

Key Post

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IN THIS ISSUE:

FOOD SERVICE
CONTRACTS

A NEW YEAR

BEHIND THE BA -
KATIE ATTWOOD

ABM PRESIDENT -
SUSAN THAMES

COUNTERING
MISINFORMATION

ASBO INTERNATIONAL
GIVING BACK FALL 2017

UPCOMING
WORKSHOPS

FOOD SERVICE CONTRACTS – DO THEY MATTER?

By Susan Young, CPA, RSBA, CFE, SFO

On June 14, the New Jersey Department of Agriculture, Division of Food and Nutrition, School Nutrition Programs (SNP), quietly announced a change in the type of contract that will be allowed with Food Service Management Companies (FSMCs). The original schedule was supposed to begin July 1, 2018, but it was revised on July 31, to provide for a one-year-delay – to the 2019-2020 school year – in the launch.

According to the actual announcement, “contracts with Food Service Management Companies will require a standardized RFP which will be provided by the State Agency. **The RFP will be based on fixed-price.** Cost-reimbursable contracts will be phased out as noted in the schedule....” The initial memo indicated that all contracts would be phased-out beginning with the 2018-2019 school year, and completed by the 2020-2021 school year.

This new change will apply to the majority of our districts. The change does *NOT* affect, however, those districts not participating in the National School Lunch Program (NSLP), or those that operate their own in-house food service programs. ***(Please see the sidebar on below for an NJASBO Resolution addressing the new contract changes.)***

continued on page 2

NJASBO has developed a resolution related to the new rules governing Food Service Management Contracts introduced in June 2017. We ask that your board of education and administration discuss, complete, and sign the following resolution, then submit it to the organizations listed in the final section of the resolution on page 4.

FOOD SERVICE CONTRACTS *continued from page 1*

Understanding the critical differences between the two types of contracts is important to be able to assess if your district will be impacted by the change. The SNP requires a district to issue a Request for Proposal at a minimum of every five years. Historically, the result of that process has been a cost-reimbursable contract with the successful FSMC.

A cost-reimbursement contract enables the district to collect the revenues from the food service program and, with proper documentation, reimburse the FSMC for the costs (food, personnel, supplies, etc). The FSMC also receives a management fee (call it their profit) typically based on a cents per meal calculation or a fixed amount established in advance. A cost-reimbursement contract also typically includes a bottom line profit (or loss) guarantee.

It is important to not confuse a fixed-price management fee under a cost reimbursement contract with the newly mandated fixed-price contract. Under the new fixed-price contract requirement, the only price quoted will be a fixed-price per meal that will have to cover *ALL* elements of the cost of running the program, including – presumably – the profit margin for the FSMC. The SNP has stated that “price is *NOT* the sole basis for the contract award; however, price remains the primary consideration once the most qualified proposal is identified. Price/cost must have the most weight of all scoring criteria.”

Based on conversations with many business administrators and multiple FSMCs, there are a number of ramifications for our affected districts to consider.

On one hand, a fixed-price contract could simplify a BA’s financial oversight of the operations. The FSMC would be reimbursed at a fixed-price per meal, times the number of meals or meal equivalents served. Rebates, discounts, and commodity usage no longer would be a concern.

There is a concern, however, that price could become the primary consideration of any purchase and limit other options. In order to monitor price versus value, the Request for

Proposal specifications would have to be detailed and thorough as “the RFP will require the School Food Authorities (SFAs, i.e., school districts) to lock into food specifications, paper quality, staffing requirements, wages and benefits, and all associated costs for the contract term.” As a BA working in the real world, there also are issues that must be considered when providing a successful food service program, such as ongoing level of staffing, declining participation, providing additional service lines, and changing the quality of paper products, as well as:

- Food allergies
- Sushi bars
- Organic foods
- Vegetarian options
- Jersey Fresh produce
- Quality of cold cuts

This level of detail is important because, per the SNP, “If an SFA expects to renew the contract for additional years, it is recommended that it plan for its needs over a 5-year period to assure that all potential program changes can be identified in the RFP. This planning will help to minimize material changes which will require a new RFP.”

How many of us are able to anticipate changes five years out, or have not had a parent, PTO, staff or student request changes? The SNP states, “it is anticipated that the SFA will be able to dictate the level of quality and service it expects in its RFP...any significant change would require the district to go back out to bid the next year.” Budget exceptions only will be allowed if the request could not have been reasonably anticipated during the development of the RFP, and is of an emergent nature. “Failure to properly anticipate requested enhancements, improvements or other changes in and of itself must not be the only justification for the requested budget exception.” If the requested change is material, the SFA would have to re-bid.

Re-bidding can be involved. There is the administrative time to revise the RFP, but there also are tasks involved in potentially changing over FSMCs each time a material change occurs. Additionally, there may be changes in staff, Point

continued on page 3

FOOD SERVICE CONTRACTS *continued from page 2*

of Sale systems, other equipment and inventory, etc. And, what happens if there are fewer competitors and there are no bidders? Who reaps the benefit of increased rebates, discounts and commodities?

Perhaps some of the more major considerations are the outcomes that arise from placing a primary emphasis on pricing. The FSMC would need to project its cost of operations and guarantee those, potentially, for five years. The SNP would continue to calculate the allowable annual price adjustment in accordance with the consumer price index. This type of contract places the risk of fluctuations in food costs, labor and benefits, supplies, and of course rebates, discounts, and commodities, in the hands of the FSMC – for better or worse. Would this reduce competition and FSMC options for districts? Time will tell.

More important is a concern about the risks to the quality of the food served to our students, if the FSMC needs to offset unanticipated costs over the contract term. Would New Jersey Fresh string

beans, for example, be replaced by canned string beans? Over time, how would these qualitative changes impact participation? At what point are fewer meals being served without reducing staff?

Of course there are a multitude of scenarios that could play out both in favor of, or against, the district. The SNP has said this new method will improve integrity, transparency, and accountability. But, will we sacrifice the ability to effect change for a known price per meal? Will a change in the contract potentially jeopardize the quality and participation rates for our students' food service operations? Will it reduce the workload and responsibilities of the districts that must monitor the quantitative and qualitative components of the RFP? Each district has its unique characteristics and priorities, new rules will require careful consideration. ***Please review and consider the NJASBO Resolution on page 4.***

Susan Young, CPA, RSBA, CFE, SFO, has been the Business Administrator/Board Secretary for the Morris County Vocational School District since July 2010.



A NEW YEAR!

By John F. Donahue

Other than trying to figure out where and how to install carbon monoxide detectors and deciding whether to track personnel and non-personnel expenses by school location

(ESSA reporting), the year begins as it typically does. We deal with busing issues, building problems, payroll mistakes, missing textbooks or supplies, new superintendents, auditors, and everything else that's thrown our way.

It's also another year closer to "super tenure" – that's 25 years at the age of 55. Having said that, though, I have asked BAs with many years of experience, "Would you change your career if you could do it all over again?" Without hesitation, the response always is "No!" I feel the same way.

With all the frustrations and headaches we have from time-to-time, we truly enjoy a wonderful profession. We often are in charge of an operation that is one of the largest employers in town. We manage the largest portion of local tax revenue. If there is a major building program or crisis, you can be sure we are out front managing the issue.

The sheer scope of our responsibilities is far beyond what you study in school or cover in certification classes. Often, I would come home from the office looking frazzled and my wife would ask, "How was your day?" I would answer, "Everyone wants a piece of me." And what other position exists where the public body must spend tens of thousands of dollars reviewing and evaluating your performance (Audit), and then reporting their findings at a public meeting? But having said all that, I wouldn't change a thing!

continued on page 5

NJASBO RESOLUTION

Cost Reimbursement for Food Service Management Services works best for

Name of School District _____

Whereas, the Department of Agriculture sent a notice on June 14, 2017 to New Jersey school districts participating in the National School Lunch Program announcing a significant change in the procurement protocol for the contracting of food service management companies that operate breakfast and lunch programs for New Jersey public schools, and

Whereas, this new procurement protocol would change the fundamental basis for awarding food service management contracts from a “Cost Reimbursement Basis” to a “Fixed Price Basis” for contract awards, and

Whereas, the _____ Board of Education has engaged staff and the community year-after-year to provide a local food service program that addresses and meets the needs of our children, and

Whereas, the _____ Board of Education credits the current “Cost Reimbursement” procurement method as the reason why the local school district can design a food service program that has the flexibility of meeting the needs of its children, and

Whereas, the _____ Board of Education declares that the “Fixed Price” procurement system would dramatically reduce the school district’s ability to change or alter its food service operations without the need to rebid for food service management services, and

Whereas, the _____ Board of Education further declares that the “Fixed Price” procurement method would impact the quality of the meals served to its children and, therefore, impact the participation of children in our breakfast and lunch program, and

Whereas, the _____ Board of Education further declares that the “Fixed Price” procurement method may limit the number of competitive proposals received by boards of education, and

Whereas, the _____ Board of Education rejects the Department of Agriculture’s underlying reasons for making this change without giving NJ School Districts the opportunity to address their concerns in an attempt to keep this procurement method in place, and

Whereas, the _____ Board of Education prefers an optional procurement system for securing Food Service Management Companies whereby the district could choose either “Cost Reimbursement” or “Fixed Price” as the basis for contract awards.

Now, Therefore, be it Resolved, that the

_____ Board of Education hereby requests the Department of Agriculture to reconsider its plans to move the basis of awarding Food Service Management contracts to a “Fixed Price” basis and allow the option of continuing to use a “Cost Reimbursement procurement model; or in the alternative , a “Fixed Price” procurement method, and

Be It Further Resolved, that copies of this resolution shall be forwarded to:

New Jersey Association of
School Business Officials

New Jersey Secretary of Agriculture
(369 S Warren St, Trenton, NJ 08608)

Local Legislators

NJ School Boards

NJ School Superintendents

NJ Principals and Supervisors

NJ PTA

A NEW YEAR

continued from page 3

What makes the difficult times bearable is the camaraderie and professional relationships we enjoy within the profession. County groups are the best place to meet and share with each other the many problems we face every day. For some reason, it's always comforting to know that you are not the only one with a problem. And sometimes when you hear from others, it makes our problems a little less stressful. Every County Association reaches out to new members to offer their support and guidance as needed. Hey, us old timers need support from time-to-time as well!

Your Association also is here for you! We always have the time to talk to you and offer help and guidance. We do our best to offer timely and relevant in-service programs. County Presidents attend State meetings and relate important issues and discussions when they meet with their county members.

Our Committees are hard at work this year. Our Technology Committees are updating the website and developing platforms to provide online in-service instruction and remote meeting opportunities. The Accounting Committee got to work early this summer meeting with DOE finance personnel relative to new reporting and compliance requirements for the ESSA. The Education Committee is reviewing and updating the course outlines for our certification classes. The Legislation Committee has met and put in place a plan to monitor new legislation. Conference and budget committees are scheduled to meet within the next month.

So when everyone wants a piece of you, talk to us, talk to your colleagues, attend professional activities, and enjoy this wonderful profession.

BEHIND THE BA – KATIE ATTWOOD

Hamilton Township School District



As a child, Katie Attwood loved the Flintstones and the Jetsons, didn't take her mother's career advice, and claims to have been a "mean Rugby" player in college. She also says that she always "liked" education and loved policy and financial analysis.

There is a lot more to Katie Attwood... let's find out!

When you were a small child, what did you want to be when you grew up?

I did not know then, and still do not know now!

Where did you attend college and what was your major?

I attended Brown University, and received my BA in Mathematical Economics. I also attended the University of Pennsylvania, where I received my Masters in Government Administration.

You came from the Department of Education – was that experience helpful in your current role as a BA? How long were you there? How did you start at the DOE?

My tenure with DOE was invaluable. I was there for more than 11 years, and it provided me with the unique experience of being exposed to more district issues and problems than hopefully no one BA will ever have to face in their career. It also provided me with a comprehensive understanding of school finance laws and regulations, and an extensive exposure to district budgets. I do tell people, however, that if I ever went back to DOE,

continued on page 6

BEHIND THE BA – KATIE ATTWOOD

continued from page 5

I would be very dangerous because now I really know what information is available to support budgeted numbers...and with that, I really know what areas to look at...On the flipside, I also really know how hard a BA's job is and see how so many State laws and regulations make little sense...they only suffocate the business office and make our tough job that much harder!

I joined DOE after working for the EPA for more than 7 years following graduate school. And prior to that, I worked in the private sector at an economic forecasting firm. I always liked education though, and loved policy and financial analysis. I felt that school finance was a good fit, so I joined DOE as a Special Assistant to the Assistant Commissioner for Finance. It was a great start and gave me an immediate exposure to the workings of the State and all the finance programs. I was promoted to Director of Fiscal Policy and Planning, and I finished my DOE career as the Assistant Commissioner for Finance.

How is being a BA different than being with the DOE – what are the major issues that stand out for you as a BA?

The biggest difference is in the scope of school finance issues, and what I personally can get accomplished and changed each day.

Although I worked on district-specific issues and budgets at DOE, the most challenging and fun part was working on and within the larger State system on things like legislation, the Governor's initiatives, and the dreaded four-plus hour drilling that came with the annual DOE Appropriation/Budget Hearings. But, working on those bigger issues and the Governor's office "requests" – most of those crazy hours did not result in a change (or a change for the better). In a district, every day results in a problem(s) addressed and projects completed. Although I miss the larger scope of issues and the influence I had on State initiatives, I love the accomplishments and change I can make as a BA in a district every day.

Hamilton Township has nearly 25 schools in the district, including 17 elementary schools – what are your tips for managing that many different schools?

Take a deep breath! You have to enjoy challenges and a bit of daily chaos, because the volume of work and issues that come with it are overwhelming.

If you were not a BA, what do you think you would be doing?

I think I would be working in some other public sector capacity.

What's the most resonant piece of advice you've ever received, and from whom?

From my Mom when I was in college. She told me I should be like Roger (Goodell, the current NFL Commissioner, who was a few years older than me and went to the same high school), and follow my athletic interests and find an internship with a professional sports organization/team.

I obviously did not follow that advice....

What was your favorite extra-curricular activity in high school and why?

Well, sports, as my mother's advice would suggest. I ran track and competed in a State championship, jumped horses competitively, but my favorite was field hockey. I loved the competition and being part of a team. I continued to play in college and regularly through my thirties.

What was your favorite cartoon as a child? Why?

That's a hard one, probably The Flintstones. The Jetsons is a close second. They made me laugh.

continued on page 7

BEHIND THE BA – KATIE ATTWOOD

continued from page 6

Would you tell us about your family? What role do they play in your ability to be a good BA?

My husband (Frank LoDolce) and I met and married while we were at DOE. We both are working in school districts now. We have the unique opportunity of actually understanding what the other spouse does, and truly can empathize and help with the daily challenges. When we both first moved to a district, we constantly discussed how to handle the new issues we faced. Now that we both have been in a district for many years, we have found we need more of a break from the daily issues, so we best support each other now by not bringing home the craziness of each day.

Although both my parents have long passed, I grew up in a very successful family, and realize every day how fortunate I was to have had their support and the opportunities and life exposure they provided.

In what way is NJASBO most helpful to you?

NJASBO is a source of information, advice, and camaraderie!

What's the one thing you can share that few people know about you?

I was a mean Rugby player in college!

NEW ASSOCIATE BUSINESS MEMBER PRESIDENT – SUSAN THAMES



NJASBO's new Associate Business Member President is Susan Thames, Associate Director with TTI Environmental, Inc. Susan has been with the firm for more than 17 years, and involved with NJASBO for more than 10 years.

Although Susan currently lives in Southampton with her son Dalton (16) and daughter Sara (14), she grew up in Chatsworth and attended Pemberton High School. After receiving an associate's degree in Journalism from Burlington County College, Susan completed her Bachelor of Arts degree in Broadcasting at Lock Haven University.

One of Susan's favorite school memories is of interning for KYW-3 Philadelphia during the summer of 1992. Susan worked in the sports department, and was right there when her favorite hockey team – Philadelphia Flyers – was awarded

continued on page 8

NJASBO Associate Business Member Executive Committee

Joining Susan Thames on the Executive Committee are:

Charles "Tony" Solimine – President-Elect
McAnimon, Scotland & Baumann
casolimine@msbnj.com

Laura Bishop – Vice President
Laura Bishop Communications
laura@laura-bishop.com

Giovanni Mancini – Secretary
Treadstone Risk Management
gmancini@treadstonerisk.com

Shannon Balken – New Member Chair
Balken Risk Management Services
sbalken@balkenrisk.com

Alan Walker – Immediate Past President
Atlantic Tomorrows Office
awalker@tomorrowsoffice.com

NEW ASSOCIATE BUSINESS MEMBER PRESIDENT

continued from page 7

a mediation resolution and the rights to the top draft pick from the previous year, Eric Lindros. Susan said it was exciting because she not only had the opportunity to meet Lindros, but she also met her idol, hockey broadcaster Gene Hart. Although Susan had the opportunity to experience other great sports moments that summer, that was tops.

Susan is an avid runner; she ran the Marine Corps Marathon in 2008, and the Boston Marathon in 2009. She currently has plans to run the Chicago Marathon in 2018. But Susan has a lot of interests

besides sports. She is very active with veterans programs, including the non-profit, Homes For Our Troops, and previously served as Honorary Commander for the Joint Base McGuire-Dix-Lakehurst. Susan also enjoys reading and writing, and playing chess with her kids.

Susan is excited to lead the ABM board this year, and to work with NJASBO President Susan Young. As she has noted, "It is the year of the Susans!"

Susan Thames can be contacted at susant@ttienv.com.

COUNTERING MISINFORMATION: ARE YOU A FIDUCIARY FOR YOUR 403(B) PLAN?

By Ellie Lowder

Many have read about the new fiduciary regulations applicable to retirement plans, and have asked "how do these regulations impact me?"; as well as "am I a fiduciary for my 403(b) plan?" This article addresses these issues, and relies heavily on a document prepared by the ASBO Retirement Plan Council (of which I was a proud member) and posted on the ASBO [website](#).

The new fiduciary regulations were promulgated by the Department of Labor and finalized with an effective date of June 10, 2017, to begin a transition period, but only to apply to ERISA plans, and to IRA rollovers and transfers. Those regulations do not apply to the plans of public education employers, which are exempt from coverage under ERISA 3(32).

The short answer then is that those regulations do not impact your retirement plans, including your 403(b) plan. However, the regulations will apply to your employees (not to you) when they choose to direct rollovers from your plan to an Individual IRA. Financial advisors and support staff of those advisors and the product providers may be required to serve in a fiduciary role in those situations. This will mean that your product providers will be offering both the required

disclosures, and the training of advisors and support staff to meet those fiduciary obligations on behalf of your employees. Keep in mind that the DOL currently is conducting studies to see if those regulations should be adopted as currently written.

That being the case, are there other sources that would apply fiduciary responsibilities to you as the sponsor of your 403(b) plan? The short answer is "probably not". But, the document prepared by the ASBO Retirement Plan Council expands on that answer.

- 1) The final 403(b) regulations, effective on January 1, 2009, did impose new compliance responsibilities to 403(b) plan sponsors. That simply means that the IRS does require that you obtain agreement from your product providers that they will share information with you, and otherwise cooperate in helping you comply with compliance responsibilities (including and adopting a plan document and sharing with your employees a list of the providers offered under the plan). Those regulations did not apply fiduciary responsibility to you.
- 2) The only other possible source of fiduciary exposure is state statute, which was not

continued on page 9

COUNTERING MISINFORMATION

continued from page 8

changed in the final 403(b) regulations. And, if any fiduciary statutes exist, it is unlikely those statutes apply to 403(b) plans because most such statutes apply to assets held in trust (not a requirement for 403(b) plans). However, it is possible that fiduciary responsibilities could exist based on actions taken by school districts and their governing boards:

- A) Generally, if the school or governing board chooses to select providers based only on their ability and willingness to comply with the plan document and operational requirements, it is possible there is no assumption of fiduciary responsibilities. On the other hand, if the school or board chooses to select the investment/product providers based on other criteria, or move to a single provider under the plan, the possibility is that there is fiduciary exposure under state statutes. Examples of criteria above and beyond the requirement to meet compliance responsibilities would be the annual review of costs, investment performance and quality of investments, and the subsequent de-selection of providers not meeting certain performance standards.
- B) If the school or governing board moves from multiple providers to a single provider for reasons unrelated to the compliance responsibilities of the final 403(b) regulations, it is possible that this action would cause fiduciary exposure.

The question continues to be asked – If I am not a fiduciary, then why are consultants calling on me to say that I am?

This is more complex, but it may be that XYZ Consultant is not familiar with the non-ERISA plans sponsored by public education employers – and, sometimes, unfortunately, the Consultant in question is simply attempting to create new business. So – the Consultant either is misinformed, or has a business model based on providing fiduciary services for a fee.

If the Consultant can convince you that you are a fiduciary, you might be persuaded to contract with that Consultant for fiduciary services. I will agree they have no business giving you inaccurate information. Your best defense is to demand those consultants provide written citations supporting their position. Because there likely are none, and this should settle the issue for you.

How Should You Select the Investment Providers?

First of all, approve only the providers that will agree to share the necessary information so you can meet your compliance responsibilities (such as information on loans, withdrawals, calculations for catch-up contributions, and required minimum distributions).

Approve the providers that will agree to work with your employees to increase participation in your 403(b) plan. If you have providers that are not enrolling employees on a regular basis and who have very few participants, it should not be a fiduciary action to eliminate those providers.

Next, be sure to include providers who offer individual service to employees (financial advisors). Not only will this increase participation in your plan, we know from numerous studies that face-to-face service will provide a better outcome for your employees.

- For example, a recent LIMRA study tells us that pre-retirees who work with an advisor are twice as likely to feel well-prepared for retirement than those who do not work with an advisor. You also can include the lower-cost, limited service providers for the “do it your selfers” on your staff.

Because 403(b) investment choices are limited to annuities and mutual funds, your provider choices should include some of each type of investment. This permits employees to select either type of investment to meet the needs of diverse employees.

continued on page 10

COUNTERING MISINFORMATION

continued from page 9

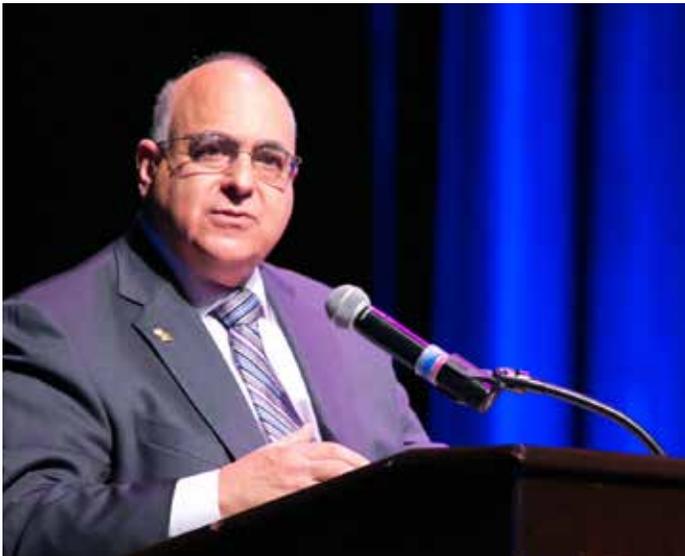
Finally, to protect yourself from possible misinformation, require the specific state statute that supports the claim of anyone asserting that you are a fiduciary for your 403(b) plan.

And, to be clear, *Ellie Lowder cannot, and does not, provide tax or legal advice to you.* If you still have concerns after reviewing this information, I recommend that you consult your own legal counsel. Don't get caught in the trap of acting on incomplete or inaccurate information!

Ellie Lowder, TGPC, is a consultant and author of "Section 403(b) Compliance Guide for Public Education Employees", published by Rowman & Littlefield for ASBO. Lowder also is a long-time supporter of ASBO with membership on the ASBO Retirement Plan Council, and responds to questions from ASBO members as they prepare to comply with final 403(b) regulations. Lowder can be reached at elowder@gainbroadband.com, or at 520-290-0534.

REPORT FROM THE PRESIDENT OF ASBO INTERNATIONAL

By Anthony N. Dragona, Ed.D.



It continues to be my honor to serve the members of the New Jersey Association of School Business Officials as President of Association of School Business Officials International. The support that I have received from many of you has helped shape my goals in ways to best serve its membership.

New Jersey continues to be one of the most active of affiliates involved in the professional development programs, recognitions, and certification programs that ASBO International sponsors. Many of you have attended the annual Executive Leadership Forum, designed to bring affiliate leaders together for a strategic planning seminar, led by nationally renowned presenters. Just a few weeks ago, the Annual Meeting and

Exhibits was held in Denver, Colorado. It was a great opportunity to gain a global perspective on issues, while networking with colleagues from around the globe.

ASBO International has affiliate associations and members representing all 50 states, all Canadian provinces, as well as the United Kingdom, South Africa, Australia, South America, and Asia, reflecting more than 4,000 members. Therefore, taking on the leadership of such an association forces me to expand my view of school finance well beyond the borders of New Jersey. As I enter my 43rd year at the Union City Board of Education, and 20 years of membership in New Jersey ASBO, I take the many valuable lessons that I have learned over that time and use them to shape my leadership style at ASBO International.

My goals this year are:

- Increase Annual conference attendance;
- Broaden International program and services; and,
- Ensure greater transparency between the ASBO Board and Executive staff and its membership.

I have to admit, although I thought that each goal would be easy to achieve, as I began to peel back the layers of the onion, I soon realized that there were many more layers than what

continued on page 11

ASBO INTERNATIONAL

continued from page 10

appeared on the surface. Each goal presented specific challenges, and two seemed to be closely intertwined. Increasing Annual Conference attendance brought to light a need for greater transparency, as the selection process for future meeting destinations was considered. Many of you have asked, “Why does ASBO keep returning to Orlando and Phoenix for the Annual Meeting?” So let’s peel back another layer of the onion, this time we find that as a result of a multi-year agreement signed 10 years ago, ASBO was locked into contracted locations through 2020. This means that as a Board member since 2013, the first time I will be able to apply your comments and suggestions will be for the 2021 and 2022 Annual meeting destination selection. Frustrating yes, but I am happy to now have input into choosing a great location for the 2021 and 2022 conferences.

Focusing on broadening International programs and services is a goal where I feel significant progress has been accomplished. This year, Trevor Summerson’s (United Kingdom) term as a non-voting International Representative expired and the Board took advantage of the timing of the reappointment to expand the International Representation from one to two members. Aubrey Kirkpatrick, from New Brunswick, Canada, and Karen Starr, from Victoria, Australia, have been appointed as International Representatives. Their

goal is to increase the participation of International members in conversations on the Global School Network, and attract more participation from the International Community at our annual meetings and events.

I am fortunate to work with a very dedicated group of Board members, including Chuck Peterson, Vice President from Pennsylvania. Chuck and I have developed a strong professional bond, and share a similar agenda for ASBO International’s future, as Chuck becomes President in 2018. Equally important is the fact that recently elected 2018 Vice President Tom Wohlleber, from Arizona, also is committed to supporting increased transparency and has pledged to keep ASBO International relevant to its membership.

Currently, New Jersey ASBO is the third largest ASBO affiliate with 390 members, Illinois has 410 and Pennsylvania has 394. Obviously, a united New Jersey and Pennsylvania can have an impact on the future of ASBO International. I encourage you to become more active in the programs, services and activities of our association.

In addition to being President of ASBO International, Anthony N. Dragona, Ed.D., is the School Business Administrator for the Union City Board of Education. He can be reached at adragona@ucboe.us.



NEW JERSEY TEACHER OF THE YEAR

Michele Loree, Business Administrator/Board Secretary from Middlesex School District, was a member of the Teacher of the Year Selection Committee. Michele, right, is pictured with Ocean County School District’s Amy Andersen, who was named New Jersey’s Teacher of the Year at the October State Board of Education Meeting. Andersen teaches American Sign Language at Ocean City High School and now is in contention for National Teacher of the Year.

NJASBO MEMBERS GIVING BACK TO THEIR COMMUNITIES

This is the third and final – for now – in a series of articles on the amazing ways NJASBO members give back to their communities. You are a caring, dedicated group of people who support many causes and organizations so generously with your talent, time and commitment.

Let's see whom we are highlighting in this issue...



The Business Administrator and Board Secretary at the **Shore Regional High School District**, **Corey Lowell**, is a trustee of the Asbury Park Toy Drive, a 501 (c) (3) organization founded in 2000. Corey has been involved with the organization for about eight years. "We have many events throughout the year," explained Corey, "because we couldn't contain ourselves to one season of giving!" So, in addition to the annual toy drive event, she said there also is a Mother's Day and Father's Day essay contest, a backpack and school supply collection, and a coat drive.

Helen G. Haley, CPA, Business Administrator/ Board Secretary, Vineland Board of Education, devotes a lot of her time to the Hammonton Band Boosters at Hammonton High School, including serving as – no big surprise here – treasurer! Helen's daughter is in the band, which is how Helen became involved. Helen noted that the marching band is a past winner of the state championship for US Bands Group IIA.

Comptroller for the **West Windsor-Plainsboro School District**, **Lawrence LoCastro**, and his wife spend some of their time as "buddies" to special needs adults. He said they helped out at one of the many prom-like "Night to Shine" affairs sponsored by the Tim Tebow Foundation that was held at the Fellowship Alliance Church in Medford.

Tom Johnston, Califon Assistant Business Administrator also is a professional singer/ songwriter and recording artist. Tom likes to give back to the community by donating his time and talent to various benefit and fundraising shows throughout the year.



Another person who likes to give back to the community is **Shannon Balken, Balken Risk Management**. Shannon said she has enjoyed being a Volunteer Driver for Meals on Wheels in Clinton Township for the past five years. Shannon takes a morning off from work once a month to drive a hot meal to the disabled and elderly in her hometown. "Sometimes I am the only person the recipient of the meal will see that day," explained

continued on page 13

GIVING BACK

continued from page 12

Shannon, “so I truly enjoy bringing a smile to their face and a hot meal to their bellies!”



Abigal Postma, Lebanon Township School District’s Business Administrator and Board Secretary also is a swim team and dance Mom, a 4-H volunteer, field hockey coach, horsemanship competitor, and is part of a farming family! Abigal also is the former mayor of the farm community in Harmony Township where she also served, at one time, as the Open Space/Farmland Preservation Committee Chair. Abigal said she and her husband “enjoy teaching our daughter, Ashley Mae, the role of agriculture in our daily lives as well as caring for our animals. Farm life teaches our daughter valuable life lessons that will carry forward in all aspects of her life. She’s learning a great work ethic and having fun!”

We will finish up our series with **Florham Park Public Schools** Business Administrator and Board Secretary **John Csatlos**.

John is involved in a number of projects, including Project Community Pride, a 5K and 1K Family Fun Run, which was founded by and benefits the schools and communities of Florham Park, Madison, and The Chathams. The program provides students and families with a range of anonymous youth development and counseling

services. He also is a member of One Day, One School, which was founded in 2007. Annual events have serviced the school districts of Florham Park, Hanover, East Hanover, and the Hanover Park Regional High School District. The program is a partnership of local schools, Borough Department of Public Works, communities, peer leaders, and members of the tree care industry. There have been donations of approximately \$500,000 in labor and materials made over the decade. A winner of the NJ Green Community Achievement Award and honored by the NJ Shade Tree Federation, NJDEP’s Parks and Forestry Division, the program has been a model for others throughout the United States.



Additionally, John has been a member of the Kings Road School, Madison Public School District – School Safety Committee (SY2016 and SY2017) Committee. This group plans student and parent programs designed to educate and address the climate and culture of public schools. He also has been involved with the Sesquicentennial (150th Anniversary) Celebration and Fundraiser for Columbia School District No. 5 - 1866 “Little Red School House”, Borough of Florham Park, as well as being the head coach for Madison Softball since 2010.

Whew...we don’t know how you manage, but we are so proud of all of our NJASBO members and all you do in your communities. You make things happen!

UPCOMING WORKSHOPS

NOVEMBER

Current School Law Update

November 14 – Mt. Laurel; November 16 – Rockaway

Attendees receive an update on Current School Law. Michael Kaelber, formerly of NJSBA, will present a variety of topics including the Ethics and the Business Office, Re-Organization, Voting Requirements, Tenure, and Rice Notifications. This program will provide timely information for business administrators as they begin to build their budgets.

3 CPE Credits – Business Law; 1 QPA Credit – Ethics

DECEMBER

Payroll Fundamentals

December 7 – Rockaway; December 12 – Mt. Laurel

This payroll fundamentals seminar will provide a general overview of the payroll process. Payroll accounts for the vast majority of public school budgets, but often is a dreaded topic among business administrators. Strong payroll administration can reduce overall operating expenses and avoid costly fines and late fees. The program will briefly discuss the components of payroll, including topics currently debated at local, state and national levels. Presenters will provide general tips for prudent payroll administration and overview best practices, including pointing out where potential issues may arise. The program will end with a discussion of the “other” duties assigned to payroll, including health benefits, pension, worker’s compensation, unemployment, and time and attendance.

3 CPE Credits – 1 Finance; 1 Accounting; 1 Business Law

JANUARY

Legal Issues that Impact the Business Office and Business Administrator

January 18 – Mt. Laurel; January 23 – Rockaway

Speaker William Donio, Esq., of Cooper Levenson, P.A., will discuss a variety of issues that have an impact on you as the Business Administrator, the Business Office, and the Board. These issues include the Open Public Meetings Act, Minutes, and Agendas. The second part of the program will be a discussion of OPRA and the current rulings that impact how you should be answering requests from both in-state and out-of-state persons.

3 CPE Credits – Business Law

Pension

January 25, 2018 – NJASBO Robbinsville Office.

Please note that the December Pension Program is closed.

The intent of this workshop is to help attendees understand the retirement systems from two standpoints: (1) in your role as an administrator in your district; and, (2) in your personal role as a member of the system. The two are intertwined; therefore, if you understand how the benefits affect you, it will enable you to answer the questions of others in the performance of your job. Mort Reinhart, Pension Consultant for NJASBO, will answer a number of questions such as, how soon can I retire and how much income will I receive, as well as do I have to pay taxes, may I work after retirement, will I have health care and who pays for it, and when can I collect Social Security?

3 CPE Credits – 2 Business Law; 1 Finance

TOYS FOR TOTS

Donations Accepted Through December 8th

The annual "Toys for Tots" drive at NJASBO always results in a mountain of toys. Please bring new, unwrapped toys for our toy drive between now and December 8th, to any professional development, committee meeting, or county meeting.

In addition to the NJASBO Marine Corps Toy Drive, be sure to check your county ASBO for information about county-wide food, clothing and toy drives. Together, we can make the holidays brighter for our neighbors in need!



NJASBO MEMBERS IN THE COMMUNITY

