



# August/September 2011

## IASBO MISSION STATEMENT:

*The mission of the Iowa Association of School Business Officials is to provide programs and services that provide the highest standards of school business management practices and professional growth.*

### A MESSAGE FROM THE PRESIDENT . . .

**Jan Miller-Hook**

#### Iowa ASBO 2011-2012 FISCAL YEAR OFFICERS

##### President

Janice Miller-Hook - Johnston CSD

##### President Elect

Karron Stineman - Louisa-Muscatine CSD

##### Past President

Kurt G Subra - West Des Moines CSD

##### Secretary

Doug Nefzger - Cedar Falls CSD

##### Treasurer

Trudy Pedersen - Storm Lake CSD

##### District Directors

Angie Morrison - West Branch CSD

Kristy L.Hansen - Council Bluffs CSD

##### Executive Director

Dr. James R. Scharff

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##### Assistant Executive Director

Nancy Blow

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Can you believe it's time for school to start again? I know that's a sign of getting older, but it does seem summer goes by quicker every year! I hope each and every one of you took some time off to enjoy the summer days and enjoy your family-even if it was a day at a time! It's definitely important to take the time to get recharged-we have so much to accomplish during the summer from all the yearend tasks, preparing for audit, and getting ready for the new school year all at the same time. (Don't you just love those folks who ask you if you have the summer off?)

The annual Boot Camp for new business officials was held in July, and there were 29 in attendance. IASBO leadership (current IASBO board, regional directors, professional growth committee and past presidents) also met in July to further study IASBO as an organization, looking for ways to bring added value and service to the association in addition to planning the fall conference sessions. A fun and exciting event will be the planning of the 50<sup>th</sup> anniversary for IASBO which will be celebrated the fall of 2012, and we look forward to the leadership of past presidents in helping to organize this important time.

Another important time in the history of IASBO, is the SBO certification which will become effective July 1, 2012. With the change, your board and leadership will be reviewing the professional development opportunities available, and will be working with Iowa State as the transition occurs. As you recall, we were very fortunate to restructure our staffing to keep Dr. James Scharff (now part-time Executive Director) and Nancy Blow (now Asst. Executive Director). With this restructuring, our Executive Director is no longer with Iowa State University. However, he and our Professional Growth Committee will be closely working with Dr. Deb Van Gorp who assumed this role with ISU and will be working in detail on the Iowa State programming in conjunction with the SBO certification.

The next professional development opportunity is the Student Activity Fund Workshop to be held August 31<sup>st</sup> in Ames. IASBO co-sponsors this workshop with SAI, and it is always in great demand. This workshop will give you insight from the business manager viewpoint, auditor's office, legal, and athletics as well to help you manage these funds. Hope to see you there!

Also, please mark your calendars for our fall conference October 27<sup>th</sup> and 28<sup>th</sup>-we are planning many great sessions to keep you current in financial issues. Just think-by then, CAR, SES, Audit, Certified Enrollment, etc will be done!

Thanks for allowing me to serve as your President. I hope to see many of you August 31<sup>st</sup> in Ames!

*Jan Miller-Hook*



# *Get to know your Iowa ASBO Leadership*

**Iowa Association of School Business Officials Board of Directors 2011-2012 (July-June)**

## **President**

**Janice Miller-Hook**

Director Business & Finance - Johnston CSD  
Box 10  
Johnston, IA 50131  
Ph: 515-278-0470  
e-mail: jan.millerhook@johnston.k12.ia.us



## Work History:

**2007 to Present** *Johnston Executive Director of Financial Services*  
**2006 to 2007** *Urbandale Director of Business Services*  
**2002 to 2006** *West Des Moines Director of Business Services*  
**1997 to 2002** *Simpson College, Asst. Vice President for Business Services*  
**1994 to 1997** *Simpson College, Controller*  
**1988 to 1994** *Southwestern Community College, Controller*  
**1986 to 1988** *First Interstate of Iowa, Inc, Senior Auditor*  
**1983 to 1986** *Perfection Form Company, Asst. Controller*  
**1983 to 1986** *Harrison County Magistrate*  
**1981 to 1982** *First Interstate of Iowa, Staff Auditor*  
**1980 to 1981** *American National Insurance, Internal Auditor*

## Education and training:

**Central College, Pella, Iowa** 1980  
**Bachelor of Arts-Major Accounting, Minor Spanish**

What do you value or appreciate about Iowa ASBO?

*From the time I started in K-12, IASBO has been a strong resource both through professional development and the networking of peers. In addition to the great conferences and Academy, the website has many posted resource documents, and you can also contact a peer anywhere in the state. I would have to say what I most appreciate about IASBO would be the relationships through networking, conferencing, etc.*

Why did you agree to serve on the Iowa ASBO Board?

*I agreed to serve on the Iowa ASBO Board because of what the organization had already done for me. Again, from the time starting in K-12, this is the organization I have looked to for answers. It's an honor to be on the Board and to be able to contribute to such a great organization. It truly cares about its members, and wants to not only meet their expectations but try and exceed them by staying on top of all current issues that could affect us. (I have never been involved with such a strong, caring organization in past non-k12 experiences).*

What is your dream or vision about Iowa ASBO in 10 years?

*My vision for the organization would be to change as times warrant (for example, the ISU partnership that changed), but stay the strong organization that plays the supportive role for all its members. IASBO excels at professional development and I would want to see that continued.*

~~~~~

## President-Elect

Karron Stineman

Business Mgr / Bd Sect. Louisa-Muscatine CSD  
14478 170th St  
Letts, IA52754-9432  
Ph: 319-726-3541  
e-mail: kstineman@louisa-muscatine.k12.ia.us



### Work History

#### **Louisa-Muscatine CSD:**

*Business Manager/Board Secretary (2000 - to current)*

*Accounting (1987 – 2000)*

*HS Office Secretary/Activity & Lunch Fund Bookkeeper (1976-1987)*

*McKee Button, Accounts Receivable (1974-1976)*

### Education and training:

*Muscatine Community College accounting/finance courses*  
*IASBO Academy Graduate*

### What do you value or appreciate about Iowa ASBO?

*I don't know where school business officials would be without this organization! The membership is so willing to share abilities, experiences, and knowledge with their peers without hesitation. I appreciate Jim Scharff and Nancy Blow's commitment to the organization, taking on every task with enthusiasm.*

### Why did you agree to serve on the Iowa ASBO Board?

*I was encouraged to serve on the board by people that I respect. My hope is to represent the smaller districts' views and challenges and to pass on that encouragement to serve. I believe it is the membership that makes the organization strong and that each member should make their own contribution in some way.*

### What is your dream or vision about Iowa ASBO in 10 years?

*The next 10 years is sure to bring changes in how IASBO serves its membership as new technologies emerge daily. The challenge will be to find the balance between meeting the needs of busy business officials while maintaining the valuable face-to-face meetings.*

~~~~~

## Past President

Kurt G Subra

Director of Financial Services - West Des Moines CSD  
3550 George M. Mills Civic Pkwy.  
West Des Moines, IA 50265-5556  
Ph: 515-633-5075  
e-mail: subrak@wdmcs.org



### Work History (most recent first including years at each district / job):

*CFO, West Des Moines CSD -- July 2006 to present*

*CFO, Ames CSD -- March 2001 to June 2006*

*Pioneer Hi-Bred International (Johnston, IA) -- July 1989 to March 2001*

*KMPG (Minneapolis, MN) -- January 1986 to July 1989*

### Education and training:

*Iowa School Business Management Academy*  
*M.S. in Business Administration -- ISU*  
*CPA certificate*  
*B.A. in Accounting -- UNI*

### What do you value or appreciate about Iowa ASBO?

*IASBO provides the "platform" for me and my peers to do our best for our students, parents and communities. I greatly value the IASBO educational opportunities and the network of peers and consultants (ok, even the lawyers) to help us be successful. I*

*entered the school business profession knowing that this organization existed, and it has exceeded my expectations. I am very appreciative of the Iowa school business officials that had a vision and the passion many years ago, which now allows IASBO to celebrate this special time in its history.....50 years in 2012.*

Why did you agree to serve on the Iowa ASBO Board?

*I wanted to continue serving IASBO members but at a new level. I had been presenting at workshops, participating in regional and area meetings, etc. I first served on the IASBO Board as the Treasurer, and I later served as President Elect and President, and now I serve as Past President. While serving on the Board I also became involved in the Legislative Committee for ASBO International, and I serve as Vice Chair for that Committee. I enjoy working with my peers from around the country on issues of common interest.*

What is your dream or vision about Iowa ASBO in 10 years?

*That IASBO retains its place as a highly respected professional organization and that the new credentialing program further elevates IASBO's status. I want IASBO to be an organization that embraces change and that always looks for ways to bring value to the patrons that we serve. Our members need to be comfortable in making recommendations to our supervisors and to our school boards....recommendations that are well thought out, sometimes bold, and made to optimize the resources entrusted to us.*

~~~~~

## **Secretary**

**Doug Nefzger**

Director Business Services - Cedar Falls CSD  
1002 W. First St. Cedar Falls, IA 50613-2214  
Ph: 319-277-8800 Fax: 319-277-0614  
e-mail: doug.nefzger@cfschools.org  
Term - July 1, 2008 - June 30, 2010



Current local district position:

*Cedar Falls Community School District – July 2007 to present  
Decorah Community School District – December 1997 to June 2007  
New Hampton Community School District – August 1985 to December 1997*

Education and training:

*AIC, Cedar Falls (Now Kaplan) – Accounting  
Graduate – IASBO Academy*

What do you value or appreciate about Iowa ASBO?

*The interaction with other business officials and their willingness to offer assistance always amazes me. Typically you just do not see this in the private sector. We all are extremely busy and for IASBO members to take the time to answer surveys, discuss topics or just listen as you vent is something I will never take for granted.*

Why did you agree to serve on the Iowa ASBO Board?

*Serving on the IASBO board allows me to “give something back” to the organization that has helped me so much in my career and hopefully, in some small way, I will be able to assist current and future members in their career.* What is your dream or vision about Iowa ASBO in 10 years?

*I would like to see all of Iowa school business officials hold membership in our organization. I see IASBO taking even more of a leadership role in professional development, increased business resource for schools as Area Education Agencies and the Department of Education resources dwindle and raising the awareness and stature of the school business official in their local communities.*

~~~~~

**Treasurer**

Trudy Pedersen

Business Manager / Board Secretary - Storm Lake CSD  
419 Lake Avenue Storm Lake, IA 50588-0638  
Ph:712-732-8060  
e-mail: [tpedersen@slcsd.org](mailto:tpedersen@slcsd.org)  
Term - July 1, 2011 - June 30, 2013



Work History

*Storm Lake CSD Business Manager/Board Secretary-Treasurer – June 2002 - Present*  
*City of Storm Lake Staff Accountant – 1998 - 2002*  
*Storm Lake CSD Payroll – 1994 - 1998*  
*1990 – 1994 – various work experience in banking, insurance & university business office*

Education and training:

*BA in Accounting & Business Administration from Northwestern College, Orange City, IA*  
*Graduate of IASBO Academy*

What do you value or appreciate about Iowa ASBO?

*The people! Our membership is so willing to help each other & share experiences for others' benefit. The resources & supports available through IASBO are incredible.*

Why did you agree to serve on the Iowa ASBO Board?

*My primary goal as an IASBO Board member is to be a good example, representative and resource for our membership. In addition, I personally like to be involved and tuned in to school finance issues going on in Iowa so that I can keep up with the ever changing demands of the job. Storm Lake CSD is a medium sized district in NW Iowa, yet we often face opportunities and challenges similar to bigger districts in metro areas of the state. I find it invaluable to be able to network with colleagues from other districts around the state and then share information with our administrators and with other school business officials. I would highly recommend involvement in IASBO, in any capacity, to anyone who's interested. It's a great chance to meet new people and broaden your horizons.*

What is your dream or vision about Iowa ASBO in 10 years?

*That IASBO will continue to be the "go to" resource for school business officials and that we'll be able to keep raising the bar of professionalism, accountability and training for our membership.*



**District Directors**

**District ONE**

(Regions 1, 5, 6, 7, and 10)

Angie Morrison

Business Manager - West Branch CSD  
P.O. Box 637  
West Branch IA 52358-0637  
Ph: 319-643-7213  
e-mail: [amorrison@west-branch.k12.ia.us](mailto:amorrison@west-branch.k12.ia.us)  
Term - July 1, 2009 - June 30, 2011



Work History

*West Branch Community Schools 2001-present*  
*Winfield-Mt. Union Community Schools 1998-2001*

Education and training:

*University of Iowa, BA in Accounting*  
*Iowa School Business Management Academy*

What do you value or appreciate about Iowa ASBO?

*I have never been involved in an organization where all of the members are so completely selfless and so willing to help each other out. I honestly don't think it would be possible to do this job without IASBO. With everything from law changes to training to networking with peers, IASBO is the primary place for SBO's to get what they need!*

Why did you agree to serve on the Iowa ASBO Board?

*I really enjoy working with people and getting to know others from around the state. I felt that this was a good way to give back to the organization as well as further my development personally and professionally.*

What is your dream or vision about Iowa ASBO in 10 years?

*I hope that we continue growing and improving as an organization. With certification, I hope that we can help elevate the professionalism and recognition of all of our members, including the small school business officials. We need to continue to build our relationships with SAI, IASB and other educational organizations as well as the DE and the legislature. We need to work with Iowa State and any other institutions that will be offering SBO certification programs and continue to provide our members with the training, information and support that they need to allow for our students to receive the best education possible within the confines of school budgets.*

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## District TWO

(Regions 2,3,4,8, and 9)

**Kristy L. Hansen**

Exec. Dir. Finance - Council Bluffs CSD

12 Scott St.

Council Bluffs IA 51503-0782

Ph: 712-328-6438 ext 242

e-mail: kristy.hansen@cbscd.org

Term - July, 2010 - June 30, 2012



### Work History

*July 2010-current Director of Financial Services, Council Bluffs Community School District*

*July 2000-2010 Director of Finance, Harlan Community School District*

*13 years Public Accounting experience prior to joining Harlan Comm. School*

### Education and training:

*Bachelor of Arts in Accounting, Buena Vista College*

*Certified Public Accounting License*

What do you value or appreciate about Iowa ASBO?

*IASBO provides great educational opportunities that help school business officials stay current on school finance laws and regulations. The conferences focus on real world examples and focus on what we need to know. IASBO works hard to build networks between school business officials.*

Why did you agree to serve on the Iowa ASBO Board?

*I wanted to be part of a great organization that strives to make school business officials the best they can be.*

What is your dream or vision about Iowa ASBO in 10 years?

To continue to provide training to school business officials. Help insure we are respected as professionals.

---

## Executive Director

James R. Scharff, PhD

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Phone: 515-210-7457

## Assistant Director

Nancy Blow

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e-mail: iowaasbo@gmail.com

Ph: 319-931-1833

## Legal Counsel

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## **Iowa Association of School Business Officials Regional Directors 2011-2012**

### **Region 1**

Kevin Kelleher Assistant Director of Business  
Services/Finance Manager  
Dubuque CSD  
2300 Chaney Road Dubuque, IA 52001-3095  
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Term End Date: 6/30/2013

### **Region 2**

Lisa Groth - Bd. Sec./Bus. Mgr.  
St. Ansgar CSD  
P.O. Box 398  
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Term ends June 30, 2012

### **Region 3**

Leann Evenhuis - Board Secretary  
MOC-Floyd Valley CSD  
P.O. Box 257  
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Term ends June 30, 2013

### **Region 4**

Angie Smith - Bus. Mgr.  
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Email: [asmith@sioux-central.k12.ia.us](mailto:asmith@sioux-central.k12.ia.us)  
Term ends June 30, 2012

### **Region 5**

Michael Coughlin - Ex. Dir. Adm. Serv/Treas.  
Waterloo CSD  
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Term ends June 30, 2013

### **Region 6**

Rox Aude - Business Director/Bd. Sec. - Treas  
Camanche CSD  
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Term ends June 30, 2012

### **Region 7**

Angie Morrison - Business Manger  
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Term ends June 30, 2013

### **Region 8**

Lora Appenzeller-Miller – Direct. Busin. Serv.  
Waukee CSD  
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Term ends June 30, 2012

### **Region 9**

Shirley Maxwell - Bd. Sec./Bus. Mgr.  
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Term ends June 30, 2013

### **Region 10**

Kim Sheets – Bus. Mgr.  
Fairfield CSD  
403 S 20th Street  
Fairfield, IA 52556  
Ph: 641-472-2655  
Email: [kim.sheets@fairfieldsfuture.org](mailto:kim.sheets@fairfieldsfuture.org)  
Term ends June 30, 2012

## Iowa School Business Management Academy 2011-2012 Professional Growth Committee

### Chair

Paulette Newbold  
Business Manager - Boone CSD  
1824 SE Linn – Boone, IA 50036  
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Term – July 1, 2009 – June 30, 2013

### IASBO President

Janice Miller-Hook  
Director Business & Finance  
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Ph: 515-278-0470  
[jan.millerhook@johnston.k12.ia.us](mailto:jan.millerhook@johnston.k12.ia.us)  
Term – July 1, 2008 – June 30, 2012

### IASBO President Elect

Karron Stineman - Business Mgr / Bd Sect. Louisa-Muscatine CSD

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Ph: 319-726-3541  
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### Secretary

Joan Loew  
Board Secretary/Business Manager Oelwein  
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Term – July 1, 2008 – June 30, 2012

Chad Vink  
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Term – July 1, 2009 – June 30, 2013

Cindy McAleer  
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Term – July 1, 2010 – June 30, 2014

Michelle R. Wearmouth  
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Term – July 1, 2010 – June 30, 2014

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Melissa Fettkether  
Business Manager - Valley CSD  
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Term – July 1, 2011 – June 30, 2015

Jeffery Dieleman  
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Term – July 1, 2011 – June 30, 2015

Jackie Black – IASB Representative  
Janice Evans – D.E. Representative  
Dan Smith – S.A.I. Representative  
Susan Battani – Auditor Rep. – **Finance Monitor**  
Danielle Haindfield – **Legal Monitor**

**Academy Director**  
**Deb Van Gorp**

### **Constitution & Bylaws Committee**

Chair: Past President Kurt Subra  
Joe Hintze  
Paul Bobek  
Marsha Tangen

### **Nominating Committee:**

(most recent three presidents)

Kurt Subra  
Leslie Finger  
Ramona Jeffrey

### **Mentor Coordinator:**

Nancy Blow – Assistant Director IASBO

### **Mentor Trainer:**

Donna M. Gregory – Director of Bus. Serv.  
West Des Moines CSD  
e-mail: [gregoryd@wdmcs.org](mailto:gregoryd@wdmcs.org)

### **Independent Contractors:**

#### **Trade Show Manager:**

Vinsand Co. (Alice Vinsand)  
10927 Lincoln  
Des Moines, IA 50325  
e-mail: [avinsand@mchsi.com](mailto:avinsand@mchsi.com)  
Ph: 515-225-1051

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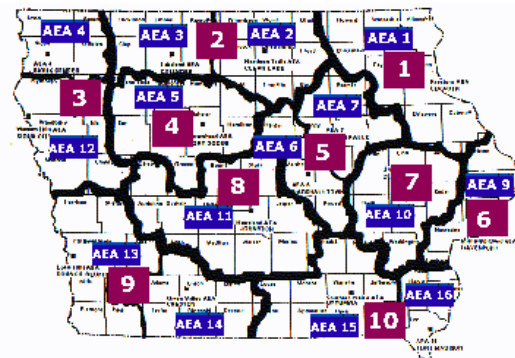
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IASBO Regions and original AEA boundaries





# Your Iowa ASBO's Tomorrow

We are truly living in a most interesting time. The stock market continues (at the time of this writing) to be more than a little volatile, well-established institutions and business are struggling, and if you listen to the news for just a few minutes you begin to think like Chicken Little that the "sky is falling." Fortunately for Iowa ASBO that is not the case AND we strongly desire to keep it on an upward trend.

Organizations run a life-cycle like a human body with seasons of growth, maturity, maintenance and eventually decline. We have been on a "maintenance" path for some time and to keep from dying as an organization it is time to reinvigorate and renew our energy and focus.

Your leadership of the board, past presidents, regional directors and members of the professional growth committee have identified a number of areas in which IASBO services could be expanded, enhanced or changed. As with any goals process you cannot do everything at once and need to live within realistic resource limits to flesh out those areas where we can get the greatest benefit for the resources expended. The challenge is to enhance and improve what we have without losing those things that are important to members.

A taste of the many ideas the Board will be addressing at their September meeting include:

- Meet all job and experience levels at conferences with tracked sessions with small committees developed to provide specific area sessions (HR and payroll, fund accounting, legal, operations, etc.)
- Continue / expand the use of technology to respond to special interest group professional needs.
- Maintain a balance of remote vs. face-to-face conference sessions
- Increase opportunities for members to participate in the professional growth of the association that require minimal time commitments.
- Increased communication among regional directors to share program interest topics, dealing with vendors, meeting dates/times, and other sharing of ideas.
- Determine how social media (twitter / facebook / linkedin) can be applied to our association
- Plan for Iowa ASBO's 50<sup>th</sup> anniversary celebration at the Fall 2012 meeting
- Encourage established members to intentionally invite newer members to regional and state meetings.
- Continue the monthly webinar for new members

You are going to have the opportunity to be part of IASBO re-inventing itself. Sometimes people are unwilling to volunteer due to a large time commitment that can be required and would take away from your primary job responsibilities. We are going to attempt to find more avenues where you can apply your special interests and skills to improve the profession without over-extending your commitment.

The rise and decline of many organizations can be traced to a beginning where members were heavily involved and then evolved to a point where they depended on the "hired help" to keep programs going with the eventual loss of "passion" by the members. One of the primary reasons IASBO has been so successful over the years is that it has been heavily invested by members to provide program development and presentations. Yes, we want you to be passionate about school finance.

*Jim Scharff -*

Iowa ASBO Executive Director



## *IASBO Fall Conference*

October 27 and 28 are the dates IASBO members will be gathering for the annual Fall Conference at the Sheraton in West Des Moines. **Registration will soon be available on the IASBO website.** Hope to see all of you there for professional development, networking and a bit of time away from the office.

***Thursday's general session*** will open with informative sessions on the School Business Official Authorization, an IPERS update and the 403b Special Pay Plan .

***Breakout sessions*** will feature a variety of sessions designed for both the experienced and those new to the profession. Crackerbarrels for size-alike schools will also be offered.

Sessions will include:

- Financial Forecasting – Gary Sinclair and Michelle Wearmouth, Dallas Center-Grimes
- Healthcare Reform – What is on the horizon - Stacy Wanderscheid, Perspective Consulting
- Student Fees: electronic payment, collection, legal opinion and practices – Ron Peeler, Ahlers
- How to Take Board Minutes: A hands-on workshop - Danielle Haindfield, Ahlers
- 1:1 Initiative: The good, the bad, the ugly - Beth Grob, Ahlers and Carol Greta, DE
- How to Interact with PTO/Booster Clubs – Kristy Latta, Ahlers and Claudia Wood, Davenport
- Payroll Organizational Tips - Trudy Pederson, Storm Lake and Angie Smith, Sioux Central
- Internal Controls from an Insurance Perspective - John Seefeld and Bob Jester, Jester Insurance
- P-Card, an indepth look for those interested in adding the service

***The Iowa School Business Management Academy session on Friday will include:***

### **Worker's Compensation**

- Pay requirements
- Tax requirements
- What to do when you suspect abuse
- What to do when employee claims injury months after incident
- How can districts protect themselves
- What is light duty
- What to do when an employee cannot do the job after release to return to work

### **Nutrition**

- Procurement
  - When formal and informal bidding is required, importance of specifications, monitoring contracts
- Impact of required meal price increases
- How will new regulations impact food costs
- General Nutrition program information
- Financial issues
- Federal program background

## *New School Business Officials - Boot Camp Continued*

New members are invited to take part in an orientation session preceding the IASBO Fall Conference. It will begin Wednesday, October 26 at 1:00 at the Sheraton in West Des Moines. For those of you who attended the July 19 Boot Camp, this is Part II with new topics and more information. If you were not in attendance this summer, this session is designed for those new to the profession (in your first year). The purpose is to provide assistance and direction to School Business Officials early in their responsibilities.

Presentations include:

- Fund Balance / Unspent Authority Review
- Accounting and GAAP Responsibilities
- Legal Considerations for Schools including Duties, Responsibilities, Relationships and Ethical Protocol Prescribed in Iowa Code
- Duties of a School Board Secretary/Treasurer
- Uniform Administrator Procedures Manual

This is a great opportunity for new members to network with IASBO Board members and presenters, gather good information and ask all of the questions that have been rattling around in your mind, but you have been afraid to ask.

Registration will be available on the IASBO website. Hope to see all of you there!

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# ASBO Intl *Eagle Institute*

IASBO Executive Director James Scharff, Ph.D.

Each summer ASBO Intl. conducts a leadership session in the Washington, D.C. area for approximately 25 ASBO members. This year I was fortunate to attend the three day event and have summarized below four of the sessions, with my interpretations and minimal embellishments. I trust at least one of them may have application to your situation.

## **Communication**

Dr. Jeff McCausland, Colonel, U.S. Army (retired artillery commander and president of the Army War College) and Founder/CEO of Diamond6 Leadership and Strategy, CBS military consultant

The basic elements of successful communication have changed little over time with only technology varying the method of delivery.

1 – Learn to write well. Edit your writing to simplify the wording, reduce jargon, and make the message as concise as possible. Our jobs often include a great deal of detail to get the complete message across. One method of keeping focused on the main points is to provide a summary of less than a page (4-5 powerpoint slides) with ready access to the details for those who are interested.

2 – Listen. To ensure you are interpreting what someone is saying one technique is to say the following “To make sure I understand correctly what I think you said was.....” That gives them the chance to make sure you do grasp what they were saying and also honors the fact that you were truly listening to them and not just planning your reply.

3 – If you are trying to get a new program, plan, proposal, change, etc. accomplished it is critical that you repeat a consistent message. That means it has to be the same message delivered by everyone involved all the time.

4 – In our current era it is easy to see the problems rather than the opportunity. You will be much more successful if you are the positive problem solver with a message of hope than the bearer of doom and gloom.

NEVER, NEVER, NEVER use email to convey emotion. The lack of body language and voice inflection can make complements seem more or less than intended and a mild criticism can seem like yelling to the world. The advent of public information requests for all emails can also place a different meaning to the public without the benefit of understanding the background or context. Think back to the old Dragnet series where Detective Joe Friday just “wanted the facts.”

## **Culture and Organizational Change**

Tim Lupfer, Director (retired), Deloitte Consulting LLP, retired military officer

For this session “culture“ is defined as the underlying assumptions and beliefs that determine how things get done.

Businesses and corporations have been getting “lean and mean” for some time and now it is governmental institutions’ turn. Every organization is experiencing change, some is desired and some is forced. We are in a new age when we see rapid and major changes occurring all around us rather than predicted incremental changes in businesses and organizations.

The suggested four step method to pursue change includes:

1 – Plan for the following:

- Where are we now? Communicate this to everyone in the organization
- Where are we going? Communicate this to everyone
- What can go wrong?

2 – Communicate:

- Why is there an urgency to do anything differently?
- What has to change? Is it a minor or a major upheaval? Know that change causes pain. Don’t sugarcoat the situation.
- Address W.I.I.F.M. (What’s In It For Me?) Most of us are more resistant if the impact of the change is an unknown. This is consistent with the theory of “loss aversion” where we humans would often rather deal with a known bad situation rather than trade it for something that is thought to be better, but may be worse.

3 – Launch:

- Timing: Think about the best time to begin the change. Be patient but include a due date.
- Training: If the change requires training conduct it as close to the implementation as possible. Research has shown that training unused after 30 days is wasted.
- Pilot: If at all possible conduct a pilot or test run of the change to identify the ever likely “unintended consequences.”

4 – Sustain:

- Accountability must be maintained by all those involved in the change.
- Measure the progress made on a regular basis.
- Recognize and reward those who have helped make the change a success.

## **Integrity**

Art Athens, Director at the Stockdale Center for Ethical Leadership, U.S. Naval Academy

The concept of integrity is derived from an ancient concept of wholeness or completeness. With that understanding the power of integrity is extended to “what is in your mind and heart comes out of your mouth.”

What does it look like, or how do we know if a person has it? There are many public examples in history with one about Confederate General Robert E. Lee used as the example. Following his defeat in the Civil War General Lee had lost his plantation, home, and wealth. He was approached by an insurance company to become their president with the agreement including a great deal of money. When he asked what he would be expected to do they said he had no duties other than lend his name to their product. His response was “my name is not for sale.” How many of us would possess that level of integrity if we were destitute.

Our daily life provides many small opportunities to test ourselves such as when a clerk unknowingly returns more change than we are due do we return the overpayment or keep it?

## **How do we keep our integrity?**

- Know what we believe and why we believe it. In the past people had much more time to honestly reflect and consider their actions and thoughts. In our go-go world how often do we just sit and think about our relationships, goals and future? To do so would benefit each of us.

- Lead with humility. This too is difficult in our competitive “win at all costs” culture. Many studies and biographical research have found the most highly esteemed leaders in government, society or business were in truth humble individuals who possessed a persistent and focused purpose in life.
- NEVER compromise. It truly is a slippery slope. When does a pattern of “little white lies” expand into a major deviation from what we know is right?
- Get someone else to keep you accountable. Find someone in whom you can confide your thoughts and actions who will ask the tough questions and even tell you when you’ve gone astray of your original core beliefs.

How do you develop a culture of integrity in an organization?

- Lead by example. This concept is consistent with admonitions from the state auditor that fiscal responsibility starts with the “tone at the top.” We cannot expect others in the organization to behave with higher integrity than those leading the organization.
- Communicate the standards and expectations A LOT. We learn best by repetition and frequently being reminded of that which is expected.
- Reward those who exhibit integrity, don’t just take it for granted, and remove those who knowingly or repeatedly violate the expected standards.

You CANNOT separate your personal levels of integrity from your work levels of integrity. Again, the origin of the concept is “wholeness” or “completeness” and the functioning under diverse beliefs will eventually cause you trouble.

### **Abraham Lincoln’s Second Inaugural Speech**

Presented by: Ford’s Theatre, Education Programming

This session dissected Abraham Lincoln’s Second Inaugural Speech, argued to perhaps the finest inaugural speech in American history. Each phrase was intended to speak to a particular audience. Speeches were typically short to be readily telegraphed to newspapers across the country.

We identified the communication skills President Lincoln used to speak to different audiences? During this interactive workshop, we discussed the imminent end of the Civil War and understand President’s Lincoln message to the nation.

### **Stretching the Tax Dollar**

Rick Hess, Resident Scholar and Director of Education Policy Studies, American Enterprise Institute

The academic and operation efforts in a district must learn to work together as a team rather than as independent, and often competing, interests. Are you going to work together to find solutions or go your own way and blame the other for being the problem? Our current economic situation can be seen as a negative / problem or as an opportunity to “take out the trash.” Every organization has developed well-intended and valuable programs over the last \_\_\_ years. Does funding continue to sustain them? Does the need for the program still exist? Does the program / expenditure meet the basic mission of the district? Is it required or just desired?

The current financial constraints provide a necessity to reduce expenditures and an opportunity to prioritize without personalizing programs or services. Doing more with less can be viewed as creating an opportunity and necessity to innovate.

The concept of calculating “cost per unit” to compare and prioritize expenses seems to basic and simple to ignore. Emotions and personalities may create conflict when deciding on priorities. If data would show the

cost per student for program / service X was \$25 and the corresponding program / service Y cost \$140 the decision becomes more defined.

Mr. Hess' vision for the future included the following:

- Property values will continue to decline for another year or so. The change in assessments will take another 2-3 years. When school taxes are based on 2 year old valuations we can expect to see property tax rates increase about 2015.
- The underfunding of retirement plans is "eating our lunch" and must be corrected either by an increase in member contributions or a reduction in benefits.
- We have yet to really realize the increase costs of the healthcare and medicaid obligations to be realized in 2014
- The end of the stimulus funds, ie: the cliff, will have a damping effect on the economy.

### **Dealing with the Media**

Kimberly Dozier, Associated Press correspondent, former CBS News correspondent

Eric Ruff, Executive Vice President of Public Policy and Communications, former press secretary for the Department of Defense

When speaking with reporters be sure to clarify the status of your conversation BEFORE you begin and that you both understand the following definitions.

- On the record means: anything you say may be quoted and your name will be listed.
- Background means: what you say may be reported but only apposition, not your name, can be used (ex: central office official, etc.)
- Off the record means: the reporter can use the information to better understand the situation / topic but cannot use anything said in a report or your name.

Avoid multiple spokespersons providing information when possible. Reporters are expected to contact anyone that may have a connection to a story. Have a plan in your district on how to handle communications and to whom reporters need to be directed.

It often seems as though critics can say anything whether true or untrue but public / school officials are more limited in defending or explaining a situation. This is the unfortunate reality that the "public face" of an organization comes under much tighter scrutiny by the press and the public than individual credibility.

Former research found an untruth that was not rebutted within 48 hours was presumed to be true. In our current era of social media that time has been reduced to mere minutes when a video or story can span the world in minutes.

Public officials need to remember:

1. Understand the role of media and the importance / influence they possess on *their* audience
2. Engage the media BEFORE there is a crises. Give

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them background information on a topic so they can more accurately report a story.

3. The media is NOT the audience, their readers are your audience. Provide information that relates to their interests and concerns. If the article is going to be read by parents or non-parents, taxpayer groups or employees provide information that meets the audience. (ex: budget implications mean: taxes are going up/down, class size is going up/down)
4. Remember you know a LOT MORE about the topic than the reporter. You are better served to keep it as simple as possible with the advice to limit it to the top 3 points that can be bullet-point paragraph leaders.
5. KNOW your facts and stick to them. Research and assure your data are accurate rather than guessing on the spot.
6. If you make a mis-statement apologize and clear it up as soon as possible. The public is almost always ready to accept and forgive an acknowledged error if admitted right away. Admit if you don't have a ready answer to a question and respond with "I don't have that information at my ready command but will research it and get back to you," then do get back to them.
7. De-Fang critics by admitting if an organizational error has been committed and then tell what is being done to correct / fix it so it doesn't happen again.
8. Reporter criticism / contempt often starts with denial of access to public information, snide remarks and condescending attitudes.

Journalists are trained to be skeptics and get both sides of a story. They normally begin in the business with a desire to be objective but personal bias often enters their perspective in an article. Many times they develop an aloof or distant personality that is similar to auditors establishing a position of "independence" so personal relationships are not developed that can skew a story.

Develop the instinct to know when something is influential or just irritating. Don't wrestle with a pig.

Remember: "if it bleeds it leads."



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## Iowa School Business Management Academy Class of 2011



Left to Right – front row Becky Wood-Central Decatur, Gwen Mellman-Central Springs, Terrill Karr-North Tama, Marge Holub-North Linn, Stephanie Edler-West Marshall  
Second row – Shane Wolf-AEA 267, Lisa Waddell-Colo Nesco, Jessica Boyer-New London, Sandra Downing – LeMars, Bob Ayers-New Hampton  
Back row – Jann Murphy-Odebolt Arthur, Sarah Brown-Linn Mar, Carrie Coble-WACO, Matt Burke-Mount Vernon, Lonna Moeller-Bennett

Most of the above individuals have successfully passed the four levels of the assessment and will receive a plaque recognizing their “Certificate of Proficiency” at the fall IASBO conference.



## 8 Ways To Appear More Authoritative.

YAHOO - by Woman's Day, on Thu Jun 30, 2011

Whether it's your self-assured best friend or that coworker who always garners respect, some people just seem to have a natural air of authority. But while it can feel like a quality you're either born with or not, this type of boldness is actually an attitude you can learn to project. From dressing the part to mastering proper email etiquette, the following simple behaviors can help you exude confidence in every situation—read on to learn how.

## Stand up while you're on the phone.

It may sound silly, but getting up out of your chair while you're on an important call—whether it's to your insurance provider or a potential employer—can help make your voice sound more authoritative. “Your voice is closely linked to your body and physicality,” says Susan Berkley, author of *Speak to Influence* and president of The Great Voice Company. “When you're standing up and gesticulating, you're going to have more energy than if you're sitting down, relaxing in your chair.

You're pumping yourself up physically and it's going to come through in your voice.” Plus, she notes that when we stand up straight, we breathe more fully, enhancing the power of our voice. Photo: Ciaran Griffin/Thinkstock

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## Avoid turning statements into questions.

“It drives me nuts when I'm in a coffee shop and a woman places an order that sounds like a question: ‘I'd like a latte?’” says Ginny Clarke, career coach and author of *Career Mapping*. “Do you or don't you want a latte?” By allowing the tone of your voice to rise at the end of a sentence, you're subconsciously undermining your own authority by treating your statements as questions. “Tell someone what you're thinking,” Clarke stresses, “don't ask them.” According to her, we often do this in mundane circumstances, like when ordering food or responding to simple questions. To overcome this habit, she recommends keeping the three “Ds” in mind: Be decisive, definitive and deliberate. “And never answer a question with a question,” she adds. “If you need clarification, lead with a statement like: ‘Let me make sure I understand you. Are you asking if...’”

### Mastering the art of persuasion

Everyone has little tactics for getting what he or she wants. Some use seduction, others beg, while there are those who use plain-old intimidation. But you don't have to resort to unseemly methods to get your way. According to Michael Lee, author of *How to Be an Expert Persuader in 20 Days or Less*, “The power of persuasion rests on getting people to do what you want willingly, resulting in a win-win scenario for everyone involved.” Can't get your employees to meet deadlines? Then these 10 secrets are for you.

1. Start things off on their behalf. “People are more likely to be persuaded to complete a task if it's already been started for them,” says Steve Martin, coauthor of the bestselling book *Yes!: 50 Scientifically Proven Ways to Be Persuasive*. Next time the dishes need to get done, try cleaning the silverware, then asking if your partner wouldn't mind finishing the job.
2. Use the magic word “imagine.” I know it'll be a late night, but can you imagine how relieved we'll be if we get the job done before going home? This tactic paints a vivid picture in the person's mind of the pleasure if she/he does—or the pain if she/he doesn't—do what you asked, says Lee.

3. Stress their losses. Can't pry your hubby away from Sunday sports for a trip to the beach? No problem. Rather than guilt him into it with complaints about needing more "quality time" together, remind him that he's passing on one of the last days of summer. "We're more persuaded by the thought of losing something than the thought of gaining," says Martin.
4. Be the first to give. People are psychologically conditioned to return a favor, says Martin. And, instinctually, we've known this one all along—i.e., if you buy the first round of drinks, they'll buy the second. So think of doing the initial good deed as an investment, explains Lee. "In turn, people will feel compelled to do things for you."
5. Ask for more than you need. "People feel a sense of guilt when they refuse a request," Lee says. "If the second request (a.k.a. the real request) is something they can afford to comply with, then they'll grab the opportunity," says Lee. This is a tactic kids know well: Can we go to Six Flags? No? OK, so how about the pool? "The second request gives freedom of choice, like an escape route," Lee says. They'll feel relieved, and you get what you want.
6. Make them laugh. "If you want to be more persuasive, work on your sense of humor," says Lee. And so does British comedian John Cleese of Monty Python fame, who once said: "If I can get you to laugh with me, you like me better, which makes you more open to my ideas. And, if I can persuade you to laugh at a particular point that I make, by laughing at it you acknowledge it as true." Classic comedian mentality, but he's also right: People generally laugh at things when, for one reason or another, they identify with them, explains Lee.
7. Drop the "I" for "we." "Studies have shown that the reassurance of 'we' is more productive in persuading people to compromise than other approaches," says Martin, including the threatening approach (If you don't do this, I will) and the rational approach (You should do this for the following reasons). The use of "we" immediately conveys a sense of belonging, commonality and support: We've worked through this before; we can work through it again.
8. Rely on the majority. Energy reduction studies show that households are more likely to reduce their energy consumption if they see their more energy-efficient neighbors' utility bills. "When persuading, point to evidence of what others like the person you are trying to persuade are doing," Martin says. After all, when making decisions on our own, he explains, we likely survey the scene for reassurance anyway.
9. Use the positive labeling technique. "You did a fantastic job with this—I'm sure you'll do even better next time." One of the most powerful principles of persuasion rests on a person's need to remain consistent with his past actions, Lee explains. "People are more likely to be persuaded to behave in certain ways if they have acted that way before—and it has been noticed," adds Martin.
10. Time your request. "Sometimes, it's not what you ask for but when you ask for it," says Martin. People are most persuadable immediately after thanking someone, and at their most persuasive after being thanked, so it's the perfect time to ask for a favor: My pleasure. In fact, I was hoping you might be able to help me out with something, too.

### **Dress the part.**

Dressing for success doesn't necessarily mean donning a suit. Instead, make a note of what everyone else is wearing, and emulate their style in a put-together way. If the dress code at work is slacks and a button-down shirt, invest in a few sharp-looking separates that will ensure you fit in with the office culture. "Dressing conservatively for the sake of getting respect will make you seem out of touch with what the organization needs, and that can automatically undermine your authority," says Dawn Chandler, a career management and HR professor at the California Polytechnic State University.



Dress to impress in this confidence-boosting outfit.

Want a raise? Making a big presentation? It's essential to dress the part in an outfit that conveys confidence, especially in today's competitive job market. So skip your tired slacks and sweater and go for these power pieces that are sure to make a statement. Not only are they chic and affordable, but their classic styles have serious staying power so you can put them to work for many days to come.

### **Make eye contact.**

Whether you're giving a presentation to a roomful of people or negotiating a better deal on a car repair, making eye contact is key. As Antoinette Kuritz, a publicist in San Diego, notes, when you're so focused on what you're saying or doing it can be easy to converse with people without actually looking at them. "Making eye contact infers that what you have to say is important and that the person to whom you are saying it is important, too," says Clarke. "People will remember you when they sense that you've really seen and paid attention to them." Photo: Jared DeCinque/Thinkstock

### **Pause before hitting Send.**

Before firing off a hasty response to an email from your boss, wait a few extra minutes to see what other information you can gather. Constant accessibility has become the norm these days, but a rapid reply simply acknowledging that you got her message, without a real thoughtful answer to her question, isn't the way to command respect. "Instead of sending five emails that don't say much, stop and gather good information so that you can provide her with a more considered answer." Even better: When appropriate, head over to her office to discuss her inquiry, or ask your own questions. By showing up in person you'll appear more confident than if you quietly send out a stream of emails. Photo: Hywit Dimyadi/Thinkstock

### **Make yourself visible at meetings.**

When it comes to commanding authority, "having height helps," says Clarke. "You want to stand as often as possible." This means rising when someone comes to chat with you at your desk or standing, when appropriate, during meetings, which will automatically give you a bigger presence in the room and your stature will subtly connote authority." Being so visible, you may also be called to question or comment first, which can work in your favor.

### **Don't lead with a disclaimer.**

According to Clarke, women tend to pepper their ideas with disclaimers and apologies, like "I don't know if this will work, but..." or "This might not be what you were thinking of, but..." Instead of giving your audience a reason to discount what may be an excellent idea, present it without any judgment at all and let them decide what they think. You'll be surprised at how much people will trust you if you trust yourself. In situations that require a disclaimer, Clarke recommends making it after you've asserted your facts or opinion; for example: "I don't think we should move forward with this project, unless of course I don't have the latest data that would suggest otherwise."

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## Manage your boss's expectations.

Think that promising to tackle that giant pile of expense reports by 5 p.m., despite having no experience with accounting, will endear you to your boss? Offering to take on work that is outside your area of expertise won't impress anyone—especially when you turn in a less-than-stellar final product. On the other hand, avoiding projects like the plague won't impress your superiors either, since being a team player is essential for career development. If you're asked to do (or want to volunteer for) something that you know you can't handle alone, be honest about your limitations, advises Clarke. "Say something like, 'I'm always up for learning, but this project might take me a little bit longer and I may need a few extra resources.' People will respect you more for being honest rather than taking the assignment, turning it in late and flubbing it." Plus, you'll be able to manage your team's expectations while still giving yourself a fair shot to complete the work.



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### *Short-term Planning is Not Sufficient and Lacks Fiduciary Responsibility for the Future Needs of Your District*

Provided by Matt Gillaspie of Piper-Jaffray

It's easy for school board members to ask their business manager for current cash balances in PPEL and Sales Tax funds, add to those balances an estimate of upcoming near-term revenues to be received, and budget for the expenditure of all of those funds in the upcoming year. If there are surplus dollars why not spend them now, right? Planning in this near-sighted, simplistic way may accomplish the board's short-term goal of funding [what the board may perceive to be] currently needed infrastructure improvements without overdrawing those fund balances. This approach doesn't look into the future and considers neither (a) necessary capital improvements and equipment acquisition that can be reasonably anticipated to occur in the future, nor (b) changes that might impact resources, such as future enrollment changes, statewide sales tax revenue trends, inflation, or changes to the law. This is particularly problematic for those schools that generate well below the statewide average revenue per student (RPS) locally. Remember, under current law, as we evolve into the "statewide" tax system, those that generate below statewide average RPS will continue to receive 'supplemental' payments (currently in August) while those that are above the statewide average RPS will not receive supplemental payments. For some of you who are well below average and see a substantial portion of your total sales tax collections occur due to the supplemental payment, this fact could cause significant cash flow problems well into the future if you are not careful managing your board's expectations now; problems that may not be plainly evident when just looking at the budget forms for next year.

Most districts will levy the \$0.33 Board PPEL well into the future, many of you also have revenues from a Voted PPEL of up to \$1.34 for a period of time, and all districts will have continued sales tax revenues through the current sunset of the penny-for-schools on December 31, 2029 (final payment February 1, 2030). A prudent board will be planning now for this entire period of time through the 2029 sunset of the sales tax.

These future revenue streams available for capital expenditures (PPEL and Sales Tax) will be impacted by changes that could take many forms, such as: your enrollment, statewide enrollment, changes to taxable property valuations (including potential changes to the methodology for taxation of commercial property), consumption of taxable goods & services by consumers, changes in law,



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changing interest rates for the investment of idle funds, the implementation, extension or expiration of a Voted PPEL, increases or decreases in transportation expenses, technology, general maintenance needs, future inflation, and future bond repayment or abatement requirements.

For many of you, a current capital projects fund surplus may be needed to cover future deficits caused by items such as: decreases in future revenues, increases in future capital needs, increased expenditures for maintenance, additional technical and equipment acquisition and possibly the changing nature of delivery of educational product. For many of you the deficit conditions may not present themselves for years to come, although you may be able to anticipate such deficits using reasonable assumptions today. Comprehensive, continuously evolving long-term planning, coupled with regular board education, is essential to avoiding actual deficits. Drawing your current or short-term future balances to zero may not be the prudent decision when looking at the larger global picture of the ongoing infrastructure needs within your district.

Long-term planning will also help today's school board respond to patron inquiries regarding the district's ability to fund Project X, Y or Z. Your board members will be better able to answer questions such as, "when will you be replacing the sidewalks" or "have

you set aside sufficient funds to cover the replacement of deteriorating windows so that we don't have an emergency later" or "can our district have an improved athletic facility sometime soon" or "will we be able to see a future tax reduction and afford our ongoing needs without the extension of the Voted PPEL when it expires?" With comprehensive long-range planning, you will also be able to give a reasonable explanation to your patrons that question why your current fund balances appear to be so high: current positive fund balances may be needed for future cash flow needs. And those needs may be in three or four years, or might be forecast for fifteen or twenty years into the future. Proper planning today will help your school district manage these needs for many years to come.

This type of planning is essential and should be done every year to keep the board of education currently informed. Contact your financial advisor for help with this service.

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## Critical Dates for the School Business Official:

(developed by IASBO Regional Directors Winter 2011 – changes may subsequently occur)

<b>TASK</b>	<b>INFORMATION SOURCE</b>
<b>July</b>	
Second Semester Non-Public Transportation Report	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a> Contact Pat Ratcliff w/questions @ 515.281.5812
Preliminary Audit, if applicable	
Quarterly payroll reports	<a href="http://www.irs.ustreas.gov/">http://www.irs.ustreas.gov/</a> <a href="http://www.iowaworkforce.org/">http://www.iowaworkforce.org/</a>
Publish list of prior year employee salaries	Code Iowa 279.35 and (OAG #64-4-15).
Prepare end of year calculations for accruals, etc.	
Fuel tax refund	<a href="http://www.state.ia.us/tax/forms/motor.html">http://www.state.ia.us/tax/forms/motor.html</a>
Quarterly claims for previous quarter reimbursable categorical funding: Title IIA, Title III, & other reimbursable grants/funding	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a> Check award letters for quarterly claim instructions
File final Title VI report for previous fiscal year	
Announce when people can file for school board election and any open seats odd yrs	
<b>August</b>	
SAI Conference	Refer to SAI website calendar
SBRC Request due for September meeting	<a href="http://www.iowa.gov/educate/content/view/125/734/1/2/">http://www.iowa.gov/educate/content/view/125/734/1/2/</a>
SBRC Exhibits Due	
Debt reporting for Treasurer of Iowa	<a href="http://www.debtreportingiowa.com">www.debtreportingiowa.com</a>
Annual Transportation Report due	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a>

Foster Care Claim	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Special Education District Court Placed Claim Due	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Special Education Foster Care Claim Due	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Special Education High Cost Fund Claim Due	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Special Ed Provided to Nonpublic Schools Claim Due	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Juvenile Home Claim	Contact <a href="mailto:steve.crew@iowa.gov">steve.crew@iowa.gov</a>
Facility, Bond PPEL Elections	
Federal Perkins Reports Due	
Enter new contracts, letters of assignment, update leaves	
New staff orientation, back to school workshop	
<b>September</b>	
Verify all contracts and payroll information for first teacher contract payroll of fiscal year	
September 1 - Deadline for Open Enrollment for Kindergarteners only	<a href="http://www.iowa.gov/educate/options-for-educational-choice/open-enrollment.html">http://www.iowa.gov/educate/options-for-educational-choice/open-enrollment.html</a>
Regular school board election - second Tuesday odd-numbered years	County Auditor
Organizational Meeting of the Board of Education at the first regular meeting after the canvass for the regular school election during odd-numbers years	Code of Iowa 279.1
Annual meeting by Board of Education to close books and select officers even numbered years	

Title I application due	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a> <a href="http://www.iowa.gov/educate/title-programs.html">http://www.iowa.gov/educate/title-programs.html</a>
Certified Annual Report	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a>
Special Education Supplement	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a>
By September 30th, Districts must notify all parents within the district by this date of the following dates : a) Open enrollment; b) Transportation assistance; c) Right to appeal to State Board of Education if original request to open enroll was based on repeated acts of harassment or serious health condition of the student; and  Possible loss of athletic eligibility for open enrolled student	281- IAC 17.3(2):
Prepare / send contracts for tuition-in special education students	
File Title VI forms for current year	
Board resolution to study reorganization due Oct 1	
IDEA Part B Application	
<b>October</b>	
Certified Enrollment Count is taken on the first day of October every year, or the following Monday if the first falls on a weekend	Code of Iowa 257.6
IASBO Fall Drive-In Conference	<a href="http://www.iowa-asbo.org/">http://www.iowa-asbo.org/</a>
Quarterly payroll	<a href="http://www.irs.ustreas.gov/">http://www.irs.ustreas.gov/</a> <a href="http://www.iowaworkforce.org/">http://www.iowaworkforce.org/</a> <a href="https://idcf.bls.gov/">https://idcf.bls.gov/</a>

	<a href="https://uits.iowaworkforce.org/iwduits/">https://uits.iowaworkforce.org/iwduits/</a>
Whole grade sharing count date for 1 <sup>st</sup> Sem. Tuition	
Send 1 <sup>st</sup> quarter open enrollment billings	<a href="http://www.iowa.gov/educate/">http://www.iowa.gov/educate/</a>
Quarterly claims for previous quarter reimbursable categorical funding: Title IIA, Title III, & other reimbursable grants/funding	<a href="https://www.edinfo.state.ia.us">https://www.edinfo.state.ia.us</a> Check award letters for quarterly claim instructions
ASBO International Conference	<a href="http://www.asbointl.org">http://www.asbointl.org</a>
Finalize line-item operating budget	
<b>Monthly</b>	
Food Service reports to DE	<a href="https://www.edinfo.state.ia.us/CNP/splash.asp">https://www.edinfo.state.ia.us/CNP/splash.asp</a>
<b><u>Bank reconciliation with secretary records</u></b>	
Publish Board agenda, minutes, list of bills within two weeks of meeting	Iowa code 279.35
Payroll tax deposits	<a href="http://www.state.ia.us/tax/elf/eservice.html">http://www.state.ia.us/tax/elf/eservice.html</a> <a href="https://www.eftpssouth.com/Eftps/">https://www.eftpssouth.com/Eftps/</a>
File Iowa Withholding reports	<a href="http://www.state.ia.us/tax/elf/eservice.html">http://www.state.ia.us/tax/elf/eservice.html</a>
Submit IPERS payments & reports	<a href="http://www.ipers.org">http://www.ipers.org</a>
Job Service Monthly report (if applicable)	
403B Contributions	
Contracts for Board approval	

## **Counsel's Corner**

By: Danielle Jess Haindfield  
IASBO General Counsel

### **Contracts, Contracts, Everywhere!!!!**

It's the beginning of a new school year and many different contracts have come, and will continue to come, across your desk every day. While you know (or should know) that school contracts must be approved by the Board and signed by the Board President, the bigger question is do you know what is actually in those contracts that are sent to the Board for approval? Do you know what the District's contract responsibilities are and what implications could arise should those responsibilities not be met? With contracts, the old saying from Benjamin Franklin is true: "An ounce of prevention is worth a pound of cure". Not only should school business officials review the contracts that come across their desk so they know what the District's obligations are, but they should also strongly consider having their legal counsel review them for any legal concerns or for any revised language that could better protect the District's interests.

While the following are general principals to consider when reviewing or looking at all types of contracts, remember that every contract is different and one size doesn't usually fit all. The best advice is to read every contract closely and consult with legal counsel regarding areas of question or concern.

#### **I. Types of Contracts**

##### **A. Personnel contracts**

- Examples: employment agreements, independent contractor agreements, separation agreements, settlement agreements

##### **B. Real estate contracts**

- Examples: real estate purchase agreements, lease agreements, facility use agreements, option agreements

##### **C. Construction contracts**

- Examples: architect agreements, contractor agreements, construction manager agreements, performance and payment bonds

##### **D. Vendor contracts**

- Examples: agreements for the purchase of goods, agreements for the purchase of services, equipment/material lease agreements

##### **E. Consultant contracts**

- Examples: agreements to retain a search firm, agreements for financial advisory services for a bond issue

E. Sharing contracts

- Examples: personnel sharing agreements, facility sharing agreements, 28E agreements

## II. Scope of Contract Review

A. Business Elements

1. The business elements of a contract should be reviewed by you. “You” and “your” mean the entity you work for and on whose behalf the contract is being negotiated.
2. Business elements of a contract include all of the details associated with the particular arrangement that is subject of the contract, and include items such as price and payment terms, contract term and timelines, and products/services specifications.
3. The business elements of a contract are often more important than the legal elements of a contract.

B. Legal Elements

1. The legal elements of a contract should be reviewed by your legal counsel.
2. Legal counsel can ensure the document constitutes a binding and enforceable agreement and advise you about the meaning and significance of the legal elements of the contract.
3. Legal elements of a contract include the terms and conditions that are part of the contract, and include items such as indemnification, limitations of liability, and disclaimers as to warranties.
4. Certain legal elements of a contract often consist of language which is standard, or “boilerplate,” in many contracts. “Boilerplate” sounds like something unimportant, but it is not. Boilerplate language can many times “save you”.

NOTE: Your review of the business elements of a contract should complement the review of the legal elements by legal counsel.

## III. Business Element Review

A. Issues to Consider When Reviewing a Contract

1. Take sufficient time to review the contract. Don’t be in a hurry just to meet the next board meeting. Rushing may cause you to miss important things in the contract.
2. Review all relevant documents – make sure any exhibits or other terms that are incorporated by reference into the contract are attached to the contract or otherwise reviewed. Make sure if you send a contract to legal counsel to be reviewed you also include all attachments or exhibits to the contract.



3. Review the details of the contract, such as pricing and products/services specifications, to make sure they are acceptable and properly reflect the arrangement of the parties and your needs.
4. Remember to use each party's legal name, and make sure each party is a legal entity with the ability to enter into a contract. (i.e. the X High School does not have the legal ability to enter into a contract, but the X Community School District does).
5. Think about what the parties are being asked to do – if the contract does not include each party's obligations or is one-sided, ask why. Consider either insisting upon the removal of one-sided language or incorporating mutual language where appropriate.
6. Be careful of contracts with lengthy terms (i.e., longer than three years) and review the contract termination provisions. Also note any automatic renewal provisions.
7. Review any insurance requirements in the contract. Many contracts should contain some type of insurance language. Your local insurance advisor should review insurance language to ensure you can meet your coverage obligations and to advise you on what you should require of the other party.

#### **IV. Legal Element Review**

##### **A. Issues to Consider in Consultation with Legal Counsel**

1. Again, ensure there is sufficient time for a complete review of the contract by legal counsel.
2. Be familiar with any indemnification provisions.
  - a. Consider whether the contract requires you to indemnify (to compensate for incurred loss or damage) the other party and, if so, under what circumstances this will take place.
  - b. You should avoid agreeing to indemnify the other party for the other party's negligence (breach of duty to take due care) or the other party's breach of the contract (violation of the agreement). Ideally, each party will be responsible for its own actions.
  - c. You should request "mutual" or "mirror" indemnification clauses.
3. Be wary of any disclaimers of warranties.
4. Note any limitations of liability. Often there is a restriction on the types of damages that you may recover (i.e., only direct damages and not consequential damages) as well as a cap on the total amount that the other party will have to pay (i.e., the amount paid under the contract). You should consider whether such limitations are acceptable.
5. Keep in mind restrictions that may exist regarding the disclosure of certain information. Consider whether it is appropriate to include in the contract any requirements regarding the handling of your confidential information by the other party or whether there are any freestanding laws governing the disclosure of legally protected information, such as student records.
6. Be familiar with the purpose of any "boilerplate" language, such as:

- a. Governing law and forum – this provision typically states what law the contract shall be interpreted under and the forum for litigating any disputes arising under the contract. Consider whether references to any law or forum other than Iowa are acceptable.  
  
Also note whether there are any required forms of alternative dispute resolution, such as arbitration, and consider whether these are acceptable to the parties in light of the costs and benefits of such techniques.
  - b. Entirety of agreement (integration clause) – this provision typically states that the contract constitutes the complete understanding of the parties.
  - c. Severability of contract – this provision typically states that if any provision of the contract is held invalid or unenforceable, the other provisions of the contract shall remain in effect.
  - d. Waiver – this provision typically states that the failure of either of the parties to enforce any right or provision under the contract does not constitute a waiver of such right or provision.
  - e. Assignment – this provision typically states that neither party may assign any right or obligation under the contract without the other party’s prior consent.
  - f. Amendment – this provision typically states that the parties may amend the contract only in the form of a written amendment to be signed by an authorized representative from each party.
  - g. Counterparts – this provision basically allows each party to place their original signature on a separate copy of the signature page, and all such signature pages become a part of the contract.
  - j. Force majeure – this provision says neither party shall be liable for complying with any obligation under the contract if prevented from doing so by reasons beyond their control (i.e., fire, terrorism, civil commotion, acts of civil or military authorities, acts of God, acts or omissions or failures of carriers or utilities).
8. You or someone on your behalf (such as your legal counsel) should address any contract revisions or comments with the other party. You will need to determine who would be best to handle the negotiations.
- a. It is often possible to negotiate modifications to the contract documents, even with large entities.
  - b. However, keep in mind that it may be difficult to negotiate modifications if the other party is not agreeable. Should the other party refuse to agree to the proposed changes, you may find yourself in a position where you must weigh the benefits of the contract against the possible risks.

*The purpose of this column is to identify issues. It does not purport to be exhaustive or to render legal advice. You should consult with qualified counsel or other professionals in developing responses to specific situations.*

# IASBO Dates to Remember

August 31, 2011 Student Activity Funds – Ensuring Accountability, Scheman Center in Ames  
September 16-19, 2011 ASBO International Annual Meeting and Exhibits, Seattle, Washington  
October 26-28, 2011 IASBO Fall Conference at Sheraton West Des Moines, Iowa  
Fall and Winter Regional Meetings and Webinar dates to be determined

March 28-29, 2012 IASBO Annual Meeting & Trade Show, Scheman Center in Ames, Iowa  
(Wed-Thurs)

October 12-15, 2012 ASBO International Annual Meeting and Exhibits, Phoenix, Arizona

October 25-26, 2012 IASBO Fall Conference and 50<sup>th</sup> Anniversary Celebration, at  
Sheraton in West Des Moines

March 28-29, 2013 IASBO Annual Meeting & Trade Show, Scheman Center in Ames, Iowa

October 25-28, 2013 ASBO International Annual Meeting and Exhibits, Boston, Mass.

September 19-22, 2014 ASBO International Annual Meeting and Exhibits, Orlando, Florida

Oct 30- Nov 2, 2015 ASBO International Annual Meeting and Exhibits, Dallas, Texas

