Wednesday, September 26: *Wednesday Webinar* with RUVNA - **SAVE THE DATE!**

Thursday, September 27: PAISBOA Welcome Back BBQ! - **REGISTER TODAY!**

Tuesday, October 2: PAISBOA Data Survey Webinar Q&A - **SAVE THE DATE!**

Thursday, October 11: Impact Investing with Glenmede - **REGISTER TODAY!**

Wednesday, October 17: Purchasing Consortium Breakfast - **REGISTER TODAY!**

Wednesday, October 17: Organizational Health Day with Scott Barron - **REGISTER TODAY!**

Thursday, October 18: Plant Managers Meeting - **REGISTER TODAY!**

Wednesday, October 24: *Wednesday Webinar* with GradFin - **SAVE THE DATE!**

Wednesday, October 24: Sustainability Group at SCH - **REGISTER TODAY!**
Thursday, October 25: Lunch and Learn with ATLIS - REGISTER TODAY!

Tuesday, October 30: Vendors Breakfast - REGISTER TODAY!

Wednesday, November 14: PAISBOA Business Insurance Group Annual Meeting - REGISTER TODAY!

Thursday, November 28: Wednesday Webinar with SchoolDoc - SAVE THE DATE!

Friday, December 7: HR Day - SAVE THE DATE - REGISTER TODAY!

Thursday, December 13: Plant Managers Meeting - REGISTER TODAY!


FROM THE EXECUTIVE DIRECTOR

SEPTMBER 7, 2018

What Did You Read This Summer?

I love to read! For as long as I can remember, I have had a summer reading assignment. In the beginning of my educational journey, there were required summer reading books that would prepare me for the upcoming school year. Somewhere around high school we had some required books to read and a list of books from which we could choose. I read them all!

When my kids started school and had their own summer reading assignments, I read their summer reading with them — we read everything from Call of the Wild and the Harry Potter series to The Bridge to Terabithia and the Twilight series. I also read The Good Earth (again) and Cold Mountain — both of which my daughter and I struggled to get through. We are a family of readers!

This summer, my daughter, who teaches at one of our PAISBOA schools, was the only one with required reading — The Energy Bus by Jon Gordon. So, I read The Energy Bus too!

In The Energy Bus, we meet George, a “corporate zombie” who encounters Joy, a unique bus driver and the “cast of characters,” who over the course of two weeks impart ten rules for the ride of his life. This two-week trip changes George’s life while saving his job and his family in the process.

It was a quick read for Meaghan and me, and made us think about the life we want to lead and the choices we make — Do we want to be an “energy vampire” or live a life of positive energy filled with optimism, trust, enthusiasm, love, purpose, joy, passion, spirit to live and work, and perform at a higher level; to build and lead successful teams; to overcome adversity; to share contagious energy; to bring out the best in others and yourself; and to overcome all the negative people and situations that threaten to sabotage your health, family, team and success?”

Here are Jon Gordon’s “10 Rules for the Ride of Your Life"
1. **You’re the Driver of Your Bus.** If you don’t take responsibility for your life, and control of your bus, you are at the whim of everyone else’s travel plans.

2. **Desire, Vision, and Focus Move Your Bus in the Right Direction.** Stop thinking about what you don’t want and focus your energy on your vision and what you do want.

3. **Fuel Your Ride with Positive Energy.** We can’t control the events in our lives, but we can control how we perceive them; our perception and response determines our outcome.

4. **Invite People on Your Bus and Share Your Vision for the Road Ahead.** If you don’t clearly communicate your vision of the road ahead, no one will want to travel with you.

5. **Don’t Waste Your Energy on Those Who Don’t Get on Your Bus.** You can’t drive anyone else’s bus; you can only drive your own bus.

6. **No Energy Vampires Allowed on the Bus.** We need a positive, supportive team, and if you are not going to be productive and contribute to the vision then you’re off the bus.

7. **Enthusiasm Attracts More Passengers and Energizes Them During the Ride.** Chief Energy Officers tap the power of their heart by getting excited about being alive, filling up with positive energy, and by being optimistic about life and work. They don’t let fear stop them.

8. **Love Your Passengers.** Share love generously with care and concern about their future and welfare.
   - a. Make time for your passengers
   - b. Listen to them
   - c. Recognize them
   - d. Serve them
   - e. Bring out the best in them

9. **Drive with Purpose.** Purpose is the ultimate fuel. Purpose keeps it fresh.

10. **Have Fun and Enjoy the Ride.** Live and work like you have nothing to lose and everything to gain.

As we begin this new school year, I hope you are thinking about your bus and your passengers — I know I am. In addition to **Ron Hill**, our Operations Manager, we have added two new passengers to the PAISBOA Bus this summer.

**Sara Evans** is our new Project Manager. Sara has worked in independent, boarding and day schools in New England for many years before moving to the area, and worked with me at PAIS as the accreditation assistant where she supported the accreditation efforts of schools all over PA and DE. Sara has been working with Ron and me on various projects this summer including a database that will help us track all our consortia transactions and will ultimately enable member schools and vendors to get information in real time. You can reach Sara at projects@paisboa.org.

**Rachel Tilney** will be joining us in October as the Consortia Manager. Rachel has been in independent schools and non-profits for her entire career — mostly in advancement and enrollment management. She has worked in both day and boarding schools in New England and the Mid-Atlantic regions. Rachel was a colleague from Episcopal Academy, and she served with Lisa Carbone Warren at Moorestown Friends. She served with Carolyn Hapeman on a couple of PAIS accreditation committees, and attended the PAISBOA HBT meeting in August to meet with Mark Gibbons and some of the other business officers in attendance. Rachel has years of successful relationship-building experience which will serve us well as she takes the helm of the PAISBOA Consortia. You can reach Rachel at consortia@paisboa.org.

Now that we have all our passengers on the PAISBOA bus, we will be heading out on our listening tour. Our first stop will be with Rose Neubert at Stuart Country Day School of the Sacred Heart in New Jersey. We are inviting local Business Officers and their teams to join us for lunch and conversation in October/November. In addition, we’ll be making other stops on our listening tour as we schedule stops in a town near you. If you would like to host a lunch at your school, please contact Sara Evans at projects@paisboa.org to confirm a date.

I hope your opening week was smooth and all your summer projects came together before the students arrived — Cheers to a terrific 2018-2019 academic year!

Take advantage of the Power of the Flock!

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https://mail.google.com/mail/u/0/?ui=2&ik=ba45b70674&jsver=UOKBNK1_NG8.en.&cbl=gmail_fe_181104.12_p2&view=pt&search=inbox&th=16709… 3/10
PAISBOA Annual Data Survey Continues; Have YOU Started Yet??

The 2018 PAISBOA Annual Data Survey is well underway, and hopefully you are moving forward through your survey with relative ease. Please remember the following CRITICAL DEADLINES:

- General Survey: Friday, October 5.
- Salary Survey: Friday, October 12.

To give you some help, we have scheduled two 30-minute Q&A Webinars with our “Survey Gurus.” Look for your ZOOM link the day before each webinar! Those dates are:

- Thursday, September 20 at 2pm
- Tuesday, October 2 at 10am

Helpful Hints from Our Gurus!

Speaking of our Survey Gurus, Tom Devine of Merion Mercy Academy, one of our Gurus who also serves as PAISBOA Board Secretary, has come up with some Helpful Hints to make it easier to tackle parts of the Survey. Kudos to Tom for offering up these pointers:

READ MORE

Don't Miss Our Welcome Back Barbeque!

Please join us for PAISBOA’s First Annual Welcome Back Barbeque! Set for Thursday, September 27, we’ll be offering a huge helping of delicious delights from Mission Barbeque along with a tasty side order of “Fiduciary Compliance” sponsored by Carroll Consultants.

Are you aware of your Fiduciary responsibility regarding your school’s Retirement Plans? Our panel of experts from Carroll Consultants will take us through their easy-to-understand Fiduciary Compliance Checklist, compiled by the Department of Labor.

This will be our first social event of the new school year, so don’t miss out! For more information, or to register, CLICK HERE. We look forward to seeing you!

Impact Investing Workshop Sponsored by Glenmede October 11

Please join us on Thursday, October 11 as PAISBOA presents a special program on Impact Investing. The seminar, sponsored by Glenmede, will be held at the PAISBOA Offices in Radnor Township.

A growing number of investors have discovered that environmental, social, and governance (ESG) factors can be incorporated the investment process and add value to the portfolio. Research has resulted in an exciting new era in the discipline of impact investing. A spectrum of approaches has emerged,
from identifying companies that adopt ESG-aware policies and practices to direct value-based investing. The result is more and more institutional investors are building impact criteria into their investment process.

Don't miss this fascinating workshop! To register, or for more information, CLICK HERE.

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**Scott Barron to present Organizational Health Day**

How Healthy Is Your School? Please join us as Scott Barron of School Growth presents Organizational Health Day on Wednesday, October 17. Take our check-up as he presents the Three "Core Components" of your school's Growth Engine and gives us insights into what a High Performing Leadership Team looks like.

Look for more info in the days to come! SAVE THE DATE!! CLICK HERE to Register

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**Lunch and Learn with ATLIS October 25**

We're bringing together Business Officers, Tech Directors and other interested administrators for a Lunch and Learn on Thursday, October 25. In association with our partner organization ATLIS, Don't Work Alone: How Business Officers and Technology Directors Can Work Together to Manage Risk is an interactive program designed to promote a better understanding of the trends facing independent schools in the area of technology and risk management. READ MORE HERE!

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**WEDNESDAY WEBINAR: Ruvna - Sept. 26**

Our next Wednesday Webinar will feature Marshall Singer of Ruvna on Wednesday, September 26 at 10 a.m. One of our newest Business Services vendors, Ruvna is a real-time school safety platform that enables schools to locate and account for students and staff, chat live with faculty, and get help to those in need quickly, safely, and accurately during emergencies and drills. Ruvna replaces paper-and-clipboard emergency rosters, eliminating the need for paper rosters, red/green cards, walkie-talkies, and more. Schools also use Ruvna to speed up monthly fire drills and streamline staff notifications and messaging.

No registration necessary! Look for your ZOOM link in our next Friday Flyer!

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**Next Meeting: October 18 - Unlock the Secrets to Leadership II**

Our first Plant Managers Meeting of the new school year is set for Thursday, October 18 from 11:30 a.m. to 1:30 p.m. We are pleased to bring back Dean DiSibio, VP of Sales and Marketing for the Philip Rosenau Co., for another installment of his Unlock the Secrets to Leadership series. In this unique workshop, Dean, a US Army Reserve Colonel (Ret.), takes a non-traditional approach to helping others learn about leadership, using movie clips to illustrate the principles that effective leaders must have in order to succeed. Don’t miss this fascinating program! Save the Date and Register Today!
GradFin: A New Resource for Student Loan Consolidation

Along with the cost of college tuition, the total amount of student loans amassed each year is increasing at an alarming rate, and is in many cases a huge burden of debt that can be a heavy load for employees to deal with.

This has become an important issue for all employers, and especially our schools as they hire teachers and employees fresh out of college, and for veteran teachers and employees who are co-signing student loans for their dependent children. GradFin, one of our newest vendors provides a strong range of services and support to employees of all our member schools.

The Primary Objectives of the GradFin program are to provide comprehensive solutions to give borrowers the ability to reduce their debt by refinancing and consolidating their student loans; and to provide a faster and more efficient path for employees to become debt-free, while saving thousands of dollars over the term of their loan.

For a brief overview of our program, download the promotional flyer.

Our contact is Brian Walters, Senior Vice President, Business Development & Strategy. He can be reached at 610-639-7840 or bwalters@gradfin.com. Visit www.GradFin.com for more info.

Back to School Discounts Continue at Fisher Science Education!

Fisher Science Education is continuing their offer of $50 off any order over $250, plus a free gift, to our Purchasing Consortium member schools. For more information, download their infographic, or visit their dedicated promotional website for Purchasing Consortium members!

CDW-G Hosts Informational Webinars on E-Rate Funding

CDWG is offering a series of webinars to help schools maximize their E-Rate funding. In 2014, the program was modernized to better support the ever-expanding needs of connectivity in K12 School Districts. Hosted by Amy Passow, Infrastructure Transformation Business Development specialist, the Webinars will take place on the next four Tuesdays at 12 noon EST. Amy will go over the basics of the program, with a focus on Category 2 or Internal Connections. The promotional flyer contains dates, times, and password links. For specific information about your school's account, contact Thomas Figureido at thomfig@cdwg.com, call 203-851-7220, or visit CDWG.com/paisboa.

PAISBOA HBT Member Reminder:
Extend Your Participation Agreement!

The PAISBOA Health Benefit Trust is inviting all member institutions to extend the Participation Agreement for two plan years beyond the current October 31, 2019 commitment date. By extending this commitment through

https://mail.google.com/mail/u/0/?ui=2&ik=ba45b70674&jsver=UOKBNK1_NG8.en.&cbl=gmail_fe_181104.12_p2&view=pt&search=inbox&th=16709… 6/10
2021, member institutions will empower the HBT to secure advantageous, multi-year contracts with its providers.

The PAISBOA HBT staff is hard at work researching and negotiating future agreements. Having the committed support of all members will be a vital component of our collective strength in dealing with increasingly more challenging health care markets.

Please help the PAISBOA HBT continue its powerful representation of participant health care interests by reviewing, signing, and returning the Extension of Participation Agreement as soon as possible.

Contact PAISBOA HBT Operations Manager, Patrick Hennessy at 484-580-8844, via email at patrick.hennessy@phbt.org if you have any questions.

Sustainability Group to Host First Meeting
October 24

The PAISBOA Sustainability Group will hold its first meeting of the fall season on Wednesday, October 24 at Springside Chestnut Hill Academy. Come learn about connecting your school with nature and the power of Biophilia. To register, CLICK HERE.

Coordinated by PAISBOA and Boyer Sudduth Environmental Consultants, the PAISBOA Sustainability Group is a network of environmental sustainability champions from area independent schools. The group gathers three times a year at member schools, tours "green" campus features at a designated host school, with time to network with peers. At each session, the group discusses a specific sustainability topic over dinner provided by the host school.

If your school is not already participating in the PAISBOA Sustainability Group, please contact Ron Hill admin@paisboa.org or Mary Ann Boyer maboyer61@gmail.com. You can also sign up to receive emails through the group’s e-list. Contact Ron Hill for more information.

Upcoming Meetings: Tuesday, January 15, 2019, at Ancillae-Assumpta Academy; Thursday, April 4, 2019, at The Shipley School. Meetings take place from 5:15 pm - 7:30 and include a tour of the host school’s sustainability features, networking opportunities, and a sustainable dinner. SAVE THE DATES!

Child Abuse Reporting Reminder

Susan M. Guerette, Fisher Phillips

A recent Pennsylvania decision reminds us of the importance of reporting any suspected child abuse. In that case, a student reported to the Headmaster that a coach had been sending her very inappropriate text messages of a sexual nature. Although the student had deleted the texts, and the school was not able to confirm their content, the school was able to determine that the coach had sent the student more than 3,200 texts in three months. During its investigation, the school learned
of two other students who had issues with this coach. The school asked the coach to resign but did not report the alleged abuse. The coach was then hired for another coaching job, ended up texting and having sexual relations with a minor student, and that student sued the school.

The court held that there did not need to be physical abuse to require child abuse reporting, and the sheer number of texts, the student’s allegations, and the rumors about misconduct with other students was enough to create the reasonable suspicion that required a report. Based on this, the judge refused to dismiss the negligence claim against the school and it is proceeding in court.

Schools are facing some tricky issues, and we have had a number of calls about borderline situations. However, this case affirms that if there is any question, the better course is to report the suspected abuse. ChildLine can decide that it does not warrant an investigation, but there are greater risks in ignoring your suspicions. After the school year settles in, schools may want to remind their employees that all school employees are mandated reporters and point them to the school’s policy, which hopefully provides instructions on reporting or directs them to ChildLine’s reporting procedures.

Fisher Phillips provides free advice regarding simple employment related questions to PAISBOA member schools, so please do not hesitate to call if you have questions. Email Susan at sguerette@fisherphillips.com

October is Anti-Bullying Month

Robert Pallini, Willis Towers Watson

In honor of Anti-Bullying Month, it seems like a logical time to discuss the implementation of an Anti-Bullying procedure in your school.

When developing procedures for an Anti-Bullying policy, schools should be sure to include everyone - administrators, faculty, staff, students and even parents to establish a uniform approach to the prevention and proper management of bullying by all parties affected.

The following should be considered when developing an anti-bullying policy:

1. Make sure that the policies and procedures you develop comply with regulations established by the Department of Education. These guidelines should be communicated to staff, students and parents via newsletter or other school publications. The guidelines should also be re-enforced regularly in school through ongoing discussions between faculty and students.
2. Make sure that your message is clearly delivered – Bullying will not be tolerated at any level. Be sure that all staff, students and parents are aware of the code of conduct and the consequences for disregarding the rules.
3. Make the reporting of an incident easy and possibly anonymous. People will be more likely to report an incident of bullying if they can do so without the threat of retaliation. No staff member, student or parent should be afraid to step-up and put an end to bullying.
4. Properly train your staff in the following areas:
   - How to spot bullying or the warning signs that someone could potentially be getting bullied. These signs include physical displays of aggression from one or more students against another, verbal insults or taunting, and public humiliation directed towards a specific student.
   - How to properly report an incident and how to follow-up on a suspected case of bullying. Train your staff in effective ways to intervene without making it overly obvious or embarrassing to the students involved.
   - How to communicate their concerns to the students and parents of the parties involved.
Health Modification Can Increase Retirement Dollars

Marcie Carroll, Carroll Consultants

A top concern for individuals nearing retirement is out-of-pocket healthcare costs. A recent survey revealed that 74 percent (of 1,316 U.S. adults aged 50 or older) admit that one of their top fears is out-of-control healthcare costs, and 64 percent are terrified of what healthcare costs may do to their retirement plans (up from 57 percent in 2015).

Although the fear is clearly real, there is something people can do to mitigate future healthcare costs. Personal care and healthy lifestyle choices can reduce healthcare costs and increase retirement dollars.

Many organizations are initiating wellness programs to promote healthy living among their employees. These programs focus on employee engagement and correcting the health epidemics facing Americans today. Eighty-seven percent of the world's workers are disengaged. Additionally, sedentary office culture is being linked to lifestyle-related conditions such as diabetes and heart disease.

A case study conducted by HealthyCapital follows a typical 45-year-old male (John) diagnosed with high blood pressure. The study showed that John will spend $1,591 more annually out of pocket today versus a healthy person. With a few simple lifestyle adjustments (exercising, limiting alcohol intake, choosing healthy fats and limiting dietary salt) he could save an average of $3,285 annually over his lifetime, extend life expectancy by three years and reduce his pre-retirement (age 50-64) healthcare costs by $65,697. If he invested his annual savings into a typical retirement portfolio, John could generate an additional $100,348 retirement by age 65.

Annual Out-of-Pocket Healthcare Costs:

Moving from an average lifestyle to well-managed living is a clear win - not only does the well-managed person feel better, they also have additional income in both pre-retirement and retirement.

Encouraging employees to live a well-managed life through wellness programs is not only a benefit for employees, but employers as well through reduction in medical-related employee absence and increased productivity and morale.

Founded in the 1950s, Carroll Consultants, Ltd. provides investment advisory, retirement plan consulting and administration services to clients throughout the country. For further information about this article, please contact Marcie Carroll at mcarroll@cclbenefits.com or 610-225-1210.

For more information about the PAISBOA Business Insurance Group, contact Ron Hill at admin@paisboa.org or 484-367-7553, or Robert Pallini at 610-260-4359 or by email at Robert.pallini@willistowerswatson.com.