



Taking Care of Business

The Official Bimonthly Publication of the Wisconsin Association of School Business Officials Volume 23 | Number 4 | August 2019

BUILDING RESILIENCE IN TIMES OF CHANGE



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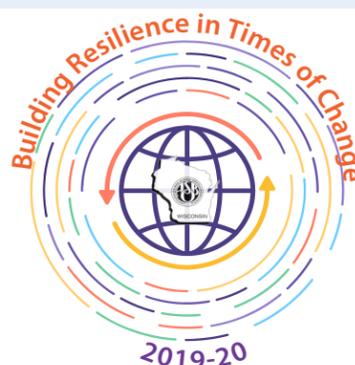
Taking Care of Business is issued bimonthly by the Wisconsin Association of School Business Officials. Send address changes to:
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ABOUT THE COVER

Our president's theme for 2019-2020 is "Building Resilience in Times of Change." The sunflower is an amazingly resilient plant. Did you know they can even be used as scrubbing pads?



Kathy Davis
Director of Business & Auxiliary Services,
De Forest
WASBO President

NEW BOARD, NEW OPPORTUNITIES

Welcome to another new school year which is sure to bring on new changes and challenges. Many in our profession are probably also seeing changes at work and maybe even in our personal lives. Change is something that is inevitable. Some of the changes may be unwanted, come out of nowhere, and be stressful. However, change can be something that creates new opportunities and can help us grow as leaders. Although change is constantly happening every year, there are some big changes for WASBO and at our state level that led me to make this year's theme "Building resilience in times of Change."

One of the big changes our WASBO organization is experiencing this year is new leadership. Joining us this year is our new executive director, Mike Barry. Mike comes to WASBO with several years of experience in the school business management field. He started his career as a business manager for the Pewaukee School District, served the Oconomowoc Area School District as their Assistant Superintendent, and most recently served as an Assistant Superintendent in the Madison Metropolitan School District. His experience in a range from small up to the second largest district in Wisconsin provides him with a variety of perspectives that

"Although change is constantly happening every year, there are some big changes for WASBO and at our state level that led me make this year's theme 'Building Resilience in Times of Change.'"

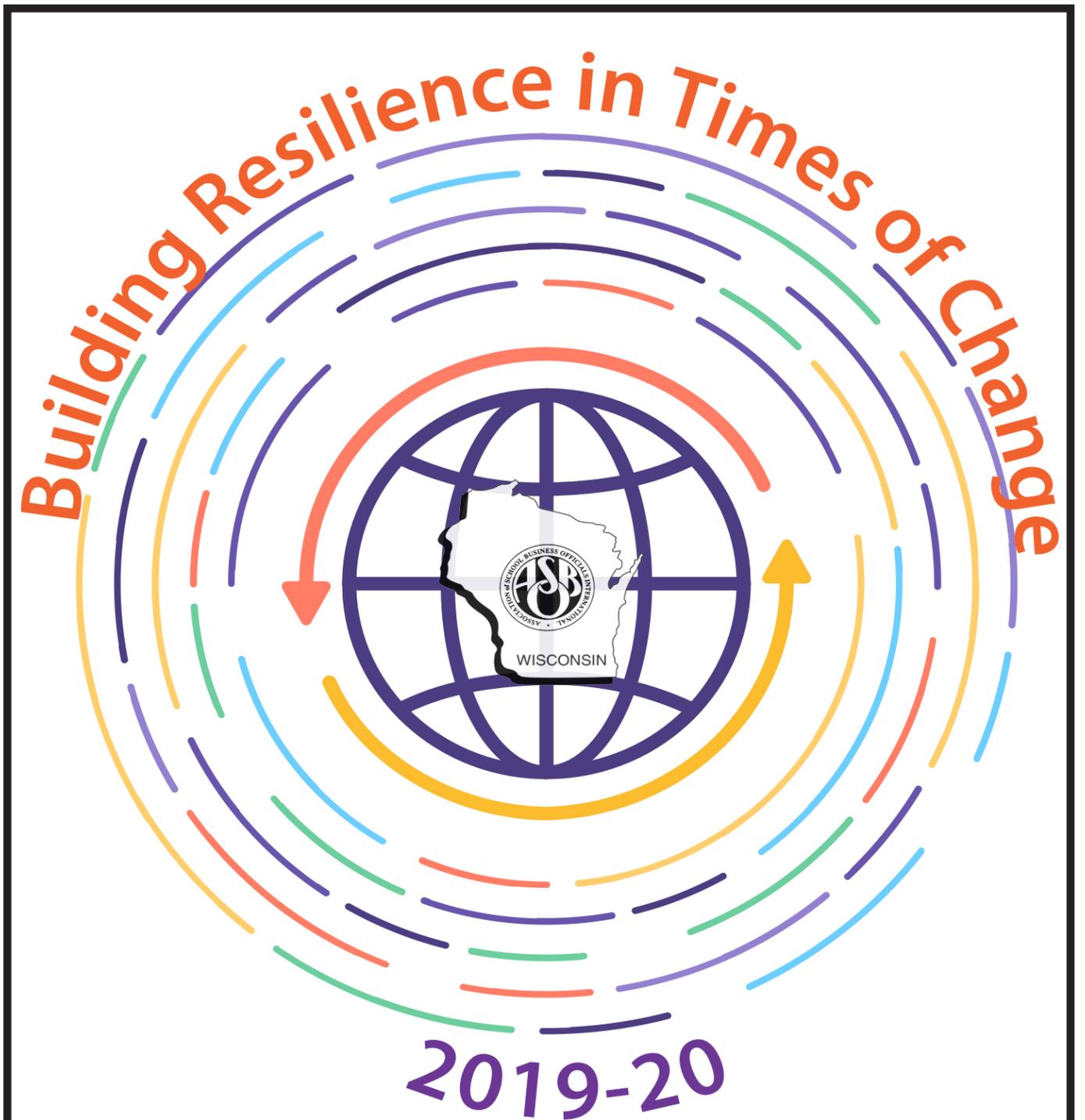
can relate to many of us in WASBO. I would like to formally congratulate Mike on his new role. In the near future Mike and members of the Board will be working on reviewing WASBO's mission, vision and belief statements. We have also started work on developing our 2019-20 SMART goals for WASBO. During the 2019-20 year the membership will be asked for feedback on these items.

When the time comes, please take a moment to respond to our feedback request. WASBO membership feedback is crucial in helping ensure that our mission and goal work is in line with the will and needs of the WASBO membership. Also new to WASBO this year is a new staff member, Ryan Silvola. Ryan is the new Marketing Communications Coordinator.

In addition to new staff we also have some new board members, Marta Kwiatkowski, Eddie Then, and Holly Burr. Our new president-elect is former board member John Stellmacher. John served as a director through last year.

At the state (and national) level we have some changes coming out that many of us will have to navigate through. These changes will most likely have an impact for those working in business offices in regard to student activity accounts, scholarships, and federal ESSA grants. If you haven't already done so be sure to check out the "School Financial Services Team Bulletin" at: dpi.wis.gov/sfs/communications/listserves/2019

Best wishes to all of WASBO's members during this new and exciting year. For those dealing with change, I hope that you are able to see it as an opportunity, embrace the willingness to learn, and are able to build your own resilience. I would also recommend that you take a look at a free resource that was recently shared with me. The Compassion Resilience Toolkit for School Leaders and Staff was created as a resource to help build resilience for educators. This free toolkit can help educators build a reservoir of well-being to help maintain their own mental well-being and compassion helping students during stressful times. It can be found at: www.wish-schools.org/resources/compassion-resilience.cfm



Each year the WASBO President selects a theme which draws attention to timely and important aspects of our work. President Kathy Davis selected "Building Resilience in Times of Change" as the theme for 2019-2020.



Mike Barry
WASBO Executive Director

GROWING AS LEADERS

BUILDING A STATEWIDE NETWORK OF IDEAS, INNOVATION AND SUPPORT

Around this time of year, in the neighborhood where I grew up, our school principal would post the student class lists for the new school year. He would tape them to the windows of the school office, facing outward.

Upper grades were taped up high on the glass, primary and intermediate grades were displayed lower, all designed for eye-level viewing. There was one sheet for each teacher, indicating the teacher name, the room number and the list of students assigned to that particular class.

This was a highly anticipated event, like a kid version of the Powerball lottery. It seems we would spend most of August speculating on which teacher we might get, which one we wanted most or most wanted to avoid.

Then somehow, without a formal announcement by the school or the benefit of social media, word would spread through the neighborhood that the lists were up. And soon the student pilgrimage would begin, on foot or bicycle, to check out the lists and learn our fate.

In the weeks before 5th grade, I was desperate to avoid being assigned to Mrs. Shelby's class. My older brother had been in her class two years earlier and said she was murder, a homework assigning machine, tough grader,

"This year and next, we'll be working to help you with some of the larger challenges facing WASBO members."

strict disciplinarian, and she smelled like hairspray.

Of course, as I pressed up against the school office window, I found my name, third down on the list, M. Barry, assigned to Mrs. Shelby's class. But there was a silver lining, as there so often is. My best friend was in the same class, which made all the difference, and I met some other friends that year as well, some I still see today. And as for Mrs. Shelby, she turned out to be at least a little better than her reputation had suggested.

Now, almost fifty years later, I am again looking forward to a new school year, my first as the executive director of WASBO. I'm delighted to be working with many WASBO friends, with a chance to meet new friends as well. That still makes all the difference for me, and it's a big

part of the WASBO mission, bringing members together for new learning and surrounding you with a statewide network of ideas, innovation and support.

This year and next, we'll be working to help you with some of the larger challenges facing WASBO members. On the financial side, ESSA school level reporting, GASB 84 for fiduciary funds and, coming soon, DPI's new WISEdata financial reporting process.

On the building services side, school safety remains a top concern, as it must. WASBO remains committed to providing you with the services and supports you need to meet these challenges. We look forward to seeing you this year at WASBO's many professional learning events. Let's have a great school year!

WASBO CODE OF ETHICS

OUR WORK AS PROFESSIONALS IS ANCHORED TO A CODE OF ETHICS WHICH GUIDES OUR ACTIONS AS LEADERS.

AS MEMBERS OF WASBO, WE PLEDGE TO:

- Honor the public trust of the position above any economic or social rewards; not permit considerations of private gain nor personal economic interest to affect the discharge of their professional responsibilities; and recognize that the schools are the public's business and seek to keep the community informed about its schools.
- Accept responsibility for mastering, contributing to and sharing in the growth of specialized knowledge, concepts, and skills which are necessary to perform their duties.
- Perform and direct the Business Functions of the district in full support of educational opportunities provided to all in the district.
- Adhere to local, state and national laws.





John Forester
Executive Director,
School Administrators Alliance

CONTINUOUS ADVOCACY NEEDED

ONGOING CHALLENGES FOLLOWING PASSAGE OF 2019-2020 STATE BUDGET

Republican and Democratic legislators have been battling to characterize the 2019-2020 State Budget as either “good” for public schools or “woefully inadequate” ever since Governor Evers signed it on July 3. However, the Wisconsin School Administrators Alliance (SAA) believes there’s more work to be done. In previous comments the SAA noted the increases in general school revenues, the low revenue ceiling, special education aid and support for school mental health and characterized the budget as an important step forward in addressing the fiscal challenges facing Wisconsin school districts.

However, the SAA went on to say that the 2019-21 State Budget is not without its disappointments, unmet needs and ongoing challenges. In particular, we are very concerned about the lack of action on funding for English learners. Even with some of the positive developments in the budget, it is abundantly clear that Wisconsin has a lot more work to do to support special education, English learners and students facing mental health challenges.

The Legislative Fiscal Bureau (LFB)

and the Department of Public Instruction (DPI) have produced some useful analyses of the budget’s impact on all 421 Wisconsin school districts. Unfortunately, these documents can never tell the full story for every school district. Developing that “full story” for every district’s unique circumstances is the responsibility of local school leaders. This is a clear example of how our responsibility to advocate for necessary resources for our students and needed evidence-based policy does not stop with the signing of the state budget. It is ongoing and continuous. Therefore, here is my suggestion to all school district administrators and business officials: Engage your district administrative team and collaboratively develop your district’s analysis of 1) what this budget means for educational opportunities for the students you serve, and 2) the unmet needs from this budget and the ongoing challenges that remain. Then use this information to educate your legislators, your staff, your board and your community. Then use it again... and again.

Continuous advocacy will be an ongoing focus for the SAA moving forward. Wisconsin school children deserve nothing less. Thanks for listening, and thanks for everything you do for the kids you serve.



“Developing that ‘full story’ for every district’s unique circumstances is the responsibility of local school leaders. This is a clear example of how our responsibility to advocate for necessary resources for our students and needed evidence-based policy does not stop with the signing of the state budget. It is ongoing and continuous.”

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WASBO Foundation 2019-20 Professional Development & Networking Calendar

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Professional Development Opportunities

WASBO Fall Conference ★ *f* - Modules 4 & 5
Oct. 3-4 - The Osthoff Resort, Elkhart Lake

ASBO International Annual Meeting
Oct. 25-28 - National Harbor, Maryland

Midwest Facility Masters Conference *f* - Module 3
Nov. 4-5 - Kalahari Resort & Conference Center, Wis. Dells

SFO Study Group
Dec. 3 - Kalahari Resort & Conference Center, Wis. Dells

Winter at a Glance ★
Dec. 3 - Kalahari Resort & Conference Center, Wis. Dells

WASBO/WASPA School Personnel Academy
Dec. 4-5 - Kalahari Resort & Conference Center, Wis. Dells

State Education Convention (School Finance Puzzle - Jan. 21)
Jan. 21-24, 2020 - Wisconsin Center, Milwaukee

ASBO Executive Leadership Forum
Jan. 30 - Feb. 1, 2020 - New Orleans, LA

WASBO Facilities Management Conference *f* - Module 7

Feb. 4-5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

WASBO Transportation & Bus Safety Conference
Feb. 5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

WI Federal Funding Conference ★
Mar. 4-5, 2020 - Kalahari Resort & Conference Center, Wis. Dells

Accounting Conference ★
Mar. 18-19, 2020 - Madison Marriott West, Middleton

School Business Office Professionals Conference
April 9, 2020 - Wausau

Spring Conference ★ *f* - Modules 1 & 2
May 14-15, 2020 - Kalahari Resort & Conference Center, Wis. Dells

★ *Part of the Year of Success program*
f *Facilities Manager Certification Core Modules available*

Certified School Risk Managers (CSRM)

Course Offerings

Fundamentals of Risk Management
Sept. 18 - School Leadership Center, Madison

Handling School Risks
Sept. 19 - School Leadership Center, Madison

Measuring School Risks
Oct. 16 - School Leadership Center, Madison

Funding School Risks
Oct. 17 - School Leadership Center, Madison

Administering School Risks
Nov. 13 - School Leadership Center, Madison

Crisis Prevention *p*
Nov. 14 - School Leadership Center, Madison

p **CSRM Update Credit; anyone may attend**

Scholarship Fundraisers & Networking Events

Fall Golf Outing
Oct. 2 - Quit Qui Oc

Fall Run/Walk
Oct. 2 - Elkhart Lake

Spring 2020 Golf Outing
May 13 - Trapper's Turn

Spring 2020 Bike Outing
May 13 - 400 Trail

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Kent Ellickson

Director of Finance and Business Services,
Onalaska
WASBO Past President

BEYOND THE NUMBERS

Often times, the scope of the decision-making goes well beyond analyzing the numbers on spreadsheets. Take the School District of Onalaska's summer school program for example. Our District has a tremendous summer school program with unduplicated enrollment equal to nearly half of our school-year head count. As you can imagine, while summer school is tremendously popular in the community, it challenges those of us in the district office to provide support. This includes implementing the program, providing support services such as busing, and monitoring the resources. All of this happens while we are closing the fiscal year, preparing for a financial audit, enduring the field work of the audit, overseeing facility projects, hiring and onboarding new staff, updating the district budget based on state factors and much more.

This past year I spent a bit of time through the winter and spring working with summer school administrators in preparation for the summer school program. Three different principals run the program. I will admit one of my biggest concerns was program expenses exceeding the increase in the revenue limit provided by the additional summer school FTE, thus reducing resources available for programs during the school year. I was working with the administrators on

monitoring anticipated enrollment and staffing ratios. I provided them with special spreadsheets to help calculate "appropriate" staffing ratios to help ensure the expenses of this year's program would not exceed the revenue limit increase generated. One particular summer school offering that caught my attention this year is a program called Summer Adventure Camp.

Summer Adventure Camp is a summer school program that looks like a special education program, but it isn't — at least in the technical sense according to professional staff who oversee school business and the special education program. We know the difference is that Extended School Year Services (ESY) are required special education services provided beyond the school term in accordance with the child's IEP. And we know these expenses are eligible for special education categorical aid. Our Summer Adventure Program is not an ESY program. Clearly this program with high staffing ratios and high transportation costs is an expensive offering contributing to my financial concerns with the overall summer school program.

Our Summer Adventure Program attracts students of varying disabilities and helps them interact in a variety of summer educational and recreational opportunities in the community. Some of these opportunities include

visiting a fish hatchery, the local Eco Center, area agricultural fairs, museums, the National Eagle Center, and various area parks.

Crowded summer venues are avoided, and very adequate levels of supervision through professional staff and paraprofessional staff is provided. As you can imagine, I've questioned if alternative (less costly) means could be used to meet the goals of the program.

One early July day caused me to think differently about this program. Upon returning to the office from a brief lunch, I could hear our administrative assistant taking a call regarding an incident with the Summer Adventure Camp that had just taken place during one of the regularly scheduled park outings. This call and the details to come from staff debriefings told an amazing and powerful, yet tragic story.

We learned that staff and students on this outing were spending time on a sandy beachfront and had noticed a makeshift boat from which two individuals were fishing during the morning.

Mid-day one of the teachers noticed someone in the water and heard a faint call for help near the boat. Several teachers and the only other bystander in the area went into the water and 911 was called. Some staff stayed with the students. Fortunately,

the area of the incident was not readily visible to the students. The area between shoreline and the incident was swampy with seaweed, multiple trees and branches, and rocks.

The three teachers and one bystander could not easily reach the area of the boat. When they did, they found two men, the middle aged man who had called for help and his father both in the water. The father was in the water, purple and unconscious. Due to the size and weight of the victim and the treacherous conditions between them and the shore, it would have taken considerable time to get the victim to shore.

The group used quick thinking and hoisted the victim onto a log and performed CPR. The water was deep and created a big challenge. Two people took turns performing CPR on the log, leapfrogging each other when tired. The other two remained in the water struggling to keep the log

stable for the victim and two people performing CPR. EMT's and police arrived after about eight minutes. However, the initial responders did not have a boat. The four continued to aid the man until responders were able to take over and get the victim into the ambulance.

Initially the outcome seemed like it may be favorable. However, later we learned the final outcome at the hospital was not favorable. However, in reflection, it was good that we had several staff at that park that day trained in CPR and first aid to compliment the only other adult bystander. The man made it out of the water and to the hospital instead and his family got to see him a final time.

Emergency personnel said the staff did everything they could and should have done per training and should be commended. While counselors discussed the incident with the students, the staff commended how they

behaved and conducted themselves during this tragic real-life situation. Through these final weeks of summer, I have been reflecting on many questions regarding this incident: What would have happened if we changed our program and did not provide resources for the staff to be there with the kids that day? Was it an unfortunate circumstance that the children were near the scene of this tragedy or a practical real-life scenario that will help them in the future?

All of our paraprofessionals, custodians, bus drivers and custodians are trained in CPR and first aid due to job requirements. Many of our teachers are trained because they elect to do so. Should more teachers be required to be trained?

As we begin the year, let's remember that we have the power to significantly change the outcome through the decisions that are made based on our influence.



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Greg Gaarder
Business Manager, Tomah
WASBO Director

BUILDING YOUR SUPPORT TEAM

WHY RELATIONSHIPS ARE THE ROADMAP TO NAVIGATING A COMPLEX BUSINESS OFFICE

"The complexity of the job really forces me to seek outside resources in order to successfully complete even some of the most basic day-to-day tasks."

My success is often defined by relationships that have been built with various consultants, vendors, co-workers and colleagues. Over the years, I rely on the expertise, opinions, and suggestions of consultants and vendors as much as I rely on those closest to me in the Business Office in the Tomah Area School District. The complexity of the job really forces me to seek outside resources in order to successfully complete even some of the most basic day-to-day tasks.

I am not an expert nor necessarily a great role model in the area of developing and maintaining relationships, but I certainly understand the value and importance of creating new and maintaining current relationships as it relates to the office. I would guess that applies in any job as well, but I believe it may be uniquely important in to the Business Office.

I often tell people the Business Manager position is like being a "jack of all trades but a master of none." At one minute, I can be talking about the complexities of investments, the next minute talking about the complexities of solving drainage issues at an athletic field, and the next minute discussing the Family and Medical Leave Act. I would argue that there are few positions that involve the need for knowledge, above the basic level, for

just about every aspect of the business world. Quite frankly, being an expert on even a portion of all the areas a Business Manager touches is simply unrealistic. However, being an expert in securing resources to help when a specific expertise is needed is critically important. More importantly, having a trusting relationship with the expert is even more important. Often, my success or failure lies in my ability to find an expert that I can trust and rely on to give me answers I need.

I received a phone call the other day from a colleague who needed an opinion on a bid process. The question was not necessarily just about the bid process but also how the decision will ultimately play out with staff and the Board. While I am certain the individual was not counting on my response to make a decision that involves significant dollars, I am hopeful my response did give this colleague some comfort that someone else had the same opinion. More importantly, I hope they trusted my views and opinions enough to help in making a decision. Just the other day in our office, a question was asked regarding insurance coverage. We needed to make a couple of different phone calls

to our vendor and consultant in order to answer the question. More often than not it seems to be the norm now that we need to get multiple opinions in order to settle on the "best answer or option." So why did I call our vendor and consultant? The obvious answer is, "That's what they get paid to do." The not so obvious answer is that I trust them to help us succeed and make a decision that is in the best interest of the Tomah Area School District. Why did my colleague call me, I hope she trusted that my response would be open and honest and help her make a decision that was in the best interest of her District.

Relationships are more about trust than about answers. I cannot move forward with an answer- whether that be from a vendor, consultant or colleague- unless I know they have the District's best interest front and center. It takes time to build relationships to the point that we are willing to invest millions of dollars or risk making decisions that will affect people's lives. I have never taken those responsibilities lightly, which makes it even more important that I have trusting relationships with people that help me make those decisions.



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Brian Adesso
Director of Business Services,
Menahsa Joint
WASBO Treasurer

CREATING YOUR OWN PERSONAL CARE PLAN

There are a lot of factors in life we cannot control. Without a solid self-care plan these stressors can take a huge toll on one's mental and physical health. My wife and I both have completed trauma-informed care trainings.

The first thing that all these trainings always addressed is having a self-care plan. Before having training in this, I never really thought about having a plan that encompasses me. Yet after the training, I can't believe that I never had one before.

What comes to mind when you think of the self-care? May be a massage, or taking a relaxing walk to clear your thoughts, or taking time to read a book. Those are all wonderful examples of part of a self-care plan. However, self-care is so much more than a one-time thing.

Self-care is about taking care of your entire self- emotional, physical, mental,

relationships, and even spiritual self. Self-care is about making yourself a priority. If we cannot take care of ourselves, how can we possibly take care of anyone else.

Recently, my family and I took a vacation to Alaska. It was amazingly beautiful and truly a once in a lifetime experience.

While I was in Alaska, I felt so relaxed and unstressed. After, thinking this over more thoroughly I realized I needed to take some time to create a self-care plan for myself. Before I started my own self-care plan, I pondered what made being in Alaska so different than being at home.

Here are my two biggest takeaways from my vacation in regard to my self-care plan:

First, I realized while I was in Alaska, I was disconnected. I had unplugged digitally. This allowed me to not have my daily work stresses (i.e., checking my e-mail which is right on my cell phone).

I discovered that it was okay to unplug from work. I realized the work was still there waiting for me when I returned to it.

While I had more e-mails to catch up on, it was worth it to be fully present with my family. It also allowed me to take in the natural beauty of Alaska and I more fully enjoyed myself. So, number one I learned was to unplug from my devices. Certainly, I was able to this more often and at home.

Secondly, I learned from my Alaska vacation that I am more relaxed, and it is easier for me to unplug when I am away from home. If I am home, I want to work on house projects, my garden, my yard, etc. It is almost like a retreat from all the daily stressors that I need to completely relax. This made me realize I really do need to take some time annually to get away to relax and recharge.

Those were my two biggest takeaways in regard to self-care. So, like I said after my vacation I decided I was going

to make my own self-care plan. I liked the unplug and getaway as a bigger picture self-care plan.

However, for my daily self-care plan here is what I created:

Go to bed at a reasonable hour (for me that is 9:30-10:00 PM)

We all know how important sleep truly is for us. Also, if I do not get a good night's sleep, work is more challenging, I have a much shorter fuse and I am just overall unhappy. So, sleep is my number one priority for my self-care plan.

Make time for family and your best friends

My wife and I both agree that we love to be surrounded by friends and family as often as possible. I also find it so helpful to have someone to remind me to not take things so seriously, that life

is short, and to laugh and have a good time. I put this as my number two because I think without these important relationships, my life would be much less full.

Down-time

I put this as my number three because while I love being surrounded by family and friends, I also think it is healthy to have some alone time. My family recently started a nightly reading time, where we all quietly read before bedtime. It has really made our bedtime routine extra smooth with our two daughters. It is one of my favorite ways to end the day.

Physical and Dietary Health

My fourth and final part of my self-care plan is physical and dietary health. Exercise and eating non-processed foods are my newest additions to my self-care plan. I am making exercise a priority

and finding time for it daily. Eating non-processed foods will be challenging, but after making this week's meals, I am sure it will be fun and worth the payoff for my health.

I know that in jobs like ours, Directors of Business Services or really any profession, we have a lot of daily inevitable stress. Truly, life is inevitable and always can throw some curve balls at us.

Having a plan to manage daily and overall life stress has something I find to be really helpful. My wife created a self-care plan, too.

They were nearly identical, so it has been really helpful to work on this together. We have also noticed that we handle stress in a more positive way and can really work through anything together!



Dental care and vision screenings — at no cost to your school

UnitedHealthcare's mission is to help people live healthier lives and to help make the health system work better for everyone.

UnitedHealthcare is supporting DentaMed Healthcare and VisionQuest 20/20 in their efforts to bring dental services and vision screenings to students, at no cost to schools.

Dental Care:

Through a grant from UnitedHealthcare, DentaMed will provide comprehensive dental care to students at schools like yours via its new state-of-the-art mobile dental clinic. Screenings are available to any student, regardless of whether the child has health insurance.

To discuss bringing the DentaMed mobile dental clinic to your school, email: info@dentamedhealth.com or call 414-877-0707.

Vision Screenings:

VisionQuest 20/20 will provide schools in Wisconsin with access to its EyeSpy 20/20 vision screening software to check students for vision problems. Participating schools will receive unlimited use of the EyeSpy 20/20 vision screening software and training on how to administer the screenings and utilize the data collection systems.

To discuss bringing the EyeSpy 20/20 vision screening software to your school, contact: Chris Greening, 630-503-7650, chris@good-lite.com.



DentaMed and VisionQuest 20/20 are not affiliated with UnitedHealthcare and each entity is responsible for its own contractual and financial obligations.

AARON & BRIAN SAY "R-E-L-A-X"

CYBERSECURITY IN SCHOOL DISTRICTS



Tim Erickson
Chief Financial and Operations
Officer, Hudson
WASBO Director

Since 2016, K-12 school districts in the U.S. have experienced more than two cyber incidents per week on average. We continue to hear about major data breaches almost weekly and the most recently discovered Capital One breach exposed over 100 million individuals most sensitive information including names, addresses, dates of birth, credit scores, bank account numbers and social security numbers. When companies like Capital One and Equifax are challenged to protect our data with their armies of technology staff, how can we as school districts protect our most sensitive data?

IT'S NOT IF, BUT WHEN IT WILL HAPPEN TO YOU

Our district embarked upon a journey to review the strength of our systems against the myriad of cyberattacks from phishing and social engineering to hacks and data breaches about two years ago. We have taken various steps over that time to improve our cybersecurity. Some steps seem like we are taking steps backwards, such as using the United States Postal Service, picking up the phone or talking face to face instead of using email.

I have been working closely with our IT Director as we navigate through cybersecurity. A case in point, I wanted to use biometrics as an option for employees logging on to our time management system. The technology has been around for years and I thought it was relatively safe. After more discussion with our IT Director and being educated on associated risks, our district will not be using this technology, at least not soon. The Consortium for School

Networking (CoSN) has issued a brief regarding facial recognition technology and the concerns surrounding this technology. If you are considering using biometrics, I would recommend reading the brief. It includes information on efficacy, racial bias, privacy issues, storing the data and so on. The brief can be found at cosn.org/cybersecurity.

Another area that should not be overlooked is having adequate breach and cyber insurance. The former is the more valuable as it covers legal fees, forensics costs and other liabilities the district could be shouldered with. According to CoSN, adequate coverage will require the district to have adequate technology security in place such as protocols for identification, authorization, authentication and accountability and network security including intrusion, firewall, dmz and

See **ERICKSON** on p. 20

SCHOOL DISTRICTS

A RISKED-BASED APPROACH

Timothy McLaurin
Director of Information Security
Wildcard Corp, Stevens Point
WASBO Service Affiliate

The threat of cyber-attacks on schools is growing. Earlier this year, a Wisconsin district recently experienced a significant and costly data breach. The fact is, schools are much more vulnerable to hacking than large organizations and they have more to lose. Hackers have realized that schools are typically easier targets because they have a higher dependence on their sensitive data and fewer resources to protect them.

Cybersecurity threats are outpacing school systems' ability to identify and protect themselves against the new variants of attacks facing them. In order to mitigate cyber threats, schools must utilize a risk-based

approach to protecting their assets. Here are some tips to make sure your data remains safe: When developing a risk-based approach to protecting your school, the first step is to identify which assets you have to protect. This could include employee and student data. After identifying your critical assets, the next step is to implement protective measures and develop a recovery plan that could be used in case such assets were ever lost or stolen.

In instances where the assets are stored digitally, create backups on another medium that cannot be easily accessed from a connected system. If an attacker can compromise a system that is connected to both live data and backups, it is almost as if you have no backup at all. Make sure you regularly test your ability to recover your data from your backups. Protecting and maintaining your backups is key because

they should also be deemed as a critical asset.

The third step is to patch your systems. Most hackers are not like the ultra-elite computer experts portrayed in movies who are capable of breaking into any system. In reality, most hackers are opportunists who take advantage of pre-existing vulnerabilities and weaknesses in security systems.

Most hackers breach systems using well known exploits, which could be prevented with certain fixes, but have not been put into place. Most hacks can be prevented by applying and maintaining the necessary patches to your systems, applications, and network appliances. Most places have their workstations and server operating systems patched but ignore applications and network appliances.

See **SECURITY** on p. 23

ERICKSON

traffic inspection. All the tech jargon that I know just enough about to be very dangerous.

According to EdTech Strategies, LLC, 20 percent of cyber incidents involving K-12 schools are due to the actions of staff or students. We saw this as a huge opportunity to educate staff and students. We used software to send out phishing emails to staff. If you clicked on the link, you were taken to an educational page about phishing email. Over time, we have seen the percentage of staff who clicked on what could have been harmful dramatically decrease. The software we used saved IT staff a substantial amount of time versus creating something in-house.

You may recall a WASBO conference presentation a couple of years ago from Washington County Administrator Josh Schoemann who recounted the story about a “spoof” email. The County Treasurer received what appeared to be an email from the

Administrator about making two bank transfers. Unfortunately, we know how this ends. The County lost tens of thousands of dollars. Ironically, the day prior to the transfers, the Administrator and Treasurer were next to each other at a meeting, but conversation about the transfer never came up. Lesson learned the hard way...if they had only picked up the phone or talked face to face about the transfers. We have prioritized a variety of security practices this past year. We hired a third party to perform an audit of our systems. Through this audit, we could then focus on additional improvements to our security. We also use third party network monitoring on a 24/7 basis. If we have anything that looks suspicious on our network, the third party will call us immediately and offer assistance as to next steps. Now this is painful, but we require password changes every 90 days on our network. This is one of the easiest, lowest cost and effective changes that we implemented. A little frustration in having to create a new password, but well worth the alternative.

On the non-tech side, we confirm vendor requests to change any banking information by making a confirming phone call to the number we originally have on file. We now require a data protection agreement as part of vendor contracts that involve the use of student or employee data. Any requests from administrators for sensitive data like social security numbers or bank transfers require a face to face conversation or when that’s not possible, a phone call to confirm.

What I just covered barely scratches the surface of steps districts can take to protect their data and systems. The bottom line in cyber security is to develop a good working relationship with your IT department/person to find the most vulnerable areas of your systems and then work together to develop a plan to address the shortcomings and fund it adequately.

In the world of cybersecurity, we know it’s not if, but when you have a breach. Districts will want to answer confidently about the reasonable steps they took to protect sensitive data.

NEW BEGINNINGS

Ryan Silvola
WASBO Newsletter Extraordinaire



My name is Ryan Silvola, and I am WASBO’s new Marketing and Communications Coordinator. I am beyond thrilled to join the WASBO team, and I look forward to meeting all of the dedicated district administrators, staff members and service affiliates who are tirelessly working to improve Wisconsin’s educational system. I look forward to meeting all of you in the near future at WASBO’s numerous conferences.

After growing up in the northern suburbs of Chicago about 15 minutes away of Six Flags, I graduated from Augustana College — in Rock Island, Illinois, NOT South Dakota — with majors in Multimedia Journalism and Mass Communication and Women’s and Gender Studies. I then moved up north...well, just north of the border to Beloit to make an impact as a journalist. I’ve spent the last three years as a reporter and designer for the Beloit Daily News. During my time at the newspaper, I worked closely with the School District of Beloit Turner. I learned about school districts’ fiscal operations, the implementation of facilities referendums and other issues facing Wisconsin schools.

After seeing the passion of Wisconsin school districts’ stakeholders from the outside as a reporter, I decided I wanted to help those who improve the lives of Wisconsin students every day. In addition to my time at the Beloit Daily News, I also have been serving as marketing coordinator for Quilt Addicts Anonymous, a small

start-up business based out of Illinois. While working remotely for the small business, I have been sending out frequent email campaigns, developing and editing video tutorials, measuring the business’s growth through social media other such tasks. I intend to utilize all of these marketing skills to inform our members and promote our programs.

I don’t plan to totally put my days as a storyteller behind me, though. I look forward to highlighting your stories. In my new role here at WASBO, I am eager to work with our district providers and partners in the private sector to highlight all the services they bring to Wisconsin school districts.

I will coordinate the exhibit halls at many of WASBO’s annual conferences. I also plan to work with our affiliates to make sure their generous sponsorships don’t go unnoticed. Recognizing our members and the work being done at WASBO is vital, so I’ll be sending out press releases and running WASBO’s social media accounts. I’ll also be managing WASBO’s official website and conduct-

ing email outreach to make sure our members know about our upcoming conferences and other opportunities.

After closely studying the very thorough Taking Care of Business newsletter over the last month, I look forward to using my design and communication skills to create an even more successful publication. After taking over the helm from my predecessor, Clare May Burnside, I hope to continue to make the newsletter an asset to all our WASBO members. I know I have big shoes to fill after Clare’s departure, but I look forward to rising to that challenge.

I’m excited to get started and to connect with all of you! Feel free to reach out to me by emailing ryan.silvola@wasbo.com or by calling 608-249-8588.



risk damage my school budget. I will not let unexpected risk damage my school budget.

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- Crisis Prevention • Nov. 14, 2019

Info at WASBO.com/riskmanagement

MAKE THE MOST OF YOUR WASBO MEMBERSHIP BY GETTING INVOLVED!



Dear WASBO Members: Congratulations on making the choice to be a member of WASBO. Being a member in itself has a lot of benefits, however, you can expand on those benefits by becoming actively involved in WASBO. There are a number of activities that can help improve your WASBO experience and create valuable connections that can serve as resources for you during your career. Becoming active as a committee member, presenter and board member has granted countless opportunities for myself to grow both professionally and personally. I am confident that it can for you as well.

WASBO is a professional association that depends on the willingness of its membership to play an important role in planning and carrying out its numerous functions. A lot of our members give their time and talents to keep WASBO a responsive and healthy organization. This allows us to maintain a lower dues structure and lower priced conferences as compared to other school related organizations. In order to maintain this structure though, we do rely on our members to assist where and when they can.

Please consider serving on a WASBO committee or sharing your expertise at a conference during this upcoming fiscal year. Whether you are new to WASBO or have been involved for years, please submit committee membership requests and/or calls for presentations to help keep our organization strong. Through service, you will make many great connections with colleagues from across the state and it will enhance your growth as a professional. By sharing your expertise, you will be serving your peers and helping them become better professionals.

Our jobs can be demanding and very busy, and I do understand that finding the time to volunteer may seem like an extra burden. However, any time you can commit will be time well spent and has the potential to enrich your own experiences in the profession.

Kathy Davis
WASBO President, 2019-20



Available Committees:

- Accounting
- Ad Hoc
- Fall Conference
- Midwest Facility Masters
- Safety and Risk Management
- Scholarship
- School Facilities
- School Finance Puzzle Planning
- School Personnel Academy
- Service Affiliate
- Spring Conference
- State Education Convention (Joint Convention)
- Transportation



SECURITY

This is because patching network appliances and applications require more of a manual approach, whereas operating systems tend to handle themselves. Care has to be given to everything that is connected to your network to ensure no device is running software that is vulnerable to attack.

One of the biggest vulnerabilities that hackers exploit are users. Attackers will target personnel and trick them into divulging sensitive information or open programs with malicious code. The current attack trend is to trick users into divulging sensitive banking information, which gives an attacker direct access to funds. The common position to mitigate attacks that target users is to teach users how to identify malicious activity and respond appropriately. However, even

the most savvy IT security professional can be fooled into clicking malicious links or leaking sensitive information. With this in mind, schools should assume that inevitably, a well-intentioned employee will make a mistake that could lead to compromise. Schools should design their defenses around this assumption.

Finally, schools need to assign someone with the responsibility of making sure its school operates securely, as defined by policies. Information security is ever-evolving and the threat landscape adjusts for the protection mechanisms that schools put into place. Someone needs to stay informed about the most current threats and evaluate how their organization can mitigate the associated risks. Such responsibilities could be assigned to one person or split between several people that are currently on-staff who have an

interest in information security.

Developing and implementing a cybersecurity plan might seem daunting. You do not have to start from scratch when it comes to being more resilient against cyber-threats. There are many publicly available templates for policies and procedures that you can tweak to your unique needs. Take the parts that apply and throw away the aspects that do not. There are many information security frameworks that detail ways in which you can take small steps toward improving your security.

Managing risk is a process that must be ongoing. It is not a one-time proposition. It might seem like a daunting task, but when broken down into smaller components, it can be accomplished by anyone, no matter how few resources they have.

ACCESSING FILE:

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- Policy Development
- Residency, Open Enrollment, and Tuition
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- School Finance
- Contract Nonrenewal
- Labor and Employment
- Transportation and Vendor Contracts
- Open Meetings
- Special Education
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ON THE ROAD WITH WASBO CUSTODIAL AND MAINTENANCE CONFERENCES

Over 650 custodial and maintenance staff and 81 exhibitors had the opportunity to visit four locations to gain professional learning in their field. The Custodial & Maintenance Conferences were coordinated through the WASBO School Facilities and Safety and Risk Management

committees, and took place in Madison, June 18; New Berlin, July 17; Westby, July 24; and Appleton on July 31.

Each conference offered something unique. In Madison we welcomed participants seeking to finish Module 7 in Emergency Management, School Safety & Security for the WASBO Facilities Certification Program.

The Eisenhower Middle and High School in New Berlin welcomed Thomas Thibodeau as keynote presenter on Servant Leadership. Thibodeau encouraged participants to be leaders in the profes-

sion. New this year in New Berlin an HVAC Challenge was incorporated into the program. Participants had to identify maintenance issues regarding HVAC management. The New Berlin Police Department provided a session on Vandalism Reporting providing attendees the importance of proper reporting points. These sessions were among the over 25 learning opportunities offered.

The Custodial & Maintenance Conference in Westby offered safety-based trainings in place of the Safety Room Challenge and keynote. Attendees could use a more hands-on approach to learning. To kick off the day, all attendees gathered in the auditorium with local law enforcement to discuss different training methods for Active Shooter Response.

As part of this, law enforcement used blank rounds to simulate the sounds of gunshots and demonstrate what they would sound like in a real active shooter situation. Although nerve-wracking, this interactive general session helped to cement that having some form of training to prepare staff for threats is important. This preparation allowed attendees to understand the methods and determine how to react quickly.

In addition to this powerful kick off training, local law enforcement partnered with EMS to offer back to back breakout sessions on how to “Stop the Bleed.” Attendees had the opportunity to practice tourniquet tying as well as other rapid response first aid practices. Meanwhile, the fire department offered two sessions in which attendees could practice using a fire extinguisher.



The Appleton East High School welcomed attendees. Jim Beckmann was their keynote. Jim reminded participants they are an integral part of their school districts and promote the health and safety of students and staff.

Attendees had the chance to learn about Geographic Information System technology which manages infrastructure both outside and inside buildings for full operational awareness. Along with the GIS for Facilities Management session participants could take Construction and Building Tours and learn in over 20 session topics covering custodial operations, maintenance and safety.

In addition to sessions geared to enhance the duties of maintenance and custodial staff, the conferences offered four modules in the Facilities Management Certification Program. This certification is designed to provide those who are responsible for maintaining the learning environment in

Wisconsin school districts with current knowledge and best practices.

The Facilities Management Certification Program is recognized by the Wisconsin Department of Public Instruction, and those earning the certification receive a certificate signed by the State Superintendent.

New this year, the WASBO School Facilities Committee recognized four custodial and maintenance staff of the year. These professionals were recognized for their leadership, creating a safe and healthy environment for their students and staff and dedication to their district.

Winners received registration to the Custodial Conference of their choice and a registration to the upcoming 2020 WASBO Facilities Management Conference.

Please join WASBO and the WASBO

School Facilities Committee in honoring:

- *Amado Hernandez*, Head Custodian, Marshall Public Schools
- *Rich Hellenbrand*, Maintenance, Waunakee Community School District
- *George Leopold*, District Buildings and Grounds Supervisor, Somerset School District
- *Bill Moyers*, District Daytime Custodian, Montello School District

The WASBO School Facilities and Safety and Risk Management Committees greatly appreciate the leadership of our hosts Kaitlyn Peters (Madison), Andy Stefancin (New Berlin), Norm Davis (Westby) and Mark Hansel (Appleton). These conferences went smoothly due to the hard work of these leaders and their teams. We hope you or your team can participate in the “custodial road trip” next summer!



Great to see WASBO Past President and retired member Gary Siegman in New Berlin!

CONGRATULATIONS SAFETY ROOM WINNERS!

During WASBO's Custodial and Maintenance Conferences in New Berlin and Appleton this July, individuals and teams competed in the Safety Room Challenge. The Challenge tasked teams or individuals with identifying and explaining how to resolve hazards, such as a missing face plate on an outlet, blocked fire alarm light, crushed can of hydraulic fluid, an extension cord tied to a lift and much more. Here are the winners:

Individual Winners

Scott Bessette, Pewaukee SD

Paula Richter, New Berlin SD

Team Winners

Menasha Joint SD: Jason Griesbach, Andrew Quella, Jason McCoy, Tony Hopfensperger and Mike Binsfeld

Mukwonago SD: Andy Wegner, Nick Haddon, Gary Malchow and Rodger Kraft



Menasha Team

Paula Richter Scott Bessette



Mukwonago Team

Special Thanks to the Sponsors of this year's WASBO Custodial & Maintenance Conferences

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MEET THE 2019-2020 WALLY ZASTROW LEADERSHIP ACADEMY COHORT

Becoming a better leader doesn't happen overnight. In fact, the 19 participants in the 2019-2020 Wally Zastrow Leadership Academy met for the first time in July. For the rest of the year and into April of 2020, all of the participants will meet five more times to further hone their leadership skills.

Participants will also be expected to complete a leadership development goal and a school improvement project for their home district. Discussion of what kind of school improvement project and how to manage it will take place and time will be allocated for discussing projects at each session. Participants will write up their results in a simple format and present it prior to graduation, which is set for May 15, 2020 at the WASBO Spring Conference.

Academy participants include: Mike Barry, WASBO Executive Director, Brian Adesso, of the Menasha Joint School District; Jeff Bloch, of the De Forest Area School District; Alayna Y. Burger, of the School District of Superior; Holly E. Burr, SFO, of the Clintonville Public Schools; Tom Dembski, of the School District of Fort Atkinson; John Gahan, SFO, of the Pewaukee School District; Grace Green, of the CESA #7; Colin Jacobs, of the Pewaukee School District; Peter Kempfen, of the Seymour Community School District; Joseph Marquardt, of the School District of New London; Joanie Niemiec, of the School District of



Greenfield; Amanda Sievers, of the Mequon-Thiensville School District; Patty Sprang, of the La Crosse School District; Dan Storch, of the Wrightstown Community School District; Veronica VanDerhyden, of the Adams-Friendship Area School District; Sarah Viera, of the Mequon-Thiensville School District; Vicki Waller, of the Prairie du Chien School District; Timothy Charles Williamson, of the School District of Waukesha.

For more information, go to wasbo.com/leadership

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WHERE EDUCATION & ECONOMICS MERGE

ATTENDING GEORGETOWN'S EDUNOMICS LAB

Michael Williamson

Contributor & WASBO Member
Director of Business Services, Whitnall

I was at the February Federal Funding Conference where Dan Bush had made a passing comment on the work Wisconsin and 37 other states were doing with Georgetown University and the Edunomics Lab that caught my attention. Being a former high school economics educator, having my M.A. in Economics, and being on the finance side of education for the past five years, the combination of Education and Economics naturally caught my attention.

After the conference I perused the Edunomics Lab website and found the articles and information engaging and thought provoking. Through the Edunomics Lab, Georgetown University offers a Certificate in Education Finance which goes into further depth on the information found on their site.

After working out the possibilities with my superintendent, I decided to sign up for the June cohort on Georgetown's campus and the subsequent seven online sessions that follow in order to obtain the certificate. This past June 19-20, I was in Georgetown for the "in-person" sessions and want to share my experience with those interested in the program.

Georgetown University, through the McCourt School of Public Policy, created the Edunomics Lab in 2012. As Dan Bush stated at the Federal Funding Conference, Wisconsin

"Edunomics Lab is seen as the leader in this field of school - level reporting and financial transparency."

worked with the Edunomics Lab to create the framework of the school-level reporting that we all took part in this past fall. Edunomics Lab is seen as the leader in this field of school-level reporting and financial transparency. Dr. Marguerite Roza's engaging style, experiences, deep level of knowledge, and her ability to get to the root of the appropriate and timely questions to ask; given greater financial transparency kept the two days stimulating and full of conversation.

Our cohort was made up of over 60 professionals from across the country. This included a school board member from Los Angeles and his staff (yes, school board members in L.A. need a staff!), several policy directors at both state and national levels, business directors, principals, and even an analyst from the World Bank. The wide breadth of experience and roles created a group wide expertise on education issues related to school funding that I haven't found matched anywhere.

We all brought unique perspectives to different discussions and yet, whether you are the Director of Business Services for Whitnall School District, the Connecticut Department of Education CFO, or a school board member in Los Angeles, the broad issues we are dealing with have common themes and questions that will need to be addressed. This cohort will continue to address these questions over the

upcoming months through our online sessions and presentations.

The topics themselves were a great introduction before the cohort dives deeper into some specific issues throughout the remaining time we have together. The two-day cohort helped in organizing our thoughts on resource allocation and how little is actually considered fixed costs in education.

To get us to think differently, Dr. Roza led us through different exercises around the topics of budget surpluses/deficits, focusing on per pupil expenditures for programs, budget models, communication, productivity data, equity, etc. The topics brought a wide array of responses from the cohort which brought infinite value to the conversations both in our small groups and as a larger cohort.

While every member of the cohort undoubtedly took away different pieces of valuable information, I can briefly write about my own "nuggets." First, through the WASBO Wally Zastrow Leadership Academy, we learned that communication is something that cannot be done well enough or often enough. Dr. Roza really brought that to light with financial data reporting and corresponding productivity. More important that any formulas that could be derived in order to allocate resources, the story and communication behind the data and decisions are what

is most important.

Knowing which points to emphasize and what questions to ask of the data is crucial in appropriate communication. Dr. Roza and the Edunomics team provided strong scenarios in which to practice this skill. Second, education must break out of the mindset that there are too many fixed costs and no room for flexibility. This simply is not true. While we dived into examples to help break us all of this mindset, I'm most excited for the upcoming sessions which will further provide tangible

ideas and frameworks in which to be more creative and groundbreaking in how we address limited revenues.

In summary, the best professional development experiences are the opportunities that allow you to bring tangible ideas back to your office, district, community, or state.

When a professional development opportunity offers to provide ideas for all four, that's a "home run" and that's what the first two days of the cohort provided! I'm excited to con-

tinue reshaping how we think about education finance, and I hope more individuals are able to take advantage of the program that is offered through Edunomics Lab. If you have any questions about the program, feel free to reach out to any staff at Edunomics Lab (which is what I did) or please feel free to reach out to myself for further details on the two-day cohort or topics that will be discussed in the subsequent 7 sessions.

I can be reached at 414-525-8403 or mwilliamson@whitnall.com.

The infographic features a central question, "What Kind of Workplace Culture are you Creating?", surrounded by eight interconnected icons representing key workplace values: Innovation (lightbulb), Quality (star), Trust (handshake), Responsibility (globe), Ethics (scales), Students & Staff (thumbs up), Goals (target), and Teamwork (gears).

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Author, motivational speaker Will Bowen

School District of LaCrosse Supervisor of Buildings and Grounds Joe Ledvina

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WASBO'S FALL CONFERENCE

BE THE LIGHT: ILLUMINATING THE FUTURE OF OUR SCHOOLS

Whether you are new to school operations, a seasoned professional or somewhere in between, the WASBO Fall Conference provides an opportunity to recharge, regroup and regenerate.

This year's theme is "Be the Light: Illuminating the Future of Our Schools." We need to take time to learn, breathe, and reflect. We need to mingle with friends and support the people who share our real-world experiences. We all have the responsibility to "Be the Light" and be a leader in our districts. Whether you are comfortable in your current position or your job tests you everyday, building your leadership capacity will

help your district move forward. Bring your questions and unique experiences as you network with your colleagues.

As fall approaches, you will be thinking about enrollment counts, the revenue limit, how to tell your story through ESSA's new school level reporting, and for many, referendum planning and execution.

Along with these topics, the Fall Conference offers timely sessions on school safety to help ensure the security of students in your district. The conference also provides other learning opportunities, such as changes in the state budget and new legal issues related to human resources. Information-rich sessions on leadership, human resources, school nutrition and GASB 84 shouldn't

be missed. We'll also cover Facilities Certification Module 4 (Maintenance & Operations) and Module 5 (Facility Life Cycle & Budgeting).

On Thursday morning, Lucas Jadin's keynote on transformational leadership will help us identify how we can be our best even when it seems like we are at the end of our rope.

Attend with an open mind and an eager attitude. We guarantee you will learn some new tips, tricks, or mindsets that will enable you to serve your district (and promote inner peace!). Best of all: You will form new friendships and meet with respected colleagues.

The conference features professional learning targeted toward every level of WASBO member. We strive to make sure attendees have an exceptional conference experience!

Begin networking with your peers at the golf and run/walk fundraisers and attend the Welcome Reception on Wednesday.

Following sessions on Thursday afternoon, join in on the fun at the team-building event. Each year the team-building activity is kept a secret planned around the theme of the conference. It is guaranteed to be a blast again this year!

Later that evening, join your peers for networking through a little Casino fun at Thursday's Networking Reception. We will also be supporting the Kiel Lions Club who fundraise for youth programs.



Enhance your leadership skills, learn best practices and network to improve the education of students in Wisconsin during one of WASBO's largest conferences of the year. Business Managers, Facility Managers and those working toward Facilities Manager Certification, Bookkeepers, District Administrators and Service Affiliates can't miss this.

Thursday Keynote: Lucas Jadin

In his keynote, called Win in the Dark, Lucas will share how to develop leaders to do their best even in the organization's darkest moments. Specifically, this session will focus on intentionally building the mental skills to be the best version of yourself so that you can elevate the performance of others.



On Friday, we celebrate and honor the recipients of the WASBO Mike Roshar Shining Star Award (Jerrud Rossing, of Monona Grove SD) and the Tina Hafeman Friend of WASBO Award (Kevin King, of Skyward, Inc.).

Make your plans now to attend! Dust off your golf clubs and running shoes and come prepared for an exceptional learning experience. Also, enjoy the fall colors and the peaceful Osthoff Resort and Conference Center.

Learn, listen, share, and be a leader. Plan to attend on October 3-4 in beautiful Elkhart Lake, Wisconsin. Register today at wasbo.com/fall. The value of attending continues long after the last session!

FALL CONFERENCE

October 3-4, 2019

The Osthoff Resort, Elkhart Lake, WI

Special Early Bird Pricing through Sept. 19! Golf Outing and Run/Walk Scholarship Fundraisers on Oct. 2 at the Quit Qui Oc Golf Club

WASBO.com/Fall

Learn more by calling (608) 249-8588

WELCOMING NEW PROFESSIONALS

Last week's New Administrators and Support Staff Conference kicks off annual Year of Success series

On August 7-8, 2019, WASBO welcomed more than 35 participants to the New Administrator and Support Staff Conference at Stevens Point. Attendees included bookkeepers, business managers and district administrators looking to deepen their understanding of school finance. Some were in their position for a year and others only a few weeks.



WASBO collaborates annually with DPI's School Finance team to provide timely sessions at this conference. It also kicks off

five additional conferences through the Year of Success Program, which provides relevant information at the Fall, Winter at a Glance,

Federal Funding, Accounting and Spring Conferences.

As the two-days wrapped up, attendees expressed appreciation for the DPI School Finance Team. Attendees also enjoyed presentations by their WASBO colleagues.

WASBO thanks all presenters for sharing their time and expertise with attendees. We also thank our sponsors!



Coaching for Mentors & Protégés

WASBO offers a Mentorship Program which provides technical assistance and advice to **first- and second-year school business officials** relative to the myriad of duties and responsibilities that are inherent within every school business officials' job description.

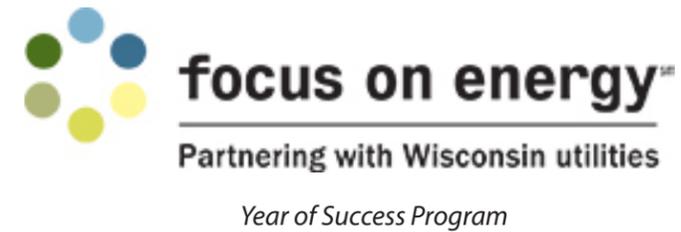
The mentorship program is designed to provide opportunities for new school business officials to acquire the performance skills and knowledge necessary for the effective implementation of their job responsibilities.

For more information, contact Mary Jo Filbrandt at maryjo.filbrandt@wasbo.com.

WASBO.com/Mentorship

Special Thanks to the Sponsors of this year's New Administrators & Support Staff Conference

PLATINUM



BRONZE



FRIEND



Time to Renew

Want to keep receiving this publication?
Renew your WASBO membership!

wasbo.com/RENEW



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Advertise in the 2019-2020 editions of Taking Care of Business

Learn more at WASBO.com/advertise



SERVICE AFFILIATE CHECKLIST

Your contact for sponsorship, advertising, and newsletter submissions is Ryan Silvola, Ryan.Silvola@wasbo.com

- **Sponsorship Opportunities:**
 - WASBO Fall Conference
 - ASBO International Annual Meeting & Expo
 - Midwest Facility Masters Conference
 - Winter at a Glance
 - WASBO/WASPA School Personnel Academy
 - Wisconsin Federal Funding Conference
 - Facilities Management Conference
 - Transportation & Bus Safety Conference
 - Accounting Conference
 - Spring Conference
- Taking Care of Business articles are due September 15 for October issue.
- Advertise in Taking Care of Business.
- Call for Presentations due September 30
- Update your profile and communication preferences at WASBO.com.
- Renew your 2019-20 membership.
- Join a WASBO Committee.
- Mark your calendars! Exhibit hall registrations open November 12 for 2020 Facility Management Conference & January 8 for 2020 Spring Conference

STAY CONNECTED

Call for Presentations

Has your school district implemented an innovative new practice? Do you have an engaging story to tell? WASBO invites you to share your experience and expertise by applying to present at one of our upcoming 2020 WASBO conferences: Facilities Management, Transportation & Bus Safety, Accounting and Spring conferences. A Call for Presentations is posted at WASBO.com/present. Submit by September 30.

If you are a District Professional, consider teaming up with your colleagues/Service Affiliate members to present a session on an innovative idea or best practice you have implemented in your district. Attendees appreciate the information provided by their peers and often find they can apply what they have learned at the conference when they return to their districts.

Service Affiliate Members are encouraged to team up with a school district professional to co-present educational and informative solutions that address the needs of school districts. Inviting district personnel to co-present gives additional credibility to the information you are providing. If you present quality information, attendees will remember the expert who provided it. Final programming decisions for each conference are made by that conference's planning committee.

Questions? Contact Kaitlyn Peters, kaitlyn.peters@wasbo.com or 608.729.6631.

Network by Participating on a WASBO Committee

Meet professional school colleagues and service affiliates, share ideas, enhance WASBO services and enrich your professional development. Serve on a WASBO committee — you'll do all that, and more.

Find out more at WASBO.com/committees. Contact Kristin Hauser at kristin.hauser@wasbo.com.

Interim Assignments

As WASBO members take new positions or retire, the districts they leave are left may be temporarily short-handed. In addition, many districts are in need of consulting help.

If you are interested in an interim assignment, please send a one-page resume to Mike.Barry@wasbo.com.

Keep us Posted

Retiring? Contact WASBO before you leave so we can update your member type and get your new contact information. Email Kristin Hauser at kristin.hauser@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.

Mentorship Program

New professionals are entering the field regularly. If you know of someone new in your region who could use the help of a mentor, contact WASBO's Mentor Coordinator, Mary Jo Filbrandt, at maryjo.filbrandt@wasbo.com.

For a school facilities mentor, contact Joe Ledvina at jledvina@lacrossesd.org or Dave Hoh at david.hoh@oshkosh.k12.wi.us.

Submit a Newsletter Article

Share your experience by writing an article for Taking Care of Business. Email your submission to Ryan.Silvola@wasbo.com.

TAX CONSEQUENCES OF TUITION REIMBURSEMENT AGREEMENTS

Brian P. Goodman and Christopher T. Schmidt
Contributors

Many districts have entered into formal or informal Tuition Reimbursement Agreements with some of their teachers or administrators.

Sometimes the purpose of the reimbursement agreement is so individuals can obtain a new certification or skill which will hopefully benefit the district at some point down the road. Other times the purpose is to provide an incentive to retain existing employees or attract new employees.

One compliance concern for a district is making sure that the amounts reimbursed or paid are treated appropriately as either taxable or nontaxable income. From a tax perspective, there are two ways under the Internal Revenue Code (IRC) that reimbursements for education expenses under reimbursement agreements can be excluded from income and not become taxable wages for either the employee or the employer:

1. Educational Assistance Program (IRC Section 127)
2. Working Condition Fringe Benefit (IRC Section 132)

If the reimbursement does not meet the requirements of either of those sections, then the reimbursement paid

will be treated as a taxable benefit subject to income tax, FICA, and other withholdings.

For both of the above paths, whether a district reimburses the employee directly or pays the expenses directly to a college or university does not affect the taxability of the reimbursement.

Also, the district can place additional requirements on employees without affecting the taxability of the reimbursement. For example, a district can require that an employee receive a certain academic grade in order for the district to reimburse the employee, such as requiring a "B" or higher.

Educational Assistance Program

IRC Section 127 allows districts to reimburse up to \$5,250 per employee, per year, for educational expenses, and these reimbursements will be excluded from wages and not be taxable to the employee who received the reimbursement.

The main requirements under Section 127 are:

1. The terms of the reimbursement arrangement must be in a written document. Generally these are part of a separate plan document for a larger class of employees rather than a one-off benefit provided to a single employee. These plans are sup-

posed to be open to all employees or at the very least an entire class of employees.

2. The district cannot provide the benefit to dependents or spouses of employees.
3. The district cannot discriminate in favor of highly compensated employees.
4. Employees eligible for the plan must have reasonable notice of such eligibility.

Working Condition Fringe Benefit

Amounts reimbursed or paid for education can also be excluded as a working condition fringe benefit under IRC Section 132(a)(3). Under this section, there is no IRS imposed cap on the maximum amount that can be reimbursed in a year (the expenses must just be reasonable).

To qualify as a working condition fringe benefit, the following requirements must be met:

1. The education the employee is being reimbursed for must maintain or improve skills required by the individual in his or her employment, or meet the express requirements of the individual's employer, or the requirements of applicable law or regulations, imposed as a condition to the individual's retaining an established employment relationship, status, or rate of compensation.

2. The education the employee is being reimbursed for cannot be required in order to meet the minimum educational requirements for qualification in the employee's employment or other trade or business, or cannot lead to the employee qualifying for a new trade or business.

If the education is to allow an employee to obtain the minimum requirements to teach [for instance a bachelor's degree is required by law or by the employer, and the employee does not have a bachelor's degree] or allows the employee to qualify for a non-teacher job [such as a business teacher taking classes to qualify as an accountant], there is a risk that any reimbursement for education for such purposes would not meet the requirements as a working condition fringe benefit and would be taxable compensation, unless part of a Section 127 plan (as discussed above).

If, however, the education is to add new skills or maintain old ones (a teacher or administrator getting a master's degree in education for instance), and the education is not being obtained to qualify for a new non-teaching position, then the reimbursement could qualify as a working condition fringe benefit.

Even where someone is taking classes toward a new position within the

district, the IRS has interpreted this fairly generously. In one case a college professor took a tax deduction for getting his PhD which was required for him to be a college president. The IRS explained that the PhD is a course of study that maintains or improves skills required in his current employment. His potential employment as college president was not a new trade or business, but rather a change of duties in the same general type of work involved in his current employment as a professor. IRS Rev. Rul. 68-580, 1968-2 CB 72.

Based on this IRS Revenue Ruling, if a district pays a teacher or principal to obtain their PhD (or other training) to become a district administrator, the district could likely exclude this payment from the individual's wages. Since the working condition fringe benefits tests are fact intensive, it might be worth it for a district offering these benefits to do a quick review with counsel to make sure that the expenses would qualify and not be taxable benefits.

Other Considerations

One question that comes up in these circumstances is the treatment of food, travel, and lodging expenses that might be incurred and the employee would like them reimbursed. If the

individual is incurring these expenses primarily to obtain education (and this education qualifies as non-taxable under the IRC minimum qualifications), expenses for travel, meals, and lodging can be reimbursed without it being taxable income.

Another area school districts are frequently concerned about is whether they can recoup some or all of the payments made to employees back from such employees who either fail to complete a program or leave the district shortly after they complete a program. The answer is yes; however, repayment obligations need to be spelled out and structured correctly.

For example, repayment for someone who leaves generally has to be graduated, such as the employee agrees to repay 1/3 of the cost of the program for each year the employee leaves before the employee has worked three years after finishing the program.

Tuition Reimbursement Agreements can be a useful tool for school districts. Taking time to structure such agreements properly can help avoid undesirable tax consequences for the employee and the district and avoid other potential issues as well.

For questions about this article, please contact the contributors at bgoodman@boardmanclark.com and cschmidt@boardmanclark.com.

Call for Presentations



WASBO invites you to share your experience and expertise by applying to present at one of our upcoming 2019 conferences.

Deadline to apply is September 30, 2019

Visit WASBO.com/present

Applications are currently being accepted for:

- Facilities Management Conference
- Transportation & Bus Safety Conference
- Accounting Conference
- Spring Conference

CELEBRATING OUR NEW MEMBERS!

PLEASE REACH OUT AND CONGRATULATE OUR NEW MEMBERS

District Professionals

- **Alfredo Balmaseda**, School Business Manager, Geneva Joint 4 Woods School
- **Jessica Banton**, Lead Custodian, Granton Area School District
- **Matthew Billmyer**, Head Custodian, Whithall School District
- **Jeff Borland**, Manager of School Services, West Allis-West Milwaukee School District
- **Darcy Bradley**, School Business Official, School District of Crandon
- **Tanner Buchanan**, Safety Officer, Mequon-Thiensville School District
- **Michele Butler**, Superintendent, Cochrane-Fountain City School District
- **Kathy Caldwell**, Director of Business Services, Randall Consolidated School District Jt #1
- **John Cramer**, Director of Facilities/Safety Coordinator, Waunakee Community School District
- **Nancy Davidson**, Asst Business Manager, CESA #7
- **Ben Frazer**, Manager of Buildings & Grounds, Slinger School District
- **Anna Goldbeck**, Administrative Assistant, La Crosse School District
- **Vicki Hagberg**, Finance Manager, Whitehall School District
- **Brandon Halverson**, Assistant Director of Building Services, Madison Metropolitan School District
- **Joseph Heinz**, HVAC Service Technician, School District of Waukesha
- **Stuart Hellmer**, Head Custodian, Plymouth Joint School District
- **Marissa Hoagland**, District Bookkeeper, Crivitz School District
- **Nick Kaiser**, District Administrator, Boyceville Community School District
- **Sean Kelly**, Finance Director, School District of Marinette
- **Kevin Konkol**, Lead Custodian, Glendale-River Hills School District
- **Laura Lawson**, Accountant, CESA #11
- **Cole Markee**, Director of Business Service, Twin Lakes #4 School District
- **Veronica Nelson**, Accounting Manager, Milwaukee College Preparatory School
- **Steve O'Connor**, Director of Facilities, Belleville
- **Alan Ojala**, Custodian, Hartford Union High School District
- **Tracy Peterson**, Buildings and Grounds Operations Supervisor, Oconomowoc Area School District
- **Tricia Polakowski**, CFO/HR, Berlin Area School District
- **Patricia Pottratz**, Head Custodian, Plymouth Joint School District
- **Shannon Sharrock Gordon**, Chief Operating Officer, Racine Unified School District
- **Joel Roltgen**, Energy Advisor, Focus on Energy
- **David See**, Director of Transportation, School District of Superior
- **Kim Stadler**, Bookkeeper, Columbus School District
- **Sean Strauss**, Head Custodian, Whitnall School District
- **Kaitlin Tauriainen**, Food Service Nutrition Coordinator, School District of West De Pere
- **Lois Ullmer**, Accounting Specialist, Howard Suamico School District
- **Mick White**, Finance Secretary, River Ridge School District
- **Robert Voitula**, Facilities Supervisor, Pulaski Community School District

- **Paul Wurtz**, Facilities Management Advisor, CESA #10
- **Brian Zaleski**, Executive Assistant/Finance Director, School District of Colby
- **David Ziegelbauer**, Business Manager, New Holstein School District

Service Affiliates

- **Grant Blankenburg**, Divisional Commercial Manager, Shaw Contract
- **Tina Dreger**, Office Coordinator, Dirty Ducts Cleaning, Environmental & Insulations, Inc
- **Shawn Erickson**, Commercial Insurance Advisor, Ansay & Associates, LLC
- **Tiffany Farnsworth**, Senior Associate-District Assistant, AXA Advisors, LLC
- **Greg Gillett**, District Sales Manager, Hillyard
- **Dylan Keller**, Starting Point, INC
- **Paul Kolo**, Vice President - Operations, GO Riteway Transportation Group
- **Connie Luce**, Business Coordinator, Eco Airducts
- **Lou Macdaid**, Safety Officer, Hedge Tactical Solutions
- **Elise Murn**, Baird
- **Nick Pal**, Senior Document Imaging Consultant, James Imaging Systems
- **Lee Portmann**, Sales Manager, Commercial Roofing
- **Scott Purcell**, End User Consultant, Dormakaba USA, Inc
- **Sherilyn Smith**, Commercial Account Executive, R&R Insurance
- **Matthew Josten**, Regional Vice President, TSA Consulting Group, Inc

- **Dorothy Snow**, Director of Marketing, Interstate Roof Systems
- **Ernest Tisdale**, Regional Director, EDUStaff, LLC
- **Girard Vaughn**, Field Sales Manager, Magic Aire
- **Nate Wenzl**, Business Development

- **Susan Witherspoon**, Regional Sales Director, SSC Services for Education
- **Laurie Woodhouse**, Sales Operations Specialist, The Alliance
- **Tom Weber**, Sr. Business Consultant, Unesco Group

- **Mike Wells**, Direct Sales Manager, Midwest Alarm Systems

Student Members

- **Angela Erdmann**
- **Kevin Klimek**
- **Leah Trojan**

MEMBER MOVES

CONGRATULATE WASBO MEMBERS ON THEIR NEW SUCCESSES

- **George Chironis**, Student, Lake Geneva Area Schools to Business Manager, Lake Geneva Area Schools
- **Jeff Dellutri**, Assistant Superintendent for Business Services, Fox Point-Bayside School District to Superintendent, Same
- **Michael Fischer**, Director of Finance and Business Affairs, Twin Lakes #4 School District to Finance Manager, St. Francis School District
- **Luke Francois**, Executive Director of Business Services, Sauk Prairie School District to District Administrator, Waterford Union High School
- **Marta Kwiatkowski**, Director of Business Services, School District of Rhinelander to Director of Business Services & Human Resources, Shorewood School District
- **Angie LaBine**, Business Manager, New Holstein School District to Director of Finance, Howard Suamico
- **Patrick Miller**, Director of Business Services & Human Resources, Shorewood School District to CFO/COO, School District of New Berlin
- **Steve Rhode**, Coordinator of Facilities and Operations, West Allis-West Milwaukee School District to Manager, Buildings & Grounds Department, Oak Creek Franklin Joint School District
- **Margo Smith** to Business Manager, Three Lakes School District
- **Kathy Stoltz**, Business Official, Richland School District to Executive Director of Business Services, Sauk Prairie School District
- **Brian Walters**, Director of Business and Finance, School District Marinette to Business Manager, West De Pere School District
- **David Ziegelbauer**, Student/8th Grand Math and Science Teacher, Mequon-Thiensville School District to Business Manager, New Holstein School District

MEMBER RETIREMENTS

THANK YOU FOR ALL YOU'VE DONE FOR STUDENTS AND THE PROFESSION. KEEP IN TOUCH!

- **Judy Dabbs**, Business Director, Bristol School District #1
- **Kevin Hanson**, Business Manager, West DePere
- **Steve Kopecky**, Business Manager, Arrowhead Union High School District
- **Sandy Nelson**, Bookkeeper, Gale-Etrick-Trempeleau School District
- **Larry Savage**, Manager, Buildings & Grounds, Oak Creek Franklin Joint School District
- **Mike Mrdjenovich**, President, HUB International
- **Jay Clark**, Associate District Administrator, School District of Holmen

WASBO Events Calendar

Here is a look at the conferences, workshops, regional meetings, committee meetings, and other events that make up the upcoming WASBO Event Calendar. For more information, visit wasbo.com/calendar

August

21
Midwest Facility Masters Conference Planning Committee Meeting
10 AM, conference call
wasbo.com/facilitymasters

22
Fall Conference Planning Committee Meeting
9 AM, conference call

September

12
WASBO Board of Directors Meeting
9:30 AM, WASBO office

13
Northeast & Bay Area Regional Meeting
9 AM, Denmark School District

16
Spring Conference Planning Committee Meeting
2 PM, conference call
wasbo.com/spring

18
WASBO CSR: Fundamentals of Risk Management
8 AM, WASBO office
wasbo.com/riskmanagement

Midwest Facility Masters Conference Planning Committee
10 AM, conference call
wasbo.com/facilitymasters

19
WASBO CSR: Handling School Risks
8 AM, WASBO office
wasbo.com/riskmanagement

20
Madison Area Regional Meeting
9 AM, Monona Grove SD

26-27
Wally Zastrow Leadership Academy
10 AM, School Leadership Center, Madison
wasbo.com/leadership

October

2
WASBO Foundation Fall Golf & Run/Walk Scholarship Fundraisers
Elkhart Lake
wasbo.com/fall

Northwest Regional Meeting
10 AM, Lehman's Supper Club, Rice Lake

3-4
WASBO Foundation Fall Conference
The Osthoff Resort, Elkhart Lake
wasbo.com/fall

8
School Facilities Committee Meeting
9:30 AM, WASBO office

Safety & Risk Management Committee Meeting
11:45 AM, WASBO office

10
West Central Regional Meeting
9:30 AM, Sparta Area School District

11
Southwest Regional Meeting
9 AM, CESA #3

14
Spring Conference Planning Committee Meeting
2 PM, conference call
wasbo.com/spring

16
WASBO CSR: Measuring School Risks
8 AM, WASBO office
wasbo.com/riskmanagement

Midwest Facility Masters Conference Planning Committee Meeting
10 AM, conference call
wasbo.com/facilitymasters

17
WASBO CSR: Funding School Risks
8 AM, WASBO office
wasbo.com/riskmanagement

West Central Business Office Professionals Conference
9 AM, CESA #4
wasbo.com/sbo

18
Madison Area Regional Meeting
9 AM, Middleton Cross Plains School District

25-28
ASBO International Annual Meeting & Expo
National Harbor, Maryland

November

4-5
WASBO Midwest Facility Masters Conference
7 AM, Kalahari Resort, WI Dells
wasbo.com/facilitymasters

ASBO INTERNATIONAL MEETING DATES

2019 Annual Meeting & Expo
Oct. 25-28, 2019 - National Harbor, MD

2020 Annual Meeting & Expo
Oct. 2-5, 2020 - Nashville, TN

2021 Annual Meeting & Expo
Oct. 13-16, 2021 Milwaukee, WI

2022 Annual Meeting & Expo
Sept. 14-21, 2022 Portland, OR



2019-20 WASBO MEMBERSHIP

1,500 members and growing!

District Professionals: WASBO Supports You

Identify

Stay on the inside of school business with relevant news and publications.

- WASBO has you covered with our bi-monthly newsletter, Taking Care of Business. This publication features important and timely topics related to school business.
- Additionally, through the Wisconsin Education News email, we provide a daily synopsis of school-related news clippings from around the state.

Develop

Expand your network, skills, and knowledge at professional development events.

- School business is an ever-changing field, making professional development a continual need. You will grow alongside other high-achieving professionals at numerous professional development opportunities throughout the year.
- Regardless of your work background or degree, if you are new to the school business office you are sure to find the learning curve is steep. Little can prepare you everything the job entails. WASBO offers the Year of Success program. This six-conference package is designed to offer new business managers, bookkeepers and district administrators with the timely knowledge they need to succeed in a typical school business office year.
- A mentorship program designed to provide technical assistance and advice to first and second year school business officials relative to the myriad of duties and responsibilities that are inherent within every school business official's job description. This is accomplished by pairing new business officials on a one-to-one basis with experienced veterans.

Lead

Support leadership skills and achieve recognition with certification, award programs and participation.

- WASBO sets standards of excellence with our award and scholarship opportunities. The WASBO Facilities Manager Certification program provides a knowledge base for those who are facilities leaders to provide safe and healthful educational facilities in Wisconsin.
- Through a partnership with The National Alliance, WASBO offers the Certified School Risk Managers Program (CSR). CSR is a cohesive, unified education and designation program that builds risk management knowledge.
- The Wally Zastrow Leadership Academy provides practical leadership skills.
- Participate on one of WASBO's committees by serving and connecting with colleagues from across the state. Your professional growth will be enhanced because of your involvement.

Connect

The Peer to Peer Communication Forum is a resource for information sharing.

- Enjoy networking opportunities at WASBO conferences when you connect with school business professionals from around the state.
- Log into Peer to Peer at WASBO.com/PeerToPeer for real-time answers to your specific questions. Share and download practical resources. Use the new WASBO ConNetwork to make even greater connections to grow your network.
- Find best practices and resources in school business management in the online Education Resource Center (ERC).





Wisconsin Association of School Business Officials
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