



PAISBOA

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**Friday Flyer Vol. VII, No. 13 - July 20, 2018**

1 message

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# FRIDAY FLYER

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Volume VII, No 12 - June 15, 2018

## CALENDAR OF UPCOMING EVENTS

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**Wednesday, August 1:** New Business Officers Breakfast - **REGISTER TODAY!**

**Wednesday, August 1:** Health Benefit Trust General Meeting - **REGISTER TODAY**

**Wednesday, August 8:** PAISBOA Summer Barbeque! - **REGISTER TODAY!**

**Thursday, August 16:** Sustainability Teacher Training at Springside Chestnut Hill

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

**Thursday, October 11:** Impact Investing with Glenmede - **SAVE THE DATE!**

**Thursday, October 18:** Plant Managers. SAVE THE DATE! - **REGISTER TODAY!**

**Wednesday, October 24:** Sustainability Group at SCH - **REGISTER TODAY!**

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

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

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

**Wednesday, January 23:** Purchasing Consortium Annual Meeting at the Springfield Country Club - **SAVE THE DATE! REGISTER TODAY**

## FROM THE EXECUTIVE DIRECTOR



July 20, 2018

### Change and Influencers

Change is inevitable! Every year on July 1, many of our schools and universities experience changes in leadership and changes in personnel throughout their communities. While change can be necessary, exciting, and transformative, it can also be unsettling, challenging, and operational. New leaders and colleagues guarantee a shift in the status quo. So, how can new leaders and colleagues navigate their new workplace, and how do current leaders and colleagues create an onboarding experience that gets these new folks off to a good start?

When entering a new community, a person only has one chance to make a first impression, and new leaders and colleagues have an opportunity impact their new workplace right from the start. Embracing the **9 Core Behaviors of People Who Positively Impact the World** can help you be the “maker, shaker, or disruptor” in “powerful and constructive ways.”

On the flip side, the way in which the current team onboards new leaders and colleagues is equally important. As business officers and HR professionals, you have likely become “influencers” in your school or university communities, and as such, you have developed skills that will enable you to successfully onboard new members of the team. Here are some reminders about how you can launch new employees using **7 Ways to Build Influence in the Workplace:**

1. Build trust with co-workers
2. Cultivate reliability through consistency
3. Be assertive not aggressive
4. Be flexible
5. Be personal
6. Focus on actions rather than the argument
7. Listen to others

As influencers, you know the importance of excellent communication and building a strong team. In the past two years, PAISBOA has focused on communication, using the Laws of the Grapevine, and on performance management by highlighting the importance of strategic recruitment, talent acquisition and retention, and employee engagement. This year, we will examine, “How Healthy is Your School?” with Scott Barron from School Growth, Inc. Look for more details in the next Friday Flyer on August 17.

Before then, we hope to see you at the **New Business Officers/HR Breakfast** on August 1 and the first **PAISBOA Summer Barbecue** sponsored by **Carroll Consultants** on August 8. We are fortunate to be a regional association that can gather in person, regularly, to reinforce the bonds of friendship and extend a hand to the new members.

Please join me in a warm PAISBOA welcome to these new business officers:

- Christopher Dwyer**, The Baldwin School
- Gail Crane**, Gwynedd Friends School
- Ralph Ferrara**, Princeton Academy of the Sacred Heart
- Liyan Shen**, Quaker School at Horsham

Take Advantage of the Power of the Flock!



### PAISBOA HBT Member Reminder: Clock Ticking to 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 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, but no later than **August 31, 2018**.

Please do not hesitate to contact PAISBOA HBT Operations Manager, **Patrick Hennessy** at 484-580-8844, via email at [patrick.hennessy@phbt.org](mailto:patrick.hennessy@phbt.org) if you have any questions.

**GENERAL MEETING AUGUST 1:** Don't forget the PAISBOA Health Benefit Trust General Meeting, set for Wednesday, August 1 beginning at 9:00 a.m. All participating schools are reminded that attendance is mandatory. Contact Patrick Hennessy at [patrick.hennessy@phbt.org](mailto:patrick.hennessy@phbt.org) for more information, or **CLICK HERE** to register.



### PAISBOA Summer Barbeque Set For August 8!

Please join us for PAISBOA's **First Annual Summer Barbeque!** Set for **Wednesday, August 8**, from 10:30 a.m.-1:30 p.m., 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**. The event will take place at the PAISBOA Offices in Radnor Township.

Are you aware of your Fiduciary responsibility regarding your school's Retirement Plans? Our panel of experts from **Carroll Consultants** will be led by Marcie Carroll, Buzz Hartsig, and Tom Giedgowd. They'll take us through their easy-to-understand Fiduciary Compliance Checklist, compiled by the Department of Labor, including:



- Are You a Fiduciary?
- You and Your School's Fiduciary Liabilities
- Monitoring Your School's Various Investment Options
- Plan Document Compliance
- Excessive Fee Exposure
- Fiduciary Responsibilities
- Form 5500 and Compliance Testing
- DOL & IRS Audits
- And more!

If you're not sure of your responsibility in this area, or if you're just interested in a fantastic luncheon, please join us! This will be our first social event of the new school year, so don't miss out!

To register, [CLICK HERE](#). We look forward to seeing you!

## New Business Officers and HR Directors Breakfast With PAISBOA

**Attention New Business Officers and HR Directors! If you:**

1. Just Started Your Job
2. Have Recently Been Promoted
3. Are New to Independent Schools
4. **or** Would Like to Learn More About PAISBOA

**We'd Love to Meet You!!**

Please join us for our Second Annual **New Business Officers and HR Directors Breakfast** on **Wednesday, August 1**, from 8:00am-9:00am, immediately prior to the PAISBOA Health Benefit Trust General Meeting.

The **New Business Officers and HR Directors Breakfast**, as well as the HBT General Meeting, will take place at the PAISBOA Offices in the Radnor Township Building.

If you are a new Business Officer or HR Director -- or even a veteran independent school professional -- please join us for an overview of the many facets of **PAISBOA**, and tour our second floor office suite. This breakfast meeting is open to anyone in the Business or HR Offices who might be new to your staff over the past few years.

Come meet the leaders of the Association and Health Benefit Trust, as well as some of your colleagues from all over the Delaware Valley!

We look forward to seeing you on Wednesday, August 1!!

To register, [CLICK HERE](#)

PLANT MANAGERS

## June Plant Managers Meeting Showcases Ongoing Construction at FCS; Technology Safety Software

The Facilities staff members at Friends' Central School were the gracious hosts of the final **Plant Managers** Meeting of the school year, held on June 21. Themed Interesting Things Happen at the Intersection of Technology and Facilities, participants were treated to a tour of several campus construction projects, including

the Shalcross cafeteria -- which is currently under construction and expected to open in September -- followed by lunch and a discussion of campus safety technologies FCS is currently using.

Our Hosts for the day included **Tom McDaniel**, Director of Facilities and Campus Safety and **Steve Delores**, Director Emeritus and Project Manager, who conducted the tour for the 17 members of our party. Following lunch, **Dan Crowley**, FCS Director of Technology, presented, along with Tom and Steve, a brief overview of School Dude's crisis management software, which is connected directly to the school's Safety Center. The application provides mobile access to critical planning materials as well as serving as a communications link.

In addition, FCS alum **Marshall Singer**, CFO and co-founder of RUVNA, gave a presentation on their state-of-the-art school safety application. The platform enables schools to locate and account for students and staff, communicate with faculty, and get help to those in need quickly, safely, and accurately during emergencies and drills. The discussion was highlighted by a "real-time" simulated emergency wherein everyone in the school was safely located, communicated with, and had injury or illness needs addressed, all within just a few moments.

RUVNA, with whom PAISBOA has just entered into a new agreement, will be featured in the first Wednesday Webinar of the season, set for **Wednesday, September 26** at 10:00 a.m. Stay tuned for more information to come!

## Our 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. at the PAISBOA Offices in Radnor Township. 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: He uses movie clips to illustrate the principles that differentiate effective leaders from those who are not. Don't miss this fascinating program! **Save the Date** and **Register Today!**

# PAISBOA PURCHASING CONSORTIUM

## Vendor Showcase: Summer Opportunities!

Several of our Vendors are offering limited-time, seasonal offers to our Member Schools. Check out the following deals below!

### MBS Direct Online Bookstore

Join over 400 independent schools who easily distribute affordable textbooks to their students with a custom MBS Direct Online Bookstore. Contact Bill Love at [bllove@mbsdirect.net](mailto:bllove@mbsdirect.net) for a live demo.



### CDW-G Offers Windows Device Bundle

For a limited time, PAISBOA Purchasing Consortium member schools can purchase an exciting Windows Device bundle that includes:

- 30 Devices (HP or Lenovo)
- Bretford Cart
- Office 365
- 10 Little Bits Kits
- Free PD
- WGS

This is a great opportunity for schools looking for an affordable way to add to their STEM departments. To see more, [download the promotional flyer](#). For more information, contact Thomas Figureido at [thomfig@cdwg.com](mailto:thomfig@cdwg.com)

or call 203-851-7220.

# SUSTAINABILITY

## Sustainability Teachers' Academy Workshop Coming Up Quickly; Very Few Seats Remain

Our Summer **Sustainability Teachers' Academy** is set for **Thursday, August 16** at Springside Chestnut Hill Academy. PAISBOA, Boyer Sudduth Environmental Consultants, and SCH are hosting the workshop for area independent school teachers and administrators.



Led by experts from the **Walton National Sustainability Teachers' Academy** at Arizona State University, the workshop will focus on sustainability science, how to teach relevant sustainability issues in the classroom, and developing projects for the school and/or community. The workshop content is unique because it is built on research from ASU and other leading universities.

Most of the available slots are filled, but there may be an opportunity if you are interested in attending. For more information on seating, contact Mary Ann Boyer at [maboyer61@gmail.com](mailto:maboyer61@gmail.com).

### October Sustainability Group at SCH; Save the Date!

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](mailto:admin@paisboa.org) or Mary Ann Boyer [maboyer61@gmail.com](mailto:maboyer61@gmail.com). You can also sign up to receive emails through the group's e-list. Contact Ron Hill for more information or to be added to the list.

**Upcoming Meetings:** [Tuesday, January 15, 2019](#), at Ancillae-Assumpta Academy; [Thursday, April 4, 2019](#), at The Shipley School. **SAVE THE DATES!**

# EMPLOYEE BENEFITS

## Tips for Preventing Uncashed Retirement Checks

**Marcie Carroll, Carroll Consultants**

Managing uncashed retirement checks may be considered a nuisance by plan administrators. Nevertheless, the employer still has fiduciary responsibility when a former employee fails to cash their distribution. Search efforts to locate a missing plan participant consume time and money and may fail to locate the participant. Likewise, going through the process of turning over dormant accounts to the state can also consume time and resources.

Decrease the burden of uncashed checks by:

1. Discussing with terminating employees during the exit interview the options for their retirement plan. Employees may forget they have a company-sponsored retirement plan, or don't know how to manage it.
2. Reminding departing employees that they can roll over their retirement assets into their new employer's plan. Your plan's service provider or the new employer can answer questions the former employee may have about the rollover process.
3. Letting employees with an account balance of \$1,000 or less know they should expect to receive a check in the mail after a certain amount of time.
4. Having the employee verify their current address to where the check can be sent.



Remember, fiduciary responsibility and liability extends to terminated employees with assets in the plan. This responsibility includes delivery of all required distributions and all fiduciary prudence responsibilities. Stay in touch with this important group.

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 [mc Carroll@cclbenefits.com](mailto:mc Carroll@cclbenefits.com) or 610-225-1210.

## EMPLOYEE BENEFITS

### Fiduciary Responsibility

**Karen R. McLeese, Esq. CBIZ Vice President of Employee Benefit Regulatory Affairs**



Fiduciary responsibility is one of the most important aspects for individuals engaged in welfare and qualified pension benefits plan sponsorship. A fiduciary is one who exercises discretionary authority or control regarding management of the plan, as well as disposition of plan assets. Certain positions in administering or managing a plan are always fiduciary roles, such as a named fiduciary or specific person, entity or corporation designated in the plan document, or an investment plan committee.

Generally, with the exception of named fiduciaries, fiduciary status is a functional test based on the role the individual plays in conjunction with the plan.

A plan fiduciary must have undivided loyalty in its role, and act solely in the best interest of plan participants and beneficiaries. Further, a fiduciary can only use plan assets for the exclusive purpose of providing benefits for participants and beneficiaries and to pay reasonable expenses of plan administration. Where applicable, the fiduciary must diversify investments related to the plan. And finally, the fiduciary must follow the terms of the plan, unless it the plan is inconsistent with the law. This obligation extends to oversight of plan operation, correction of plan errors, satisfying reporting and disclosure requirements, and maintaining a solid record retention process.

It is also important to carry out these duties with the utmost attention to detail given the high standard imposed on a plan fiduciary.

For more information contact: Karen Roberts, CEBS, CRSP, QKA Vice President Plan Operations & Compliance  
[kroberts@cbiz.com](mailto:kroberts@cbiz.com) 407.377.2123 [www.cbiz403bexperts.com](http://www.cbiz403bexperts.com)

# BULLETIN BOARD

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## Five Must-Have Tools for Summer Cleaning Projects

Summer is here! Bring on the sun, sand, picnics and fireworks! With many employees on vacation and schools on a break, summer is the perfect time to start larger cleaning projects. Here are a few ideas on cleaning tools for those special jobs on your agenda this summer. [Read More at Scott Holland's Blog!](#)



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## Safe School Initiatives issued by Secret Service, Dept. of Education

The United States Secret Service and the Department of Education partnered on two research studies – The Safe School Initiative (2002) and The Bystander Study (2008). After the school shooting at Marjory Stoneman Douglas High School earlier this year, Secret Service issued this guide for school leaders: Enhancing School Safety Using a Threat Assessment Model: An Operational Guide for Preventing Targeted School Guidance. You can learn more about threat assessment teams and other Secret Service recommendations on school safety [on their website](#).

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