



Wisconsin
Association
of
School
Business
Officials



Taking Care of Business

A Bimonthly Publication of the Wisconsin Association of School Business Officials - Volume 18, Number 1 - February 2014

Inside This Issue

President's Message	3
Executive Director's Report	5
Legislative Update.....	7
Bringing Your Safety Plan from Paper to Reality	9
Transportation & Bus Safety Conference	10
ASBO Member Spotlight: Janice DeMeuse, SFO.....	11
Director's Corner: Doing it the Right Way with WASBOnian Character	12
Director's Corner: Transitioning In and Transitioning Out.....	14
Tech Tip: And Now for Something Completely Different	17
Registered Sex Offenders Must Now Provide Notice Before Visiting Schools	19
Meet the Candidates for WASBO Board of Directors.....	22
Proper Lifting and Carrying Procedures.....	25
Tax Changes for 2014: A Checklist	26
Preparing for the Unthinkable.....	29
Developing a School Society Media Policy	30
New Year, Deep Clean, Fresh Start!.....	31
Getting the Most from Your Pest Management Professional.....	31
1st Annual CTO Clinic March 2.....	33
Green Schools National Conference.....	33
Mrdjenovich: The Right Stuff.....	35
OCR Issues Additional Guidance On Athletics For Students With Disabilities	36
State Education Convention Highlights	37
Book Review: Shifting the Monkey.....	38
Graduating with Honor.....	40
Welcome New Members/On the Move.....	42
Stay Connected	43

Advertisers

A'viands.....	40
CESA 10	13
Community Insurance Corp.	21
DLR Group	35
EMC Insurance.....	4
Hoffman Planning, Design & Construction.....	16
e~Funds for Schools.....	34
McClone.....	35
National Insurance Services	8
PBBS Equipment Corp.	10
Skyward	16
Springsted.....	9
WEA Trust.....	2
WEA Trust Member Benefits.....	34
Weidenhammer.....	42
WI OPEB Trust.....	41
WPS Health Insurance.....	6

WASBO Honors Gail Moesch as 2014 School Business Official of the Year



Gail Moesch, Business Manager for Shawano School District, received the 2014 School Business Official of the Year Award from the Wisconsin Association of School Business Officials (WASBO). The award was presented Jan. 23 at the WASB-WASDA-WASBO State Education Convention in Milwaukee.

Gail was recognized for her leadership in schools, commitment to professional development, active participation in her profession, and role in her community. Gail is a 50-year veteran of the Shawano School District and has been Business

Manager for the past 15 years. As a member of WASBO, she has served as a director, treasurer, president-elect and president, and continues to give her time as a volunteer and presenter.

WASBO's Bay Area and Northeast Regional Groups and Shawano superintendent Todd Carlson nominated Gail for the award. Her regional colleagues noted, "Gail was instrumental in starting the wellness program in her district in order to

Continued on page 18

WASBO Honors Becky Hansen as 2014 Shining Star



Rebecca Hansen, Business Manager for the New Holstein School District, has been chosen to receive the 2014 WASBO Shining Star Award in acknowledgement of her service, time, expertise, and leadership in the Wisconsin Association of School Business Officials (WASBO). She has been a member of WASBO since 2001. The award was presented Jan. 23 at the WASB-WASDA-WASBO State Education Convention in Milwaukee.

Becky was nominated by her Bay Area and Northeast regional business manager colleagues. Becky received

WASBO's New School Business Manager of the Year Award in 2006, and has been active on the association's Accounting Committee and Accounting Conference Planning Committee. The nomination noted her participation in the People to People International trip to Russia in 2005, visiting schools and representing WASBO and her school district. James Scharff, Executive Director of Iowa ASBO, and Bert Huszcza, Executive Director of Colorado ASBO, both

Continued on page 18



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 2013-14
Board of Directors

Lynn Knight - President
John Gahan - President Elect
Jeanne Stahl - Treasurer
Janice DeMeuse -
Past President

Directors At-Large

Robert Avery
Jay Clark
Kathy Davis
Jason Demerath
Kent Ellickson
Kenneth Mischler
Rob Nelson
Andy Weiland
Dale Zabel

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
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

© 2014, Wisconsin Association of School Business Officials (WASBO)



President's Message

A Word From Your President

Change!

By Lynn Knight, Business Manager, School District of Nekoosa



Lynn Knight
WASBO
President

Albert Einstein defines insanity by doing the same thing over and over again and expecting different results. "We've always done it this way." "If it's not broken, why fix it?" "You just don't understand how we do things around here." "The staff won't like this!"

How many times have you heard these phrases or similar phrases when you want to implement change? For some, the idea of change dies as soon as somebody voices opposition. Let's set up a scenario.....(The names in this story have been changed to protect the innocent!) "Business Manager Paul is in a meeting with his staff, Accounts Payable Lisa and Payroll/Benefits Bob. Superintendent Roy believes that the business office could be more efficient and is asking for ideas. Lisa and Bob are thinking thoughtfully. Paul begins speaking with the idea of automating timecards. He glances in Bob's direction and realizes at once that he has made a mega mistake. Never, ever, make a suggestion to change a process without asking for approval from everyone, especially a change in PAYROLL!! Paul quickly covers for his eager voice by estimating the cost of this change in the thousands of dollars." Now granted, the story is a bit exaggerated but the message is pretty clear. Some individuals cannot handle the controversy of change on any level. Others identify change as an opportunity for learning and growth, regardless of the controversy.

School districts across the state have been thrown in the sea of change since the passage of Act 10 in 2011, and we're not done churning yet. Some districts are facing a change in their culture. Others are changing their compensation plans. Still others aren't changing anything at all.

Change doesn't happen overnight, but there are some helpful strategies that will make the change less painful. First and foremost, communicate, communicate, communicate. And when you're done, communicate some more. Nothing halts the progress of change more than lack of communication. The message must be strategic, clear and concise, but also utilize the same language throughout the process. For example, a change to restorative justice can be described as a discipline change, a behavior change, or even a paradigm shift. Whatever terms are communicated, use the same words consistently and be clear on the message.

Second, include the stakeholders: parents, community, students, staff, school board, and even local businesses. The more involved stakeholders are in the process, the easier it will be to change. This isn't to say that the stakeholders will be making the decision; rather, it will provide an open forum to discuss the concerns of all that will be potentially affected by the change. Rarely do you go wrong by involving stakeholders.

Third, follow through and follow up. Create a timeline and/or objectives to keep the process moving. And most importantly, keep the stakeholders informed.

These are just three strategies that will help facilitate change. There are many more. Find the strategies that will work in your district.

Albert Einstein also said, "The world, as we have created it, is a process of our thinking. It cannot be changed without changing our thinking." Well said, Mr. Einstein! 🍷



To protect classrooms,
playgrounds and everything
in between, Wisconsin
schools *Count on EMC*®.

EMC Insurance Companies offers all lines of insurance, including school board errors and omissions, workers' compensation, commercial property and fleet. You also benefit from the expertise of two experienced managing general agents to complement your local independent insurance agent's service. *Count on EMC* and our trusted Managing General Agents to protect what you, your staff and your community have worked so hard to achieve.



800.272.2443



800.541.5710



Milwaukee Branch: 855.495.1800 | Home Office: Des Moines, IA

www.emcins.com

© Copyright Employers Mutual Casualty Company 2013. All rights reserved.

Executive Director's Report

Presented at the Semi-Annual Business Meeting, Jan. 23, 2014

By Woody Wiedenhoeft, Executive Director, WASBO



Woody
Wiedenhoeft

WASBO Professional Recognition Program – Today, WASBO is honoring Gail Moesch, Business Manager of the Shawano School District, as the 2014 Business Official of the Year (sponsored by Hutchinson, Shockey, Erley & Co.) We are also honoring Becky Hansen, Business Manager at the New Holstein School District, as WASBO's 2014 Shining Star (sponsored by Quarles & Brady, LLP).

WASBO Honored with Two ASBO Pinnacle Award Recipients – Scot Ecker of Carthage College and a former WASBO Board member received the top Pinnacle of Excellence Award at ASBO's 2013 Annual Meeting in Boston. Additionally, Joe Marquardt of the New London School District received one of only three Pinnacle of Achievement Awards. Read about both Scot and Joe in the December issue of *Taking Care of Business*.

Next Year's WASBO Professional Recognition Program Nominations Are Due March 3, 2014 - WASBO has many members deserving of award nominations. Recognize them with a nomination for one of the following WASBO awards:

- 2014 Wallace E. Zastrow Award – Sponsored by Wis. Investment Services Cooperative (WISC)
 - 2014 New School Business Official of the Year – Sponsored by Key Benefit Concepts
 - 2014 Facilities Manager of the Year – Sponsored by Stalker Flooring and SchoolDude.com
 - 2014 Business Services Award – Sponsored by Robert W. Baird & Co.
 - 2014 Tina Hafeman Friend of WASBO
 - NEW for 2014! Safety, Security & Wellness Grant – Sponsored by M3 Insurance
 - 2015 School Business Official of the Year – Sponsored by Hutchinson, Shockey, Erley & Co.
 - 2015 Shining Star Award – Sponsored by Quarles & Brady, LLP
- Criteria and the online nomination process can be found at WASBO.com/awards. We encourage each WASBO Regional to submit a nomination.
- Growth and Upcoming Initiatives** – Attendance at Foundation conferences continues to grow and registration is open for the following:
- Federal Funding Conference – For the third year, WASBO is collaborating with WCASS and the DPI to provide this conference. It is scheduled for February 24-25. Considering the nuances of MOE and other federal funding situations, this is a very popular conference. Sign up soon because the conference is close to being sold out. School district teams have found this conference beneficial to attend together.
 - Facilities Management Conference – March 13-14. This conference continues to expand every year and this year will introduce a mentoring program for facilities directors.
 - Transportation & Bus Safety Conference – March 13. Check out the timely and useful sessions for both in house and contracted school transportation including a session on how to execute an evacuation plan.
 - Certified School Risk Managers (CSRM) – The CSRM certification program has been a success. You can now sign up on WASBO.com for spring courses held in Oshkosh which started on February 4 and will continue in April. Another round of courses will be offered in the fall in Madison.
 - Accounting Conference - March 19-20. Due to the success of this conference, the 2014 event will be held in a new location – the Madison Marriott West in Middleton. Sessions developed by the Accounting Committee will provide valuable information to you and your district.
 - p-Card User Group Meeting – This FREE offering for current and prospective WASBO p-Card users is scheduled for the afternoon of March 18 and will also be held at the Madison Marriott West as a prelude to the Accounting Conference.

Mark your calendars:

- WASBO Foundation Spring Conference & Exhibits – May 20-23 at the Kalahari Resort & Conference Center in Wisconsin Dells. Exhibitor registration is open and conference, golf and bike ride registration is coming soon!
- Custodial & Maintenance Conferences – Two additional sites have been added this year to make this professional development more accessible to districts around the state. This is the second year of reduced registration fees of only \$15 to make it VERY affordable to send your entire custodial & maintenance staff for a day of training & networking. Locations include: Glendale & Black River Falls (June 19), Antigo (July 16) and Oshkosh (July 30).
- WASB/WASBO School Finance Conference – WASBO is partnering with WASB to provide School Board members a School Finance Conference on August 2. Be thinking about bringing your

Continued on page 20



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.

Legislative Update

SAA PAC & SAADirect FAQ

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



John Forester

In the past several weeks, many SAA members have asked for additional information regarding the SAA PAC and SAADirect.

The SAA has produced a Frequently Asked Questions document that we believe would be helpful to the membership at this time. It appears below.

In 2003, the SAA Legislative Committee created SAA PAC, which is supported by members of all four SAA member associations, to strengthen the identity of the SAA and to improve the management of our combined political activities. SAADirect, the SAA's conduit, was formed in 2006 to provide SAA members with another opportunity for political involvement. The SAA Legislative Committee believes that SAA PAC and SAADirect are vitally important to our objective of establishing a comprehensive SAA giving program designed to strengthen our relationships with lawmakers and influence legislation.

What is SAA PAC?

SAA PAC is the SAA's registered political action committee (PAC) in Wisconsin. A PAC is any political committee, other than a candidate committee or a political party committee, which receives contributions, distributes funds, or incurs obligations for the purpose of influencing the election or defeat of candidates to state or local office. SAA PAC funds are used for campaign contributions designed to help reelect "friends of public education," strengthen our relationships with key legislators and, ultimately, to influence legislation.

What is SAADirect?

SAADirect is the SAA's conduit. A conduit is an organization that receives money from individuals, deposits it in a financial institution, and then

transfers contributions to a candidate or campaign committee at the request of the original contributor. Conduits can be thought of as "political savings accounts" held by individuals but administered by the association. SAADirect has the same purpose as that of SAA PAC.

How do conduit and PAC contributions differ?

Conduit contributions differ from political action committee (PAC) contributions in that they are considered by the Government Accountability Board to be individual contributions and reported that way on candidates' campaign finance reports. Therefore, they are not subject to the same limitations as PAC contributions. However, the check to the candidate or committee is made out in the aggregate and the association gets "credit" along with the individual contributors in the transmittal letter that accompanies the check. A good example would be a \$500 check to candidate A from the association's conduit that is comprised of 10 individual contributions of \$50 each. Each contributor would be listed in the transmittal letter and candidates would report them as \$50 individual contributions on their finance reports. A key element of the conduit is that each participant retains the absolute right to decide when and where their contributions are distributed. The SAA, the administering body of our conduit, will follow political events and make suggestions as to where contributions would be most beneficial, but the ultimate decision rests solely with each conduit participant.

Why does the SAA need a PAC and a conduit?

Conduits are such an important complement to PACs because many of the candidates that we wish to support

for reelection reach their PAC limit very early in an election cycle. Therefore, the only way that we can hope to strengthen our relationship with these "PAC'd out" candidates is via individual or conduit contributions. Unfortunately, the SAA receives no "credit" for individual contributions sent directly to the candidate.

How are SAA PAC and SAADirect funds distributed?

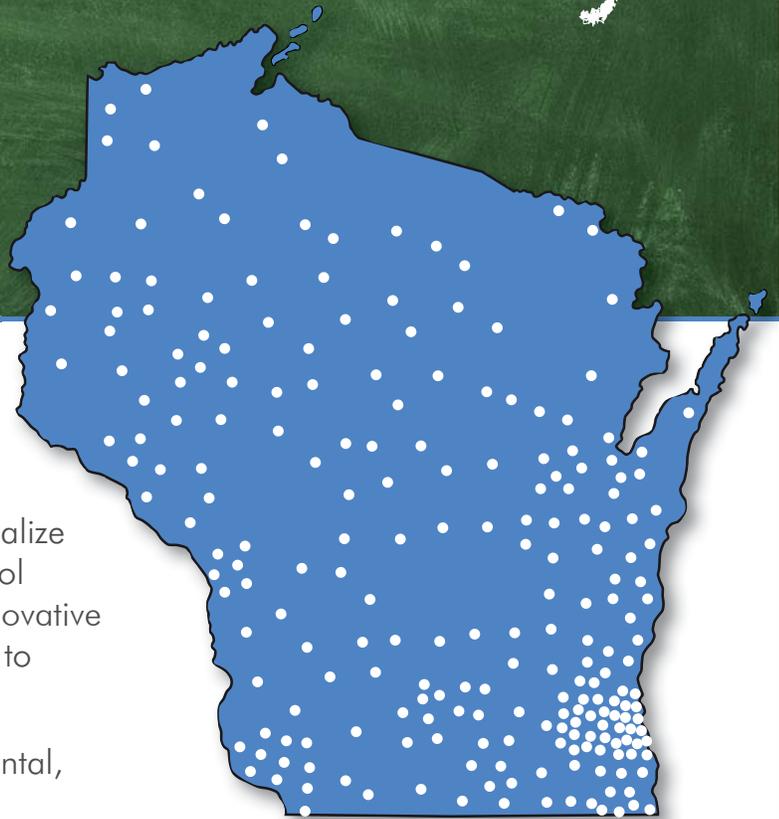
The SAA Director of Government Relations develops a PAC contribution plan that conforms to the following SAA PAC contribution guidelines. This plan is subject to the approval of the SAA Steering Committee, which serves as the governing body of SAA PAC. It is also reviewed by the SAA Legislative Committee. The SAA will make suggestions (generally conforming to the guidelines listed below) as to where SAADirect contributions would be most beneficial, but the ultimate decision rests solely with each conduit participant. The distribution of SAA PAC campaign contributions is limited to:

- Each of the four legislative campaign committees controlled by leadership (i.e., Committee to Elect a Republican Senate) in equal amounts.
- Incumbent legislators.
- Legislators with a proven record of support for public education and SAA positions on issues.
- Key legislators in positions of power.
- Members of the Joint Committee on Finance.
- Selected members of the Senate and Assembly education committees.

Continued on page 13



284 Wisconsin
School Districts
already work
with us.
Find out why.



Contact us for a quote today on your employee benefits including HRAs.

At National Insurance Services (NIS), we specialize in employee benefit plans specifically for school districts just like yours. See why we are an innovative leader in employee benefits. We look forward to finding the right solution for you.

- Short and Long-Term Disability, Health, Dental, Life and Vision
- OPEB solutions, Active HRA and FSA plans, 403(b) plans and Retiree-Only HRA plans

NATIONAL INSURANCE
SERVICES
Client Focused. Solution Driven.

800.627.3660



Stephanie Laudon
Regional Vice President
slaudon@NISBenefits.com



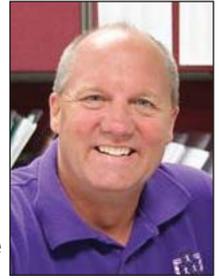
Ken Zastrow
Market Development, Retirement Income
kzastrow@NISBenefits.com



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

Bringing Your Safety Plan From Paper To Reality

By Dale Zabel, Director of Facility Services and Safety, Kettle Moraine School District
Submitted on behalf of the WASBO Transportation Committee



Dale Zabel
WASBO Director

ACT 309 came into play a few years ago for school districts mandating them to have safety plans in place and review these plans annually. We, as school districts, are also directed to actually turn the safety plans into functional exercises. All plans are well thought out and look good on paper; it's the art of making them into something that can be choreographed into a scheduled event that can be the challenge. We all know that schools are "schedule driven," and the school year is measured in minutes, so every minute we use for safety needs to be productive.

At Kettle Moraine, we have worked out our plans from the safety manual to the tabletop, and then run the exercise in real life and in real time. This has taken many hours of dissecting and reevaluating former plans that were based on just having a plan in place on paper to something we can actually communicate to staff and school children of all ages to perform. Also involved is communication with all of the outside people that we work with, such as, fire departments, police and sheriff, local businesses and neighbors; as well as partners in the plan, such as, your transportation provider, churches and other places to house large groups of children and staff.

We started with the basic need to set the culture of safety in the School District of Kettle Moraine by informing staff that running live evacuation exercises will be part of the normal curriculum, just as fire and severe weather drills are. This may sound like a no-brainer except there are different views on how it affects children. Some educators believe that bringing in all of the emergency responders and equipment may frighten students. Others believe that parents may not agree on what level of exposure to threats, real or perceived, are acceptable to their children. We could debate this here, but you have to decide what practices are acceptable for your school and community while keeping in mind that ACT 309 says school districts must perform evacuations on an annual basis.

I want to bring out a few key components to send you on your way to conducting a successful exercise. First and foremost is that you have to identify your objectives and keep them the focus of your exercise. This seems so basic but it is easily lost when you have all of the different participants in one room. There seems to be the mindset that the exercise has to run perfect or it is a failure. This is so far from the truth because as you attempt to reach your preset goals, numerous other factors come into play that you never thought of, which gives you more objectives to obtain in the next exercise. You have to keep in mind that you will be running some type of evacuation exercise annually that contributes to building the safety culture in your district.

One of the key components to a successful evacuation exercise is to include your transportation provider in the early planning meetings. The school bus can be a great asset to assist in a school evacuation. The school bus is: mobile, a place to get students out of the weather, and most important, a safe place that most students see and use every day. In the case of an actual emergency, the school bus can give students a sense of calm and protection during a stressful situation.

This brings us to why I am involved in WASBO and how we can, as an organization, help each other. The WASBO Facilities Conference will be held March 13-14 and the Transportation Conference is March 13. There is a presentation on March 13 at the Transportation Conference titled "School Emergency Planning – Implementing Realistic Drills," given by Rob Nelson (Dousman Transport), Laura Lloyd (Kettle Moraine Middle School Associate Principal), and myself, (School District of Kettle Moraine – Director of Facilities and Safety). This presentation covers how to plan and implement evacuation plans with local police, fire, and transportation departments. It is highly recommended that your safety leaders in your district attend this conference. We look forward to seeing you! 🍷



Ensure your decisions are guided by an independent financial advisor.

"Taxpayers could avoid unnecessary interest costs if school districts and political subdivisions issued general obligation bonds on a competitive basis and used independent financial advisors."
Missouri State Auditor

Springsted's Public Education Team:
Call (414)220-4255

Jerry Dudzik	jdudzik@springsted.com
Stacy Childers	schilders@springsted.com
Patricia Heminover	pheminover@springsted.com
Don Lifto	dlifto@springsted.com

 **Springsted** springsted.com
(800)236-3033

Transportation & Bus Safety Conference

By Joyce Smalley, Finance Manager, La Crosse School District and Chair, WASBO Transportation Committee
Submitted on behalf of the WASBO Transportation Committee

Are you new to school district transportation? Have you been in charge of transportation in your district since the Model T? Do you want to learn more about transportation related topics and network with colleagues? Then join us for the WASBO Foundation Transportation and Bus Safety Conference on Thursday, March 13 at the Kalahari Conference Center in Wisconsin Dells.

The WASBO Transportation Committee has a full day scheduled with sessions that cover a broad spectrum of transportation topics. We'll start the day out with learning about human resource issues and requirements specific to transportation. We will hear from the Stevens Point Area Public School District, which operates its own fleet, and from GO Riteway, a transportation contractor. The presenters will share best practices and answer HR related questions you may have.

We've all heard the acronym PBIS, right? Find out how PBIS (Positive Behavioral Interventions and Supports) can help improve student behavior on the bus and create a culture of positive interactions between students and drivers. Brad Larrabee of the Eau Claire School District will share his expertise on this topic.

We all have different safety drills in place – evacuation drills, lock-down procedures, tornado drills to name a few. What is the transportation department's role when it comes to school emergencies and student safety? Learn how the Kettle Moraine School District and Dousman Transport Company implemented drills for school emergency planning and involved the local police and fire departments and the District's transportation department. Learn how they worked together to improve student safety.

After lunch, Sergeant Travis Lauer from the Wisconsin DOT Motor Carrier Enforcement division will share the

latest in transportation trends. He'll share his experiences with the new electronic bus inspection process and more.

Looking for best practices when it comes to bus safety and security practices? Ted Hayes from M3 Insurance and Harry Steenbock from the Hortonville School District both have many years of experience with school transportation. Come and learn from the best.

Wrapping up the day will be a Q&A roundtable discussion on transportation topics. This is your opportunity to ask your colleagues questions you may have on anything related to transportation. Discussions at previous roundtable sessions have included homeless transportation, unique needs of 4K transportation, parent contracts, counting students

WASBO Foundation Transportation & Bus Safety Conference



Thursday, March 13, 2014
Kalahari Resort & Conference Center, Wisconsin Dells
WASBO.com/transportation

for the DPI Transportation report, alternate vehicle driver requirements – the list goes on. Perhaps you have an innovative idea that you want to share with the group. There's a place on the registration form for you to submit your "burning question" or share your ideas.

For a complete conference schedule and to register, go to WASBO.com/transportation or call 608.249.8588. We look forward to seeing you in the Dells on March 13. 🍷

“

If you don't know where you want to go, then it doesn't matter which path you take”

~ From "Alice in Wonderland”

ASBO International Milestones January 2014

- Debra Michel, Wisconsin Dells SD, Wisconsin Dells, WI (10 years)
- John E. Gahan III, Pewaukee SD, Pewaukee, WI (20 years)

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, Limpfield

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

pbbs.com

ASBO Member Spotlight: Janice DeMeuse, SFO

Reprinted from Accents Online, Dec. 12, 2013

Janice DeMeuse began her school business career in 1978, working in rural and suburban school districts in Wisconsin for 22 years. It was while she held her third position in the field that she earned her state certification, which is required to be recognized as an official school business manager. Today she serves as director of business services for Fox Point-Bayside School District in Milwaukee, Wisconsin, and holds her Certified Administrator of School Finance and Operations® (SFO®) certification.

Fox Point-Bayside is one of three K-8 districts that feed into one high school, serving approximately 950 students in two schools—550 students in the elementary school and 400 students in the high school. Janice explains that the district has a long history of academic excellence that emphasizes instilling positive behaviors and attitudes as part of a strong foundational education. The Wisconsin Department of Public Instruction recently recognized Fox Point-Bayside as one of only nine districts that “significantly exceeds expectations.”

Janice believes in giving back to the field, having served as president of WASBO for the 2012-2013 school year. As part of WASBO’s Accounting Committee, she co-authored *School Budget Cycle*, which serves as a textbook in school business management certification classes.

Wisconsin made headlines in recent years when the governor was able to pass legislation that eliminated many employee groups’ bargaining rights. Although legal proceedings are still ongoing, Janice points out that they

are living with major changes in employee relations.

“Under the legislation, employees are required to pay a higher portion of some of their benefits,” Janice says. “Boards have the power to modify employee benefits such as health insurance coverage and post-employment benefits without getting agreement from employee groups.”

Of course, it’s part of a school business professional’s job to come up with the best solutions when difficult issues are presented. “Whether or not we agree with the change or the way it was implemented, school officials across the state are searching for the best way to handle things in their district,” she says. 🍷



Janice DeMeuse
WASBO Past President

ASBO MEETING DATES

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

2019 Annual Meeting & Expo
October 25-29, 2019 - Washington, DC

2020 Annual Meeting & Expo
October 2-5, 2020 - Nashville, TN





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.



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.



Director's Corner

Doing it the Right Way with WASBOnian Character

By Kent Ellickson, Director of Business Services, Sparta Area School District



Kent Ellickson
WASBO Director

Recently during my drive home from work one evening, I listened to an interesting radio discussion about the trait called “Midwestern Nice.” According to some, natives of Wisconsin, Minnesota, and neighboring areas routinely demonstrate certain behaviors — behaviors similar to those painted by Garrison Keillor in his description of the residents of Lake Wobegon. In other words they are viewed as mild-mannered, courteous, and reserved with a tendency to avoid confrontation.

One of the radio discussion guests shared a story that seemed to validate this for him. He described attending a networking event during a national conference in a busy establishment in a large coastal city. To make sure everyone in his party was comfortable, he went to secure one more seat from another table. He approached the table and asked if he could grab what appeared to be an unoccupied seat. Instead of receiving a reply of yes or no immediately, one of the people at the table asked the radio guest if he was from the Midwest. The guest asked if he had an obvious Midwestern accent. He was told he didn't have an accent marking him as a native from the Midwest. He was told he must be from the Midwest because he asked if he could take the seat instead of just taking it.

As WASBOnians who are practicing professionals in fiscal and other support services, we potentially encounter situations where other parties involved may be anxious,

Certainly, demonstrating competence by providing the right resources to stakeholders is imperative. Equally important is the character we show in how we engage with stakeholders as we help them. It builds the credibility for future successful interactions.

emotional, confrontational, or are otherwise challenging. Obviously, these situations may be way more difficult than moving furniture at a crowded reception.

We engage with various stakeholders as our districts struggle through challenging budget processes. We investigate incidents and follow up with parents when things don't go as planned with student transportation. We welcome the new school board member who is ready to single-handedly reform the school district — during her first term. We calm the employee who is nervous or anxious about the impact of a change in Board of Education policy or the employee handbook. We listen to citizens when political conversation regarding education becomes highly charged.

In dealing with such situations as school business officials, our personal credibility is vital. Those WASBOnians

who recently read together Stephen R. Covey's *The Speed us Trust* may remember Covey's explanation of how personal credibility comes from both competence and character. Both competence and character are equally important components of personal credibility.

Certainly, demonstrating competence by providing the right resources to stakeholders is imperative. Equally important is the character we show in how we engage with stakeholders as we help them. It builds the credibility for future successful interactions.

My experience in this profession routinely shows me that our profession attracts people of very good character. WASBONIANS want to do what is best for schools, children, and the community—they want to do it the right way. They listen. They respect stakeholders. They advocate for adequate resources for education. They share their knowledge with their peers. Everything they do is focused on students.

This is a “stereotype” I am glad to be included in. I am happy that stakeholders in education can easily recognize us by the way we conduct ourselves. Thank you, WASBO members, for regularly demonstrating your character. 🍷

Legislative Update: SAA PAC & SAADirect FAQ

Continued from page 7

Should I participate in SAA PAC or SAADirect?

PACs and conduits each have their distinct advantages, so you should participate in both programs if possible. Many restrictions that apply to PACs do not apply to conduits. The SAA intends to use both programs to maximize SAA political influence. If you wish to “direct” where your contribution goes, and you don’t mind being listed as a contributor on that candidate’s campaign finance report, you may wish to support SAADirect. If you wish to remain more anonymous in your support of the candidates the SAA chooses to support, you may prefer SAA PAC.

Are political contributions tax deductible?

No. (Sorry, but it’s the law.)

How do I contribute?

To open an SAADirect account, or to support the SAA PAC, please fill out the contribution form found at WSAA.org and return it, along with your check(s), to SAADirect and/or SAA PAC, 4797 Hayes Road, Madison, WI 53704. Call the SAA at 608.242.1370 if you have any questions.

The SAA is also pleased to announce the creation of a secure on-line credit card option for your SAA PAC and SAADirect contributions. This option was created at the suggestion of many SAA members.

For your convenience, we have made available a video tutorial on this new option. If you are interested in making a credit card contribution, please go to the Donate Now button on the left hand side of our home page at WSAA.org.

Note: Contributions to both SAA PAC and SAADirect must be made with separate checks. Thank you! 🍷

“

I can’t go back to yesterday because I was a different person then”

~ Lewis Carroll, “Alice in Wonderland”

Performance Contracting
Considering a Revenue Limit Exemption Project?

CESA 10's unique position as a nonprofit agency, coupled with decades of experience and expertise in managing school facility needs make us the perfect partner for projects of any size. We're here to help make project decisions truly in the best interests of schools.

CESA 10 offers options to allow for maximum flexibility while providing high quality services and achieving savings as efficiently as possible. We will adjust our service to meet your needs and budget.

Resolutions must be passed between July 1st and November 1st, 2014 for projects to be completed in the 2014/15 school year.

Call CESA 10 for your facility audit now and be ready to start your project July 1!

Call C.E.S.A¹⁰ at 1-888-947-4701

Director's Corner

Transitioning Out and Transitioning In

By Kathy Davis, Director of Business Services, Neenah Joint School District



Kathy Davis
WASBO
Director

A few months ago I did something that surprised many who knew me (including myself) — I decided to leave Cambridge for a new job in Neenah. With that decision came the necessary process of learning how to transition out of one district and how to transition into another. Honestly, the transition was a lot more uncomfortable than I ever could imagine; however, it was made more tolerable when I connected with my WASBO peers.

One thing that I have noticed during my years as a WASBO member is that when someone in our WASBO group transitions jobs, typically several others are transitioning as well: the person who is filling your position, the person whose position you are filling, the one who moved five districts away who created a position for that person whom you are replacing, and so on. These multiple changes present an opportunity to reach out to each other and ease the transition process. Whether you are retiring, moving to a new district, resigning, or staying at a district where someone new is coming in, I hope you will consider some of the following lessons that I — with my WASBO support group of transitioning colleagues — have recently learned.

My immediate WASBO support group of transitioning colleagues consists of Mark Worthing (Edgerton to Cambridge), Susan Schnorr (Fond du Lac to Oshkosh), and Wendy Brockert (Lake Mills to Fond du Lac). I will refer to them here as the “Support Group.” An extended support group also plays an important role in the transition process, but for the sake of brevity I’m only going to touch on the immediate group.

Our support group shared many similarities in our transitions and our experiences in WASBO and the profession. The four of us were seen as long-timers in our districts. Although

we each may have had moments where we thought about leaving, none of us really took the plunge until this year. In a weird roundabout way, all of our transitions were very much connected. Sue started the ball rolling by surprising everyone with her move, and then Sue encouraged Wendy, then Sue encouraged me, and I encouraged Mark. So you might say we all have Sue to blame for our transition challenges, but I believe our group is going to be very thankful to her once we’ve made it beyond this stage.

Transitioning Out

Someone once said to me “the future is built on the foundation that you helped build.” I thought about that a lot as I was preparing to leave Cambridge. I was certain that Mark would have his own way of doing things, which honestly made me a little more territorial and agitated than I care to admit. I reminded myself that change is okay and beneficial to a district’s growth. After all, if I hadn’t built that foundation, Mark would be limited in what he could do to build upon it.

Another great saying that I found helpful during the process was from my former superintendent: “When it comes time to leave, you truly leave.” What he meant was that coming back too soon could sabotage the transition process and be uncomfortable for the staff who could be caught between the old and new boss. Let the new person take ownership of the role without your shadow hanging over it. Of course, it is okay to visit, but wait until the newness has worn off. When you do stop by, do just that: visit — no shop talk.

As you are preparing your office for your departure, consider some of the following suggestions that came from the members of my support group.

- Write down notes for the entire year. Either complete a new

calendar or leave a copy of your calendar so the new person can get a sense of what needs to be done when.

- Take the time to identify all accounts, logins, etc. that may need to be switched. Begin the process of having those items switched so when the new person comes, they just need to sign.
- Purge things that you know won’t be needed. It is much harder for a new person to determine what should be kept and what’s trash.
- Organize your computer files and leave behind the ones that were used for important salary calculations, budgeting, reports, etc.
- Make copies of emails that the new person may find useful.
- Leave your contact information and be available for questions.
- Have your technology person copy the Internet favorites you used to complete work tasks.
- Leave notes on “land mines” (AKA sensitive areas/people/topics)
- Get pressing things done before you go. If the budget report is due the week after you leave, don’t leave it for the new person.
- Prepare your staff for the transition. Help them to cope with the change and embrace the new person. Keep them informed about the transition process and identify areas that they can help the new person.
- Invite your replacement in and introduce them to the staff.
- Set up the office in a way that is welcoming to the new person

Continued on next page

Transitioning Out and Transitioning In

Continued from previous page

(remove your personal touch).

Finally, be prepared to go through a grieving process. That was one thing that hit me, worse than what I anticipated. After spending years in one district, you make connections with the people and the community. It is hard to not miss that. I was lucky enough to have my very last hours at Cambridge completely to myself. At first, I was a little offended that no one stuck around to wish me goodbye, collect my keys, or make sure I didn't take any office supplies on my way out. However, in all honesty, the goodbyes had already been said, and I knew they trusted me enough that I wouldn't walk away with the district's grand master key. When it came time for me to power down my computer, leave my keys in the desk, and shut the lights off in the district office, I very much appreciated that I was alone because it was that moment I truly appreciated my time there.

Transitioning In

The difficult thing about our profession (business managers, buildings and grounds directors, etc.) is that there are no all-encompassing manuals. So when we go to a new district we have to figure out everything on our own and hope that the previous person left us notes and is still available for phone calls. In addition to having to learn the tasks of the new job, you are faced with a new boss, new colleagues, new town, new board, new issues, new environment, and new rules. You have to come to terms with the vulnerability you can feel when you leave a district you knew like the back of your hand. Transitioning in can be just as challenging as transitioning out.

On Day One of my new job, I immediately went through Cambridge withdrawal. When I walked into my new office, it was pretty much bare: no computer, no desk chair, an unfamiliar layout, and nothing that reminded me of home. The sinking feeling that

I wasn't in Kansas (a.k.a Cambridge) anymore hit me hard. Thankfully, it was only a matter of minutes before the computer came and someone asked me to choose a desk chair and an office arrangement. My initial anxiety was proven for what it was, just a panic attack. Then came the next one. I was sitting at my desk looking at unfamiliar numbers in an unfamiliar software program and feeling totally awkward for not having a million tasks to do like I had in Cambridge. It's funny how having no tasks to complete as a school business manager isn't relaxing, it's alarming! Since we know there are *always* tasks to be completed, not knowing what they are means that something important is being missed!

After I went through Phase Two of my panic, I realized that I needed to stop panicking and start connecting with some of my colleagues. Hence my Support Group. Once I connected with the group, I was comforted to know that I wasn't alone. They were experiencing the same feelings of panic that I was. We all missed knowing the finances the way we did at our old districts, we missed knowing the people, we struggled with making new connections, and we missed the confidence that comes from knowing a district for so long. So it is from this group's experiences that I share the following list of how to ease the struggles of transitioning in.

- If possible, spend some time with the person you are replacing. During those visits, ask questions about their daily tasks, ask them about the people, request tours, and find out what they think the next steps are for the district. You may have ideas of your own, but take the time to listen their ideas; they know the district and people better than you do.
- Get out and meet people in the buildings. A great person to start with is the Director of Buildings and Grounds — have him or her take you out to the buildings. You

will not only get to see the facilities and their conditions, but you will get to meet some of the people in those buildings.

- Take the time to learn the staff's processes, try to figure out why they do the things in the way they do it.
- Find out who has been in the district the longest. These people possess a ton of history and can be great resources.
- Read the board policies, starting with the financial section.
- Keep an open mind.
- Embrace the fact that you were hired for a reason.
- Try to avoid using the terminology "this is how we did it in my old district." It could be perceived as if you feel your old district was better.
- Connect with your colleagues going through similar transitions.
- Meet regularly with your new boss.
- Be patient with yourself. Everything is overwhelming at first. It can take a year or more to get to know your new job.

On a final note on transitioning in, change is not always instantaneous. After being on the job for a little over a month, I was frustrated with my own perceived lack of progress. I didn't know the finances like the back of my hand, I hadn't gotten to know all of the principals, and I still didn't know the business office staff as well as I would have liked. Out of frustration, I texted a friend for what I suppose was venting and maybe a little bit of whining, and his response to me was, "It's new, Kathy. Deep breath." My own stubbornness had me looking at a calendar to count the number of workdays I had been there, and I was a little surprised to find out it had only been 20 working days. He was right. It was still new. A deep breath later, the

Continued on page 18

Providing WISCONSIN SCHOOL DISTRICTS
with INNOVATIVE SOLUTIONS for more than 35 years.



MASTER PLANNING • FACILITY ASSESSMENTS • REFERENDUM • ENERGY UPGRADES • DESIGN • RENOVATION • CONSTRUCTION

www.hoffman.net

Hoffman[®]
Planning, Design & Construction, Inc.

Appleton, Wisconsin
800.236.2370



A school management solution like no other, Skyward empowers your district with more options to manage and improve student performance than any other system available.

Recognized for our commitment to listening and responding to our customer needs is just one more reason we are the leading solution to manage both your student and business operations.

- ✔ Student, finance, and human resources software
- ✔ One solution for all your administrative software needs
- ✔ State & federal reports included




PREFERRED VENDOR FOR
MORE THAN 80% OF WISCONSIN DISTRICTS

visit www.skyward.com | call 877.764.7237 | email info@skyward.com

“The Mad Hatter:
“Have I gone mad?”

Alice:
“I’m afraid so.
You’re entirely
bonkers.
But I’ll tell you a
secret.
All the best people
are.”

~ From “Alice in
Wonderland”

**The 2014
WASBO
Foundation
Spring
Conference
theme is
inspired by Alice
in Wonderland.
Enjoy these
quotes from the
book.**



“Sometimes
I’ve believed as many
as six impossible things
before breakfast.”

~ From “Alice in
Wonderland”

Tech Tip: And Now For Something Completely Different

By Richard Walker, Trane



Richard Walker

News that Monty Python was having a reunion jogged a brain cell that tipped over a domino that led to this month's column.

The last two columns (*Electrical Demand and Fall Operations Planning* – Oct 2013, and *Of Snow Days and Holidays* – Dec 2013) dealt primarily with reducing costs associated with utility consumption. That is always a popular topic, and we will pick it up again in the next column.

But for now, it's time for something completely different!

While utility costs are one of the ways that we can measure success in our facility operations, they are not all that matters. In fact, if we are reducing utility costs at the expense of either comfort of students and staff or their ability to learn or teach, then we are short circuiting the primary reason that the facility exists in the first place.

All businesses have Key Performance Indicators (KPIs) that help keep the business on the path to success. Schools are no different. And while there are common KPIs that we see across the K-12 market, there can be specific KPIs that are reflective of certain problems or opportunities in an individual district, school, or department within that school.

We commonly see BTUs/sq. ft./yr. as a measure of the energy use in a building, or \$/sq. ft./yr.

Both of these are extremely valid measures and watching them year over year, or against peer facilities can give you an indication of how you are doing. If you're doing that, or tracking your EnergyStar score, GREAT!! Keep it up.

But now think outside the box for a minute. What other Key Performance Indicators could you develop and measure that related directly to your individual goals, your departmental goals, or the district goals.

The Collaborative for High Performance Schools (CHPS) gives us some ideas to start the KPI process. Their KPIs generally relate to the learning environment.

- Classroom acoustics – measuring and managing noise levels that impact learning in the classroom
- Indoor air quality – measuring and managing ventilation & fresh air to control CO2 and CO levels thus keeping people alert
- Visual comfort – is the right amount/right time of light and daylight for a specific task
- Thermal comfort – are we maintaining temperature and humidity levels within optimal range to reduce distractions and absenteeism
- Energy efficiency – while still doing all the preceding, are we still able to reduce utility expenditures

The LEED rating system has a broad array of KPIs and requirements for a LEED certified school.

Better Bricks; the EPA; The Green Schools National Network; Wisconsin Green & Healthy Schools; and literally dozens of other organizations all have programs that dictate or suggest Performance Indicators.

Those KPIs may or may not reflect things that are important to you or your district.

Are there things that you've always wondered about that might make good KPIs?

- Is there a relationship between filter changes and sick days?
- What is the % of energy costs associated with that swimming pool, the fieldhouse, parking lot lighting, gyms, auditoriums, etc. versus classrooms?

- As we see maintenance budgets cut, are you seeing greater unplanned repairs as a % of M&O budget?
- What is the actual utilization factor of rooms or wings of the building / classroom? During the school day? After the school day? Actual utilization rates of classrooms in some schools can be in the 50% to 60% range. Utilization of specialized facilities tends to be even lower. Compound this with the reality that school buildings are typically used 9 of 24 hours and only 180 of 365 days.
- What are the Facility Rental Revenues vs Utility Expenses? How about at different times of the year?

How can you go about identifying meaningful KPIs?

For lack of any other roadmap, you can use Rick's 4 Simple Steps.

Step #1: It IS All About You.

Truly this IS all about you and your district. Along with the performance indicators that are dictated to you, you can create things that are meaningful in your operations. Look at the district goals and objectives. Look at other KPIs. Does the facility somehow impact those goals, objectives or KPIs? In many cases they do. Goals related to student performance and efficient use of District resources and community outreach all relate directly to your facilities.

You are the stewards of the longest lasting assets that your district has – the facilities.

Step #2: One Small Step

Get started. Your first developed KPI

Continued on next page

Tech Tip: And Now For Something Completely Different

Continued from previous page

may not be the best. But in a sense, who cares. It's a process. You'll get better. But more importantly, going through the process will serve you well in the future.

Step #3: Make Sure You Can Get the Data

Things to think about are ease of collection, availability, cost, time investment to collect data, whether data can be shared with the public, relevance, accuracy,

and whether information can be easily communicated so that it is understandable by multiple parties.

Step #4: Choose Outcomes That Matter

Not everything that we can measure matters. Work collaboratively to create KPIs that really make a difference to the district. The more departments in the district the KPIs cross, the more people will be dedicated to making them happen.

Your facility is an ASSET that determines the success of teaching; an ASSET that is an integral part of the success and fabric of the community; an ASSET that can contribute to revenue.

Viewing district facilities as assets instead of costs? That might be something completely different. 🍷

If you have questions about this article, contact Richard Walker at richard.walker@trane.com.

Transitioning Out and Transitioning In

Continued from page 15
moment had passed.

Helping Others Transition In

One of the greatest lessons I have learned from going through the transitioning process is how important it is to make others feel welcome. Simple things like having a plant waiting for the person in their new office, stopping by to introduce yourself, providing a picture directory

of the staff, showing someone where to put their lunch, how to make a copy, or how to request a day off, goes a long way. Talk to the new person, invite them to meetings, invite them to the district's social events, give them suggestions on things they might like in town if they are new to the area. They, too, are just as curious about you as you are about them. So don't be hesitant about approaching them. Also encourage your administrative

team to formalize a training plan for new administrators. Often we have formalized training for our new teachers, but not much for our new administrators.

Finally, if you are a supervisor of a new administrator, identify tasks for him or her to work on the first couple weeks on the job. Having that structure is extremely beneficial and can be a great learning experience for the new staff member. 🍷

Hansen receives 2014 Shining Star Award

Continued from page 1

recommended Becky for her poise and integrity as a delegate.

New Holstein District Administrator William Van Meer noted that Becky "has worked very hard to utilize high level business practices which have been instrumental in both promoting high quality education programs as well as creating a healthy fund balance. Her ability to juggle a career, family, and community involvement as well as serve a great organization goes without question."

The Shining Star Award carries with it a \$750 professional development grant, sponsored by Quarles & Brady. 🍷

Moesch honored as 2014 School Business Official of the Year

Continued from page 1

help keep the district's self-funded insurance costs stable. She is never afraid to tackle new projects, and sometimes they just land in her lap. Gail is a fair, compassionate leader who has the knack of making people feel comfortable in her presence, plus she has the patience and knowledge to help new business officials feel part of this great association."

"Gail has taken on numerous responsibilities in and out of school and has done an outstanding job in helping make our school and our community a special place," said Carlson, noting that Gail's background

as a widowed mother holding down a full-time job, tending to her family and earning her master's degree demonstrates her hard work and determination.

The honor carries with it a \$500 award sponsored by Hutchinson, Shockey, Erley & Co. Moesch also will select a high school senior in her district to receive a \$1,500 scholarship sponsored by Liberty Mutual. 🍷

*See photos from
January's State Education
Convention on page 37*

Registered Sex Offenders Must Now Provide Notice Before Visiting Schools

By Shana R. Lewis, Attorney, Davis & Kuelthau s.c.



Shana Lewis

2013 Wisconsin Act 88 (Act 88) requires the registered sex offender to notify the District Administrator or his/her designee (Administrator) of the specific date, time and place of the visit and his/her status as a registered sex offender. This new law, which is effective as of December 15, 2013, prohibits registered sex offenders from being in any school building, on any school grounds, school recreation area, or school athletic field, or on any school property owned, used, or operated for school administration unless the registered sex offender notifies the Administrator.

Act 88 does not prescribe a particular method of notification to the Administrator. Nor does it provide a form to be used for such notifications. Thus, it is not yet clear whether a verbal notification will suffice.

This obligation to notify the Administrator does not apply to a registered sex offender who is on school premises to vote in an election or to attend an event or activity that is not sponsored by the school. Moreover, if the registered sex offender has a child who is enrolled in the school, the specific notice to the Administrator

is not required and instead, the registered sex offender may provide notice to the Administrator at the beginning of each academic school year, when the child is first enrolled in the school, or upon being designated as a registered sex offender, whichever occurs first. If the registered sex offender is a student enrolled at the school, the entity supervising the student (e.g., County, Child Welfare Agency, or other person) is required to work with the Administrator to ensure the safety of other students attending school with the student registered sex offender.

Act 88 creates Wis. Stat. § 301.475, which establishes that it is a crime for any registered sex offender to fail to adhere to the notice requirements in the statute. It also provides civil and criminal immunity to any Administrator “for any good faith act or omission in connection with any notice given under [the statute].”

It is important to note that Act 88 does not require the Administrator to allow the registered sex offender access to a school building or school district grounds. Nor does

it explicitly permit the Administrator to refuse to allow access to a school building or school district grounds. School districts have significant discretion to control access to school buildings or school district grounds. In fact, most public school districts in Wisconsin have already enacted a board policy governing such access. School district officials should review the applicable policy when determining whether the Administrator should refuse access to a registered sex offender after receiving his/her notification of a planned visit to a school building or to attend a school district event.

Additionally, school district officials should anticipate calls and questions from members of the public about the impact of this new law. 🇺🇸

Contact Shana Lewis, 608.280.6207 or slewis@dkattorneys.com, if you have questions about this article.

WASBO Foundation 2014 Scholarship Program

**Application
Deadline
March 3, 2014**





WASBO Professional Recognition Program

RECOGNIZING *Excellence*
IN WISCONSIN'S SCHOOL
BUSINESS OFFICIALS

Nomination Materials
Available in December

**Nominations accepted
through March 3, 2014
WASBO.com/awards**

Wisconsin Association of School Business Officials
4797 Hayes Road, Suite 101, Madison, WI 53704
(P) 608.249.8588 (F) 608.249.3163 WASBO.com

Executive Director's Report

Continued from page 5

Board members. It will be held in Madison at the Crowne Plaza. Details will be forthcoming in a few months.

WASBO Publications – The WASBO Accounting Committee, led by Ken Mischler, is updating the *Handbook for Evaluation & Improvement of Business Support Staff Functions*, June 2000. We thank the Accounting Committee and other contributing members for their work to update and improve this important publication.

Student Scholarships – The next WASBO Foundation scholarship fundraising opportunities will be at the Spring Golf Outing and the Spring Bike Ride as part of the Spring Conference. We are pleased to offer five scholarships to Wisconsin graduating high school seniors thanks to our scholarship fundraisers and the following sponsors: MetLife Resources, BMO Harris Bank, EMC Insurance Companies, SchoolDude.com, Stalker Flooring, National Insurance Services and Miron Construction. These scholarships require applicants to interview their superintendent, business manager or bookkeeper regarding the effects of revenue limits on their district. We appreciate the time you offer students to assist them in their scholarship applications. If you have a graduating senior this spring, encourage him or her to apply by March 3, 2014.

The Facilities Management Student Scholarship has been renamed by the WASBO Board to the Joel Konze Memorial / Facilities Management Conference Scholarship. This is to honor the passing of longtime WASBO member, Joel Konze from the Sparta School District. Joel passed away as a result of a car accident in October.

We also provide the Dr. Bambi Statz Academic Scholarship to WASBO members enrolled in a school business management masters program. This scholarship is funded by Ehlers & Associates and is due by

March 3, 2014. Please thank WISC for providing a scholarship for the Zastrow Award winner, Liberty Mutual for providing a scholarship for the Business Official of the Year recipient and UnitedHealthcare for providing a scholarship for our President. These award winners and our President may present these scholarships to a student in his or her district.

Democratic Process - WASBO members continue to collaborate with other associations, agencies and governmental units when appropriate alignment with the WASBO Vision and Mission occurs. WASBO is very active in the School Administrators Alliance (SAA) and in the development of the SAA Legislative Agenda. WASBO members should be meeting and conferring on a regular basis with legislators, the Governor's Office, the Department of Administration, the Department of Public Instruction and other governmental agencies and educational associations on a continuous basis. The time to build relationships with people in control of the legislative process is before problems arise. The power of WASBO's Vision and Mission is apparent. Remain active and influential.

Future WASBO Board Goals – The WASBO Board continues to move forward with changes that will benefit WASBO members in the future. Examples are developing programs in the areas of Payroll/HR Certification, providing online tracking of Certification Programs for members and investigating the possibility of using Carver's Policy Governance model for Board meetings.

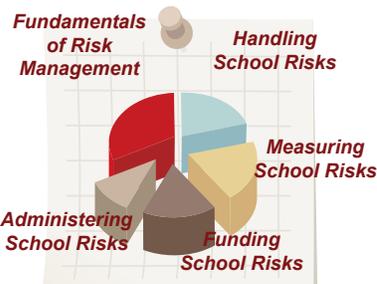
WASBO will continue to have a culture of engaged improvement, through reflection, self-evaluation and planned action steps. WASBO endeavors to enhance our present processes, services and products or create new processes, services and products to meet the needs of our members. With such a proactive, networking, and collaborative culture, WASBO can be proud that its actions positively affect Wisconsin's children.

WASBO Staff - Lastly, please thank Tina, Jeanne, Deb, Áine and Kristin for their professionalism and exuberance in serving WASBO. In turn, your WASBO staff wants to thank all of you for the great opportunity to serve WASBO. 🍷

WASBO Certified School Risk Managers Program

Register at WASBO.com/riskmanagement

Curriculum & National Designation provided by



Who Should Attend?

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

Measuring School Risks

April 1, 2014, Oshkosh, Best Western

Learn the mechanics of developing, forecasting, and trending losses.

Funding School Risks

April 2, 2014, Oshkosh, Best Western

Examine various loss funding techniques.

Administering School Risks

June 17, 2014, Oshkosh, Best Western

Learn how a school risk manager implements and monitors school risk management.

Bullying Prevention

June 18, 2014, Oshkosh, Best Western

CSRM Update Credit available

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 WASBO Events

Professional Development

DPI-WASBO-WCASS Federal Funding Conference

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

Save with
Professional
Development Coupons
WASBO.com/coupons

WASBO Facilities Management Conference

March 13-14, 2014, Kalahari, Wisconsin Dells (Viterbo Credit)

WASBO Transportation & Bus Safety Conference

March 13, 2014, Kalahari, Wisconsin Dells (Viterbo Credit with
Facilities Management Conference)

p-Card User Group

March 18, 2014, Marriott Madison West, Middleton

WASBO Accounting Conference

March 19-20, 2014, Marriott Madison West, Middleton
(Viterbo Credit)

WASBO Spring Conference

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

WASBO Custodial & Maintenance Conferences

June 19, 2014, Black River Falls Middle School, Black River Falls
June 19, 2014, Glen Hills Middle School, Glendale
July 16, 2014, Antigo High School, Antigo
July 30, 2014, Oaklawn Elementary School, Oshkosh

WASBO Fall Conference

Oct. 2-3, 2014, Osthoff, Elkhart Lake (Viterbo Credit)

Midwest Facility Masters Conference

Nov. 3-4, 2014, Kalahari, Wisconsin Dells (Viterbo Credit)

Scholarship Fundraisers

Spring Golf Outing

May 21, 2014 - Trappers Turn Golf Course, Wisconsin Dells

Spring Bike Tour

May 21, 2014 - Wisconsin Dells

Fall Golf Outing

Oct. 1, 2014 - Autumn Ridge Golf Course, Valders

Certified School Risk Managers (CSRM)

Courses (Viterbo Credit)

Measuring School Risks

April 1, 2014 - Best Western, Oshkosh

Funding School Risks

April 2, 2014 - Best Western, Oshkosh

Administering School Risks

June 17, 2014 - Best Western, Oshkosh

Bullying Prevention

June 18, 2014 - Best Western, Oshkosh (Update Credit)

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

Meet the Candidates for WASBO Board of Directors

Bob Avery

Director of Business Services, Beaver Dam Unified School District
President-Elect Candidate



Greetings, WASBOnians! I am Bob Avery. Currently, I serve as the Director of Business Services for the Beaver Dam Unified School District and, for the last three years, have had the honor of serving on the WASBO Board of Directors. I would like to ask for your consideration of my candidacy for the President-Elect position on our Board. I am willing and prepared to serve another three years on the Board's leadership team.

I have worked in public education since 1997, when I was hired as the Transportation Coordinator for the Stoughton Area School District. Over the last twelve years, since leaving Stoughton, I've worked in the business office for four other districts, (Sun Prairie, Wisconsin Heights, Somerset, and now at Beaver Dam), three of them as the business official. I have also worked for DPI as a school finance consultant. Through these experiences, I have seen a variety of environments and faced a number of different challenges. And, with the help of colleagues, have grown as a person, as a professional, and as a practitioner.

Perhaps the most outstanding quality of WASBO and its members is the dedication to the service of colleagues and a commitment to newer practitioners. To that end, the project I am most proud of during my tenure on the Board is the creation and implementation of the Year of Success program. Working with WASBO and DPI staffs, I helped develop a program of sessions within existing conferences (Fall, Winter Personnel, Accounting, Spring) that build upon the

two-day New Administrator Conference in August. The program, now in its third year, is designed to provide timely information on a variety of topics seen by new business officials and bookkeepers throughout the year.

In addition to serving on the Board since 2011, I am also on a number of committees (Spring Conference, Fall Conference, School Finance Puzzle, Investing in WI Public Schools, and Scholarship) and many years ago chaired the Transportation Committee. I have been honored to present at a number of conferences as well. I have learned and gained more by participating on these committees than I ever would have sitting on the sidelines. I encourage you to find a committee to join!

Currently, the Board is in the middle of a strategic planning process. This process will culminate in the adoption of a strategic plan in the next year and implementation of that plan after that. I believe that cohesion and consistency is paramount to smoothly working through this process. As a current Board member, I represent cohesion in this process, and promise to help guide the plan through implementation.

Regarding my personal life, I have been married to an amazing woman, Carol, for fourteen years. Together we have an incredible 12 year old. I am also honored to be the step-father to Carol's two wonderful adult children. Carol, an accountant by training, is the executive director of a non-profit in Dane County. My other big interest is cycling, having ridden 1500+ miles each of the last four years, including crossing Iowa three times on RAGBRAI while fundraising for the LIVESTRONG Foundation. And, thanks to the support of many of you, I've raised over \$12,500 for LIVESTRONG to date. (Thank you!)

Thank you for your time, consideration and, hopefully, support.

Phil Frei

Deputy District Administrator (Business and Operations), Sun Prairie Area School District
President-Elect Candidate



Hello, my name is Phil Frei, and I would like your consideration when voting for President-Elect for WASBO. I grew up in Fond du Lac and attended public school for grades K-12. Though I didn't know it at the time, that public education served me well. I was more focused on golf, basketball, and the outdoors than school work. But I had great teachers that got me thinking about my future career plans. After two years at a junior college and a undergraduate degree in Business Administration from UW-Oshkosh, I was searching for a job when I was introduced to the George Anderson, who was the business manager for Fond du Lac schools. Long story short, one year later I had my Masters Degree from UW-Whitewater under the leadership of George Gray.

My professional career has taken me from Auburndale School District to River Valley School District to my current position in Sun Prairie. Therefore, I have worked in a small, medium and large district. While each of our roles and districts are different, we all have unique challenges we deal with. No matter the size of the district we can all learn from our peers and also share information with our peers. My last 16 years have been in Sun Prairie. During that time, the district has grown from 4,500 students to 7,500. The district has more than doubled the number of staff and square footage of buildings. We passed the largest single referendum

Continued on next page

Meet the Candidates for WASBO Board of Directors

Continued from previous page

in the state, \$96M, and also a total of \$150M of referendums. While all this growth can be a blessing, it also comes with many costs. While I know most districts don't have the growth of Sun Prairie, those districts in declining districts face even more challenges. I believe with the current "state of affairs," we all need to be advocates for the children of public schools. As I wrote before, we all have unique and challenging jobs, but I believe my role is to make the operations of the district efficient and basically provide support to teachers so they can teach and not worry about the operations side.

My wife Sandy and I met at Whitewater. My wife is a third generation teacher. She tutors math and reading at Creekside Elementary in Sun Prairie. Also, both of her sisters are school counselors, her mother was a teacher, her dad a principal, aunts and uncles were teachers, and grandmother was a teacher. Thus, I have the teaching perspective pretty much covered! We have a 12-year-old daughter, Savannah, who loves to dance and go to school. She probably will be a teacher! We also have an 11-year-old son, Noah, who spends as much time outdoors and as little time as possible at school. As a family we spend much time at our cabin near Spring Green. I like to be outdoors and until recent back issues, I played golf and basketball.

I was on the WASBO Board from 2002 to 2005. I was also awarded the 2001 and 2003 Business Services Award from WASBO. After some really busy years at Sun Prairie, I feel I have the time and would like to give back to WASBO. Thank you for your consideration.

Watch your email for your ballot. Voting deadline is April 1.



Jim Beckmann

Director of Operations,
Glendale River Hills/Maple Dale-Indian Hill School District
Director Candidate



Good Morning WASBO, it is an honor to be asked to run for the WASBO Board of Directors. As a member, I have appreciated and admired the work, knowledge and friendships this organization has afforded me.

Over the past 40 plus years my career path was not typical of most "school" people. I started in retail management in 1972 working my way through the national training program for the SS Kresge Co. (K-Mart). After working as an asst. manager in several stores, managing four stores, and moving eight times in 9 years, my wife and I, with our first daughter, moved back to Milwaukee to take a position (store manager) with Kohl's. That led to a regional VP of a women's fashion chain. It was a really good job, but the company went out of business and I landed a position with Sears Roebuck & Co. While with Sears I had the opportunity to manage a store and also be promoted to the Milwaukee District Business Manager. It was a great opportunity. During that time, we had two more daughters and I ran for the School Board in Glendale. It was an eye-opening experience; I gained a new knowledge and respect for school personnel. The nine years on the Board, with five of them as president, gave me a very different perspective on school operations. In 2002/03 Sears downsized – or as they called it, right sized. Our positions in Milwaukee were eliminated, and I did not want to move to Chicago. Much soul searching led me to move my career in a different direction.

In 2003 the B&G job opened up in Glendale/Maple Dale School Districts, a unique opportunity as it was a shared

position. Working for two districts can be challenging, but I find it very exciting! I felt very blessed to interview and be chosen for the position. Since then WASBO has been invaluable in networking and the resources available to its members. As a new member, I found everyone very helpful in getting answers and solutions to my issues, problems and questions. My position with Glendale and Maple Dale School Districts is the best job I have ever had. I like to say, "a bad day at school is still better than a good day at work."

In closing, a little about my very supportive family. I have been married to Carol, my wife, for 38 years; we have three great daughters. Our youngest is an actor in New York and the other two are married and have given us six wonderful grandchildren. When I am not at work I enjoy boating, fishing, biking and playing with the grandkids.

Thanks for your consideration of my nomination for the WASBO Board.

Cathy Cramer

Director of Business Services,
Oak Creek Franklin Joint School District
Director Candidate



Hello WASBO Members – I appreciate your consideration of my candidacy for a Director position. Having worked in the field of school business management for over 25 years, I felt it was time to become more directly involved in WASBO. I believe that my professional background and willingness to understand and consider all points of view could add value to the WASBO leadership to best serve our members.

As a young college grad, I started my first job in management for Kmart in Racine. This involved a lot of on the job training in managing people, problems,

Continued on next page

Meet the Candidates for WASBO Board of Directors

Continued from previous page

money and customer service. Most of the employees I supervised were either old enough to be my mother or teen-age cashiers. The position taught me the importance of respecting and valuing the knowledge of those who had worked there for a long time, and the benefit of applying this knowledge when implementing new and different corporate directives. Not wanting to have to relocate around the country for promotions; however, I moved on to become a business manager of a small veterinary corporation in Milwaukee. Although I enjoyed the variety of tasks necessary to manage a business, I wasn't sure I wanted to continue in this vocation as I missed being a student and wanted to be involved with some type of educational organization. I considered going back to school to become a teacher. I didn't get far with that thought, though, as a small help wanted ad in a community newspaper for a Business Assistant position for the Oak Creek-Franklin Joint School District caught my attention. I never expected to be offered the job nor anticipated the wonderful career path that followed.

I have had the privilege of working for some of the best in our business—Tom Wohlleber, Bob Peck, Tony Goedheer, and Bob Buchholtz—each with their own unique style and strengths.

Through their examples and the professional experiences I have gained from serving as a business official in several different districts, I have learned the importance of not only continually seeking the knowledge necessary to do the job, but also the value of listening, understanding, collaborating and problem solving to do my best for the district I serve. To me, that is the real value of WASBO. In spite of the many changes, challenges and opportunities supporters of public education are experiencing at this time, WASBO continues to provide the necessary support, development and stability to its members. Not only has WASBO provided me professional

support and camaraderie, but also a number of close friends and confidants.

I have been married to my husband, Dave, for 28 years and have two (nearly grown up) children, who up until recently kept us chasing to school and athletic events. Our daughter, Angela, graduated from UW-LaCrosse and is working as a buyer for an electronics company in San Diego. Our son, Alex, is a sophomore at UW-Madison, studying Finance with some interest in pursuing a career in school business. Without a doubt, my family has always been and will continue to be the most important part of my life.

I would be honored to have a leadership role in our organization. I would approach this role with an open mind and commitment to support our mission while recognizing and honoring the diversity of the communities and positions WASBO represents. Thank you.

Dr. Jack E. Stoskopf, Jr.

Asst. Supt.
for Business/
Personnel
Services, D.C.
Everest Area
School District
Director Candidate



Hello, my name is Jack Stoskopf. It is my hope to have the opportunity to serve WASBO as a way of giving back for the support that organization has provided me during my career as a school business manager. I am currently in my 31st year in education. I began in 1983 as a Jr. High School math teacher in the Stevens Point Public School District. After three years teaching Jr. High, I began an eighteen-year run as a 5th and 6th grade teacher in the Stevens Point Schools. During that time I also served 18 years as the varsity hockey coach at SPASH and earned my Master's degree in Education from UW-Stevens Point. In 2004 I was hired as the Director of

Communications and Information Technology (a fancy title for Technology Director). I served in that role for five years. During that time I earned licensures for the K-12 principalship, school business manager, and special education and pupil services through Marian University. I earned my technology coordinator licensure from UW-Madison. In 2009 I was hired as the Assistant Superintendent for Operations in Stevens Point. Supervising all business operations, the transportation department, food services, buildings and grounds, and technology were my responsibilities with that position.

After 27 years in the same district, I thought it would be a good career move to gain some experience and see different perspectives from another district. I was fortunate enough to be hired in a neighboring district, D.C. Everest, as the Assistant Superintendent for Business and Personnel Services in 2010. At Everest, I oversee all business office operations, supervise the Human Resources Director, Food Service Director, and Buildings and Grounds Management Staff. During the past 3 years I completed my doctorate in education from Edgewood College.

For 20 years, I ran a small mail order business that sold self-created education and coaching products throughout the United States. I also spent 15 years investing and selling commercial real estate as a hobby. I sold the mail order business in 2008.

My wife of 16 years is a 6th grade teacher in Stevens Point. Our son, Mark, is a freshman in high school. We enjoy as much time as possible at our small cottage in Eagle River during the summer months boating, skiing, fishing, and enjoying the fresh air of the north woods. Eagle River is my hometown.

I would be honored to serve my business manager colleagues as a member of the WASBO Board. 🍷

Proper Lifting & Carrying Procedures

By Marty Malloy, Area Vice President-Client Development, Arthur J. Gallagher Risk Management Services
Submitted on behalf of the WASBO Safety & Risk Management Committee



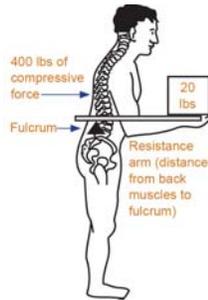
Marty Malloy

Lifting or overexertion injuries are one of the leading causes of injuries on school property. Lifting accounts for approximately 20-30% of all worker injuries. The four most common causes of back injury are:

- Excessive bending (bending at the waist typically more than 45 degree angle).
- Twisting while carrying the load (in lieu of stepping with feet toward the path of travel).
- Reaching above your head when you pick up and set down the load.
- Overreaching while carrying or setting the load down too far away from the body.



- Move close to the load.
- Be sure that your feet are shoulder-width apart. Squat down so you can use your leg muscles to lift the load.



- Pull the load close to the body and grasp object with all fingers.
- Maintain an “S” curve in your spine during the lift—don’t bend over.
- Tighten the stomach, lift the head, and chin up (this keeps “S” curve in alignment).
- Raise up with your legs. Keep the load close to your body.

In lifting injuries, nearly a third of all back injuries occur while carrying the load or while setting it down. When carrying and lowering loads, remember these few rules:

- Don’t forget to maintain the “S” curvature of your spine while carrying and lowering the load.
- Do not twist at the waist with a heavy load. When you need



to change direction, use your feet, so that you can keep the load in front of your body, where your arm and back muscles are the most efficient.



Lift in power zone—avoid back injury.

- Avoid leaning or bending over.
- Set the load down in one slow motion.
- Avoid lifting over your head. Lifting above the “Power Zone” places dangerous levels of stress on your lower back.
- Keep load close to your body and avoid reaching beyond the 10-inch range while lowering the load.



Keep load close to your body and avoid reaching beyond the 10-inch range while lowering the load. Carrying a load away from the body can increase the amount of stress on the lower back.

Questions about this article? Contact Marty Malloy at martin_malloy@ajg.com.

The first step to safe lifting is to size up the load. Will the load be too awkward for one person to lift? Is it likely to be too heavy? Should I get help? Do I need a two-wheel cart? How far do I need to carry the object?

After you have decided that you will be able to lift safely, remember the proper technique for lifting:

- Focus on the lift.

67th Annual
WASBO Foundation
Spring Conference
and Exhibits

May 20-23, 2014

Kalahari Resort & Conference Center
Wisconsin Dells, WI

WASBO.com/spring

Tax Changes for 2014: A Checklist

By Grobe & Associates, LLP

Welcome 2014! As the new year rolls around, it's always a sure bet that there will be changes to the current tax law and 2014 is no different. From health savings accounts to retirement contributions and standard deductions, here's a checklist of tax changes to help you plan the year ahead.

Filing Season Delayed by 10 Days

Taxpayers should note that the 2014 tax season opened on Jan. 31, 2014.

In most years, the filing season opens on Jan. 21; however, due to the 16-day government shutdown that took place in October 2013, the filing season was delayed by 10 days this year. No returns, paper or electronic, were processed by the IRS before this date.

The April 15 tax deadline is set by statute and will remain in place, although taxpayers can request an automatic six-month extension to file their tax return.

Individuals

For 2014, more than 40 tax provisions are affected by inflation adjustments, including personal exemptions, AMT exemption amounts, and foreign earned income exclusion, as well as most retirement contribution limits.

For 2014, the tax rate structure, which ranges from 10 to 39.6 percent, remains the same as in 2013, but tax-bracket thresholds increase for each filing status. Standard deductions and the personal exemption have also been adjusted upward to reflect inflation.

Alternative Minimum Tax (AMT)

Exemption amounts for the AMT, which was made permanent by the American Taxpayer Relief Act (ATRA) are indexed for inflation and allow the use of nonrefundable personal credits against the AMT. For 2014, the exemption amounts are \$52,800 for individuals (\$51,900 in 2013) and \$82,100 for

married couples filing jointly (\$80,800 in 2013).

"Kiddie Tax"

For taxable years beginning in 2014, the amount that can be used to reduce the net unearned income reported on the child's return that is subject to the "kiddie tax," is \$1,000 (same as 2013). The same \$1,000 amount is used to determine whether a parent may elect to include a child's gross income in the parent's gross income and to calculate the "kiddie tax." For example, one of the requirements for the parental election is that a child's gross income for 2014 must be more than \$1,000 but less than \$10,000.

For 2014, the net unearned income for a child under the age of 19 (or a full-time student under the age of 24) that is not subject to "kiddie tax" is \$2,000.

Health Savings Accounts (HSAs)

Contributions to a Health Savings Account (HSA) are used to pay current or future medical expenses of the account owner, his or her spouse, and any qualified dependent. Medical expenses must not be reimbursable by insurance or other sources and do not qualify for the medical expense deduction on a federal income tax return.

A qualified individual must be covered by a High Deductible Health Plan (HDHP) and not be covered by other health insurance with the exception of insurance for accidents, disability, dental care, vision care, or long-term care.

For calendar year 2014, a qualifying HDHP must have a deductible of at least \$1,250 for self-only coverage or \$2,500 for family coverage (unchanged from 2013) and must limit annual out-of-pocket expenses of the beneficiary to \$6,350 for self-only coverage (up \$100 from 2013) and \$12,700 for family coverage (up \$200 from 2013).

Medical Savings Accounts (MSAs)

There are two types of Medical

Savings Accounts (MSAs): the Archer MSA created to help self-employed individuals and employees of certain small employers, and the Medicare Advantage MSA, which is also an Archer MSA, and is designated by Medicare to be used solely to pay the qualified medical expenses of the account holder. To be eligible for a Medicare Advantage MSA, you must be enrolled in Medicare. Both MSAs require that you are enrolled in a high deductible health plan (HDHP).

Self-only coverage. For taxable years beginning in 2014, the term "high deductible health plan" means, for self-only coverage, a health plan that has an annual deductible that is not less than \$2,200 (up \$50 from 2013) and not more than \$3,250 (up \$50 from 2013), and under which the annual out-of-pocket expenses required to be paid (other than for premiums) for covered benefits do not exceed \$4,350 (up \$50 from 2013).

Family coverage. For taxable years beginning in 2014, the term "high deductible health plan" means, for family coverage, a health plan that has an annual deductible that is not less than \$4,350 (up \$50 from 2013) and not more than \$6,550 (up \$100 from 2013), and under which the annual out-of-pocket expenses required to be paid (other than for premiums) for covered benefits do not exceed \$8,000 (up \$150 from 2013).

AGI Limit for Deductible Medical Expenses

In 2014, the deduction threshold for deductible medical expenses remains at 10 percent (same as 2013, but up from 7.5 percent in 2012) of adjusted gross income (AGI); however, if either you or your spouse were age 65 or older as of December 31, 2013, the new 10 percent of AGI threshold will not take effect until 2017. In other

Continued on next page

Tax Changes for 2014: A Checklist

Continued from previous page

words, the 7.5 percent threshold continues to apply for tax years 2013 to 2016 for these individuals. In addition, if you or your spouse turns age 65 in 2014, 2015, or 2016, the 7.5 percent of AGI threshold applies for that year through 2016 as well. Starting in 2017, the 10 percent of AGI threshold applies to everyone.

Eligible Long-Term Care Premiums

Premiums for long-term care are treated the same as health care premiums and are deductible on your taxes subject to certain limitations. For individuals age 40 or younger at the end of 2014, the limitation is \$370. Persons more than 40 but not more than 50 can deduct \$700. Those more than 50 but not more than 60 can deduct \$1,400, while individuals more than 60 but not more than 70 can deduct \$3,720. The maximum deduction \$4,660 and applies to anyone more than 70 years of age.

Medicare Taxes

The additional 0.9 percent Medicare tax on wages above \$200,000 for individuals (\$250,000 married filing jointly), which became effective in 2013, remains in effect for 2014, as does the Medicare tax of 3.8 percent on investment (unearned) income for single taxpayers with modified adjusted gross income (AGI) more than \$200,000 (\$250,000 joint filers). Investment income includes dividends, interest, rents, royalties, gains from the disposition of property, and certain passive activity income. Estates, trusts and self-employed individuals are all liable for the new tax.

Foreign Earned Income Exclusion

For 2014, the foreign earned income exclusion amount is \$99,200, up from \$97,600 in 2013.

Long-Term Capital Gains and Dividends

In 2014 tax rates on capital gains and dividends remain the same as 2013 rates; however threshold amounts are indexed for inflation. As such, for

taxpayers in the lower tax brackets (10 and 15 percent), the rate remains 0 percent. For taxpayers in the four middle tax brackets, 25, 28, 33, and 35 percent, the rate is 15 percent. For an individual taxpayer in the highest tax bracket, 39.6 percent, whose income is at or above \$406,750 (\$457,600 married filing jointly), the rate for both capital gains and dividends is capped at 20 percent.

Pease and PEP (Personal Exemption Phaseout)

Both Pease (limitations on itemized deductions) and PEP (personal exemption phase-out) have been permanently extended (and indexed to inflation) for taxable years beginning

after December 31, 2012, and in 2014, affect taxpayers with income at or above \$254,200 for single filers and \$305,050 for married filing jointly.

Estate and Gift Taxes

For an estate of any decedent during calendar year 2014, the basic exclusion amount is \$5,340,000, indexed for inflation (up from \$5,250,000 2013). The maximum tax rate remains at 40 percent. The annual exclusion for gifts also remains at \$14,000.

Individuals - Tax Credits

Adoption Credit

In 2014, a non-refundable (only those

Continued on next page



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



Tax Changes for 2014: A Checklist

Continued from previous page

individuals with tax liability will benefit) credit of up to \$13,190 is available for qualified adoption expenses for each eligible child.

Earned Income Tax Credit

For tax year 2014, the maximum earned income tax credit (EITC) for low and moderate income workers and working families rises to \$6,143, up from \$6,044 in 2013. The credit varies by family size, filing status and other factors, with the maximum credit going to joint filers with three or more qualifying children.

Child Tax Credit

For tax year 2014, the child tax credit is \$1,000 per child.

Child and Dependent Care Credit

If you pay someone to take care of your dependent (defined as being under the age of 13 at the end of the tax year or incapable of self-care) in order to work or look for work, you may qualify for a credit of up to \$1,050 or 35 percent of \$3,000 of eligible expenses in 2014. For two or more qualifying dependents, you can claim up to 35 percent of \$6,000 (or \$2,100) of eligible expenses. For higher income earners the credit percentage is reduced, but not below 20 percent, regardless of the amount of adjusted gross income.

Individuals - Education

American Opportunity Tax Credit and Lifetime Learning Credits

The American Opportunity Tax Credit (formerly Hope Scholarship Credit) was extended to the end of 2017 by ATRA. The maximum credit is \$2,500 per student. The Lifetime Learning Credit remains at \$2,000 per return.

Interest on Educational Loans

In 2014 (as in 2013), the \$2,500 maximum deduction for interest paid on student loans is no longer limited to interest paid during the first 60 months of repayment. The deduction is phased out for higher-income taxpayers with modified AGI of more than \$65,000 (\$130,000 joint filers).

Individuals - Retirement

Contribution Limits

The elective deferral (contribution) limit for employees who participate in 401(k), 403(b), most 457 plans, and the federal government's Thrift Savings Plan remains unchanged at \$17,500. Contribution limits for SIMPLE plans remains unchanged at \$12,000. The maximum compensation used to determine contributions increases to \$260,000 (up \$5,000 from 2013).

Income Phase-out Ranges

The deduction for taxpayers making contributions to a traditional IRA is phased out for singles and heads of household who are covered by an employer-sponsored retirement plan and have modified AGI between \$60,000 and \$70,000, up from \$59,000 and \$69,000 in 2013.

For married couples filing jointly, in which the spouse who makes the IRA contribution is covered by an employer-sponsored retirement plan, the phase-out range is \$96,000 to \$116,000, up from \$95,000 to \$115,000. For an IRA contributor who is not covered by an employer-sponsored retirement plan and is married to someone who is covered, the deduction is phased out if the couple's modified AGI is between \$181,000 and \$191,000, up from \$178,000 and \$188,000.

The modified AGI phase-out range for taxpayers making contributions to a Roth IRA is \$181,000 to \$191,000 for married couples filing jointly, up from \$178,000 to \$188,000 in 2013. For singles and heads of household, the income phase-out range is \$114,000 to \$129,000, up from \$112,000 to \$127,000. For a married individual filing a separate return who is covered by a retirement plan, the phase-out range remains \$0 to \$10,000.

Saver's Credit

In 2014, the AGI limit for the saver's credit (also known as the retirement savings contribution credit) for low and moderate income workers is \$60,000 for married couples filing jointly, up

from \$59,000 in 2013; \$45,000 for heads of household, up from \$44,250; and \$30,000 for married individuals filing separately and for singles, up from \$29,500.

Businesses

Standard Mileage Rates

The rate for business miles driven is 56 cents per mile for 2014, down from 56.5 cents per mile in 2013.

Section 179 Expensing

For 2014 the maximum Section 179 expense deduction for equipment purchases decreases to \$25,000 of the first \$200,000 of business property placed in service during 2014. The bonus depreciation of 50 percent is gone, as is the accelerated deduction, where businesses can expense the entire cost of qualified real property in the year of purchase.

Transportation Fringe Benefits

If you provide transportation fringe benefits to your employees, in 2014 the maximum monthly limitation for transportation in a commuter highway vehicle as well as any transit pass is \$130 down from \$245 in 2013. The monthly limitation for qualified parking is \$250.

While this checklist outlines important tax changes for 2014, additional changes in tax law are more than likely to arise during the year ahead. 📌



Is your WASBO
membership
up to date?

WASBO.com/renew

Preparing for the Unthinkable

By Dave Schultz, Kelmann Restoration

School officials can ask themselves the following: What would I do if I received a phone call tonight and was told that a water main had burst and one of my schools was completely flooded? Where would I turn if devastation would leave a school unexpectedly uninhabitable? Is your district prepared for that which is unimaginable? And are you willing to put your trust in a complete stranger to choose an unknown contractor?

Forward-thinking managers understand that it is prudent to have a fully vetted, high level, emergency service contractor, familiar with the district's infrastructure as part of your strategic crisis plan.

Floods, fire damage, wind damage and vandalism occur each day in school districts throughout the country. Government statistics say that there is a 21% chance that a building will have a significant water event or flood in a 30 year time span. There is a 9% chance a fire of some sort will be experienced. Vandalism, of course, occurs even more often.

Understand, in a water event, time matters. The longer water impacts building materials, the less the chances are that those materials can be saved. In a fire, time matters. Emergency shore-up, securing and tarping can prevent additional damage. Pre-cleaning of certain items will allow them to be saved. Preparation is the key that the correct calls will be made to save your district countless thousands of dollars and troublesome downtime in the classroom.

Many emergency service contractors now offer pre-planning agreements that situates your district in a much better position when the unthinkable occurs. Most of these programs offer service priority guarantees. Some agreements are free of charge, some are not. Many offer walkthroughs and the ability to store confidential information so, in the event of a



disaster; your handpicked contractor is prepared to get your district back on its feet.

Your insurance carrier may or may not want to get involved. Consider that insurance is in place, not to mitigate and repair a claim, but to pay a fair amount for a covered loss. Some carriers may have agreements with national restoration franchises which they might refer. Other carriers may instruct you to simply call an 800 number after a devastating event. Either way, without some basic pre-planning on the district's part, you will most likely lose control of which

contractor is selected. Understand that some larger restoration projects might take several months to complete. Remember also that the district is the customer and it is the district's determination as to who is hired.

Emergency teams helped numerous school districts which incurred disasters over the past year. Those districts that were members of our emergency response priority program knew what to do and how to respond when the disaster struck. Tens of thousands of dollars and weeks of classroom downtime were saved.

It makes sense to prepare for that which is unthinkable. Reach out to a qualified emergency service restoration contractor and ask them about preplanning for disaster. Know who to call in the middle of the night. 📞

For more information, contact Dave Schultz at dlschultz@kelmann.com.

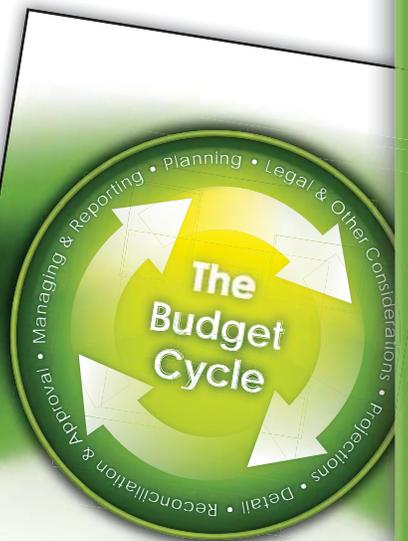


Dave Schultz

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.



Developing a School Social Media Policy

By Ted Hayes, Senior Risk Manager, M3 Insurance



Ted Hayes

The past 10 years have produced an explosion of social networking platforms such as Facebook and Twitter. Social media sites have become an everyday component of our culture.

Unfortunately, there isn't a week that goes by that the inappropriate use of these sites by school employees and students has caused problems and liability concerns for a school district. Examples include school staff members who inappropriately communicate with students, the posting of inappropriate pictures of students and staff, and the use of a social media site to threaten other students/staff, just to name a few.

'Social media' can be defined as the use of websites and other online means of communication that are utilized by groups of people to share information and to develop social and professional contacts. This may include social media networks such as internet web sites, blogs, chat rooms, forums as well as networks such as Facebook, MySpace, YouTube, LinkedIn, and Twitter, just to name a few.

On the positive side, school districts are using 'social media' technology to educate, inform, and accelerate learning for their students. Conversely, the negative misuse of this technology can cause devastating problems for your students, staff, and school district. Your school district has an obligation to teach and ensure safe and responsible use of this technology. For this reason, it is important that your school district develops a social media policy that clearly defines the acceptable (and unacceptable) use of school social media.



Even though your school district has no say in a school employee's or student's personal use of technology away from school, the use of school time or equipment for personal reasons should be strictly monitored. School employees must understand that they must avoid engaging in communications or posting information that violates state or federal law or your school district's policy.

Your social media policy should address the following concerns:

- Simply stated, prohibit your students and school employees from using school technology for their personal use.
- Strongly discourage school employees from 'friending' or communicating with students on social media sites such as Facebook.
- Instruct school employees that electronic communication with students should always be transparent - communications that are open, highly visible, and have accountability.
- Require the use of district approved password protected social media tools. Your district has a responsibility to protect your minor students.
- Instruct school employees to be professional and respectful in all communications. Never use obscene language or participate in conduct that could be viewed as bullying, threatening, harassing, or defamatory.
- Don't discuss the use of illegal drugs, alcohol, or sexual activities.
- Don't allow school employees to use their school email address for communications that have not been approved by administration.
- Never share or disclose any information on a social media

network that could be viewed as proprietary to the school or confidential.

- Never allow the use of the school district logo if it has not been approved by administration.
- Inform employees to never post images of fellow employees without their consent. Additionally, images of students should never be posted without written consent by the parent/guardian. Some exceptions may be images of students in a public setting such as at a school sponsored event such as a theater performance or athletic event.
- Never post images of the school district's property - especially floor plans. Do not post or discuss the school's crisis or security plans.
- It's understood that students or school employees may create social media sites that include or represent students/groups of the school district. When school employees participate in these groups, they must understand they do so as a school district employee.

Your list of social media concerns may be greater than what is listed here. Numerous examples of good school safety media policies can be found on the internet.

In conclusion, school districts have delayed the development of a social media policy that outlines the 'rules' of using school technology.

A social media policy is not meant to restrict your district's educational process; rather it is meant to be a structure that may prevent your school district from facing liability problems in the future. 🍷

If you have questions on this topic, email Ted Hayes at ted.hayes@m3ins.com.

New Year, Deep Clean, Fresh Start!

From School IPM 2015, January 2014

It is that time of year when we spend more time indoors. This can lead to more clutter, which can provide a perfect winter home for pests. Signs of infestation include droppings, holes chewed in pest-edible materials, and paper stashes in corners or behind and under appliance and fixtures. Here are some great tips for custodians and teachers to keep pest presence to a minimum:

- Identify, inspect and clean if necessary hard to reach places. These are often dark, hidden areas that require looking under and behind furniture, equipment and fixtures. Periodically inspect for food debris or signs of pests, moving items as needed for a thorough inspection.
- Untidy storage areas lead to accumulations of debris and hiding places for pests. Keep shelving and storage closets neat and orderly.

Dispose of cardboard shipping containers when new shipments arrive; store pest-attractive materials in clear containers off the floor.

- Trash bins should be lined with thick trash bags that fit properly to ensure that trash goes directly in the bag, and that bags will not leak. Regularly wipe down trash bins and wash out the bottom to remove any build up of food for pests.
- Restrict food and drink to designated areas and clean up spills immediately after they occur. If food is kept in classrooms, dispose of perishable food at the end of each day and store non-perishable food in sealable containers. Make sure to report to cleaning staff any spills on carpet or in hard-to-reach areas as soon as possible. Implementing a school-wide locker clean out every month is a great way to ensure that food and drinks are not forgotten.



Monitoring, inspecting and reporting are crucial to the success of an IPM program. Take notice of pest vulnerable areas (PVAs) which typically have potential access to food, water and harborage. PVAs are areas prone to infestation and require more intensive monitoring and inspection than other areas of a facility. Report pest-friendly conditions, or signs of pest infestation to the person in charge of receiving and taking the proper steps to resolve. 🐜

Getting the Most from Your Pest Management Professional

From School IPM 2015, December 2013

Mike Mascia, quality manager/account manager at Plunkett's Pest Control, recently shared some tips for schools working with Pest Management Professionals (PMPs) on a North Central IPM Working Group conference call. Mascia has spent six of his 28 years with Plunkett implementing an IPM program within Madison, WI city buildings. Here are some of the strategies discussed on the call:

Ask Questions

Does the company provide IPM services for other school districts? If not, you are not likely to get IPM services. If so, ask to speak to those in charge of managing the contract in other districts served. What is the response time in the event of an emergency? Which insects are included in the services offered? Does

the company have a successful track record addressing bed bugs if they were to become a problem?

Verify Credentials

Ask the PMP if they belong to the National Pest Management Professional Association or another state or regional pest management professional association. Ask about any third-party certifications held by the company or technicians including GreenPro, ACE, EcoWise the Associate Certified Entomologist or Green Shield Certified programs. Third-party certifications suggest a higher-than-average level of performance and professionalism.

Establish Clear Expectations

IPM bid specifications and contracts can be helpful. For an example bid

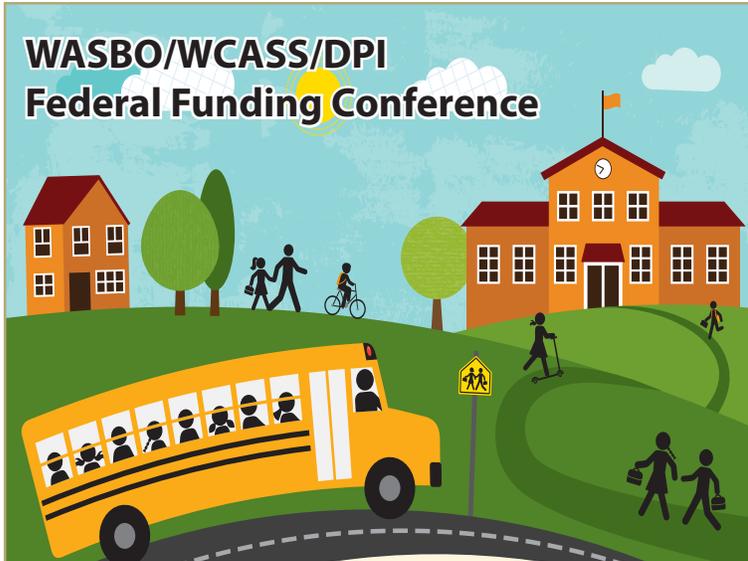
specification, see Appendix D of the University of Nebraska-Lincoln's Integrated Pest Management in Sensitive Environments: A How To Guide (pestfiles.unl.edu/2012_IPM_Manual.pdf). For a model contract, see the University of Florida's example at schoolipm.ifas.ufl.edu/doc/model_contract.htm.

Provide Effective Oversight

It's critical to train your IPM coordinator to oversee your contractor effectively. For a concise guide to evaluating contractor performance, see Albert Greene's example at bit.ly/1lrnzLU. To learn more about what an IPM coordinator is and their responsibilities, visit the IPM Institute of North America's IPM Coordinator job description at bit.ly/M6xrOR. 🐜

**Mark Your Calendar to Attend WASBO Professional Development!
Registration Coming Soon at WASBO.com**

**WASBO/WCASS/DPI
Federal Funding Conference**



February 24-25, 2014
Kalahari Resort & Conference Center
Wisconsin Dells, WI

Register at
WASBO.com/federalfunding



**WASBO Transportation &
Bus Safety Conference**



March 13, 2014
Wisconsin Dells, WI
Kalahari Resort & Conference Center

Who Should Attend?
Transportation Directors,
Contractors,
Business Managers,
District Administrators

Register at
WASBO.com/transportation

**16th Annual WASBO Facilities
Management Conference**



March 13-14, 2014
Kalahari Resort & Conference Center
Wisconsin Dells, WI

Who Should Attend?
Facilities and Maintenance Directors, Safety
Directors, Business Managers, District
Administrators

Attendee & Exhibitor Registration at
WASBO.com/facilities

**WASBO
Accounting
Conference**



March 19-20, 2014
Marriott Madison West
Middleton, WI

Register at
WASBO.com/accounting

Who Should Attend?
Business Managers, Directors of
Finance, Bookkeepers, Accountants,
District Administrators, Human
Resources

Sponsorship Opportunities for each conference at WASBO.com

1st Annual CTO Clinic March 2

The CoSN (Consortium for School Networking) and Wisconsin Educational Technology Leaders (WETL) are hosting the 1st Annual CTO Clinic in Wisconsin Dells, WI on Sunday, March 2 from 12 noon-5 pm. This half-day clinic is being held on the opening day of the Brainstorm 15.0 Conference which is March 2-4. You do not need to register for the Brainstorm Conference to attend the WI CTO Clinic. If you are interested in attending the Brainstorm Conference, please register at brainstormk20.com.

Our CTO Clinic theme, "Tooling for the Future" focuses on strengthening your CTO role through the Frameworks of Essential Skills (cosn.org/framework), developing strategies for building capacity within future-ready schools, and relationship-building with your peers.

Award Winning CTO Ed McKaveney, CETL, will be presenting "Powering Technological Innovation and Education Change."

Mr. McKaveney is the Technology Director at Hampton Township School District and Co-chair of the PA CoSN State Chapter and the winner of the 2013 National CoSN Withrow CTO Award, the 2013 PAECT Outstanding Leader of the Year, and the White House 2012 Champions of Change Award.

Do not miss this opportunity for an intimate professional development opportunity featuring award winning CTOs, nationally recognized speakers and a host of other sessions aimed at providing you with professional and personal advancement in the field.

Registration is free. Space is limited, so register today at cosn.org/events/2014-wisconsin-cto-clinic.

Check out the CoSN website at cosn.org for more information, or email membership@cosn.org with any questions. 📧

Green Schools National Conference

The Green Schools National Conference will be held March 27-29 in Sacramento, CA. In the spirit of this year's conference theme, "Working Together for Healthy, Sustainable Schools," all workshops highlight partnerships designed to support structures and practices that help develop strong teachers and leaders.

One of these sessions, "Whole District/School Sustainability: Leadership Matters!" will offer practical strategies for leading an entire school or school district toward sustainability, exploring leadership challenges and lessons related to transforming schools and districts into more environmentally responsible, socially just, and economically efficient organizations.

See the conference program at greenschoolsnationalnetwork.org/conference. 📧

SCHOOLS DON'T



WHEN THEY
PLAN.

WHEN THEY
PREVENT LOSS.

WHEN THEY
CONTROL RISKS.

Risk management courses designed for schools

Certified School Risk Managers (CSRM) is a five-part designation program designed for personnel responsible for school risk management. These courses help schools protect budgets and save money, by preventing loss and controlling risk.

Classroom and online courses:

- Fundamentals of Risk Management
- Handling School Risks
- Measuring School Risks
- Funding School Risks
- Administering School Risks

www.WASBO.com/riskmanagement or 608-249-8588



eFunds for Schools
powered by MVP Bank
Online Payment Solutions for Schools
 make payments
 24 hours a day for all
 school related expenses



Pay ...
 make payments
 24 hours a day for all
 school related expenses

Payment Solutions for Schools!



**Online Lunch and
 Other Payments**

**Mobile/Text Pay
 In-Person Credit or
 Debit Card**

e-Check and Cash

www.efundsforschools.com



Products & Services

- Online Payments
- Cash Tracker
- Check Processing
- Sports Pass
- Mobile Pay
- Tuition Payments
- School Store
- Summer School
- Fall Registration
- Textbook Rental
- Activity Registration
- Mobile Pay
- In-Person Credit Card Payments

Solutions

- Cost Control
- Full Compliance
- Risk Management
- Single Source Solution
- Increase Fund Raising

- ✓ PCI Compliant
- ✓ Free to the School

**For More information:
 Contact Richard Waelti
 Phone: 262-377-8306
rwaelti@mvpbanking.com**

Have you heard about

TRUST ADVANTAGE™?



YOUR NO-COST EMPLOYER SOLUTION TO:

- Recruitment and retention challenges
- District budget constraints
- Changing employee benefits

Learn why more than **160**
 Wisconsin districts are
 participating in this voluntary
 employee benefit program!

Visit weabenefits.com

WEA TRUST
Member Benefits™
weabenefits.com

Personal Insurance 1-800-279-4010
 Retirement & Investments 1-800-279-4030



The Right Stuff

By Don Mrdjenovich, Retired WASBO Executive Director



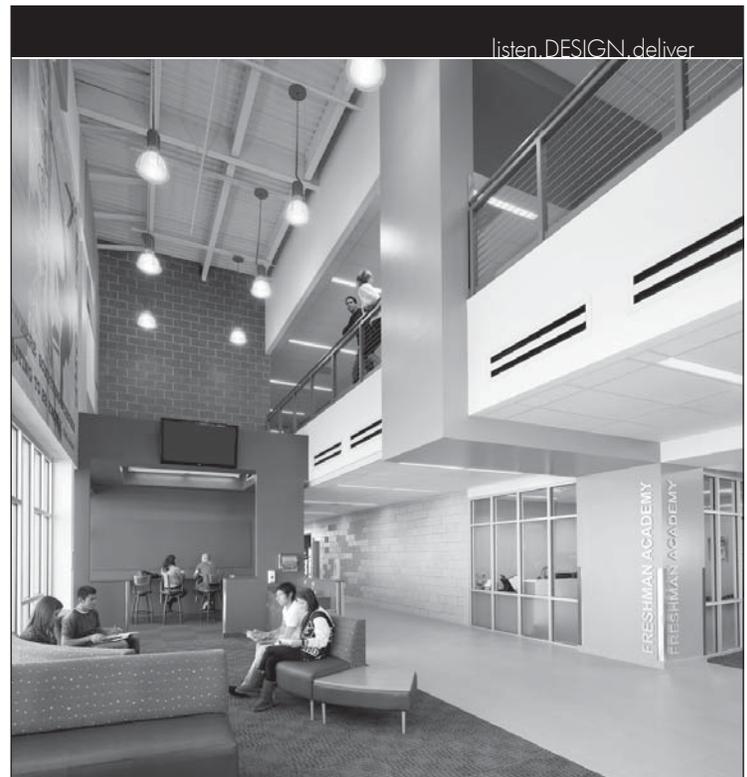
Don Mrdjenovich

As I write this article, the media is zeroed in on former Secretary of Defense Gates and Republican New Jersey Governor Christy. In his book, Gates is quite frank in his criticism of the President and other Washington officials. Christy is on the hot seat for his staffers ordering traffic jams in Democratic enclaves that did not support him. He has also been accused of appearing in an ad promoting the Jersey Shore recovery while running for re-election. It is alleged that he may have used federal disaster relief to pay for the ad. Christy denies any knowledge of wrongdoing and that may prove to be true.

The contrast that these media events brought to my attention was the coverage given to Gates. Both the print and electronic media were high in their praise of Gates for his unwavering honesty and integrity, even though some disagreed with his criticism of the President. It seemed to me that honesty and integrity was being regarded as an exception as opposed to the norm. When legislators and other government officials were asked for comments about Gates or Christy, a large majority of them did a political dance. I think it is called “politispeak.” How many times do we witness television interviews where a question begging an honest answer is responded to with creative avoidance and misdirection?

Unfortunately, there are those who must work in a culture that does not reward honesty or integrity. It appears that was the case with Secretary Gates. It also appears that may be the case in many aspects of governance and the corporate world. When someone breaks from that culture for the sake of the public good, we most often admire and appreciate their honesty and integrity.

In the workplace, we can't often be heroic. We need to keep our jobs. However, we have numerous opportunities to simply do the right thing. When we do so on a regular basis, we define who we are. In doing so, we are sending the message that we are not willing participants in a negative culture. The people I have known who consistently did the right thing and refused to be party to a lie, cover up or the spreading of misinformation had the right stuff. In the public sector, it is unlikely that one would lose a job for having the right stuff. In the private sector it may not always be so. Sometimes one must move on to maintain one's integrity. They are deserving of our admiration and support. Getting stuff right isn't always easy. 🍷



listen.DESIGN.deliver

DLR Group
Architecture Engineering Planning Interiors

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

Tired of the insurance game?



Strategic. Transparent. Refreshing.

Protect Your Business and Your Family with Our Family

Since 1949, McClone has worked to help protect businesses, families, and communities throughout Wisconsin.

(800) 236-1034
www.mcclone.com

Fox Valley • Oshkosh • Fond du Lac
Milwaukee • Sheboygan
Green Lake • Madison

OCR Issues Additional Guidance On Athletics For Students With Disabilities

By Mary S. Gerbig, Attorney, Davis & Kuelthau, s.c.



Mary Gerbig

On Jan. 25, 2013, the U. S. Department of Education, Office of Civil Rights (OCR), issued guidance related to the participation of students with disabilities in extracurricular athletics. The guidance raised a variety of questions for school districts related to the scope of the guidance. The National School Boards Association (NSBA) issued a formal letter to the OCR on May 21, 2013 seeking to clarify the guidance in terms of its application in four basic areas: Equal opportunity, individualized inquiry, equal opportunity in the context of the Individuals With Disabilities Act and the creation of new athletic opportunities. Davis & Kuelthau discussed the OCR guidance in a June 2013 Client Alert after the OCR publically acknowledged the concerns raised by the NSBA and other professional education associations. On Dec. 16, 2013, the OCR issued its formal response to the NSBA letter and provided clarification of its original guidance. The following is a summary of the four areas addressed in that response.

Equal Opportunity

34 C.F.R. § 104.37 requires school districts to provide students with disabilities an equal opportunity to participate in the district's non-academic services, including existing extra-curricular athletic activities. Under this provision, a district must not exclude a student with a disability based on stereotypes and assumptions about the student, but must consider each student individually. In order to ensure equal access, a district must make an individualized inquiry to determine if reasonable modifications could be made, or aids and services provided that would allow those students an equal opportunity to participate. Examples include using a light along with a starter pistol so

a deaf runner could compete, or administering insulin so a student with diabetes can take part in after-school gymnastics.

What equal opportunity does not mean under the law, as confirmed by OCR in the new guidance, is compromising student safety or changing the nature of selective teams. This means students with disabilities must compete with everyone else and legitimately earn their place on a team. The law does not give a student with a disability an unfair advantage over other competitors, nor does it change essential elements that affect the fundamental nature of the game.

Individualized Inquiry

In response to the NSBA's questions, OCR clarified that conducting an individualized inquiry to determine if reasonable modifications or necessary aides and services would provide a student with a disability an equal opportunity to participate does not mean the Section 504 team must convene when a student wishes to take part in an activity. The inquiry could be as straightforward as a coach or staff member consulting with a student and the student's parents to determine what reasonable modifications could be provided for the student to participate, or a district's athletics official might be brought into the conversation to address adaptations to the district's standard rules or practices for competitions (i.e., the example of using a light along with a starter pistol). Individuals with knowledge and expertise should provide a reasonable, timely, good-faith effort to determine whether there are realistic modifications or aids and services that would provide a student with equal access to an activity.

FAPE and Equal Opportunity to Participate

An IEP of a student covered by the Individual with Disabilities Education Act, 20 U.S.C. § 1400, may include provisions that relate to a student's participation in extra-curricular activities. As such, failure to provide the services as set forth in the IEP could constitute non-compliance with Section 504. However, OCR is not articulating in its guidance a legal requirement under Section 504 that the IEP must address participating in extra-curricular athletics, nor is it stating Section 504's FAPE provisions require that a student's participation in non-academic services be addressed by the Section 504 team as part of delivering FAPE.

Creation of New Athletic Opportunities

Although a district is not required to create additional opportunities for students who are unable to participate in the district's existing extra-curricular athletics programs, even with reasonable modifications or aids and services, the guidance urges districts to consider that alternative. If a district voluntarily chooses to provide separate activities, those activities must be supported equally as compared with the district's other athletic activities. For example, if a district created a varsity wheelchair lacrosse activity, OCR would look to the supports provided to other varsity teams as a benchmark for what might be appropriate for the adapted varsity activity. 🍷

Contact Mary S. Gerbig at 920.431.2242 or mgerbig@dkattorneys.com if you have any questions about this article.

2014 State Education Convention Highlights

More photos on page 43



Jim Beckmann of the Glendale-River Hills School District participated as presenter in several sessions including *Long Range Capital Planning*, *Green and Healthy Schools*, and *What Does a Facility Manager Do?* These were just a few of the expanded number of sessions this year provided by the WASBO Joint Convention Committee, led by John Stellmacher.

Right: Several WASBO committees met during the convention including the Service Affiliate Committee (shown right with Aine Calgaro, Joan Hauser, John Sackett and Josh Barbian), Accounting Committee, Payroll Certification Committee, HR Certification Committee, and Spring Conference Committee. The Service Affiliate Committee discussed upcoming changes to the WASBO website and ideas for the Buyer's Guide, as well as the WASBO Board position which will become available for a Service Affiliate member for 2014-15. Service Affiliates will meet during the Facilities Management Conference March 13 at 1 pm in the exhibit hall, as well as before the Spring Conference exhibits on May 22.



Left: WASBO members Judy Weinstock, Jim Beckmann and Diane Pertzborn share a moment in the exhibit hall. Thanks to the many WASBO volunteers who took turns staffing the WASBO booth!



WASBO President Lynn Knight and Executive Director Woody Wiedenhoeff presented Gail Moesch of the Shawano School District with the 2014 School Business Official of the Year Award at the opening general session.

Right: WASBO President Lynn Knight of the Nekoosa School District presided over Friday's general session which included Governor Scott Walker and keynote speaker Stacey Bess.



As part of the WASBO Business Meeting and lunch on Thursday, School Business Official of the Year Gail Moesch was honored by award sponsors Jim Miller and Kevin Mullen of Hutchinson, Shockey, Erley & Co. Gail was joined by family and her district administrator for the presentation.



Rebecca Hansen of the New Holstein School District was honored as the 2014 Shining Star. Award sponsors Allison Buchanan and Jeff Peelen of Quarles & Brady, LLP presented the award.

Right: WASBO's Finance Puzzle Session was reworked this year to be part of the regular conference program. This included an interactive introduction to the background of the school finance in Wisconsin. We thank the presenters, Bob Avery, Emily Koczela, Erin Fath, John Stellmacher and Debi Towns as well as those who served as table facilitators.



Book Review: Shifting the Monkey

Authored by Dr. Todd Whitaker

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



Orvin R. Clark,
EdD, RSBA

Shifting The Monkey was written by Dr. Todd Whitaker, a professor of Educational Leadership at Indiana State University. Dr. Whitaker is one of the leading authorities on employee motivation and leadership effectiveness. He has written more than 20 books on management topics.

Shifting The Monkey is 117 pages in length, organized around seven chapters and an epilogue. In the workplace everyone has roles, responsibilities and problems to deal with; also known as “monkeys.” Some people have mastered the art of shifting (moving) those monkeys onto the backs of others.

Therefore, don’t take on a problem if the problem isn’t yours, that monkey doesn’t belong to you. The reasons for the shift are because workers claim they don’t know how to solve the problem and/or don’t have time. The results are that loyal employees shoulder those burdens; the best employees become alienated and overworked so the slackers get attention, empathy and less work. Managers loaded down with other people’s monkeys can’t manage properly. To paraphrase Pogo, “I have seen the enemy, and he is!!” It’s time to look at leadership.

There are three tiers of leadership:

- **Tier One** – The self-focused leader who goes back in the office and closes the door.
- **Tier Two** – The team focused leader who goes out periodically and checks to make sure employees aren’t abusing each other.
- **Tier Three** – The organization focused leader who shifts the monkey back to the ineffective people.

It is also time to consider three important questions:

- 1. Where is the monkey?**
- 2. Where should the monkey be?**
- 3. How do I shift the monkey to its proper place?**
 - **Where is the monkey?** The need to investigate starts with checking for monkeys in every situation, even the smallest interactions. It is not always obvious where the monkeys are, so it pays to ask. Handling problems while they are still small will lower the future monkey population. Also flush out hidden monkeys in your organization by reviewing personnel practices and policies.
 - **Where should the monkey be?** Locate the rightful owner and assign a single monkey and delegate a family of monkeys. Many people use the words (delegate & assign) interchangeably, the words are, to quote Mark Twain, “as different as lightning from a lightning bug.”
 - **How do I shift the monkey to the proper place?** The solution to proper monkey placement is to learn to keep your cool and manage your emotions. When this occurs people will realize that you neither use these monkeys nor tolerate them. Below is a list of monkeys and how to deal with them.
- 1. The Blanket Monkey** - deal directly with the problem.
- 2. The Rule Monkey** – deal with the few individually not as a group.
- 3. The Avoidance Monkey** – deal with the problem now.
- 4. The Blame Monkey** – don’t shift problems and failures to others.
- 5. The Crying Monkey** – learn to control your emotions.

- 6. The Lying Monkey** – always speak truthfully.
- 7. The Arguing Monkey** – don’t engage in arguing-control your emotions.

Thoughts to remember:

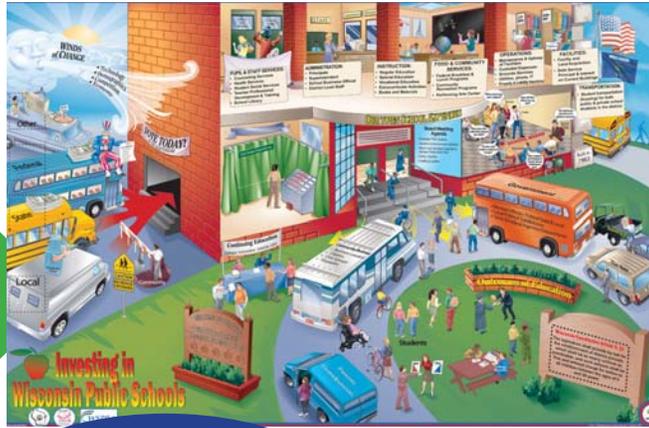
- Treat everyone as if they are good responsible and honest.
- Don’t treat everyone the same as that’s discouraging to high achievers.
- You are not expected to fix the bad people, but you are expected to control them.
- Give the good workers the gift of confidence.
- Give your good people permission not to take on additional duties.
- It’s OK to give preferential treatment to your superstars.
- Understand organizational time:
 - Boss-imposed Time - time you spend doing things you would not be doing if you did not have a boss.
 - System-imposed Time – time you spend on administrative and related demands from people.
 - Self-imposed Time – time spent doing things you decide to do, things that make our work truly rewarding such as creating, innovating, leading, planning and organizing.

Monkeys are an inescapable part of life at work, home and elsewhere.

Shifting The Monkey is a quick read on people management. Now quit “monkeying around” get back to relaxing. 🍌

Introducing an exciting, hands-on tool to provide an understanding of the variables, stakeholders and nuances of financing Wisconsin's public schools.

Investing in Wisconsin Public Schools



Six Components of the Map Process

- Visualization or Storyboarding of the Wisconsin Educational System & Complex Systems
- Data Connections
- Socratic Dialogue & Discovery
- Learning Peripherals, Exercises & Simulations
- Interaction in Small Group Settings
- Trained Facilitation

See photo from Pre-Convention Investing session on page 43 of this issue



For More Information and Pricing
**WASBO.com/
InvestingInSchools**

Investing in Wisconsin Public Schools™ presents very targeted and provocative questions on core organization issues, challenging participants to think...often driving each person to address unpleasant but nonetheless vital systemic and environmental realities.

Investing in Wisconsin Public Schools™ was collaboratively developed by



Wisconsin Association of School Business Officials



Wisconsin Association of School Boards



Wisconsin School Public Relations Association



edventures®
Edventures in Learning, Inc.

Service Affiliate Checklist

- If you haven't already, renew your membership through June 30, 2014 at WASBO.com/renew.
- Sponsorship Opportunities at WASBO.com/sponsor:
 - Federal Funding Conference
 - Transportation & Bus Safety Conference
 - Facilities Management Conference
 - Accounting Conference
 - Spring Conference
 - Custodial & Maintenance Conference
- Call for Presentations at WASBO.com/present:
 - Fall Conference due March 31
 - Midwest Facility Masters due March 31
- Exhibitor Registration Open for Spring Conference at WASBO.com/spring.
- *Taking Care of Business* Articles due March 31 for April issue - send to calgaro@wasbo.com.
- Advertise in *Taking Care of Business* - contact Áine at calgaro@wasbo.com.
- Update your profile and Buyer's Guide categories at WASBO.com.
- Join a WASBO Committee.
- Attend the Service Affiliate meeting March 13 at 1 pm in the Facilities Management exhibit hall.



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 Willcoxon Sr., RSBA, White Bear Lake Area Schools (MN)



Association of School Business Officials International

www.asbointl.org

Graduating with Honor

By Annie Getsinger, Baraboo News Republic

When he arrived at the most recent meeting of the River Valley School Board, 90-year-old board member Herman Kaldenberg knew something special was in store. His three daughters, Vickie Bedard, Pauline Borgen and Kris Scharfenberg, were in the audience, and Superintendent Tom Wermuth announced a special presentation.

"At that time, I asked for somebody to give me a handkerchief to wipe the tears out of my eyes," Kaldenberg, a Lone Rock resident, said.

"He had this puzzled like, 'What are you doing here?' look on his face," Bedard said. "I was crying, too. We all knew it was something that was really special to him."

Kaldenberg donned his grandson's black graduation cap and gown, a white stole, and a red, white and blue tassel and honor cord to receive his high school diploma, more than 70 years after leaving Baraboo High School to serve in World War II.

"The tests you endured were much tougher than any tests ever taken

in class, and the lessons you have learned in your 90 years of life have taught you far more than I could ever imagine learning in my lifetime," his daughter Borgen, of Marinette said, as she presented the diploma to her father.

Kaldenberg left high school in the middle of his third year, the 1939-40 school year. With World War II beginning at the time, he sought to help the war effort on the home front by working on his family farm. Soon, though, he felt the call to serve in the military.

"They was asking for people," Kaldenberg said, adding that most of his friends had enlisted.

He joined the U.S. Army, serving in the infantry, and was sent to fight in the Philippines, working as a radio man for his company.

Kaldenberg said he will never forget his first day in combat. Surrounded by jungle, he was flanked by twin brothers from Wisconsin when the servicemen came upon a machine gun nest.

"The twin on each side of me got killed, and I didn't get a scratch," Kaldenberg said. "... You never know why. You thought of it a lot."

He spent two years in service

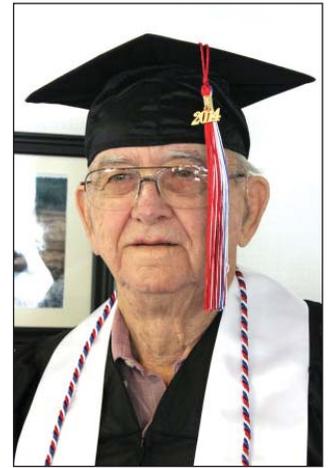
to his country before returning home to Wisconsin, where he married his wife, LaVina, who died last August after a long illness. The couple lived in Idaho for several years before settling in the Spring Green area, where they raised four children together.

Kaldenberg said he struggled for a long time to understand the reasons people are sent to fight in far-off places. His company was set to be among the first wave of infantry in the U.S. invasion of Japan that did not take place.

"I didn't know that for about 20 years," he said. "... We've got a way of life in the United States that some people never understand what you have to do to make it survive. It would be so easy to lose everything we've accomplished, and there are times we're real close to that."

Upon returning home, Kaldenberg worked on his family's farm and took a job at the Badger Army Ammunition Plant. Under the G.I. Bill, he also attended trade school in Chicago for six months to learn automobile work. But he never went back to finish high school.

The father of four always talked about the importance of education, though. He was elected to his local school board at age 88, and is the oldest serving school board member in



Herman Kaldenberg, 90, of Lone Rock, recently received his high school diploma, more than 70 years after leaving high school in Baraboo.

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

Continued on next page

Graduating with Honor

Continued from previous page

Wisconsin, his daughter said.

"I guess I would say I'm kind of disappointed in the way education is going today," Kaldenberg said, adding that he believes there is too much emphasis on all students pursuing college degrees.

Some students aren't suited for a college environment or would prefer a different track, and they should be encouraged to pursue their specific skills, he said. All jobs are important, Kaldenberg said. "It's a good thing we're not all alike."

He has been working to implement a financial literacy course requirement in his district.

Kaldenberg said that he became interested in receiving his diploma after finding out that in Wisconsin, local school boards have the authority to award diplomas to veterans who

left high school and served honorably during specific eras of conflict. His children decided to surprise him with the honor.

"He had no idea," said Bedard, who worked with the Wisconsin Department of Public Instruction and local school districts to accomplish the task.

Veterans can receive diplomas in their home school districts or the places they attended before their time of service. Because of his position on the school board, Kaldenberg's children thought it would be meaningful for him to be the first River Valley graduate of 2014.

"I got a diploma a week ago, and nobody's offered me a job since," Kaldenberg said with a chuckle and a grin. During the presentation, Wermuth helped Kaldenberg turn his tassel to signify his graduation, and the board member shook hands with his supporters, friends and family. He said

it was a special and unique opportunity to share the milestone with several generations of his family.

"There are not many grandkids that are around when their granddads graduate high school," he said, remembering something that a grandson told him.

Kaldenberg and his family have had a difficult year after his wife's death, Bedard said.

Receiving his diploma was a "highlight to help bring him out of the doldrums," she said, "a moving moment for us and for everybody in the room."

"The only thing that would have been better is if her mother had been able to be there," he said. 🍷

Herman Kaldenberg is the father of Pauline Borgen, Director of Business & Finance, Marinette School District. Pauline is a longtime member of WASBO. Article reprinted with permission from the Baraboo News Republic.



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).



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

www.wiopeb.com



Welcome New Members

December 2013 - January 2014

District Professional Members

- **Kenny Carley**, Safety and Grounds Coordinator, Omro
- **Nancy Deffenbaugh**, Transportation / Open Enrollment, West Bend
- **Darrin Frye**, Bus Driver, Reedsburg
- **Jim Kufner**, Bus Mechanic, Reedsburg
- **Laura Lloyd**, Associate Principal, Kettle Moraine
- **Rebecca Wonder**, Accountant, Madison Metropolitan
- **Ann Marie Wuest**, Accounts Manager, Green Lake (correction from Dec. 2013 issue)

Service Affiliate Members

- **Greg Baufield**, Director of Business Development, TIES
- **Al Bohl**, Energy Advisor, Focus on Energy
- **Mike Grade**, Regional Program Manager, TCPN
- **Mike Granitz**, Sales and Marketing, Hallman Lindsay
- **Kert Harenda**, Vice President, KPH Environmental
- **Neil Howell**, Energy Advisor, Focus on Energy
- **Steve Ogden**, Business Development Manager, Modern Maintenance Building Services
- **Anthony Petersen**, Project Manager, Ruekert & Mielke, Inc.
- **Susan Quinn**, Sales Support, Aberdeen Eco
- **Amy Reuter**, Office Manager, Dirty Ducts Cleaning, Environmental & Insulation, Inc.
- **Ken Roskom**, Commercial Sales Associate, Tri City Glass & Door
- **Jennifer Rouse**, Business Development Manager, Audio Visual of Milwaukee, Madison, Green Bay
- **David Voss**, Energy Advisor, Focus on Energy
- **Carl Winnekens**, Owner/Architect, Architects Group Limited

Student Members

- **David Fischer**, Graduate Student & Assistant, UW-Whitewater
- **Rodney Hawkins**, Accountant, Somerset, and School Business Management student, UW-Whitewater
- **Thomas Karthausser**, Associate Institutional Planner, UW-Whitewater
- **Jason Melotte**, Technology Director, Algoma, and School Business Management student, UW-Whitewater
- **Jeff Pruefer**, Teacher/Coach, Waunakee, and School Business Management student, UW-Whitewater

On the Move

- **Carey Bradley**, from Business Administrator, Delavan-Darien to WI Dept. of Public Instruction School Financial Service Team
- **Neal Reible**, from Director of Buildings & Grounds, Wisconsin Heights to Head Custodian, Waunakee
- **Sarah Thiel**, from Business Manager, Tigerton to Business Manager, Iola-Scandinavia
- **Gretchen Thomes**, from Assistant Superintendent, Sheboygan Area to retired and part-time employee, Oostburg

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. Call 608.249.8588 if you need help.

We Remember Virgil Jenkins

We were saddened to learn of the passing of Virgil Jenkins on Jan. 1 at the age of 82. Virgil was the business manager for Greenfield School District for 30 years. He was a member of WASBO for many years.

Private services were held. An online guestbook is available at www.maxsass.com/obituary/Virgil-C-Jenkins/Greenfield-WI/1328475. Our condolences to Virgil's friends and family.

alio[®]

World Class
Financial
Management
Software

Weidenhammer
Go Paperless with **alio**
866.497.2227 | www.hammer.net



Stay Connected



Share Your Best Practices

Once again, the WASBO Accounting Conference will feature the Collaborating for Change contest sponsored by Key Benefit Concepts. Submit your best practice for consideration by your peers. Entries also will be considered for the 2014 Business Services Award sponsored by Robert W. Baird & Co.

Award Nominations

WASBO Professional Recognition Award application materials will be available this month and will be due March 3, 2014. Be thinking about whom you may want to nominate as a top-notch professional in your district or regional. New This Year: Safety, Security & Wellness grant program, sponsored by M3 Insurance. For more information on the WASBO Professional Recognition Program, go to WASBO.com/awards.

WASBO Foundation Scholarship Applications

Each year the WASBO Foundation and our Service Affiliate Scholarship Sponsors give out thousands of dollars in scholarships to several deserving high school graduates and one to a student in the School Business Management Masters Program. Scholarship application materials are available at WASBO.com/scholarships and are due March 3, 2014 to the WASBO office.

WASBO Foundation Scholarship Fundraisers: Golf and Bike!

Support the WASBO Foundation Scholarship Program by participating in the golf outing or bike tour fundraisers held Wednesday, May 21, during the WASBO Foundation Spring Conference in Green Bay. Watch your email for registration information to come!

New to School Business Management?

If you are a new school business official, a mentor can help! Find out about WASBO's mentorship program at WASBO.com/mentorship.

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. To sign up for one of the many WASBO committees, go to WASBO.com/committees.



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

Coupons Let You Attend WASBO Conferences for Less

Professional development coupons allow you and your district colleagues to attend WASBO conferences at a 15-25% savings. Coupons are only transferrable between employees of the same school district, and must be used by June 30, 2014. Find out more at WASBO.com/coupons.

p-Card User Group Opportunity

Mark your calendar and register to attend the free Wisconsin ASBO p-Card User Group Meeting on March 18, 2014 – the afternoon before the WASBO Accounting Conference at the Marriott Madison West in Middleton. 🇺🇸

More Convention Highlights

Investing in Wisconsin Public Schools

WASBO led a Pre-Convention Workshop in Milwaukee on Jan. 21 using the Investing in Wisconsin Public Schools program. Bob Avery (at left in photo) was among the volunteers who coached tables of participants during the activity.



Spring Conference Fundraiser Supports Student Music at Convention

WASBO is proud to support the student music performances that kick off each general session. This year featured the Oconomowoc High School Wind Symphony (pictured), Shawano High School Jazz I, and Vocal Point, an a cappella group from the Gale-Etrick-Trempealeau School District. Every performance showcased the talent and dedication of these students. Consider supporting this fundraising effort at the WASBO Foundation Spring Conference to allow WASBO to continue to provide financial support to these groups.



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

PRSRT STD
US POSTAGE
PAID
MADISON WI
PERMIT NO 801

Upcoming Events - WASBO.com

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

Professional Development

DPI-WASBO-WCASS Federal Funding Conference
Feb. 24-25 - Kalahari, WI Dells (Viterbo Credit)

WASBO Transportation & Bus Safety Conference
March 13 - Kalahari, WI Dells

WASBO Facilities Management Conference
March 13-14 - Kalahari, WI Dells (Viterbo Credit)

p-Card User Group Meeting
March 18 - Madison Marriott West, Middleton

WASBO Accounting Conference
March 19-20 - Madison Marriott West, Middleton (Viterbo Credit)

WASBO Spring Conference
May 20-23 - Kalahari, WI Dells (Viterbo Credit)

Scholarship Fundraisers
Spring Golf Outing
May 21 - Trappers Turn Golf Course, WI Dells

Spring Bike Tour
May 21 - WI Dells

Certified School Risk Managers (CSRIM)

Courses (Viterbo Credit)
Funding School Risks
April 1 - Best Western, Oshkosh

Measuring School Risks
April 2 - Best Western, Oshkosh

Administering School Risks
June 17 - Best Western, Oshkosh

Bullying Prevention
June 18 - Best Western, Oshkosh

Committee Meetings
Midwest Facility Masters Conference
March 6, 10 am (conference call);
April 10, 10 am (conference call)

Safety & Risk Management
All meetings at 12 pm, WASBO Offices,
Madison. April 8, Aug. 12

School Facilities
All meetings at 9:30 am, WASBO Offices,
Madison. April 8, Aug. 12

Service Affiliates
March 13 in conjunction with the Facilities Management Conference in WI Dells

Spring Conference

All meetings at 2 pm, WASBO/Conf. Call unless otherwise noted.
Feb. 19; March 18, 6 pm, Middleton;
May 1

WASBO Business Meeting
May 23 - Kalahari, WI Dells

Board of Directors Meetings
April 25 (rescheduled) Pewaukee
June 5 (rescheduled) WASBO, Madison

Leadership Team Meetings
March 5, May 14

Buildings & Grounds Group Meetings
Coulee Region - First Thursday of the month. Meetings start at 10 am.
March 6

Milwaukee Metropolitan - Meetings are the third Thursday of the month. Feb. 20, March 20

Regionals

Check WASBO.com for details.

Bay Area/Northeast - Meetings start at 11 am.
Feb. 21, DePere; April 4, Fond du Lac;
May 30, Manitowoc

Madison Area - Meetings start at 9 am.
April 4, May 2

Northwest - Meetings start at 10 am at Lehman's Supper Club in Rice Lake.
March 5, April 2, May 7, June TBA

Southeast - Meetings from 12-2:30 pm.
April 18

Southwest - Meetings start at 12:30 pm. at CESA 3. Feb. 26, April 23

West Central - Meetings from 10 am - 1 pm at Sparta Area SD Admin & Education Center. March 6, April 3, May 1, June 5

WI Valley - Coffee at 9 am, Meeting at 9:30 am.
Feb. 14, Stevens Point; March 14, Auburndale/Stratford; April 18, Minocqua;
June 19, D.C. Everest; Aug. 15, Antigo