



# FRIDAY FLYER

Volume VIII, No 10 - June 14, 2019

## UPCOMING EVENTS

**Wednesday, June 19:** Plant Managers Meeting at Overbrook School for the Blind

- **REGISTER TODAY!**

**Wednesday, July 10:** PAISBOA Breakfast with Staples at The Shipley School

- **REGISTER TODAY!**

**Tuesday, July 23:** New Business Officers/HR Professionals Breakfast - **REGISTER TODAY!**

**Tuesday, October 29:** Sustainability Group Meeting at The Philadelphia School

- **REGISTER TODAY!**

## FROM THE EXECUTIVE DIRECTOR



### **The PAISBOA Annual Data Survey: Our New and Improved Version Underway Soon!**

Led by **Tom Devine** from Merion Mercy Academy, our PAISBOA Survey Gurus (**Frank Aloise, Larry Capuzzi, Erin Donnelly, Mark Gibbons, David Gold, and Jayme Karolyi**) are gearing up for the launch of the **PAISBOA Annual Data Survey**.

With our new data collection partner, **Dynamic Benchmarking**, we plan to open our beta test to 15 member schools the week of August 12, and will open the survey to all PAISBOA members by the end of August. If you are interested in being a beta tester, please contact Ron Hill at [admin@paisboa.org](mailto:admin@paisboa.org). We will contact the first 15 respondents with the beta testing information in early August.

Independent schools and universities have many choices for data collection surveys, and depending on your focus, you may have a preference for one or another. The **PAISBOA Annual Data Survey** is the only survey built for and by business officers – with a focus on operational and salary benchmarking – in the region including Pennsylvania, New Jersey and Delaware. Why is this important? The results are geographically relevant!

We have a solid core group of about 70 schools who participate in the **PAISBOA Annual Data Survey**, and we appreciate their willingness to share their data with each other to help guide the decision-making in all our schools. Our institutions are stronger for their shared commitment to this process, and we encourage all our schools and universities to participate this year. In fact, we'd love to see an additional 10-15 schools participate in the 2019 survey, so if you haven't participated in the past, why not join us??

### ***More schools = more data! More data = better decisions!***

Working with Dynamic Benchmarking, we will host a kickoff webinar in early August, with bi-weekly "office hour" web meetings on Tuesdays at 10 am to help all schools get started with the new, online data collection tool.

The results of the survey will be available in time to use them in your budget process, and will include easy to use charts and graphs for comparisons. As for how to use the data from the **PAISBOA Annual Data Survey**, Tom Devine shares two of the multiple ways he uses the survey results:

1. **Vendors** – If we are considering a new vendor, I look to see which schools use which vendors. I then glance through the recommendations and then call a few of my counterparts at those schools to get more specifics on the vendor's pricing and reliability. It is much easier than doing an e-list question (to which I usually respond that answers are available in the general survey),
2. **Salaries** – Our Head of School, Finance Committee and Board like to get a report during our budget process as to where our faculty salaries compare to those of our peer schools. This information has been invaluable in giving all groups confidence that we are properly compensating our Faculty in our largest expense item.

While data collection is important, figuring out how to use the data can be frustrating and exhilarating at the same time! Many of our members are interested in creating dashboards that tell the story of their school in ways that multiple constituencies can better understand the financial health of their independent school or university. With all the data available to us, it can be difficult to determine the appropriate information to share with boards and school leaders. Finding the right balance between TMI and not enough information can be tricky.

Here are some resources that I have used with boards and non-profit leaders:

- *How Non-Profits Can Use Data to Inform Decisions and Drive Performance* – focuses on using data for monitoring and evaluation, decision making, and reporting.
- *A Nonprofit Dashboard and Signal Light for Boards* – is very easy to use, simplifies your presentations, and keeps your board focused on your strategic initiatives. Blue Avocado has other great resources for boards.
- *Dashboard for Nonprofits* from The National Council of Nonprofits – offers examples of dashboards and dashboard tools as well as resources about dashboards.
- *Models and Components of a Great Nonprofit Dashboard* – offers insight into the process of creating a dashboard that works for your organization.

Here are some resources that should be helpful in depicting financial sustainability in independent schools and universities:

- *Picture This: Best Practices in Financial Dashboards* – shares great advice about determining the data points that are meaningful to your school/university.
- *Beyond the Dashboard: The Financial Sustainability Heat Map* – looks at key indicators of the financial health of a school/university.

We look forward to your participation in the PAISBOA Annual Data Survey – just one of the many benefits of your all-inclusive PAISBOA membership.

Take Advantage of the Power of the Flock!



## PLANT MANAGERS

### June 19 Plant Managers Meeting: Annual Field Trip to Overbrook School for the Blind

Our final **Plant Managers** meeting of the school year will take place this coming **Wednesday, June 19**, beginning at 11:30 a.m. at the Overbrook School for the Blind. (**Please Note** that the Wednesday date is a departure from our regular Thursday schedule) OBS is located at [6333 Malvern Ave, Philadelphia, PA 19151](#).

The program will begin with a tour of the OBS facilities. Led by plant manager **Pete Crippen**, the tour will feature some of the newer features of the 20 acre campus, including Overbrook's farm to table program, and their now four-year old orchard, created with the help of the Philadelphia Orchard Project.

Following the tour, attendees will gather for lunch in OSB's new greenhouse building. Our program will feature **Mary Ann Boyer** of [Boyer Sudduth Environmental Consultants](#), who will share ideas on how schools can reduce their environmental footprint and develop sustainable practices for food waste, using The Shipley School's award-winning recent successes as a case study.

**There's still time to register**, so don't miss this opportunity to visit one of your peer schools, check out their facilities, and see what great sustainability info you can pick up and take back to your school! To register [CLICK HERE](#).



## PURCHASING CONSORTIUM

### Staples and PAISBOA Team Up for Special 'Users Group' Breakfast



PAISBOA and Staples invite you to a very special breakfast on **Wednesday, July 10** at the Shipley School to learn more about the value and discounts Staples offers exclusively to PAISBOA members.

The meeting will be held in the "Grey Box" located in the Pilch Commons, on Shipley's Upper Campus. Check-in and enjoy a light breakfast at 8:45 am; the program will begin at 9:00 am. All members of your staff and school communities who order office supplies and other products are strongly encouraged to attend!

Staples understands what it takes for your school to be productive, connected and inspired every day, and offers many solutions and products including everyday business essentials, breakroom supplies, technology, furniture, print & promotional products, and more!

Please join us and our Staples representatives to learn more about new brands, categories and our easy-to-use ordering site.

If you need a StaplesAdvantage.com account or you have any questions, contact your Staples Customer Success Consultant, **Lisa Moore** at [Lisa.Moore@staples.com](mailto:Lisa.Moore@staples.com). Be sure and bookmark [www.StaplesAdvantage.com](http://www.StaplesAdvantage.com) in your browser for easy access to your program's ordering site!

**When you order from a PAISBOA Preferred Vendor (PPV), you support PAISBOA and our professional development programming throughout the year.**

Don't miss this important opportunity to learn how you can save time and money for your school!

[CLICK HERE](#) to register today!

## UPCOMING EVENTS

### New Business Officers and HR Directors Breakfast July 23

Please join us for our Annual **New Business Officers and HR Directors Breakfast** on **Tuesday, July 23**, from 8:00-9:00 am, immediately prior to the **PAISBOA Health Benefit Trust** General Meeting. Both programs 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 event 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 Tuesday, July 23!! To register, [CLICK HERE!](#)

## SUSTAINABILITY

### Get a Charge Out of Electric Vehicles at Your School

#### Emma Schlam, Boyer Sudduth Environmental Consultants

Are you thinking about installing an Electric Vehicle (EV) charging station in your school's parking area for employee, student or public use? Installing an EV charging station is a great way to promote the use of alternative fuels, attract sustainably minded employees, and increase your school's contribution to a healthy environment. If you are thinking about investing in electric vehicle charging, now may be the time; electric vehicle use is becoming more popular across the country, and there are many state government and private funding programs available with limited time to apply. Curious to learn more? Here are answers to a few basic questions to get you started:

#### How does EV charging work?

EV charging stations come in three levels depending on the voltage required and speed of charge. Speed of charge is listed as Range miles Per Hour (RPH). The faster the charge, the more voltage required and the more expensive the station.

- **Level 1:** at home 120 volts, 2-5 RPH
- **Level 2:** 220-240 volts, max 25 RPH
- **DC Fast/ Level 3:** up to 150 RPH

#### How much does an EV charging station cost?

A Level 1 charging station will cost about \$1000 plus installation, labor, and any required permitting. These stations use less energy than Level 2 and can be set-up from existing plugs, reducing installation and energy costs.

A Level 2 charging station typically costs between \$2000 and \$5000, not including installation. Labor, permitting, and other materials can bring the total cost to roughly \$13-\$25K. Keep in mind that there will be ongoing maintenance and energy costs.



If you're looking for concrete changes to reduce your school's carbon footprint, EV charging could be an option. To read more about what to consider and what funding support is available in your area, find the full article at this link: [Getting Started With Electric Vehicle Charging Stations](#).

Emma Schlam is a graduate student in Environmental Science and Policy at Clark University and an intern at [Boyer Sudduth Environmental Consultants](#).

## Sustainability Group to Kick-off 2019-2020 Season at The Philadelphia School

The **PAISBOA Sustainability Group** will continue its good work beginning in October 2019, with our first meeting scheduled for **Tuesday, October 29** at The Philadelphia School. The meeting will begin at 5:15 p.m. and conclude about 7:30 p.m. [CLICK HERE TO REGISTER](#), and stay tuned for more information, including our speakers and topics of interest.

Other meeting dates and locations for our subsequent meetings, tentatively scheduled for January and April of 2020, will be announced in the coming weeks. Don't miss out on the important sustainability efforts taking place at our schools! For more information on the group, contact Ron Hill at [rhill@paisboa.org](mailto:rhill@paisboa.org) or **Mary Ann Boyer** of [Boyer Sudduth Environmental Consultants](#) at [maryann@boyersudduth.com](mailto:maryann@boyersudduth.com).

## GENERAL NEWS

### The School 'System' is Designed for Mediocrity

Scott Barron, School Growth



**What if your school is actually designed for mediocrity?** What if the unstated goal is actually to preserve the status quo and avoid the risks of change? That's a challenge for school leaders of all shapes and sizes because the constraints on growth and innovation are often systemically embedded.

Last week on a flight I sat next to a gentleman who is the head of a high school in Ohio. On the middle seat between us (which thankfully was empty) he placed Carol Dweck's book, *Self-theories: Their Role in Motivation, Personality, and Development*.

As an avid reader myself, right away I realized he is likely either an educator or taking a very interesting class.

Intrigued, I motioned toward the book and said: "Are you enjoying that book?"

You can read the rest of this story here: <https://www.schoolgrowth.com/sgeneralblog/designed-for-mediocrity>

## HUMAN RESOURCES

### Handbook Policies to Address Educator Sexual Misconduct

As the summer begins, we have been working with many schools who are taking this time to update their handbooks. As schools assess their handbooks, one section to consider adding or updating relates to appropriate boundaries between students and adults. In 2016, NAIS and TABS partnered to identify steps that independent schools could take to address educator sexual misconduct. The organizations eventually issued their joint report on Recommendations for Independent School Leaders from the Independent School Task Force on Educator Sexual Misconduct, which can be found [AT THIS LINK](#).



Among the extensive recommendations to help independent schools build a culture to prevent sexual misconduct and to effectively investigate any suspected cases, the report recommended that schools develop policies for clear and appropriate professional boundaries between students and adults. The report recommends that schools develop and adopt a number of policies to address issues relating to educator sexual misconduct,

ranging from expectations with regard to supervision, privacy issues, monitoring, appropriate discipline and preventing retaliation. The report details best practices that include developing protocols for overnight trips, including those relating to chaperones, contact with students, guidelines around gifts, discussing alcohol and drugs and even capturing images of students through videos and images.

As schools review their handbooks to ensure that they have the legal provisions necessary to protect their employees, students and communities, they should consider addressing the report's guidance and incorporating policies to also enhance their protection of children from potential adult sexual misconduct.

Fisher Phillips provides free advice regarding simple employment-related questions to PAISBOA member schools, so please do not hesitate to contact Susan Guerette if you have questions. Email her at [sguerette@fisherphillips.com](mailto:sguerette@fisherphillips.com)

## EMPLOYEE **BENEFITS**

### Four Ways to Increase Employee Retirement Contributions

**Marcie Carroll, Cafaro Greenleaf | Carroll Consultants**



As a retirement plan sponsor, you want your employees to save the most they can in order to reach their maximum retirement potential. A significant amount of research says that you can improve both employee participation and their saving rates. Here are four ways you can help your employees start building a confident retirement:

1. Boost employee participation with automatic enrollment. Choosing to automatically enroll all new employees in your retirement plan can dramatically improve your participation rates. According to the Center for Retirement Research (CRR) at Boston College, in one study of automatic enrollment, participation increased by 50 percent, with the largest gains among younger and lower-paid employees. While auto enrolled employees are allowed to opt out of the retirement plan, most generally stay enrolled.
2. Set the initial default contribution rate higher. Many companies who use auto enrollment set their default contribution rate relatively low at 3 percent, according to the CRR, which is lower than the typical employer match rate of 6 percent. Workers who might have contributed more to their savings passively accept the lower default rate, which means they're sacrificing employer matching funds along with saving less of their own pay.
3. Adopt auto escalation. Plans that use auto escalation automatically increase their participants' contribution rate every year, typically by 1 percent. Over time, that can significantly improve savings rates among workers. The CRR cites a 2013 study of Danish workers where the majority of workers who experienced automatic increases simply accepted them, and savings rates dramatically increased.
4. Automate investment decisions with target date investment products. Investing is complicated, and many employees don't want to take the time to learn how to manage their portfolios. Target date strategies automatically adjust an employee's investment allocations over time, shifting them to a more conservative asset mix as the target date (typically retirement) approaches. The ease of use of target date funds means their popularity is increasing. The CRR notes that in 2014, nearly 20 percent of all 401(k) assets were in target date funds, and about half of plan participants used target date funds.

Cafaro Greenleaf | Carroll Consultants provides investment advisory, retirement plan consulting and administration services to clients throughout the country. For further information about this article, or about PAISBOA's Cooperative Retirement Plan options, please contact **Marcie Carroll** at [mcarroll@cafargreenleaf.com](mailto:mcarroll@cafargreenleaf.com) or 610-225-1210.

## VENDOR **SPOTLIGHT**

### Mobile Payments Made Easy for Families, Faster Funds for Schools

Families love mobile. Schools should, too. What happens when you offer parents ease and flexibility to pay and give on the go with their smartphones? Giving becomes effortless and saves your office time by putting the

power to pay in your parents' hands anytime, anywhere. The MySchoolWallet app by Community Brands offers schools a simple mobile payment solution – no more lost checks, missing deposits, or reconciliation woes. By opting in, parents can make quick, secure payments with just a few taps and all your payment data is in one intuitive place:



- **Customizable** – Choose the options that meet your school's payment needs
- **Seamless Integration** – Export transaction details into your financial software
- **Get Funds Faster** – Access funds within 48 hours
- **Automated Receipts** – Families get immediate payment confirmation
- **Reconcile Payments with Ease** – Eliminate hours of manual work each month

Implementation for MySchoolWallet is easy and cost-free. Contact us to [request a demo](#) and learn how this new mobile payment app provides your school a better way to take care of business.

## BULLETIN BOARD

### PAISBOA Members Offered Discounts to Attend IS4 Security Summit; set for June 20 at EA

Episcopal Academy in Newtown Square will host the 2019 Independent School Safety & Security Summit (IS4) on **Thursday, June 20** from 8:00am-4:00pm. This one-day conference is designed specifically for independent schools and focuses on the unique safety and security aspects that differ from public schools. IS4 is bringing together independent schools from around the country who will be taking part in sessions led by members of the United States Secret Service Threat Assessment Center, Department of Homeland Security Director of the Protective Security Coordination Division (PSCD) as well as school safety and security experts.

**Special PAISBOA Discount:** Many schools have expressed interest in sending more than one representative. PAISBOA members receive a second pass at no cost. After registering the first member of your school, use the promo code **AUXS19** when signing up the second attendee.

[LEARN MORE!](#)

### Case Studies in Fiduciary Failure – Plan Sponsor Webinar

Cafaro Greenleaf | Carroll Consultants invites PAISBOA Members to tune into the next Monthly Webinar and Interactive Q&A for Plan Sponsors. The webinar will take place on Wednesday, June 26, at 3:00 pm. This presentation will take a closer look at recent fiduciary court cases and will outline several key lessons for Plan Sponsors and Service Providers. *This webinar is approved for professional development credits (PDCs) for SHRM-CP and SHRM-SCP credentials.* Email Brian Clark ([bclark@cafarogreenleaf.com](mailto:bclark@cafarogreenleaf.com)) for more information. [CLICK HERE](#) to register.

### Cannabis Considerations for College and K-12 Administrators

The cannabis legal and regulatory landscape continues to change on an almost daily basis. This constant state of flux raises a multitude of questions and concerns for administrators in colleges, universities and K-12 institutions alike. For example, most higher education institutions throughout the nation have policies in place that prohibit the possession, distribution, and consumption of marijuana on campus, as required by the Drug-Free Schools and Communities Act (DFSCA). However, as states continue to authorize cannabis for medical-use as well as adult-use (recreational), institutions must determine how they will respond. To answer these and other questions, tune into ***Cannabis on Education Campuses: Updates and Considerations for College, University and K-12 Administrators***, a webinar presented by Matthew Smith, Associate, Saul Ewing Arnstein & Lehr LLP, and hosted by Higher Education and K-12 Schools Practices. The webinar will take place on Thursday, June 27 at 12:30 pm. [CLICK HERE](#) to register, or contact Erin Plawecki at 215-972-7719 or [erin.plawecki@saul.com](mailto:erin.plawecki@saul.com) with any questions. We appreciate our colleagues at **ADVIS** for sharing this opportunity with PAISBOA members.

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