a tragedy is a remarkable human quality. Over the years, I have collected some things from smart folks that have helped me become more resilient. I have chosen to share a few of them here.

1. Thomas Paine, the author of the Revolutionary War pamphlet, *Common Sense*, wrote: "The real human being smiles in trouble, gathers strength from distress, and grows brave by reflection."
2. This is from Byron Katie, a self-help author. She notes: "Thoughts just appear. They come out of nothing and go back to nothing, like clouds moving across the empty sky. They come to pass, not to stay. There is no harm in them until we attach to them as if they were true. No one has ever been able to control his thinking, although people may tell the story of how they have. I don't let go of my thoughts . . . I meet them with understanding. Then they let go of me."
3. Victor Frankl spent time in a Nazi concentration camp. He said: "We are no longer able to change a situation . . . we are challenged to change ourselves."
4. Rainier Maria Rilke was a German poet and he offered this insight: "Have patience with everything unresolved in your heart and try to love the questions themselves."
5. F. Scott Peck began his best-selling book, *The Road Less Traveled*, with these words: "Life is difficult. This is a great truth, one of the greatest truths. It is a great truth because once we truly see this truth, we transcend it. Once we truly know that life is difficult . . . once we truly understand and accept it . . . then life is no longer difficult. Because once it is accepted, the fact that life is difficult no longer matters."
6. This is from the book of Romans 5:3-4: "We also rejoice in our sufferings, because we know that suffering produces perseverance; perseverance, character; and character, hope."
7. Norman Vincent Peale, the noted minister and positive-thinking guru, once shared: "Stand up to your obstacles. You will find that they haven't half the strength you think they have."

Ultimately, these seven things matter most . . . faith, hope, determination, resourcefulness, love, leadership and resilience. I hope you found these above nuggets helpful. Your day awaits . . . fearlessly take it on with gusto. Your resilience will be there to help you overcome!

Mark "Tenacious" Towers/Speak Out Seminars, LLC
Phone: 817-421-4744
Email: mark@speakoutseminars.com

The Danger of Masked Productivity

Continued from page 35

- What new ideas to improve my work or life did I come up with today? What did I do with them?
- Was I more proactive or reactive today?
- In what ways did I improve my relationships with my coworker, spouse, children or extended family today?
- Did I connect with a friend?
- How did I nurture myself as an individual?
- What did I do today that will lessen my stress tomorrow?
- What did I do (or NOT do) that is going to increase my stress tomorrow?
- Who is glad that I was a part of their day?

Renew your
WASBO membership
for July 1, 2013 -
June 30, 2014
at
WASBO.com/renew

Dear Colleague Letter Supporting Tax Exemption for Municipal Bonds

By *Municipal Bonds for America*

Submitted by *Jerry Dudzik, Vice President, Springsted*

Reps. Ruppertsberger (D-MD) and Hultgren (R-IL) have co-authored a letter to Speaker Boehner (R-OH) and Minority Leader Pelosi (D-CA), available at right, urging them to reject any proposal that seeks to limit the value of the tax-exemption for municipal bonds. The letter is being circulated to all Members of the House of Representatives for signature. Staff for Reps. Ruppertsberger and Hultgren have asked the Municipal Bonds for

America (MBFA) for assistance in highlighting this Dear Colleague letter, and requesting that Members of the House to attach their signature. We urge all MBFA members to ask your Member of Congress to sign this letter as soon as possible.

In addition, we urge you to remind your Member of Congress to co-sponsor HR 112, a resolution introduced by Reps. Neal (D-MA) and Terry (R-NE)

that recognizes the critical importance of tax-exempt municipal bonds. The resolution currently has 65 cosponsors. More information regarding the Terry-Neal resolution is available below.

We hope this information is helpful. If you need further information on MBFA or issues raised in this update, please contact info@munibondsforamerica.org.

Dear Member of Congress:

2013 marks the 100th Anniversary of keeping municipal bonds free from federal taxation. Municipal bonds have been a low-cost tool to fund capital improvements that make our nation's cities and towns attractive places to live, and competitive places to do business.

That's why I'm asking you to join Congressmen Lee Terry (R-NE) and Richard Neal (D-MA) as a cosponsor of House Resolution 112. This Resolution recognizes that for 100 years, the federal government has kept municipal bonds free from federal taxation, giving state and local governments the ability to build roads, runways, schools, affordable housing, utilities and other critical infrastructure.

Since investments in tax-exempt municipal bonds allow state and local governments to significantly reduce the cost of infrastructure financing over the cost of taxable debt, these savings can be passed directly to taxpayers in the form of reduced taxes and fees.

With so much economic uncertainty, it is essential for local governments to have the power to create jobs and rebuild infrastructure that will serve the community for the next 100 years.

Thank you for your consideration in cosponsoring House Resolution 112 and for your attention to the importance of preserving the tax-exempt status of municipal bonds.

Sincerely,

Name and Address:

Continued on page 43

DRAFT-DRAFT-DRAFT-DRAFT

John Boehner
Speaker of the House
The Capitol
Washington DC 20515

Nancy Pelosi
Democratic Leader
The Capitol
Washington, DC 20515

Dear Speaker Boehner and Leader Pelosi:

We are writing to express serious concerns regarding proposals to eliminate or cap the deduction on tax-exempt municipal bonds in the Fiscal Year 2014 Budget Proposal.

For more than a century, municipal bonds have enjoyed tax-exempt status and have been the primary method by which state governments and local municipalities finance public capital improvements and infrastructure construction. These projects are engines of job creation and economic growth, and it is imperative that their tax-exempt status remain unchanged.

Over the last decade, municipal bonds have funded more than \$1.9 trillion worth of infrastructure construction. This financing went to the construction of schools, hospitals, airports, affordable housing, water and sewer facilities, public power utilities, roads, and public transit. In 2012 alone, more than 6,600 tax-exempt bonds financed more than \$179 billion in infrastructure spending.

As you have stated before, now is the time to invest in America. Yet, The President's Fiscal Year 2014 Budget Proposal recently submitted to Congress proposed capping the tax deduction for municipal bonds at 28 percent. Eliminating or capping the current deduction on municipal bonds would severely curtail state and local governments' ability to invest in themselves. It would increase borrowing costs to public entities and shift costs to local residents through tax or rate increases.

Moreover, eliminating or capping the current deduction on municipal bonds would slow the growth of job-creating infrastructure projects. In these tenuous economic times, it would be irresponsible to jeopardize funding for the dedicated citizens who work in these important facilities such as teachers, firefighters, police officers, hospital workers and librarians as well as the construction workers who build them.

As the discussion on various budget proposals continues and the national discussion on comprehensive tax reform begins, it is our hope that you will reject proposals to alter the tax-exempt status of municipal bonds. While we agree that we must reduce government spending and our country's unsustainable debt, we should not be eliminating a vital tool for job growth and economic development. Thank you for your time and attention to this important national matter

PRINTED ON RECYCLED PAPER

Preserve the Tax-Exempt Status of Municipal Bonds

Dear Colleague:

Our communities are in trouble. Their primary means of funding new roads, schools, hospitals and police stations – as well as the hundreds of thousands of jobs these infrastructure projects create – are in jeopardy.

For more than a hundred years, the projects that keep our communities strong and vibrant have largely been financed through municipal bonds that enjoy tax-exempt status. These bonds have funded more than \$1.9 trillion in infrastructure construction in the last decade alone, mostly financing the construction and refurbishment of schools, hospitals, airports, water and sewer lines, public utilities, roads, and other transit projects. These projects aren't optional for the communities they serve, and neither is our obligation to protect the tax-free status of the bonds used to build them.

Unfortunately, that's just what some have in mind. The President's Fiscal Year 2014 Budget Proposal currently recommends capping the tax-exemption of municipal bonds at 28 percent. The Simpson-Bowles report and a GAO study recommend eliminating the tax exempt status altogether.

Neither capping nor eliminating the deduction on municipal bonds is a smart solution to our country's economic and fiscal challenges. Several members of the Ways and Means Committee who have served in local elected office – and understand the importance of these bonds as financing tools – recently testified that these misguided proposals would unfairly shift construction costs to local residents through tax increases.

If you have questions, or would like to co-sign a letter to Congressional Leadership urging them to support the tax-exempt status of municipal bonds, please have your staff contact Walter Gonzales (Ruppersberger) at 5-3061 or at walter.gonzales@mail.house.gov or Scott Luginbill (Hultgren) at 5-2976 or at Scott.Luginbill@mail.house.gov

Sincerely,



C.A. Dutch Ruppersberger
Member of Congress



Randy Hultgren
Member of Congress

PRINTED ON RECYCLED PAPER



SFO® CERTIFICATION IS THE MARK OF A DEDICATED PROFESSIONAL

The role of a school business official varies by district size and resources; however, the fundamental skills and knowledge needed to effectively safeguard school funds and maximize resources for students do not.

By earning an international credential, you'll instill confidence in those around you. Give your fellow administrators, board, and community even more reassurance that you have the know-how to support them.

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 a mastery of the knowledge and skills required to be an effective school business leader.



Architecture Engineering Planning Interiors

Tony Sjolander, LEED AP
tsjolander@dlrgroup.com
612/977-3520 - dlrgroup.com

Applications Accepted Year-round—Submit Today.

www.asbointl.org/certification

For more information, call 866.682.2729 x7065

New ASBO Resource for SFO® Hopefuls

Are you preparing to take the SFO® certification exams? Thinking about starting a study group? Wondering what study materials are available? Looking for practice questions? Get a copy of The Certified Administrator of School Finance and Operations® (SFO®) Guide to Studying for the Examinations, a new resource from ASBO International, to help you excel on the SFO® certification exams.



Association of School Business Officials International

ASBO International Milestones June 2013

- **Dave Ilkka**, Skyward, Inc. (5 years)
- **Stephen Mar-Pohl**, AIA, NCARB, Insite Consulting Services (5 years)
- **Shelley Retzlaff**, Greendale School District (5 years)

ASBO International New Members May 2013

- **Dawn Jakum**, Sheboygan Area School District



“You have to love a nation that celebrates its independence every July 4, not with a parade of guns, tanks, and soldiers who file by the White House in a show of strength and muscle, but with family picnics where kids throw Frisbees, the potato salad gets iffy, and the flies die from happiness. You may think you have overeaten, but it is patriotism.”

~ Erma Bombeck



Orvin R. Clark,
EdD, RSBA

Book Review

Negotiating with Giants

Peter D. Johnston, Author

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

Negotiating with Giants

was written by Peter D. Johnston. Peter Johnston is an

international negotiation expert. The early foundations of his distinct approaches to influence were formed by working closely with the founders of the Harvard Negotiations Project, the Program on Negotiation and the Harvard Negotiation Roundtable. He is a Harvard MBA, trained journalist and former corporate and investment banker. He has worked with clients ranging from Wall Street bankers, UN officials and political leaders to sales teams, cheated spouses and convicted felons. His ground-breaking results have been formally recognized by the US government for their positive economic and social impact.

Negotiating with Giants is 258 pages in length, well organized into six chapters made up of stories. The stories are examples from history (Canadian, American and international), politics, culture, personal vignettes and business. The giants are a boss, company, government or nation that is dramatically bigger and more powerful than us. He gives a name to the small players who achieve success through giant negotiation—he calls them Size Wizards, because they know how to make themselves bigger and stronger, their giants smaller and weaker, and their opportunities much greater than they'd otherwise be. He suggests that all the answers we're looking for are connected by four size and strength strategies used by successful smaller

players. The dominant size and strength strategies are:

Defend Yourself from the Start

Build up vigorous, pre-mediated defenses for your information, reputation, interests, deals activities and time, quickly turning from defense to offense. *Main Challenge – Your giant can't be trusted with your ideas, is poised to attack, is attacking already, or may well violate the terms of a deal.*

Level the Playing Field

Make your giant smaller and weaker—or make yourself bigger and stronger to get what you want. *Main Challenge – Your giant may not know you exist, yet you really want to influence their actions – Or your giant knows all too well that you exist and their aggressive stance puts you squarely at odds with them.*

Craft Golden Deals

Transform weak deals or no-deals into precious deals, often drawing on differences between you and your giant as you structure your agreement. *Main Challenge – You're ready to give up. No decent agreement seems possible with a giant counterpart. It looks like you will either accept a bad deal or walk away altogether, with potentially dire consequences.*

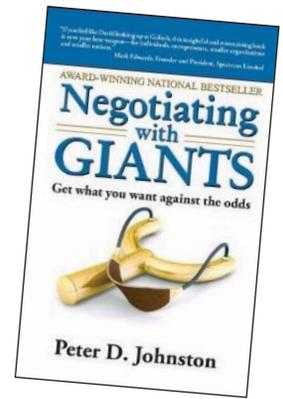
Stand Tall in Conversations

Increase your stature by what you say and how you say it, knowing what to say in most situations. You should only negotiate directly with giants as a very last step, if at all. *Main Challenge – Your giant won't meet with you, won't say yes to you once you meet, doesn't listen, entrenches themselves in extreme*

positions or is openly hostile face-to-face.

Successful smaller players are called Size Wizards as they get what they want by applying the right habits calling on the right helpers and executing the right strategies. The secrets of success are:

- **The Right Habits** – Think differently, Grounded dreams, Remain firm and flexible and Be information hounds.
- **The Right Helpers** – Controllers, Convincers, Coercers, Connectors, Coalitionists, Counselors and Cracks.
- **The Right Strategies** – Guard your information, Preserve your reputation, Shield your core activities, Protect your deals, Fend off broken promises and Shelter your time.
- **Level the Playing Fields** – Get out the rulebook, Change the way the game is played, Gain insider information, Worsen their ability to play without you, Sequence your deals (start with an end in mind), Plan to walk away, Magnify your impact through words and images (use humor), and Take advantage of your weaknesses and their strengths.
- **Craft Golden Deals** – Use differences to create value, Use shared interests to create value, Use third partners to add value, Involve your giant early on, and Make your deals bigger or smaller.
- **Stand Taller in Conversations** – Respect and question authorities.



Continued on page 46

Book Review

Continued from page 45

Build trust in unlikely situations,
Stay calm amid angry attacks and
Get them committed.

Negotiating with Giants provides chapter summaries ("Final Thoughts"), and a four-page, back-of-the-book summary that cross references the negotiation secrets and strategies, with stories and page numbers. These thoughtful features I believe will make **Negotiating with Giants** an indispensable reference tool for anyone who negotiates – which is all of us.

Looking for products
and services?

Check our WASBO's Service
Affiliate Members on the
Buyer's Guide
at WASBO.com
Member Central



Pay PCORI Fees by July 31

By Linda R. Mont, RHU, Senior Benefit Consultant, Key Benefit Concepts, LLC

PCORI stands for the Patient-Centered Outcomes Research Institute. As part of health reform, the PCORI fee was implemented and payable by health plans for the 2012 through 2019 plan years. The fee is \$1/member for the 2012 plan year. Insurance companies will pay the fee for fully-insured health plans, but employers are responsible for payment of fees for self-insured health plans – this includes health reimbursement arrangements (HRA) and Flexible Spending Accounts (FSA) for both active and retiree health plans. There are specific rules as to when an FSA or HRA plan are excepted from the fee and when they are not. The

fee for the 2012 plan year must be paid by July 31, 2013. It is based upon \$1/member. The fee increase to \$2/member for 2013. There are several ways to determine the average number of members during the plan year. Time is short to identify your active and retiree health plans, determine eligibility or exception and calculate the average number of members. Fees are filed using form 720. Review the requirements and your health plans now. If you have any questions, would like some assistance or would like to receive KBC's PCORI Fee bulletin, please contact us at 262.522.6415 or by email at info@keybenefits.com.

Connect on WASBO's
Peer to Peer
Communication Forum
at WASBO.com
Member Central



Available Statewide



Employee Handbooks = New Post-Employment Options

LET'S TALK!

ALL-IN-ONE SOLUTION

The **Wisconsin OPEB Trust** program, from CESA 6, has options to manage, analyze and innovate the right post-employment benefit choices for your school district including health reimbursement accounts (HRA).



www.wiopeb.com

Contact:
Dave Van Spankeren
920-236-0518
dvanspankeren@cesa6.org



Canada Geese Go to School

Reprinted with permission from School IPM 2015 Newsletter: April 2013

School campuses often have abundant food sources, few predators and no hunting, making them ideal for Canada geese. Geese prefer groomed lawns adjacent to water, so schools with ponds or other water features, or adjacent to water are particularly attractive. Fertilized lawn grass is a preferred food source.

Canada geese can be migratory, or may be year-round residents depending on the location. Once these birds have chosen a location to nest, migrants will continue to come back year after year and can be difficult to remove. Although research has not shown significant health threats from goose feces, the mess can render playing fields unusable.

Federal and state laws

"Canada geese are protected under the 1918 Migratory Bird Treaty Act, which means that if you collect eggs, harm their nest, or have any contact with the birds themselves, both US Fish and Wildlife and state permits are required," comments Rebecca Christoffel, wildlife specialist for Iowa State University Extension. Harassment or hazing is typically legal as long as there is no physical harm to the birds, eggs, goslings or nests. Check state laws before beginning any management plan.

Don't feed the ducks!

Often geese and ducks are tempted to stay at a particular location because people feed them. Feeding can increase conflicts with people and the spread of avian diseases. "Canada geese are very protective during their nesting season and may chase people, particularly small children who may be loud and make sudden movements," says Christoffel. Adopt a strict no feeding policy and post signs. Keep information

about the dangers of feeding wild birds on hand, such as this brochure, http://library.fws.gov/Pubs9/caution_waterfowl.pdf, from the US Fish and Wildlife Service (USFWS), to provide to interested parents and visitors. "If people discontinue feeding Canada geese, in many cases it would alleviate problems greatly," says Christoffel.

Habitat modification

"If banning feeding doesn't do the trick, the next least intrusive technique involves making an area less attractive to geese," remarks Christoffel. If there is a body of water near your school grounds, consider the possibility of establishing a barrier or buffer strip of taller vegetation around the water. Geese prefer short vegetation around water, which allows them easy access to the water and a clear view of approaching predators. Plant stiff-stemmed grasses such as switchgrass or prairie cordgrass that remain tall throughout the winter. Trees and shrubs are also an option. Buffer strips should be at least ten feet wide.

The Indiana Department of Natural Resources provides some suggestions for plant varieties that can be used as a barrier, although these recommendations will not be effective in all areas of the country. More information about habitat modification can be found in the Canada Geese publication from the Humane Society of the United States, http://www.humanesociety.org/assets/pdfs/wild_neighbors/canada_goose_guide.pdf.

When water bodies are present, fences and other barriers can discourage geese by preventing them from walking out of water to feeding sites. Barriers can be created from woven wire, wood, plastic snow fencing, chicken wire, silt fencing, netting, Mylar tape, or several strands of heavy fishing line or wire. The fence

should be long enough so that geese will not walk around the ends.

If the water body is small, a suspended grid can be created to prevent waterfowl from accessing the water. Place stakes about five feet apart on all sides of the water and string brightly colored twine or wire between the stakes in a grid pattern.



If possible, remove islands or peninsulas in water bodies. These are favored nesting sites for geese because they provide more protection. In addition, try to minimize open water during the winter months. Do not use aerators or fountains that keep the water from freezing, as migrant geese will be attracted to the open water and the spray from the fountains.

Harassment techniques

Consider noisemakers such as firecrackers, air horns or recorded Canada goose distress calls. Be sure to check noise ordinances first. Motion sensor lights, dead goose or predator decoys, Mylar tape, and remote controlled boats or planes can also be used to scare geese away. Harassment techniques will need to be used repeatedly whenever geese return and in a varying pattern so the geese don't become accustomed to them.

A remote-controlled foam drone called the "Goosinator" has been developed to scare geese. It is currently being evaluated by the Parks Division in

Continued on page 49

June 2013 47



Welcome New Members

April 2013 - May 2013

District Professional Members

- **Lori Beland**, Payroll & Benefits Specialist, Marinette
- **Tracy Bostwick**, Facilities Mgmt, Oconto
- **Leah Hauser**, Sparta Area
- **Kristin Ledvina**, Assistant Bookkeeper, Marinette
- **Makayla Luzaich**, Benefits Specialist, Superior
- **Stan Mack**, Superintendent, Oshkosh Area
- **Russell Montgomery**, Facilities Superintendent, City of Waupaca
- **Brett Netzel**, Facility Manager, Elmbrook
- **Wayne Smith**, Custodial Supervisor, Pulaski Community

Service Affiliate Members

- **Joe G. Armeli**, Account Executive, Johnson Controls, Inc.
- **Ricky Brammer**, Sales Manager, United Credit Service
- **Jenny Bulfer**, Greener World Solutions
- **Todd Carothers**, President, The TC Alan Company, LLC
- **Jeff Ireland**, Account Executive, M3 Insurance
- **Bob W. Jewell**, President/Founder, Ad-ucation Media, LLC
- **Stephanie Katzfey**, Creative Marketing Specialist, R&R Insurance Services
- **Mike Koalska**, Business Development, Larson Engineering, Inc.
- **Doug Lerch**, Facility Supplies Manager, KleenMark Distribution
- **Cindy Mayo**, Northland Recreation
- **Todd McDaniel**, Regional Sales Manager, Virco, Inc.
- **Heather Nohr**, Marketing Coordinator, Somerville, Inc.
- **Sam Statz**, Director of Construction Services, Hoffman LLC
- **Dennis Thomas**, Senior Sales Director, GCA Services Group
- **Clay Veldt**, Business Developer, Hoffman LLC
- **Colette Wallner**, Owner, Servpro of Southeast Milwaukee County
- **Wade Wiken**, Regional Manager, Seminole Retail Energy Services
- **Matt Woodruff**, Civil Department Manager, Larson Engineering, Inc.
- **Karie Zellner**, Marketing & Business Development Specialist, Schenck SC

Keep us Posted!

Retiring?

Contact us before you leave so we can update your member type to retired and get your contact information. We want to keep in touch! If you are interested in being added to our interim list, send an email to Woody Wiedenhoft at wwiedenhoft@wasbo.com.

Changing Districts?

Be sure to update your profile at WASBO.com so you don't miss any communications. Give us a call at 608.249.8588 if you need help.

On the Move

- **Brian Adesso** from Manawa, Business Manager, to Menasha, Director of Business Services
- **Mike Barry** from Oconomowoc, Assistant Superintendent of Business Services to Madison, Assistant Superintendent of Business Services
- **Mark Boehlke** from Shorewood, Director of Business Services to Sheboygan, Assistant Superintendent of Business and Operational Services
- **Keith Brightman** from Elmbrook, Assistant Superintendent for Finance, Operations & Human Resources to Ehlers
- **Wendy Brockert** from Lake Mills, Business Manager to Fond du Lac, Director of Business Services
- **Andy Chromy** from student to Clinton, Business Manager
- **Beth Hobbs** from Holmen, Assistant Transportation Supervisor to Holmen Transportation Supervisor
- **Karen Hug** from West Bend, Finance Manager to Slinger, Coordinator of Business Services
- **Amy Kohl** from Fox Point Bayside, Director of Business Services to Greenfield, Director of Business Services
- **Mike Koltes** from DeForest, Grants Specialist to CESA 5
- **Dan O'Brien** from Racine, Buildings & Grounds Director to Baraboo, Buildings & Grounds Director
- **Sue Schnorr** from Fond du Lac, Director of Business Services to Oshkosh, Business Director
- **Bob Soldner** from DPI School Management Services, Director to DPI School Financial Services, Director
- **Dan Storch** from Appleton, IT to Manawa, Business Manager
- **John Sullivan** from Sturgeon Bay, Transportation Director to Sturgeon Bay, Manager of Buildings & Grounds
- **Julie Thoreson** from Germantown, Comptroller to Kewaskum, Business Manager
- **Sarah Viera** from Brookfield Academy to West Bend, Finance Manager

Retirements

- **Patrick Acker**, Buildings & Grounds Director, Baraboo
- **Nancy Blashka**, Business Manager, Oneida Nation
- **Russ Cross**, Manager of Buildings & Grounds, Sturgeon Bay
- **Cherna Gorder**, Chief Finance & Business Services Officer, Wausau
- **Jerry Landmark**, Director, DPI School Finance Team
- **Roger Saxton**, Transportation Supervisor, Holmen
- **Bob Zuehlsdorf**, Director of Facilities and Operations, Appleton

Madison, Wisconsin and other locations throughout the country. The Goosinator is propeller-powered and is loud enough to irritate the geese.

Several chemical repellants can be applied to grass in feeding areas. Methyl anthranilate, a grape-flavored food additive, makes grass less attractive to geese. Anthraquinone aggravates geese digestive systems and contains a UV additive that changes the appearance of the grass to the geese. This must be applied by a certified applicator. Christoffel notes that repellants can be expensive to use in a large area and you have to reapply them frequently after rain or mowing.

Nest and egg destruction

Canada geese mate for life and often return year after year to nest in the same place. It is permissible to remove nesting material only if there are no eggs in the nest. Repeatedly removing the nesting material may force the geese to relocate.

Anyone who plans to destroy Canada goose eggs must first register with the USFWS between January 1 and June 30 of the year in which the nests and eggs will be destroyed. Each registrant must also return to the website by October 31 to report the number of egg-bearing nests destroyed. Note: Some states do not participate in this registration program or have different requirements. Check for your state's requirements.

Permits are required to destroy eggs, including by oiling and addling. The egg oiling method can be used to kill the developing embryo while keeping the egg intact. Food grade corn oil is applied to the eggs, clogging the pores in the eggshell and asphyxiating the embryo. "Another technique that's used is addling eggs, where the eggs are shaken to the point where the

embryo is destroyed," says Christoffel. Nesting geese will typically continue to incubate the eggs after oiling or addling, decreasing the chance that they will lay new eggs that season. Eggs can also be removed from the nest and destroyed. However, to prevent the laying of another clutch, the eggs should not be removed until they are 14 days old. To determine age, submerge eggs in a pail of water. Eggs 14 days or older will float. Eggs that sink should be oiled and placed back in the nest. Geese will aggressively protect their nest, so one person should distract the geese while another handles the eggs.

Trapping and relocation

In most areas, trapping and relocating

Canada geese requires a permit and can only be conducted during the period when the geese are molting (mid-June through early July). Geese are especially vulnerable to control techniques during their molting period because they are unable to fly, says Christoffel. Relocation is only a temporary solution, and many birds will return to the previous location once they are able to fly again.

Permits can also be obtained to trap and euthanize Canada geese. This can effectively reduce a large population. It must be done with other measures like habitat modification so new geese don't move in as soon as the original group has been removed.



WASBO Career Center

Connecting school business professionals with the leading employers in Wisconsin.

The WASBO Career Center is a dedicated search and recruitment resource for school business professionals and employers in Wisconsin. We offer simple and easy-to-use tools to make searching for career opportunities and finding qualified professionals fast, more efficient, and more successful than ever before.



Tools for Job Seekers

The WASBO Career Center gives job seekers access to inside opportunities available only through the association and provides the tools needed to quickly find and apply for jobs.

Advanced Job Search

Find the most relevant jobs from top school districts throughout Wisconsin.

Customized Job Alerts

Stay up-to-date on the latest opportunities by receiving automated notifications.

Apply for Jobs

Create an anonymous profile and resume to quickly apply for jobs and have employers come to you.

Advantages for Employers

Employers can fill positions faster and at a lower cost than other job websites by reaching a highly qualified and targeted audience of school administration professionals.

Recruit Top Talent

Target WASBO members and job seekers committed to the advancement of school administration and support professions.

Low-Cost Posting Packages

Reduce recruitment costs with flexible, affordable posting options.

Proactive and Direct Recruitment

Take advantage of search, email and online advertising options to recruit candidates.

Visit the WASBO Career Center

Discover the difference the WASBO Career Center can make for you.

To search jobs, post jobs or learn more, visit:

www.wasbo.com/jobs



Make the Most of Your Membership, Get Involved in WASBO!



Dear WASBO Members:

WASBO is a professional association that depends on the willingness of its membership to play an important role in planning and carrying out its numerous functions. We do not rely on an expensive dues structure or a large number of salaried staff. We divide our activities and services into manageable pieces. A lot of people give their time and talents to keep WASBO a responsive and healthy organization.



Available Committees:

- Accounting
- Collaborative Procurement
- Constitution/Governance Goal Action Team
- Fall Conference
- Membership
- Member Resources & Technology Goal Action Team
- Nominating
- Professional Improvement Goal Action Team
- Retirement
- Safety & Risk Management
- School Facilities
- School Finance Puzzle
- Service Affiliate
- Spring Conference
- State Education Joint Convention
- Transportation

Please consider serving on a WASBO committee or sharing your expertise at a conference during this upcoming fiscal year. Whether you are new to WASBO or have been involved for years, please submit committee membership requests and/or calls for presentations to help keep your organization strong.

Thank you,

Lynn Knight

WASBO President, 2013-14

Committee Participation

WASBO offers a variety of committees which plan conferences, develop policy positions, manage aspects of governance and bylaws, and provide direction on membership needs. From these varied options, you are sure to find a committee that matches your interests as well as your available time. For additional details on each committee's mission and goals and to indicate your interest in joining a committee, visit WASBO.com/committees.

Call for Presentations

WASBO provides programming for 12 or more conferences every year and is therefore continually considering presentation topics. If you are interested in presenting at one of WASBO's professional development activities, please complete the online form at WASBO.com/present. Final programming decisions are made by the appropriate planning committee for each event.

Selection criteria includes, but is not limited to:

- Presentation fits the planning criteria of the conference planning committee
- Presentation is informative in nature (not a marketing pitch)

We also look for members to submit articles for our newsletter, *Taking Care of Business*. Learn more at WASBO.com/newsletter



New Board Members

New Directors are Kent Ellickson, Kathy Davis and Jason Demerath. John Gahan returns to the Board as President Elect. Please take time to thank all of the candidates for their willingness to serve. We had a great slate of candidates.

Network by Participating on a WASBO Committee

Do you want to meet professional school colleagues and service affiliates, share ideas, enhance WASBO services and enrich your professional development and that of your peers? Serving on a WASBO committee can help you do all that, and more. We know it is great to meet in person, but we have options to participate by conference call as well. To sign up for one of the many WASBO committees, go to WASBO.com/committees.

ASBO International Eagle Award

WASBO nominates the previous year's recipient of WASBO's Zastrow Award for the ASBO International Eagle Award. This year Diane Pertzborn, Director of Business & Auxiliary Services from the DeForest Area School District is our candidate. We believe Diane is an excellent nomination.

ASBO International Pinnacle Award

Joe Marquardt, Director of Business and HR Services from New London School District has been nominated for the ASBO International Pinnacle Award. Each year WASBO nominates the winner of the WASBO Business Services Award. Joe has implemented an energy savings plan that involves all staff members in a unique and engaging way.

Mark Your Calendars for Future Seminars and Conferences

Registration is open for the WASBO New School Administrators and Business Support Staff Conference.

Your participation in these professional development opportunities is an important investment for you and your district. Professional development is sometimes characterized as a travel expense or unaffordable time consumption. Actually, it is an investment for the future. The expense of not staying up-to-date in our evolving demands and proficiencies may be far greater than staying current. Networking and gaining proficiency in our ever changing world will pay dividends. See the back cover of this issue for dates of future seminars and conferences or go to WASBO.com.

Renew Your WASBO Membership for July 1, 2013-June 30, 2014 at WASBO.com/renew

To continue receiving the benefits of your WASBO membership, please take a few minutes to renew at WASBO.com/renew. If you need assistance, give us a call at 608.249.8588. Your membership saves you money on seminar and conference registrations. WASBO keeps you informed through the daily Wisconsin Education News and your subscription to *Taking Care of Business*. You can access resources such as the Electronic Resource Center and the Peer to Peer Discussion Forum. When you are the only one in your district that does your job, you need to stay connected to your colleagues across the state that are faced with the same challenges. The small investment in your membership will come back to your district.

WASBO Purchasing Card Program

Eighty Wisconsin school districts received their rebate checks in June for the April 1, 2012-March 30, 2013 year. With Wisconsin program purchasing volume over \$26.8 million, over \$310,000 went back to schools. Ten school districts received checks over \$10,000. WASBO participates in this

Illinois ASBO purchasing card program with fourteen other ASBO state affiliates to offer school districts a purchasing card program that provides rebates to school districts of any size and for any purchasing volume. The entire program had purchasing power of nearly \$195 million this year.

Interim Assignments

School Business Officials are taking new positions or retiring during these upcoming summer months, leaving a void in the districts they are leaving. In addition, many districts are in need of consulting help on project or oversight work. These districts are in need of assistance for interim school business officials until their openings are filled or specific projects are completed. If you would like to be considered, please send a one-page resume and other pertinent details to the WASBO office. Some retired members have already done so, but more are needed.

Take Care of You

Again, we have lived in historic times this spring. Each WASBO member deserves a thank you and debt of gratitude for demonstrating that leadership does make a difference for our students. I thank you, applaud you and appreciate your leadership. Take a moment to celebrate your success.

Please remember to take a break and recharge your batteries. At the Spring Conference we reviewed the principles of "Ethical Intelligence." One of the essential principles is that everybody needs time to refocus on family, friends and you. Remember, you need to take responsibility for yourself to enable you to serve in the future. Please find that time for recharging.



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

PRSRST STD
US POSTAGE
PAID
MADISON WI
PERMIT NO 801



Please share with a
prospective member!

Upcoming Events - WASBO.com

Printed on Recycled Paper. Made with 100% post consumer waste.



Professional Development

WASBO New School Administrator & Business Support Staff Conference (Year of Success)

August 13-14, 2013, Holiday Inn, Stevens Point (Viterbo Credit)

WASBO Fall Conference

October 3-4, 2013 - The Osthoff, Elkhart Lake (Viterbo Credit)

ASBO International Annual Meeting & Expo

October 25-28, 2013 - Hynes Convention Center, Boston, MA (Viterbo Credit)

Midwest Facility Masters Conference & Exhibits

November 14-15, 2013 - Kalahari, WI Dells (Viterbo Credit)

Winter at a Glance (Year of Success)

December 3, 2013, Marriott Madison West, Middleton

WASBO/WASPA School Personnel Academy

December 4-5, 2013, Marriott Madison West, Middleton (Viterbo Credit)

WASB-WASDA-WASBO State Education Convention

January 22-24, 2014, Wisconsin Center, Milwaukee (Viterbo Credit)

DPI-WASBO-WCASS Federal Funding Conference

February 24-25, 2014, Kalahari, WI Dells (Viterbo Credit)

WASBO Facilities Management Conference

March 13-14, 2014, Kalahari, WI (Viterbo Credit)

WASBO Transportation & Bus Safety Conference

March 13, 2014, Kalahari, WI Dells

WASBO Accounting Conference

March 19-20, 2013, Marriott Madison West, Middleton (Viterbo Credit)

Professional Development cont.

WASBO Spring Conference

May 20-23, 2014, Kalahari, WI Dells (Viterbo Credit)

Scholarship Fundraisers

Fall Golf Outing

October 2, 2013 - Autumn Ridge Golf Course

Certified School Risk Managers (CSRM) Courses (Viterbo Credit)

School Safety from A to Z (Update Credit)

September 18, 2013 - Wisconsin School Leadership Center, Madison

Fundamentals of Risk Management

October 7, 2013 - Holiday Inn, Stevens Point

Handling School Risks

October 8, 2013 - Holiday Inn, Stevens Point

Measuring School Risks

November 4, 2013 - Holiday Inn, Stevens Point

Funding School Risks

November 5, 2013 - Holiday Inn, Stevens Point

Administering School Risks

December 3, 2013 - Holiday Inn, Stevens Point

Committee Meetings

Fall Conference

All meetings are by conference call at 2 pm.
July 24, 2013, Aug. 7, 2013, Sept. 11, 2013

Joint Convention

July 17, 10 am, WASBO Offices

Midwest Facility Masters Conference

All meetings are by conference call at 10 am.
Aug. 1, 2013, Sept. 5, 2013, Oct. 10, 2013, Nov. 7, 2013 (if needed)

Safety & Risk Management

All meetings at 12 pm, WASBO Offices, Madison
Aug. 13, 2013, Oct. 15, 2013, Jan. 14, 2014, April 8, 2014, Aug. 12, 2014

School Facilities

All meetings at 9:30 am, WASBO Offices, Madison
Aug. 13, 2013, Oct. 15, 2013, Jan. 14, 2014, April 8, 2014, Aug. 12, 2014

Committee Meetings cont.

Spring Conference

All meetings at 2:00 pm, WASBO/Conf. Call unless otherwise noted.

July 12, 2013

Transportation

July 10, 2013, 9:30 am, WASBO Offices, Madison

WASBO Business Meeting

January 23, 2014, WI Center, Milwaukee

May 23, 2014, Kalahari, WI Dells

Board of Directors Meetings

September 19, 2013	Fort Atkinson
December 11, 2013	WASBO, Madison
February 12, 2014	Beaver Dam
April 9, 2014	Pewaukee
June - TBA	

Leadership Team Meetings

August 20, 2013, November 12, 2013, January 8, 2014, March 5, 2014, May 14, 2014

Regionals

Check WASBO.com for more information.

Bay Area

- Meetings start at 9:00 a.m. TBA

Madison Area

- Meetings start at 9:00 a.m. TBA

Northeast

- Meetings start at 11:00 a.m.
September 6, 2013 - CESA #7, December 13, 2013

- Kimberly, February 21, 2014 - DePere, April 4, 2014 - Fond du Lac, May 30, 2014 - Manitowoc

Northwest

- Meetings start at 10:00 a.m. at Lehman's Supper Club in Rice Lake. TBA

Southeast

- Meetings are from 12:00-2:30 pm. TBA

Southwest

- Meetings start at 12:30 pm. at CESA 3 TBA

West Central

- Meetings are from 10 am - 1 pm at the Sparta Area SD Administration & Education Center TBA

WI Valley

- Coffee at 9:00, Meeting at 9:30.
August 16, 2013 - Antigo, September 20, 2013 - Merrill, October 18, 2013 - Lakeland, November 15, 2013, December 13, 2013 - Wausau, February 14, 2014 - Stevens Point, March 14, 2014 - Auburndale/Stratford, April 18, 2014 - Minocqua, June 19, 2014 - D.C. Everest, August 15, 2014 - Antigo