

# KeyPost

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SCHOOL BUSINESS  
OFFICIALS

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## NJASBO SLATE OF OFFICERS FOR 2018-2019

*The NJASBO Board of Trustees has approved the slate of officers for the 2018-2019 school year.*

**Matthew A. Clarke, President**



Matthew A. Clarke will serve as NJASBO President for the 2018-2019 school year. Matt has been in school business administration for 20+ years, and has been the Business Administrator/Board Secretary at the Springfield (Union County) Board of Education since November 2002.

Prior to joining Springfield, he was the Assistant Superintendent for Finance and Business Operations for the Owensboro Public Schools in Kentucky from 1999 until 2002. He began his career in school administration with the Scotch Plains Fanwood Board of Education in 1993, as the Assistant BA; he became the Business Administrator/Board Secretary in 1997.

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## ENERGY SAVINGS IMPROVEMENT PROGRAMS

**By Andrea L. Kahn**



The Energy Savings Improvement Program Law, or ESIP Law, N.J.S.A. 18A:18A-4.6 *et seq.*, provides a means by which local school districts may implement energy savings improvement programs. The law is intended to allow government agencies to make energy savings improvements to facilities and to pay for the costs using the value of energy savings that result from the improvements.

The legislation has been interpreted by Local Finance Notice 2009-11, adopted June 12, 2009, Local Finance Notice 2011-17, adopted June 16, 2011, and a BPU Order. The law is intended to encourage local governments and state agencies to implement energy savings improvements for the purpose of reducing costs, reducing energy usage, avoiding development of additional

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Before becoming a School Business Administrator, Matt spent five years in the private sector as a Mortgage Service Representative and an Assistant Vice President at Haven Savings Bank. In addition to being a member of NJASBO's Board of Trustees, Matt has been a member of numerous committees including Legislative Network, Technology, Specifications & Purchasing, and Budget/Finance. Matt is a previous recipient of NJASBO's Above & Beyond Award.

He has held several leadership positions with the Union County Association of School Business Officials, including two terms each as Secretary, Vice President, and President; he also is a member of ASBO International.

Matt received his BA from Lycoming College. He has held a New Jersey School Business Administrator Certificate since 1998, and is a New Jersey Qualified Purchasing Agent.

Matt and wife Gayle have been married for 28 years and have three children: Samantha, Wyatt and Tabitha.

### **Susan F. Young, CPA, RSBA, SFO** ***Immediate Past President***



Susan F. Young will serve as NJASBO Immediate Past President for the 2018-2019 school year. Susan has been the Business Administrator and Board Secretary for the Morris County Vocational School District since July 2010, but her career as a BA goes back more than 20 years

to Netcong School District, a small K-8 district. From there, Susan joined Morris School District as an Assistant BA/Assistant Board Secretary in January 2001; she became the BA/Board Secretary in January 2003.

Susan's career also has included both private and non-profit sector positions. She began her

professional career as a Federal Tax Accountant and Assistant Vice President Corporate Audit at Beneficial Management Corporation, where she spent 14 years. Additionally, she was the Director of Strategic Planning and Chief Financial Officer for the Waterloo Foundation for the Arts for several years.

Susan earned a BS in Accounting from Montclair State University and an MBA in Finance from Fairleigh Dickinson University. She holds certifications as a Certified Public Accountant, a Certified Administrator of School Finance and Operations, a Registered School Business Administrator, and a Certified Fraud Examiner.

In addition to being a member of NJASBO, Susan has held several positions of authority with the Morris County Association of School Business Administrators, including President, Past President, Treasurer, and Secretary. She is a member of the Morris Essex Insurance Group, where she is a Trustee, and the Association of Certified Fraud Examiners.

Susan lives in Ledgewood, NJ, and enjoys traveling, reading, biking, watersports and spending time with her children and grandchildren.

Most importantly, according to Susan, it has been her "honor to serve the association and its members as its 2017-2018 President. Thank you for the opportunity to serve."

### **Diane S. Fox, CPA** ***President-Elect***

Middle Township Board of Education Business Administrator/Board Secretary Diane S. Fox will serve as NJASBO President-Elect for the 2018-2019 school year.



Diane has been the BA for Middle Township since June 2012. But that was not her first time in Middle Township. Diane served as the Fiscal Officer for the District earlier in her career – from 2000 to 2004.

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## SLATE OF OFFICERS FOR 2018-2019 *continued from page 2*

Diane also spent eight years (2004-2012) with the Cape May County Special Services School District, where she originally was the Assistant Business Administrator responsible for performing all of the Business Administrator duties for the West Cape May Board of Education. After three years, Diane became the Business Administrator/Board Secretary for the District.

Diane's career includes private industry as well. From working at Atlantic City Electric in the accounting department to becoming the managing partner for a small accounting office in Ocean City, New Jersey. She also managed a restaurant for a few summers which gave her insight into the food industry. All of these positions have helped in her job as the School Business Administrator because, as Diane said, "as you all know, the problems and issues that we face are never easy or the same."

In addition to being a trustee for NJASBO and Past President of the Cape May County ASBO, Diane also is a member of ASBO International, NJSCPA, and AICPA.

Diane received her BS in Accounting from Stockton State College (now Stockton University). After encouragement from fellow BAs, she went on for her master's degree in Educational Leadership from Thomas Edison State College. She now holds not only her CPA certificate and Business Administrator Certification, but her certification as a School Administrator. Diane presently is in the dissertation phase for her doctorate in Organizational Leadership with a K-12 Education Focus from Grand Canyon University.

Diane lives in Cape May Court House with her husband Rodney and two children, Charles and Jennifer. Diane's other daughter Elizabeth, her husband and Diane's two grandchildren live nearby, so there never is a dull moment in the Fox household.

### **Philip H. Nisonoff, Ed.D.** ***First Vice President***



Philip H. Nisonoff, Ed.D., Assistant Superintendent of Schools and Business Administrator/Board Secretary for the Emerson Board of Education, will serve as First Vice President for the 2018-2019 school year.

Philip first joined Emerson in 1994; he served as Interim Superintendent of Schools from December 2011 until June 2013. He also has been the Treasurer of School Moneys for the Demarest Board of Education since September 2001, and the Treasurer of the South Bergen Workers Compensation Pool since July 2015.

Before joining Emerson, Philip was a mathematics teacher, coordinator of management information systems, and a Business Administrator intern at the Galloway Township Board of Education from 1989 until 1994. He spent two years at South River High School (1987-1989) as a mathematics and computer science teacher.

He holds a doctorate in education from Fordham University, and a masters in Educational Administration/School Business Administration from Kean College Graduate School of Education. His bachelor's degree in mathematics is from Rutgers University. Philip also was an Adjunct Instructor of School Finance for the GSE Educational Administration Masters Program at Fordham University Graduate School of Education.

For NJASBO, Philip is a past Chairman of the Legislative Committee and is a certified School Business Administrator Mentor. He is a past president of the Bergen County Association of School Business Officials and a former Executive Director of the Bergen County Banking Consortium. Philip was appointed by Governor John Corzine to serve as a commissioner of the New Jersey Special Education Review Commission for 2006-2007. He has been a

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## SLATE OF OFFICERS FOR 2018-2019 *continued from page 3*

member of the Board of Directors of the South Bergen Workers' Compensation Pool since 1998.

Philip is a past recipient of the Bergen County ASBO's Meritorious Service Award for Outstanding Contributions to the Profession, and the Distinguished Service Award in Recognition of Outstanding Leadership and Contributions to Education. He also has been the recipient of NJASBO's Meritorious Service Award for Outstanding Contributions to the Profession, and the Distinguished Service Award in Recognition of Distinguished Service to the Emerson School District.

Philip resides in Emerson with his wife Jennifer and four children: Tyler, Hunter, Spencer, and Sophie.



### **Robert Colavita** ***Second Vice President***

Robert Colavita, Business Administrator/Board Secretary for the Hopewell Valley Regional School District, will serve as Second Vice President for the 2018-2019 school year.

Bob first joined Hopewell Valley in 2002. He served as Assistant Business Administrator from August 2002, until June 2007, when he was promoted to Business Administrator/Board Secretary.

Before joining Hopewell Valley, Bob was an elementary school teacher for the Flemington-Raritan Regional School District, where he taught

second-grade from 1996 to 1999. He then spent three years at the Bernards Township School District (1999-2002) as a fourth-grade teacher.

Bob also worked in private industry for the Amerada Hess Corporation as a corporate accountant, and for the Haagen-Dazs Corporation as Plant Controller, when the facility was located in Woodbridge, NJ.

In his off hours, Bob spends time assisting his father in the management of the family's Christmas tree farm.

Bob holds a masters in Educational Administration/School Business Administration from Rider University, and a Masters of Arts in Teaching from the College of New Jersey. His bachelor's degree in business administration is from Rider University.

For NJASBO, Bob has served on the Conference Committee for many years, as well as on the Budget Committee. He has been a frequent presenter and panelist at NJASBO and NJSBA workshops and conferences. Currently, Bob is the president of the Mercer County Association of School Business Officials, a position he has held since 2007.

Bob is a five-time recipient of ASBO International's Certificate of Excellence in Financial Reporting. He also has been recognized by the Hopewell Valley Recreation Foundation for his hard work and efforts in support of its mission.

Bob resides in Yardley, PA, with his wife Kathy and two children: John and Caroline.

## RETIREMENT PLANS?

Are you planning to retire? Getting ready to trade-in your spreadsheets, board minutes, and budget plans, for rock climbing equipment, surf boards, or a hammock?

Please let us know so we can acknowledge your commitment, dedication and service. Have any

"then" and "now" photos you would like to share with your colleagues? Send them in!

Contact John Donahue with all of the relevant information (date of retirement, length of service as a BA, photos, anecdotes, etc.) at [John@NJASBO.com](mailto:John@NJASBO.com), and we might publish that information in an upcoming issue of *KeyPost*.



## ENERGY SAVINGS IMPROVEMENT PROGRAMS *continued from page 1*



energy production, reducing carbon generation, and furthering goals of the State's Energy Master Plan.

### The Energy Audit

The process begins with an energy audit, which must be conducted either by the Board of Education or by a qualified third-party retained by the Board. The energy audit identifies the current energy use of old facilities and energy conservation measures that can be implemented to produce energy savings.

The definition of energy conservation measures in the ESIP Law goes beyond what is commonly considered energy conservation measures, including installation of energy-efficient equipment, demand-response equipment, combined heat and power systems, facilities for the production of renewable energy, water conservation fixtures, certain building envelope improvements, and related controls.

The State of New Jersey provides a Local Government Energy Audit program under which a school district may receive financing for an energy audit using certain firms. Other firms that are qualified, or the district itself, may provide the audit, but not as part of the reimbursable program.

### Selection of an Energy Services Company

Local school districts may decide to use the services of an energy services company (ESCO) to help implement the program. An energy services company is a commercial entity that is

qualified to provide energy savings services in accordance with the provisions of the law. If the ESCO helps develop the plan, it must also offer to guarantee the energy savings to be implemented through the plan, and the Board would decide whether to purchase that guarantee. The ESCO may not conduct the initial audit. The ESCO services could be provided through other means, but an ESCO provides a specialized energy savings experience, often has broad resources, and must offer to guarantee the energy savings.

Once the audit is complete, the Board may decide to select an ESCO either through traditional public bidding or through competitive contracting procedures set forth in N.J.S.A. 18A:18A-4.1 *et seq.* If competitive contracting is utilized, the district would develop a request for proposals, receive proposals at least 20 days after publication, and select an energy services company on the basis of criteria established in the RFP. The Board of Public Utilities (BPU) has developed a model RFP. The RFP is submitted to BPU for approval, and often also must be submitted to the State Comptroller for approval prior to advertising. The Board would then adopt a resolution appointing the ESCO.

Some districts decide to pursue a "Do It Yourself Project" [see article on page 11] without an ESCO. These districts generally seek assistance of professionals with environmental engineering experience. The district would then use conventional bidding to implement the project.

### The Energy Services Improvement Plan Development

The ESCO or other professionals would then work with the Board to develop the plan, which must include the elements described in the law, including:

- (a) results of the energy audit;
- (b) energy conservation measures;
- (c) greenhouse gas reduction analysis;

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## ENERGY SAVINGS IMPROVEMENT PROGRAMS *continued from page 5*

- (d) risk assessments;
- (e) calculations of implementation costs and projected energy savings;
- (f) maintenance requirements; and,
- (g) description and cost estimate of an energy savings guarantee (if developed by an ESCO).

### Calculation of Energy Savings

The Board of Education may only enter into an ESIP if it has determined that the savings generated from the reduced energy use from the program will be sufficient to cover the costs of the program's energy conservation measures. Energy savings is defined in the law to include a measured reduction in fuel, energy, operating, or maintenance costs resulting from implementation of energy conservation measure services when compared with an established baseline of previous costs.

The calculation of energy savings involves a determination of the dollar amount saved through implementation of the energy savings plan using protocols approved by BPU, but not the cost of the energy audit and savings verification. The calculation can include operational savings, energy rebates or incentives, but BPU does not allow capital cost avoidance.

Savings generated by solar power purchase agreements, or measures benefitted by the Direct Install Program – which are eligible for significant State funding – can count toward the plan savings. Districts considering an energy savings improvement program may wish to avoid energy savings projects prior to the adoption of a plan, as that savings would not count and the energy projects with the fastest cost recovery might not be available to leverage projects with a longer cost recovery time.

### Third-Party Energy Savings Verification, Plan Adoption, and Guarantee Acceptance

The Board of Education must contract with a qualified third-party to verify that the projected

energy savings to be realized has been calculated properly. The verification report and proposed plan are submitted to BPU for review.

After the verification and BPU approval, if the Board of Education determines that the energy savings generated from the reduced energy use from the program will be sufficient to cover the cost of the program's energy conservation measures as set forth in the energy savings plan, the Board of Education may adopt the energy savings plan. The Board of Education is required to approve any guarantee by a separate Board action. Upon adoption, the plan must be submitted to BPU for posting on BPU's webpage and must be posted on the Board's website.



### Subcontracting and Project Implementation

The ESCO may be designated as the general contractor, but subcontractors must be hired pursuant to public bidding requirements applicable to the Board of Education. Subcontractors must be classified to perform the required work. Generally, the ESCO may not use a subsidiary, or wholly-owned or partially-owned affiliate, to assist in implementation of the plan. However, when the ESCO is the manufacturer of direct digital control systems and contracts with the Board of Education to provide an energy guarantee in accordance with the ESIP Law, the specification of the direct digital control systems may be treated as proprietary goods, but must meet certain statutory guidelines. To select subcontractors, the Board of Education may do the bidding or allow its representative to assist the ESCO to assure that public bidding laws are followed.

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## ENERGY SAVINGS IMPROVEMENT PROGRAMS *continued from page 6*

The ESCO contract work may include a facility alteration required to properly implement other energy efficiency or conservation measures, provided the cost does not exceed 15 percent of the total cost of work, and meets other criteria that ensure that such work is necessary or economically advantageous.

The Board of Education must obtain necessary approvals for construction projects and may only incur costs once financing is available.

### Financing

Financing may be undertaken through conventional means. If so, the district may be eligible for State facilities aid. Alternatively, the district may decide to finance through the options provided by the ESIP Law. Facilities aid is not available unless conventional financing is used. [More on financing on page 13.]

Under the ESIP Law, the Board of Education may authorize a lease purchase agreement between the Board of Education and the ESCO or another public or private entity. The lease purchase agreement may not exceed – from the time the program is placed in service – 15 years, or 20 years if financing a combined heat and power or cogeneration project. Lease payments need not be subject to annual appropriation.

Alternatively, the Board of Education may arrange for the issuance of energy savings obligations as refunding bonds in accordance with the requirements of N.J.S.A. 18A:24-61.1 *et seq.* These requirements include approval of a bond ordinance by the Local Finance Board, a state agency in Trenton.

The energy savings obligations must mature within the period of usefulness of the projects being bonded, and are funded through appropriations for utilities services in the annual budget of the Board. Short-term financing may also be utilized as necessary, provided that all the bonds and notes mature within the periods authorized for the energy savings obligations. They may be issued either through the Board or

another public agency authorized to undertake financing on behalf of the Board.

The lease purchase agreements and energy savings obligations may not be used to finance maintenance, guarantees, or revocation of guarantees of energy conservation measures. They may be used to finance the cost of the energy audit or the cost of verification of the energy savings prior to adoption of the energy savings plan. The repayment of both lease purchase agreements and energy savings obligations are subject to budget and tax levy limitations otherwise provided by law.

### Energy Savings Verification Prior to Commissioning

Once the energy conservation measures are placed in service, the ESIP Law again requires verification by a qualified third-party to ensure that the savings projected in the energy savings plan has been achieved. Individuals or organizations performing energy audits, acting as commissioning agents or conducting verification of energy savings plans, implementing energy conservation measures, or verifying guarantees, must be pre-qualified to perform work as required by law.

### Maintenance and Guarantee Verification

The Board will have to arrange for maintenance in order to ensure the continued projected energy savings. Board representatives can be trained, or services can be contracted. Any elected guarantee will require adherence to a maintenance program and require verification of the energy savings.

***(This is a condensed version; the full article is available on the [NJASBO website.](#))***

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## BEHIND THE BA – CINDY BARR-RAGUE MARLBORO TOWNSHIP SCHOOL DISTRICT

“We work in a mystery,” is how Cindy Barr-Rague describes being a BA. But, having said that, Cindy loves what she does, especially the variety the job affords. It really would have been no surprise to a young Cindy, however, to discover she grew-up and became an accountant and BA, because “math was my go-to” in school. There was a brief moment where Cindy considered a very different career. You have to read on if you want to know what it was!

If Cindy goes missing some day, she just might be in Italy, or watching her husband surf in Hawaii. Or, if we all are really lucky, she will be in the kitchen baking up some cookies! Yum!

Come along with us and find out more about Cindy.

### ***What would you tell Cindy at the beginning of her career as a BA, if you could?***

I would tell her that the job changes over the years, and that you need to decide up-front the type of person you want to be – a rule-follower, or someone who falls along the rule-following spectrum? I follow the rules, unless I can find ways to wiggle – although I really don’t wiggle! I will be starting my 22nd year in September, and I have been able to keep the district ethical. I have high moral standards and believe in being fair to everyone. I don’t play games. I don’t believe in doing anything that is “on the line”. I don’t accept gifts – I think everything should be above board, and I work hard to treat everyone fairly, whether they are friend or foe. That is very important to me, that everyone be treated the same. No preferential treatment for anyone. I strongly believe you have to “walk the talk!”

### ***What do you like about being a BA? What do you dislike?***

I like the challenges. I started out as an accountant and worked in municipal government. That’s where I first saw school business administrators. As a BA, there is something different every day. It’s always different – one day



it’s insurance, another day it might be building projects, another day it’s a board meeting – but it changes every day. I don’t like the politics. You have to walk that line a lot of times. And the board often seems to have a revolving door. There seems to be constant change on the board. I also really hated having to put in the salary caps for superintendents. I think a lot of value in education was eliminated with the caps, and we lost a lot of really good educators. I think it was a real disservice to education.

We work in a mystery. It is much more than finance. We have to sift through a lot of codes and regulations to do what we do. People have no clue how complicated it can be!

### ***What were you like in high school?***

I guess I was pretty studious in high school, but I liked to have fun. Math was my go to. I was always enrolled in the “higher” math classes – they didn’t have AP classes then. My school was a junior/senior high school that was separated by the cafeteria and auditorium – seventh- through ninth-grade on one side and tenth- through twelfth-grade on the other. I was always going over to the other side – we called it “up the hill” – for my math and science classes.

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***Can you tell us something about yourself that most of your colleagues don't know?***

I think it's that I really am a "softie" at heart. I have a pretty tough exterior, and I'm known as sort of no nonsense, but I do some things quietly – you know, for the kids. I like to take care of little stuff for the kids. I'll do anything for the kids. We like to make sure that the kids have things, like presents, at the holidays. Children often get caught up in situations that are not of their making and need a little help. I like to make sure they get that help.

My colleagues probably don't know that I love to bake, especially Christmas cookies. All of my schools know I bake because each of the schools gets a platter filled with Christmas cookies. I make Reese's balls, macaroons, sugar cookies, and sand tarts. I make about 14 different kinds of cookies. I have a special spatula and a special scoop that I use to make the cookies!



***What has kept you at the Marlboro Township School District for more than 20 years?***

My former Superintendent, Dr. David Abbott (retired), really made this a team. He was here at the district for 16 years, and had such a phenomenal presence and a great kindness. He had enormous compassion and wisdom. He was a class act. I learned so much from him. I just stayed, and have gained a reputation here.

***Who gave you the best piece of advice – personal or professional – and what did they tell you?***

The best piece of advice I have ever received probably came from David Abbott. He said, "Always be able to put your head on that pillow every night and be able to live with yourself." I so admired David.

Walter Brasch also told me, "You'll enjoy this [being a BA], it will be tough, but you've got a good mind, and are an honest, hardworking individual. Just stay with this." He was right. The finance stuff was easy, because I had the background in municipal government. I met Walter and that's how I got into being a BA. I had to learn everything else, I already knew how to be an accountant.

***What advice would you give new BAs?***

Don't give up! Keep learning. Don't ever stop thinking that you don't know everything. This job always is changing and you always have to be ready to learn. I also would tell them it is not an "easy-as-cake" job. It's not an 8-to-4-job either. If that is what you are looking for, you are in the wrong business.

***If you could travel anywhere in the world, where would you go, and why?***

I would take my husband to Italy. He has an Italian ancestry. I think we really would enjoy Italy. I also would take him surfing in Hawaii. And no, I would

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## BEHIND THE BA *continued from page 9*

not be surfing. We were in Florida recently and everyone is still talking about how I actually spent a day on the beach. I'm not really a beach person, but I would watch him surf in Hawaii.

### ***What value does NJASBO provide?***

NJASBO is a great resource. John and Michele always are there for us, and create great programs for everyone. I don't think people realize how much of a resource they can be. People don't always understand how much value there is in NJASBO. There is so much collective knowledge available to everyone; people need to know that and get more involved. I am concerned that people aren't getting involved. I am seeing the same people over and over at the meetings and events. We need to see new people, the new BAs. We've all done this job, get involved and we can help them find out information. We can share information.

### ***You have a BS in Accounting and Business/Management from Elizabethtown College.***

#### ***What led you to that major?***

As I noted earlier, math is my go to, but I actually have an associate's degree in criminal science. The FBI wanted me, but it just wasn't the "right" time. I didn't know what I wanted to do and some friends of mine were going in to criminal science. It sounded like fun. I really enjoyed it,

but then my parents sat me down and said, "let's get into the real world," and I went back and got my BS in accounting. In my early career, I did some consulting as an accountant with a police department and I really enjoyed it.

### ***It is budget season, what is your biggest challenge this year?***

School security is the biggest challenge this year, and staying within the 2 percent cap. We are putting armed officers in our schools this year – regular officers who are picking up extra work – next year, we will hire our own officers. We are trying to figure out how to fund this for the next school year. It never is easy. It's like trying to fit five pounds of flour in a four-pound bag!

### ***Are you a Jersey girl?***

Now I am a Jersey girl. I'm from Pennsylvania, but I won't go back. I grew up in Middletown, PA, and now I live in Middletown, NJ. I like the variety in New Jersey. You can go to New York, the beach, parks, and museums. I go to Florida three or four times a year with family, and have talked about buying a place there, but I'll always want to keep something here. New Jersey gets a bad reputation, but I think it has so much to offer.

## ROOT CANAL

***By John F. Donahue***



"Root Canal" is what Jim Shoop called his recent purchasing program. I love you Jim, but you give me a headache! Michele and I asked Jim to specifically address certain procurement issues, namely: professional services, competitive

contracting, EUS procurement, and notable procurement violations in state and federal audits.

Years ago, I remember the first time I went to one of Jim's programs on purchasing; and when it was over, I wished I had stayed in the office! I sat there saying to myself, "really?", "oops, don't do that", "Ok, I got one right", "that one I can fix", "I can't be the only one doing this wrong". You can add your

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## GOING DIY ON AN ESIP CAN BE A MISTAKE

By James H. Strimple, Jr.



Recently, I completed a two-year interim position as the Assistant Superintendent for Business at a K-8 school district with nine schools and nearly 8,000 students. Upon arrival, I learned that the district was in the midst of an Energy Savings Improvement Program (ESIP). Many districts use ESIPs to make infrastructure improvements

without having to go through the referendum process and incurring debt. An ESIP can be an attractive means of accomplishing much needed improvements, securing partial grants, and reducing the portion of the budget used for non-instructional operations (for more information on ESIPs please visit this [website](#)).

The Board of Public Utilities allows school districts to use various options in implementing an ESIP:

- Districts can hire an Energy Services Company (ESCO) to handle all aspects of the program;
- Districts can hire an architect, engineer, or consultant, to facilitate a “do-it-yourself” (DIY) approach; or,

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## ROOT CANAL *continued from page 10*

own thoughts, but it is truly overwhelming when you hear Jim talk about all the procurement laws and regulations we have to know to fully comply with one of our most important responsibilities as a school district: Purchasing Agent.

You may have heard me say this before, but if there is one area of responsibility that will get you in trouble, I guarantee it probably will have something to do with procurement. Whether it's in your annual audit as a comment or part of audit findings done by the State or the Feds, purchasing violations most often are mentioned, resulting in corrective action plans that the news media love to publish.

Love him or hate him, this is where Jim's passion best serves our profession. I don't expect anyone to leave Jim's programs and run back to the office and fix everything. But, as you attend these sessions, decide what you can address and make changes. Don't let “that's the way we've always done it” get in the way.

I often find that we take the easy way out when it comes to procurement compliance. We use State

Contract, and that's fine, but don't simply take the vendor's word that they have a State Contract. They may have a State Contract, but does it actually cover the items you are purchasing? Check the notice of award for the effective date and items covered by that award.

Understand the aggregation principle, which requires you to make quote and formal bidding decisions, not on one purchase, but for anticipated purchases throughout the year.

Fundamentally, our purchasing laws require us to be unbiased, fair, and open when we spend taxpayer money. Get quotes and document them with emails, newspaper ads, letters, etc. You know the old saying, “when in doubt, bid it out”. Following the bid process is the safest way to cover your (ugh) responsibilities. Don't take the easy way out if you are not sure if a procurement qualifies as a professional service or some other exemption under Title 18A.

Remember, your first job is not to save money, it is to comply with state laws and regulations!



## GOING DIY ON AN ESIP CAN BE A MISTAKE *continued from page 11*

- Districts can use a hybrid of the previous two options.

Although an ESIP is a valuable option for schools, my two-year experience in monitoring this program has convinced me that districts should carefully determine if the DIY approach is the best way to achieve their desired results.

The district initially chose the DIY method (before my time there) because it seemed that it would save money. However, with all of the parties involved (margin stacking), and significant unexpected costs, I believe hiring an ESCO would have been less costly and far more effective.



### **Multiple Projects, Multiple Points of Contact**

The district engaged an architectural firm that then hired an engineering firm, who then hired a third-party to oversee the project on a daily basis. By taking on the ESIP through the architect, the district actually took on four construction projects at its nine schools. The projects included lighting retrofits in all of the schools, boiler and hot water heater replacements in several schools, building management system upgrades, and improvements to the electrical distribution system.

The district had to follow New Jersey purchasing guidelines, which meant it had to go out to bid for the four projects, and had to take the lowest responsible bid for each one. As a result, the district now was the owner – like for any other construction project – and all of the responsibilities and problems that can arise also were the

district's to resolve. This meant attending four job meetings every two weeks, processing and reviewing monthly pay applications, verifying that appropriate wages were being paid, maintaining of files for insurance and, inevitably, the involving of board counsel. Time is a very valuable commodity to school business administrators, and this project took too much of my time that should have been spent on other issues.

In contrast, if the district had chosen the ESCO route there would have been a single point of contact for the entire project: the Energy Services Company. I believe this could have saved significant time for myself and the district, enabling us to manage one contract and allow the ESCO to manage contractor issues, rather than the significant close-out problems with which we struggled.

The district ended up facing many of the issues that a business administrator encounters when managing a construction project. We had a poor mechanical contractor, which required us to involve board counsel (more expense) and the contractor's bonding company. Several change orders had to be issued, and additional funds beyond those estimated for the ESIP project had to be allocated. This could have been avoided with the ESCO model, which allows for a fixed-price contract, reducing financial risk, as the ESCO is responsible for any contractor change orders.

When I left at the end of my two years, all of the projects had not yet been closed-out. Based on my experience, it just does not make sense for districts to use the DIY approach to implement ESIP projects. Rather than going out on their own, partnering with an ESCO seems to make a lot more sense.

*James Strimple is a former School Business Administrator who, in addition to having served as the Interim Assistant Superintendent for Business at the K-8 school district described in the article, also is a Principal with Puleio & Strimple Educational Consultants. James can be reached at 732-343-4405, or via email at [strimps44@yahoo.com](mailto:strimps44@yahoo.com).*



## RECENT DEVELOPMENTS IN FINANCING ESIPS

By Mary K. Lyons

Many districts have implemented successful Energy Savings Improvement Programs (ESIPs) since the law's inception in 2009. District ESIPs have included LED lighting, unit ventilators, boiler upgrades, controls and motor replacements, building envelope, and management systems. ESIPs have ranged from \$200 thousand to \$20 million, and have been financed from 10 to 21 years through both lease purchase agreements and energy savings improvement bonds. Energy and maintenance savings, Clean Energy Program (CEP) and utility rebates, and savings from Power Purchase Agreements (PPAs) have provided funds for payment of principal and interest.

ESIPs remain a popular "self-funding" method of generating energy savings for New Jersey school districts, with many districts having undertaken Energy Conservation Measures (ECMs) they may not have otherwise implemented. As some of the initial ESIPs have matured however, changes in ESIP guidelines, financial markets, and actual district experience in reaching BPU targets suggest that districts now considering ESIPs do so with some caution. If anticipated future ESIP revenues are not realized, principal and interest payments still have to be paid.

ESIPs can be very successful, but some of the underlying assumptions integrated into cash-flow projections should be carefully developed and vetted. These include assumptions related to rebates, financing terms, and non-energy savings assumptions.

### Rebates

Rebates typically assumed in ESIP cash-flow projections include Direct Install Incentives, Pay for Performance (P4P) rebates, Combined Heat and Power (CHP) subsidies, and miscellaneous utility company and utility cooperative incentives. Of these, P4P and CHP rebates, funded by the CEP through the New Jersey Board of Public Utilities (BPU), generally are the most valuable and constitute a great percentage of overall ESIP revenues. They typically have been included in cash-flow projections as revenues available to

pay financing costs. These rebates generally are distributed in three installments with a small first payment to offset the cost of generating an energy reduction plan application, and the second and third installment roughly equal, with the second expected approximately six months after completion of the ESIP, and the third after twelve months.

The third incentive, however, is based on actual, measured energy usage, post-ESIP, and is paid only if the district achieves the minimum CEP goal of 15 percent energy savings. Additional time may be granted by the CEP to achieve this goal, but if a district cannot meet the requirement, the third incentive may be less than originally anticipated or even forfeited. The timing of these rebates also can be delayed from original assumptions.

A few districts that have undertaken ESIPs have had problems obtaining their projected P4P and CHP rebates in full, or experienced delays in their receipt. Because these rebates were included in the initial cash-flow projections as available revenues, their delay or reduction required these districts to find other budgetary sources to subsidize principal and interest payments. Districts also should be aware that guarantees often provided by energy savings companies retained to help implement ESIP programs **typically cover energy savings only, and not rebates.**

Based on the lessons from these earlier ESIPs, many districts now only include a portion of the projected rebate amounts in their initial cash-flows or assume that the third rebate will not be received at all. This may reduce the size and scope of the ESIP, as the supportive projected revenues will be less, but eliminates cash-flow problems down the road. Additionally, providing some "cushion" over the first few years of the financing term can help mitigate any unexpected deficit in overall projected savings and rebate revenues.

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### Financial Markets

Rising interest rates and changes in the tax code generally have made financing ESIPs more costly. Most ESIPs have been financed through long-term lease purchases, but due to changes in the federal tax code (which has made tax-exempt debt less valuable to banks), 15-year ESIP lease purchase interest rates have increased almost 100 basis points from this time last year. Rates for general obligation bonds also have increased, but at a slower pace, approximately 50 basis points for a 15-year bond series.

Banks also have been more reluctant to finance longer lease purchases. The number of banks now willing to enter a 20-year ESIP lease purchase agreement is quite limited, and often only with untenable loan stipulations. This is relevant to the scope of ESIPs because districts often are pressured to consider including Cogeneration ECMs, which allow for a longer financing term. The extension of the loan term can increase the size of the ESIP (more years to pay it back), but may not make sense given a realistic useful life assessment of the ECMs and inflated interest costs for a 20- versus 15-year financing term.

Districts now considering ESIPs should first be aware of the changing financial environment and make sure that the initial cash-flows include reasonable borrowing rate assumptions. It is helpful to do this early in the ESIP development process to avoid having to reduce the scope at the last minute. Looking at both lease purchase and bond financing, particularly for longer-termed ESIP, also is advised.

Bond financing, which is more involved and has higher costs of issuance can, nevertheless, result in lower net interest costs, and can be issued to fund ESIPs eligible for financing terms of 20 years or more. (The maximum term for an ESIP that includes Cogeneration ECMs is 20 years, plus an allotment for the construction period, which may be 1 to 2 years.)

### Non-Energy Savings Assumptions

In addition to energy savings, projected maintenance savings and a decrease in paid utility costs due to a PPA for solar or other renewable energy equipment, often are included in revenue projections for ESIPs.

Regarding savings in utility costs due to PPAs undertaken as part of an ESIP, although PPAs are once again providing some reductions in future electric/gas bills, districts are urged to make sure projections are valid. At the very least, PPA bid responses should be received, and savings confirmed, prior to financing. Banks providing lease purchase financing will not, in fact, finalize financing until any relevant PPA is signed and executed.

Districts also should be aware that the BPU, which must approve ESIP cash-flow projections, is now less lenient in its review of maintenance savings projections, usually limiting those savings to three to five years. Earlier ESIPs often included projected maintenance savings for the full term of the ESIP.

### Conclusion

ESIPs have provided New Jersey School Districts with a “self-funding” financing opportunity to enact energy savings in their buildings and carry out needed facility and equipment improvements that may have been difficult to undertake through a traditional referendum process. The scope and size of an ESIP, however, often is predicated on energy and financing assumptions over a long period of time. Economic conditions change however, and initial assumptions should be informed and conservative to make sure the ESIP remains self-funding into the future.

*Mary K. Lyons is Managing Director for Phoenix Advisors LLC. Phoenix Advisors works with state, county, and local governments, as well as school and fire districts, to successfully obtain financing to enhance and protect communities. Mary can be reached at [mlyons@muniadvisors.com](mailto:mlyons@muniadvisors.com).*

## IMPLEMENTING AN ESIP AT SOUTH BRUNSWICK SCHOOL DISTRICT



After significant planning, and having received state approval in October 2016, the South Brunswick School District (SBSD) began implementing energy conservation measures in all 14 of its buildings through the New Jersey Energy Savings Improvement Program (ESIP) in the spring of 2017. SBSB's ESIP is the largest such program implemented by a school district in New Jersey.

SBSD has approximately 8,580 students enrolled in its schools for the 2017-2018 school year. The district includes seven elementary schools for students in pre-K through fifth-grade, a two-campus middle school for students in grades six through eight, and a high school.

The district's ESIP project includes 102 measures, which encompass numerous upgrades to the mechanical, electrical, and plumbing systems in all of the district's buildings. The projects were identified by an audit conducted by DCO Energy. The audit identifies the current energy use and the energy conservation measures that can be implemented to produce energy savings.

DCO Energy is an approved energy services company under New Jersey ESIP, and is managing the program at South Brunswick.

When completed, the upgrades are expected to save the district more than \$1.4 million annually in energy costs; 49 percent of that savings will come from solar energy. The district also will receive \$920,064 in energy incentives from the state. The

district's annual energy costs were \$2,369,283, before the upgrades.

### Enhancements and Improvements

The SBSB administration and Board of Education broke the \$27,322,163 needed for the project into two "tranches", or portions, which helped demonstrate budget certainty and enabled the district to secure a lower interest rate. Initial funding for the project was obtained in December 2016, and then again in April 2017, after the district secured a 15-year solar power purchase agreement (PPA). The PPA enabled the district to determine exactly how much energy it would generate and estimate its long-term cost savings. By funding half of the ESIP project at a time, the district saved \$150,000 in interest.

"Because we have opted to take advantage of New Jersey's ESIP, we have been able to make infrastructure improvements and other enhancements district-wide, without going through the referendum process and incurring debt," explained SBSB Superintendent of Schools Scott Feder. "These changes not only address needed capital improvements, but they create a healthier, more comfortable climate for our students and staff, and help us become much better stewards of our environment." Feder was named Superintendent in July 2017, after the ESIP was underway.

SBSD Business Administrator David Pawlowski also joined the district (September 2018) after the ESIP was in motion. Although only involved for a few months, Pawlowski has gained a lot of knowledge about the ESIP very quickly. He and Todd Amiet, Director of Buildings and Grounds, have some advice for anyone considering getting involved in such a project.

### ESIP Advice

"It is really critical that you have a buildings and grounds director who knows construction, can actively manage the project and be able to deal with everything that comes his way on a daily

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## IMPLEMENTING AN ESIP

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basis,” said Pawlowski. “And you have to have a good relationship with that person. The building and grounds director will hear all of the issues first, and then you both have to fix them together. That person has to be a good communicator; they have to have the relationship that enables them to really talk to the BA.” He said there are lots and lots of construction issues that develop. “You have to be able to manage change orders, vendors, contractors – all of it,” noted Pawlowski.

He also said there are “issues” that come up that really are not part of the construction, but are related. “The BA has to manage time, school principals, and the buildings, as well as the community. There are important evening meetings with community members and the company building the ground-mount solar fields, because of where they are placed on the property. You must manage the community relations well.”

Amiet also noted, “We have PARCC testing going on while they are installing solar panels on the roof. I work with the building principals, the testing coordinator, and the contractor to identify where they can be and where they can’t be on the roof, so there is no interruption of the testing.” He said this is such a big project that there is a second shift of contractors who come in to work at night, so there is less noise for the students and teachers during the day.

Pawlowski also explained there are times when everything overlaps. “Like when you have to shut down a high school building for a whole summer, you have to coordinate with camps, practices, summer classes and programs,” said Pawlowski. “Everything has to be relocated.” As Amiet also noted, “There is going to be a lot of action around here this summer. This probably will be the busiest summer I’ve had.”

Amiet said he is the liaison between the contractors and the BA. “I see myself as support staff for my customers in the buildings – students and staff. My job is to provide a safe, healthy, and clean space every day for the students and staff.”

Amiet said it is critical in managing a job as large as the SBSD ESIP to be a good coordinator, have a great general contractor, and to be “overly organized.”

In addition to hoping you have a great building and grounds director, Pawlowski has other advice. “I always add three or four months to whatever timeline the contractors give me. Construction always is going to run behind.” He said it also helps if you can “speak contractor”!



### **Build Relationships; Keep a Sense of Humor**

Pawlowski’s other advice is to make sure you build good relationships and keep a sense of humor.

He reiterated the critical importance of having a good relationship with the building and grounds director, and he said it also is important to handle everyone involved the same way. “You have to go in assuming everyone is doing their best. You are going to be working with the construction team for two or three years, you have to build those relationships. If problems arise – and they will – you need to have a good relationship with everyone.”

Pawlowski suggests meeting and sitting down with all of the bid winners in a project of this magnitude. “Set the relationship tone from the beginning,” said Pawlowski, “set-out your expectations for them, and get their expectations of you and the district.”

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## IMPLEMENTING AN ESIP

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Amiet said that a key element of the process is “careful vetting” of the general contractor. “It takes a lot of trust and coordination,” explained Amiet.

“In the end,” said Pawlowski, “you know all of the hard work will pay off for everyone. We will see a dramatic improvement in our air quality, temperature, and consistency. South Brunswick will become much more energy-efficient and the savings generated will be enough to finance the enhancements.”

Amiet agrees. “We are really excited about this project. Super ecstatic. The ESIP will put us in a really good place. We are changing out every light to be an LED lamp – there is no complicated recycling needed for those. We are putting in a co-generation unit at the high school that will use natural gas, and the heat from that unit will help heat water, so we will use the water heaters less, which will save energy. The project is putting in more efficient water heaters in some locations, and we are converting our two oldest buildings



from steam heat and window air conditioners – which are so inefficient – to a two-pipe system for heating and air. And there is so much more. This just doesn’t usually happen,” said Amiet.

But Pawlowski goes back to his last piece of advice: “Push your contractors to stay on their timeline, and keep a sense of humor – you are going to need it.”

## 56<sup>TH</sup> NJASBO ANNUAL CONFERENCE

The 56th Annual New Jersey Association of School Business Officials Annual Conference will be held at the Borgata Hotel in Atlantic City on June 6 through June 8, 2018. [Registration](#) is open!

The Conference offers three days of workshops, information exchange, networking, and catching-up with colleagues and associate business members.

Don’t forget there is a kick-off luncheon on Wednesday, June 6, with a student performance by Morris County School of Technology. NJASBO President Susan Young will welcome everyone, and then we will hold our annual award ceremony, induct our new officers, and incoming President Matthew Clarke will share his thoughts.

Thursday’s dinner includes the introduction of our Past Presidents; there are receptions and activi-



ties on Wednesday and Thursday evenings. Don’t forget brunch on Friday! Our guest speaker is Garrison Wynn – check out the sidebar on Wynn on page 18. He is a funny, interesting, motivating speaker you won’t want to miss!

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## NJASBO ANNUAL CONFERENCE

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Of course, the workshops are the big news – they are timely and we think you truly will find them enlightening. There is a full list on the website, but we thought we would share just a few with you here.

Related to the theme of this issue of *KeyPost*, there are two workshops on ESIPs (Energy Savings Improvement Programs). You can be a part of the studio audience for a Family Feud on ESIPs. Three energy services companies will be part of the Feud. You will also hear from state officials on the best practices and pitfalls of implementing an ESIP. The second program is a panel discussion with our colleagues on why and how to use an ESIP. The panel will discuss the processes they used, along with what they learned, both the positives and negatives. This session is your opportunity to understand the process and to ask any questions.

Always a hot topic, NJASBO Consultant Mort Reinhart will present a clinic on New Jersey Pension Systems and how they impact you as a member, as well as the employees in your district.

A session on Student Residency & Homelessness Issues will include an overview of the state statutes and regulations related to student residency in New Jersey, the state and federal

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### A BRUNCH SPEAKER SURE TO ENTERTAIN AND GET YOU THINKING!

Noted motivational speaker Garrison Wynn will bring his extensive business and organizational experience – as well as his comic timing – to our members at the NJASBO Conference on Friday morning, June 8.

Wynn is a fascinating person. In addition to being a speaker, advisor, and author, he also has a background in manufacturing, telecommunications, financial services and entertainment. As a teenager, Wynn worked with baseball legend Hank Aaron and Magnavox to promote the world's first video gaming system. By the age of 27, he had become the youngest department head in a Fortune 500 company's history. He has dug ditches and survived a chemical plant explosion. His background in industrial instrumentation helped him develop and market industrial products still being sold in 30 countries. Plus, Wynn has two film credits to his name, spent six years touring as a stand-up comedian, and hosted television specials and national radio programs.

And that's not all! He has written books. The most recent, published by McGraw-Hill and entitled "The Real Truth About Success", is available online and in bookstores. He also authored the Amazon best-seller, "The Cowbell Principle". He has written numerous articles for business journals, made weekly contributions to *The Washington Post* and co-authored a book with Stephen R. Covey, Ken Blanchard, and Jack Canfield.

Wynn has given keynote presentations to clients (American Express, Wells Fargo, Oracle, and NASA, among many others) at corporate and association events. And now, he will be speaking to us!

We think his down-to-earth, relatable style includes a strong mix of humor and realism that entertains as it educates. Beyond that humor, Wynn delivers high-impact, motivational programs that answer the big question that everyone wants to know: How do you get people to do what you want, when you want?

This is a brunch you do not want to miss!



## SBA OF THE YEAR SURPRISE

On April 25, NJASBO Executive Director John Donahue and several officers surprised Louis J. Pepe, RSBA, Assistant Superintendent for Business at Summit Public Schools, at a district administrative meeting to congratulate him for being named School Business Administrator of the Year! Pictured from left, NJASBO President-Elect Matthew Clarke, President Susan Young, Pepe, Donahue, Second Vice President Phil Nisonoff, and Summit Superintendent of Schools June Chang.

## DEMO DAY AT MIDDLE TOWNSHIP SCHOOL DISTRICT

BA and NJASBO Vice President Diane Fox (right) and Laura Bishop, NJASBO Public Relations, celebrated the demolition of a 49-year-old "temporary" building at Demo Day. This is the next step in Middle Township School District's construction project funded by a successful Bond Referendum in 2016.



## NJASBO ANNUAL CONFERENCE

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laws concerning student homelessness, including the McKinney-Vento Homeless Assistance Act, and how to define homeless pupils. Additional discussion will highlight such disputed issues as tuition/transportation costs, group homes, DCF custody, financial responsibilities for special education costs where residency is at issue, and best practices for documenting homelessness/residency issues.

Do you have a "cyber storm emergency plan"? Not even sure what that would include? We have a workshop for this too! Rick Hillman and Tanya Dawson will talk about their experiences as shared administrators of two districts. Despite these districts being across the street from each

other, they will show how they are dissimilar in their cyber risk profile and how they developed a must have, must know, and must be kept up-to-date list of IT-related facts in order to recover from a cyber event. Washington Township (Gloucester County) had a Cyber Audit conducted in its district in the summer of 2017, and will discuss how the audit helped to identify unknown risks and the changes used to minimize them. The white paper that was created from the two member district audits will be discussed and distributed.

Imagine – these are just a selected few of the 20 workshops available at the conference. Register today. NJASBO's goal is to provide you with a diverse experience. Enjoy!



## REPORT FROM THE IMMEDIATE PAST PRESIDENT OF ASBO INTERNATIONAL

By Anthony N. Dragona, Ed.D.



As we head into a late arriving spring season, I am pleased to provide this update on what has been happening at ASBO International.

### Committee Appointment

Congratulations to Louis Pepe, Assistant Superintendent of Business,

Summit Board of Education, for his appointment to serve on the ASBO Editorial Advisory Committee. Lou received the appointment at the February Board of Trustees meeting in Austin, Texas. Lou brings a keen insight and years of editorial experience to the committee, which comprises 13 members from New York, Missouri, Illinois, Virginia, Pennsylvania, Iowa, Arizona, and Victoria, Australia.

The editorial advisory committee works toward providing relevant articles for publication in *School Business Affairs*, ASBO International's monthly print magazine. Want to share your story or have an interest in submitting an article for publication? Ask Lou how to get started down the road to being featured in an upcoming *School Business Affairs*.

NJASBO is represented on the following committees:

- Certificate of Excellence – Brian P. DeLucia, Chairman
- Certification Commission - Dennis J. Nettleton, Member
- Editorial Advisory Committee – Louis Pepe, Member
- Audit, and Ethics Committee – Anthony N. Dragona, Ed.D.

### Volunteerism Model

In 2015, ASBO International implemented a volunteerism model with the goal of encouraging

greater member participation. The previous committee structure had specific guidelines and responsibilities that limited member activity. Through the volunteerism model, the Annual Meeting and Exhibit Committee was disbanded and replaced with 14 Content Area Committees comprising more than 400 volunteers.

The Content Area Committees meet at the Annual Meeting to discuss potential topics and to solicit presentation proposals for the subsequent year's conference. New Jersey is represented by nine members on the Content Area Committees. If you would like to help shape the agenda for a future Annual Meeting, why not volunteer for a Content Area Committee? The content areas are: Accounting, Auditing, and Budgeting, Purchasing and Supply Management, Risk Management, School Food and Nutrition Management, Human Resources and Labor Relations, Legislative Affairs, School Finance, Global Affairs, Legal Aspects, Pupil Transportation, Sustainability, Management Techniques, Professional Development, and School Facilities Management.

### New ASBO Headquarters

For many years, ASBO International has called Reston, Virginia, home. The Reston building, constructed in the 1960s, was owned by ASBO International and in need of significant repairs. In 2017, the Board authorized the sale of the building and, subsequently, a purchaser closed on the property in February 2018.

A new office condominium has been purchased in Ashburn, Virginia, in Loudoun County. Ashburn was named No. 22 in the top "50 Best Places to Live 2016" and No. 1 for job growth in the U.S. by *Money* magazine. Home to the Washington Redskins' team headquarters, Ashburn's amenities include downtown One Loudoun, where people in the Loudoun County community gather. Loudoun County is the wealthiest county in the U.S. with a median household income of \$123,966, according

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## REPORT FROM ASBO INTERNATIONAL

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to U.S. Census data. Housing is pricey, according to *Money*, with the median home value through July 2016 at \$415,000. ASBO International will be downsizing its office space and has purchased one additional office space that can be sub-leased. The new office space soon will be constructed on the second floor at Maynard Square, Ashburn, VA. I will keep you updated on the progress and the anticipated grand opening.

### Future Annual Meeting Locations

The request for proposals for future Annual Meetings (2021 and 2022) have been returned, and the staff has been busy in finalizing the details for the top three cities. The RFP responses reveal that Pittsburgh, PA, Milwaukee, WI, and Portland, OR provide the best opportunity and offer a wonderful experience for both outstanding professional development and community cultural activities. In response to member feedback and post conference surveys that demonstrated that attendees would prefer an experience that did not extend through two calendar weeks, ASBO International will be exploring a Wednesday to Saturday configuration.

### Upcoming Events

#### **Emerging School Business Leaders**

**Scholarship** - Any school business official who has been in the profession for five years or less as of the application due date is eligible. You may be awarded a \$2,000 scholarship to be used for Annual Meeting & Expo registration: \$695 and ASBO International membership (if recipient is not a member): \$225. A check for the remaining amount is awarded to the recipient to help defray the cost of attending the conference. Recipients complete a Travel Stipend Reimbursement Form indicating if the check should be made out to the school district or the recipient. Consider [applying](#).

U.S. Communities is proud to support the professional development of new school business officials by sponsoring the Emerging School Business Leaders Scholarship.

**Eagle Institute July 10-13 Philadelphia, PA** – Limited to 50 participants – An insightful look at how the framers of the constitution came together to craft a document that still lives on today, and how those lessons learned in 1787, can be utilized as we lead today.

**Joint Legislative Conference – July 10-13 Washington, DC** – American Association of School Administrators (AASA) and ASBO International bring together school superintendents and school business officials for a two-day workshop discussing key legislation that can impact education, while providing a day on the “Hill” to meet congressional leaders and staff.

**Annual Meeting and Expo – September 21-24, 2018 in Kissimmee, FL** – Mark your calendar! You have a chance to win 1 of 16 FREE registrations and a meet and greet with Sally Hogshead, the first General Session speaker. For more information check out the [website](#).

### In Closing

Since my last update, I have attended the Texas ASBO conference in Fort Worth, TX, Pennsylvania ASBO conference in Hershey, PA, where the NJASBO Executive Committee represented you, and California ASBO in Sacramento, CA. Looking ahead to May, I will be attending the annual meeting of our Canadian affiliate in British Columbia in Penticton, Canada.

I am proud to represent you and share the many successes you have achieved in your school districts.

*In addition to being Immediate Past 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](mailto:adragona@ucboe.us).*