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Fall 2015

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## PRESIDENT'S MESSAGE

# Join the conversation of major issues for MeASBO meetings to tackle

**H**appy Fall, and welcome to a new school year of MeASBO, everyone! I hope you all had a chance to get outside and enjoy the beautiful summer.

I am honored to serve as your president this year. As always, we have no shortage of big issues facing all of us, and we want to use our meetings to bring you the latest news you can use.

I was thrilled to see the big turnout in Augusta for our meeting on the Affordable Care Act.

At our upcoming meetings, we are looking forward to learning more about best practices for internal controls, grant compliance and Community Eligibility for nutrition, among other topics.



*Adam Hanson*

MeASBO is your organization, and the Executive Committee loves to hear from our members.

What topics would you like to see at future meetings? Are there speakers who you think we should bring in?

Please let us know by utilizing the "Future Meeting Topic Ideas" section of our forum at [www.measbo.org](http://www.measbo.org).

If you haven't yet signed up for the forum, please do so today. More and more, we are using the forum to share information with our members, including all handouts from our meetings.

I hope you all have your audits successfully behind you and can get out and enjoy some fall foliage. See you in November.

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## Looking outside the box in school technology

### Processing time, improving the payroll process, reducing 'buddy punching' and time stealing

By Sue Lambert, MeASBO Technology Committee

Beyond MeASBO's website forum and shared resources, school business officials can use technology in a number of ways in these days of tight budgets and rising benefit costs.

Chief among the options, which were not available a decade ago, are:

- automated sub-scheduling programs;
- automated time cards;
- online messaging systems; and
- Parent-teacher conference scheduling software

I hear positive things any time the topic of automated sub-scheduling programs is posted on a listserv or the forum.

Substitutes, teachers and administrators seem to find it a positive change. It also provides tools to help with administering the Affordable Care Act (ACA) for substitutes. The system allows subs to log in and indicate when they are or are not available. It allows teachers to log in to make requests for time off.

#### Automated Time Cards

Automated time cards can reduce time-card errors, save processing time and improve the payroll process. Also, it can reduce

the opportunities for "buddy punching" and time stealing.

Our district has been implementing a time-clock system. There was a lot to learn in the process, but one thing I didn't realize is how many cans of worms it would open. We got lots of interesting questions like "When I go pick up my daughter from school, do I have to punch out?" Well, are you talking a five-minute errand, or driving four miles, picking up your daughter, taking her seven miles to your home and then driving the 11 miles back to work? Since the answer is No. 2, the answer would be "You need to punch out for that."

It appears some of these little excursions were left off the time card all these years. Meanwhile, some groups thought it was "beneath" them to have to punch in and out.

It was painless as possible. An online clock on employees' computers allowed them to simply click on an "in" or "out" button. But employees felt their status was being threatened and they were being treated like factory workers; evidently, to them, that was a bad thing.

We still face dealing with quirks like comp time, weighted average overtime and minimum call-in times.

I understand why some districts have negotiated some of those quirks out of their agreements. There likely will never be a



Sue Lambert

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perfect system that can do it all, but once we have the majority of employees on our automated time cards, it will be a great improvement.

## **Online Messaging Systems**

We use online messaging systems to notify parents and/or employees of important events, upcoming emergency drills. Our district uses automated phone messages, but I know the systems are also capable of text messaging and e-mail.

Some districts are using it to notify parents when they send papers home with their children. Rather than doing mailings—costing postage, supplies and staff time—the papers are sent home with the child and the parents notified via a voice message and/or e-mail that day. That way they know to make sure to check for their child's paperwork. I'd like to see our district develop our use of this service more and reduce home mailings and give parents more options like text message.

## **Other Technologies**

Our district has not yet gone this route and during the "call-in" days for scheduling, we hire extra subs to cover the offices and you can forget getting through to the high school or junior high on those scheduling days. It appears online processing would be the solution.

What other technology have readers found or used that helped streamline processes, create efficiencies or reduce duplication?

Ones that I would like to explore are:

- ✓ Sub Scheduling
- ✓ On-line processing of FRAM (Free/Reduced) applications
- ✓ On-line updating of parent emergency information cards
- ✓ On-line processing of fees at the high school
- ✓ Data gathering and comparisons that allow districts to do benchmarking and investigate ways to create efficiencies and/or improvements.

The Technology Committee invites colleagues to visit the website forum and add a discussion about any technology they have found useful, or ask questions from people that may be using a "new" technology.

Let's use the forum to have those discussions and learn from each other. If you haven't signed up for the forum you can register here:

<http://measbo.org/members/forum/default.asp>



# Scott's Snippets

## Moves galore among MeASBO colleagues

**S**taff movement, retirements and changes are happening in the MeASBO community throughout Maine and I have been working to keep everyone up-to-date.

Following are a few examples of what has changed within the realm of MeASBO:

- Cathy Messmer, formerly the business manager in Lisbon, has moved on to take the new position of business manager/town comptroller for Cape Elizabeth.



*Kati Hunt*

• Taking over the business manager role in Lisbon is Haley McCrater.

• Katherine "Kati" Hunt left AOS #93 (Damariscotta region) and accepted the position of director of finance & administration for Mobius, Inc.

• Rick Kusturin has taken the position of business manager for AOS #93.

• Stacie Field said goodbye to RSU #73 and moved closer to home. She is the new business manager of RSU #16 (Mechanic Falls, Minot, Poland).

- Cyndy Moxcey is retiring this year from SAD #44 (Bethel area), and they are looking for an experienced individual.

In the meantime, Bruce Rudolph is back as the part-time business manager.

- Luci Milewski moved on from MSAD #58 and now is working in East Millinocket School Department four days a week and one day for Northport School Department.

• In Lewiston, Elaine Runyon has moved from the Controller position to take on the role of Chief Administrative Officer.

• Adam Hanson, most recently Business Office Manager with Auburn School Department, has taken the position of Business manager in Lewiston.

• Margo White has come on board in Lewiston as staff accountant.

• Denise Johnson, formerly with SAD#6 (Bonny Eagle), is now in Auburn as business office manager.

As you can see, we are definitely not a static organization!

As changes occur, please feel free to email me at [Scott.Eldridge@RSU4.org](mailto:Scott.Eldridge@RSU4.org).



*Scott Eldridge*

## Tri-State ASBO's Conference taking shape

By Kris Pottle

**M**eASBO's Planning Committee is in the early stages of developing a program for the 24th annual Tri-State ASBO Conference, which will be held at the Mount Washington Resort in Bretton Woods, N.H., May 18-20, 2016.

Ideas include Affordable Care Act; Best Practices in Construction; Managing Data; School Board Roles & Responsibilities; Managing Transportation; and Edgar Regulations.

Keynote speaker Jones Loflin will focus on Time Management — Work Life Balance. President of a training and development firm, Loflin co-authored the award-winning book, *Juggling Elephants*, a catalyst for helping employees and managers engage and focus on issues important to their individual and organizational success.

In addition to concurrent sessions, there will be time to network with colleagues from Maine, New Hampshire and Vermont. In addition, exhibitors will be available to assist with problem-solving in many different areas.

May is a busy time in school business, with budget and year-end issues. However, the opportunities for professional development are diverse and cost-effective compared to most conferences.

Mid-May is a great time of year to get out of the office, meet colleagues from the region, and invigorate your personal and work life. Mark your calendars now.

The committee welcomes input for additional ideas.

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## Legislative report

# Myriad bills would affect school districts

**7**his is biennial year and 127th Maine Legislature will convene on Wednesday, Jan. 6 at 10 a.m. to begin the second regular session. The filing deadline for 2015 for Agency Regulatory Agendas is Oct. 25.

There will be Legislative Council meeting on Oct. 22 in room 334.

All bills requested for the 2nd Regular Session will be reviewed by the Legislative Council.

Here is a preliminary lists of Legislative and Agency Requests as they have been submitted to-date that may impact Maine school districts:

### Bill Requests for Screening

#### PUBLIC EMPLOYEES RETIREMENT SYSTEM - EDUCATORS

LR: 2433 Sponsor: Representative Hubbell of Bar Harbor

Title: An Act To Increase Transparency in the Setting of Normal Teacher Retirement Costs Rates for School Districts

#### LAW ENFORCEMENT- LOCAL POLICE

LR: 2438 Sponsor: Representative

Grohman of Biddeford

Title: An Act To Allow School Resource Officers To Have Jurisdiction at Off-site Events

#### EDUCATION AND CULTURAL AFFAIRS

#### SCHOOL ADMINISTRATION - ADMINISTRATIVE UNITS

LR: 2328 Sponsor: Representative Head of Bethel

Title: An Act To Review the Impact of Withdrawal from Regional School Units

LR: 2334 Sponsor: Senator Langley of Hancock

Title: An Act To Amend Certain Education Statutes

LR: 2350 Sponsor: Representative Turner

of Burlington  
Title: An Act To Amend the Laws Governing the Withdrawal of a Single Municipality from a Regional School Unit



Jude Cyr

#### SCHOOL ADMINISTRATION - BUDGETS

LR: 2269 Sponsor: Senator Breen of Cumberland

Title: An Act To Promote Private Fund-raising for the Governor Baxter School for the Deaf

LR: 2329 Sponsor: Senator Millett of Cumberland

Title: An Act To Facilitate the Use of State Education Subsidies

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#### SCHOOL FACILITIES CONSTRUCTION

LR: 2262 Sponsor: Senator Brakey of Androscoggin  
Title: An Act Regarding New School Construction

LR: 2340 Sponsor: Senator Collins of York  
Title: An Act To Improve School Construction Finance

#### SCHOOL FUNDING FORMULA - ADJUSTMENTS

LR: 2149 Sponsor: Senator Johnson of Lincoln  
Title: An Act To Change the School Funding Formula To Provide Funding Based on a Minimum of One Teacher for Each School Day

#### SCHOOL POLICIES - COMPUTER2

LR: 2553 Sponsor: Representative Martin of Eagle Lake  
Title: An Act To Transfer Excess Revenue from the State's Liquor Contract in Fiscal Year 2016-17 to General Purpose Aid to Local Schools

#### SCHOOL FUNDING FORMULA - SPECIAL EDUCATION

LR: 2511 Sponsor: Representative Devin of Newcastle  
Title: An Act To Address the Costs for Certain Special Education Students

#### SCHOOL FUNDING FORMULA - SUBSIDIZABLE COSTS

LR: 2521 Sponsor: Senator Gerzofsky of Cumberland  
Title: An Act To Place a 2-year Moratorium on All State Mandates Involving Public Education and To Evaluate Current Mandates

LR: 2526 Sponsor: Representative Tipping-Spitz of Orono  
Title: An Act To Improve Transparency in Education Funding

#### SCHOOL PERSONNEL - BENEFITS

LR: 2300 Sponsor: Representative Hubbell of Bar Harbor  
Title: An Act To Enable Alternative Organizational Structures To Purchase Group Health Insurance for All Employees

#### SCHOOL PERSONNEL - TRAINING

LR: 2214 Sponsor: Representative Chenette of Saco  
Title: An Act To Allow Trained, Nonmedical Employees in Schools To Administer Emergency Rescue Medications

#### SCHOOL POLICIES - COMPUTERS

LR: 2484 Sponsor: Representative Brooks of Lewiston  
Title: An Act To Improve Internet Safety for Children

#### SCHOOL POLICIES - CURRICULUM

LR: 2272 Sponsor: Representative Hubbell of Bar Harbor  
Title: An Act To Establish a Specific Schedule for the Review of the Content Areas of Learning Standards

LR: 2352 Sponsor: Representative Tuell of East Machias  
Title: An Act To Facilitate Homegrown Education in Maine

#### SCHOOL POLICIES - GRADUATION REQUIREMENTS

LR: 2266 Sponsor: Representative Kornfield of Bangor

Title: An Act To Protect the Value of Diplomas for Maine's Students by Prohibiting Tiered Diploma Systems Based on Proficiency

LR: 2532 Sponsor: Senator Alfond of Cumberland  
Title: An Act To Increase Awareness of Postsecondary Financial Aid Options

#### SCHOOL POLICIES - TESTING

LR: 2213 Sponsor: Representative Espling of New Gloucester  
Title: An Act To Delay Any New Statewide Assessment Test

LR: 2397 Sponsor: Representative Golden of Lewiston  
Title: An Act To Increase Information for Parents and Teachers Regarding Standardized Tests

#### SCHOOL PROGRAMS - CURRICULUM

LR: 2279 Sponsor: Representative Daughtry of Brunswick  
Title: An Act To Require That High School Curricula Include Instruction Regarding Affirmative Consent, Communication and Decision-making Skills

#### SCHOOL PROGRAMS - NUTRITION PROGRAMS

LR: 2409 Sponsor: Senator Alfond of Cumberland  
Title: An Act To Increase Collaboration between the Department of Education and School Food Service Directors

LR: 2416 Sponsor: Senator Alfond of Cumberland  
Title: An Act To Feed Children from Low-income Families

#### SPECIAL EDUCATION - FUNDING

LR: 2140 Sponsor: Senator Davis, Sr. of Piscataquis  
Title: An Act Regarding the Funding of Special Education

LR: 2273 Sponsor: Representative Hubbell of Bar Harbor  
Title: An Act To Clarify the Liability for Special Education Costs under State-directed Student Transfers

#### TEACHERS - CERTIFICATION

LR: 2452 Sponsor: Representative Maker of Calais  
Title: An Act To Amend the Teacher Certification Statutes

#### TEACHERS - COLLECTIVE BARGAINING

LR: 2390 Sponsor: Senator Baker of Sagadahoc  
Title: An Act To Improve Teaching Assignments in Maine's Public Schools

The MeASBO discussion forum will afford members an opportunity to monitor bills as they come forward for testimony and ultimately a vote by the Education and Cultural Affairs Committee. You can follow the ongoing agenda items by following Legislative Updates on MeASBO Discussion Forum found on webpage link -[http://www.measbo.org/members/forum/forum\\_topics.asp?FID=14&title=legislative-updates](http://www.measbo.org/members/forum/forum_topics.asp?FID=14&title=legislative-updates)

You can also monitor work sessions, bills and text through the

*Continued on page 11*

# Adam Hanson juggles job, family

Fully dedicated to his job, yet deeply involved in a growing family, Adam Hanson has taken the reins of the Maine Association of School Business Officials (MeASBO).

The newly minted business manager for Lewiston Public Schools stands a discreet distance from his first post-college career as a reporter.

But Hanson is maximizing those skills, along with what he learned in nine years at School Union 74/AOS 93 in Damariscotta (four as business manager) and nearly five years as business office manager of Auburn School Department.

Now the MeASBO membership is the recipient of his leadership as the association dives into another challenging school year.

Hanson took time out of a busy day to speak with MeASBO Magazine Publisher/Editor Mark Leslie. The interview follows:

**MeASBO:** The MeASBO Executive Board held its annual summer meeting in July. What were the key takeaways from that meeting?

**Hanson:** What are the things going on that people want to learn about? What are the hot topics? We always try to hit the hot topics, but the other thing that we want to educate people more about is our certification program. We hope to have a presentation on that during this coming year.

A big topic has been the Affordable Care Act (ACA), so we did a big meeting on that in September; it was the best-attended meeting I can remember, with 118 attendees.

And we're going to be doing something I'm really excited about, which is an internal controls best practices forum. We're hoping to get a lot of participation from our membership.

We'll be tackling all of the different areas that we all face—accounts payable, receivable, handling cash, anything that falls under that broad heading of internal controls.



*Adam Hanson at his new digs — the Lewiston School Department's Dingley Building.*

Internal Controls are certainly going to look a lot different in Portland or Lewiston than they are in a small district with only a few people in the office. So we want to help people apply some “best practices” to whatever their reality looks like.

**MeASBO** When will you do that?

**Hanson:** We're looking to do that at our first meeting of the new year, which is tentatively scheduled for Feb. 26.

**MeASBO:** You mentioned hot-topic buttons. What were they?

**Hanson:** ACA was the one that came to mind. We're hoping to do something on grant compliance. It's been awhile since



we've heard any updates on that. And we hope to hear from the DOE on Handbook Chart of Accounts compliance. That's a perennial favorite.

**MeASBO:** Hasn't that all been resolved? Didn't everyone go through that?

**Hanson:** They did, several years back. But there have been a few changes and there are always issues where people are perhaps not in full compliance.

**MeASBO:** Do you ever wonder if there are maybe too many controls from the state?

**Hanson:** No comment. (laughs)

You know, I see why it's useful. You can really get down to a granular level of detail. It is a lot of work to do it to the federal government's specifications, but I can see where they're coming from. If you want to compare apples to apples, you've got to do it. If we're all doing it differently, how can we compare ourselves with anyone else, and how can we know what we're spending on one area if we're all lumping things together in different ways? So, you take the good with the bad.

**MeASBO:** It's got to get easier, right?

**Hanson:** I hope so.

**MeASBO:** What are your top few goals this year for the organization?

**Hanson:** My top goal is to increase membership, and that goes hand in hand with drawing back people who already are members but haven't been involved. We need and value all of those people, and I'd love to see a lot more of them at meetings and getting them more involved.

**MeASBO:** How are you going to do that?

**Hanson:** Members of the Executive Committee are going to be reaching out to people personally and say, 'Hey, we'd love to have you.' Just informal, and hopefully get more people to join us. Every business official in this state brings something of value to the table, and we believe we have something valuable to offer our members, so I think the benefits go both ways.

**MeASBO:** Will you be meeting more down in Portland and around the state?

**Hanson:** We usually do Augusta, Portland area, Lewiston and Bangor. Last year we started intending to have every meet-

ing in Augusta, to see if that would draw more people. It didn't seem to make much of a difference, so we're going back to spreading it around. It's such a big state, and I can understand why people can't always get there.

**MeASBO:** About certification. People have mentioned possible video-conferencing, webinars, those sorts of things so people don't have to travel to them.

**Hanson:** We've talked about it over the years, but it's never really gotten any momentum. It's something I would be interested in following up and seeing if it's possible.

It's just never fallen into place for whatever reason. If any of our members have expertise in that area, the executive committee would love to hear from them to see if we can make that happen.

**MeASBO:** When you talked about certification at the Executive Board meeting, what came out of that?

**Hanson:** The certification program has been in place for five years and it's been awhile since we've just had an overview of what it is.

We have a lot of new members and we want them to know it's out there and what it's all about, and hopefully get more people interested in applying and going for it.

We want to keep it in front of people, or introduce it to them for the first time if they have not been exposed to it. So that will happen at one of our meetings.

**MeASBO:** So your goals for the association?

**Hanson:** Increasing membership, engaging current members, keeping certification in front of people, presenting professional development so that people can go after certification, which is why we were happy to do the school business officials conference with Drummond Woodsum for the second straight year (Oct. 15).

It's always our goal to have the most relevant topics at the meetings, and that might change from month to month. So in July we lay out what we think might be good, but that could change by February and April.

**MeASBO:** Personally, what are your

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top goals?

**Hanson:** Reaching out to the current members and trying to get people involved or reengaged is my biggest thing.

Along with that is trying to raise up more leaders for the future. We've had some leadership people leave, and we don't want to leave a big void in the coming years.

**MeASBO:** We had a couple of officers move.

**Hanson:** Luci [Milewski] is back! She changed school districts so had to leave her MeASBO post, but we persuaded her to come back onto the Executive Committee.

**MeASBO:** What are you going to do about the 1st and 2nd vice presidents?

**Hanson:** As of our last meeting, Luci is back on board and Colin Walsh of RSU #57 (Waterboro area) is also on the Executive Committee, but we haven't gotten around to giving anyone titles.

**MeASBO:** What are the biggest challenges today for Business Managers doing their jobs?

**Hanson:** I think increased mandates. It's been the same story for years. More

“Increasing membership, engaging current members, keeping certification in front of people, presenting professional development so that people can go after certification ... have the most relevant topics at the meetings.”

— Adam Hanson, MeASBO President, when asked about his goals for this academic year



and more mandates, more and more need to do reporting, and compliance with grants and laws.

Also, probably just how tight funds are for everybody. Again, it's been the same story for years, but things aren't getting any easier in terms of budgets. So, complying with mandates, complying with special-ed law, keeping your facilities in good shape and yet keeping the tax burden reasonable is a huge challenge for everybody.

**MeASBO:** Quite a difference from your former job as a reporter. But you do have to be able to be an expert on one thing one day and an expert on another thing the

next day.

**Hanson** (laughs): So it is like being a reporter! And you have to be able to word things in a good way.

**MeASBO:** What have been the biggest setbacks to schools in recent years?

**Hanson:** I think it's the two things that I already said: the incredibly tight financial constraints that everyone's under, the inability of the state to meet the 55 percent requirement and the fact that none of that releases anyone from any of the education laws and requirements around special ed and other things.

**MeASBO:** Special ed has come up a couple times. What's the problem with special ed?

**Hanson:** You see more and more children coming in with needs right off the bat. It strains the system both monetarily and staff-wise.

**MeASBO:** When Sue Gendron was Education Commissioner, she said she thought more and more schools were evaluating more and more kids as needing special ed because they got 100 percent funding for them. Can you dispute that?

**Hanson:** In my experience, nothing could be further from the truth. The amount of effort and staffing and coordination and transportation, working with the families—the amount of work that goes into all that, no one is manufacturing any of this.

**MeASBO:** You didn't mention the ACA in your list of setbacks.

**Hanson:** I think that's going to be a hurdle that we all get through. Yes, it's been a big deal the past two years as we all come to grips with it.

I don't know if it's a long-term major struggle for school districts. Some of that



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has yet to be determined. But it certainly has been one more thing everyone has to deal with and we're still trying to figure it out.

**MeASBO:** Is there any possibility of rolling back any of the ACA? If so, what part of it?

**Hanson:** Depending on whatever the new administration turns out to be, and how the votes turn out next fall, I think it could absolutely change in the coming years.

**MeASBO:** So it hasn't gone too far?

**Hanson:** I don't know that. Maybe it has. I think it will be years before we all come to grips with how it affects both employees and employers.

**MeASBO:** What has been the greatest achievement of MeASBO in recent years?

**Hanson:** Just the fact that we keep going is a great achievement. We're so busy and yet people take the time to make this happen.

School finance is a unique field, and the opportunity that is afforded to people to network with others in similar jobs is, I believe, invaluable.

**I think it could absolutely change in the coming years.'**

I know I would not have survived my first few years in school finance without this organization.

**MeASBO:** When Sue Gendron and Gov. Baldacci were planning school consolidation, Sue did not speak to a single business official about it, not even Donn Davis, her assistant superintendent at Windham.

Does MeASBO now have "a seat at the table" as a stakeholder in State Capitol discussions about education?

**Hanson:** I believe so. In fact, I can think of a couple of issues where the DOE has reached out to our membership in the past few years, and we really appreciate that. We've cultivated a very good relationship with key people at the Department of Education over the years in finance. We welcome the chance to be part of the discussion about things that

will affect everybody.

We may have some insight into areas no one else thought about.

**MeASBO:** Are you fully settled into your new digs in Lewiston?

**Hanson:** I don't know if you ever get fully settled in. Everyone in Lewiston is great to work with. I really enjoy the people here. We're currently undergoing a software conversion to MUNIS, so everything's a bit crazy right now.

The conversion is a huge undertaking, but everyone here is up to the task and I'm really enjoying it here. I'm looking forward to getting to know the budget process in Lewiston. And I'm still glad I don't have to do nine budgets anymore [as in Damariscotta].

**MeASBO:** With a growing family (wife Beth; sons Samuel, 4, Noah, 2, and Josiah, 2 months) and new job, are you finding time for anything besides work and changing diapers?

**Hanson:** No. (laughs). Not as much time as I'd like to find. My family's awesome. Having three boys is crazy and wonderful at the same time. ...

## Legislature debating numerous education bills

*Continued from page 7*

Maine House of Representatives homepage where you are able to search a Bill Text by either LD Number, Paper Number or LR Number and select whether the bill is an Emergency, Governor's Bill or Bond Issue. See sample format:

As you navigate the Maine Legislature Bill Tracking and Text Search engine, it is intuitive and allows you to focus on the upcoming bills that could possibly affect your school districts.

If you have yet to link into the MeASBO Discussion Forum, do so today and sign-up to receive Legislative Updates by within the Forum Options and click on 'Watch This Forum..'

You will receive automatic updates and remain current on the Legislative session and know when to get involved.

Through Maine School Management Association web site, you are able to view ongoing Legislative concerns, whereby MSMA is an advocate on behalf of Maine Schools.

During the Legislatures sessions, this is great webpage to Bookmark and combining this site with MeASBO Legislative Updates, you'll have current informa-

tion and have the ability to provide your insights into the making of laws and regulations that ultimately affect your school district. ...

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## Business Manager Certification: A highway looking for travelers

By Mark Leslie

**S**chool Business Manager Certification, an aspiration that drove MeASBO Past Presidents Jude Cyr and Donn Davis to implore state action for years, without success, is now a reality. But is it being pursued to the extent they wished?

The old adage applies: the jar's half-full, or half-empty.

"Out of all our members we have five who are certified, six who are on track. It's a matter of what enticements do people have?" said Cyr, school business manager for 31 years for the Auburn School Department. Since he holds a master's degree in school administration and is now certified as an assistant superintendent in New Hampshire, Cyr himself sees no need for more credentials.

"People haven't yet seen the value in it," said Scott Vaitones, MeASBO's president at the time the organization finally, unilaterally, created the voluntary certification program.

Vaitones added, "If a superintendent said, 'Let's up the pay \$3,000 for [a certified business manager],' that would be an incentive. In my case the superintendent didn't even tell the school board that I'd become certified. He couldn't be bothered."

"I've been discouraged by the number not going for certification," said Deb Roberts, business manager at SAD #52 in Turner, who leads the Professional Development Committee charged with the certification program. "It's such a rewarding experience to go through... It's a great introspection into yourself and your career to date."

Roberts was the first to be certified, followed quickly by Vaitones, then Luci Milewski of East Millinocket and Northport, Sherrie Small of SAD #61 in Bridgton and Karla Miller of RSU #40 and SAD #40 in Union.

Six other MeASBO members are in the process.

"I really believe it is a great step forward for our organization,"

### Certified School Business Managers

- Deb Roberts, business manager at SAD #52 in Turner
- Scott Vaitones, business manager at St. George Municipal School Unit
- Luci Milewski, business manager at East Millinocket School Dept. and Northport
- Sherrie Small, business manager at SAD #61 in Bridgton
- Karla Miller, business manager at RSU #40 and SAD #40 in Union

### Working towards Certification

- Terry Gauvin, business manager at Biddeford/Dayton School Dept.
- Holly Vining, business manager at RSU #50 in Dyer Brook
- Sherry Moody, business manager at Mid-Coast School of Technology in Rockland
- Shirley Waning, bookkeeper at MSAD #23 in Carmel
- Denise Johnson, business office supervisor at the Auburn School Dept.
- Kelly Theriault, business manager at AOS #81 in Holden

said Vaitones, now the business manager at the brand-new St. George Municipal School Unit in Tenants Harbor.

### Decisive Factors

Hectic work schedules, a never-ending crunch of reports and



Gary Smith

**“What always impresses me when we get together is that each and every one of you seems to do this almost effortlessly and somehow you all are able to remain in good spirits. The only way this can happen is that you have mastered the art of “reinventing yourselves.” Only by constantly learning, relearning, and adapting are you able to perform these roles throughout the year and keep your districts running. By doing our jobs, school business officials in the background make our schools turn out students ready to move on to the next phase of their lives.**

— Gary Smith, then business manager SU #52  
and President of MeASBO

Fall 2015



travel distance head the list of reasons more school business managers are not pursuing certification.

"It's difficult for me to make the ASBO meetings regularly for many reasons, location being one," said Holly Vining, business manager at RSU #50 in Dyer Brook near Houlton. "I also hold a CPA license and am required to obtain 40 hours of continuing professional education credits annually to maintain that license. Most of the training for my CPA licensure does not qualify for ASBO certification, and so it's difficult to maintain both due to the time commitment involved. That's why I've put the ASBO certification on hold for now."

And yet the idea of certification is uplifting for Vining, who applied for it in 2011, and other of her colleagues.

"When I first heard about the voluntary certification I was excited about the opportunity," she said. "Many positions in education require certification. The idea of attaining a certification that says you're qualified for your position makes sense to me."

"I felt it was important to get certification," said Terry Gauvin, business manager at Biddeford/Dayton School Department, who is in the process. "It's something that we as business managers look at with pride... It's a statement: 'I do this job and am certified to do this job.' No other reason. Not financial, it's just nice to say."

"I think it's an important thing as an aspiration," said Sherry Moody, business manager at Mid-Coast School of Technology in Rockland. "To have something from our own organization is valuable. Recognition is why I'm doing it, as recognition from my peers more than anything else."

Denise Johnson, business office supervisor for the Auburn School Department, said, "My motivation is that I'm new to schools. I've been in a lot of different paths. I owned my own business, worked in retail and corporate. Now in the school environment, it's learning the methods in this accounting process and all the work that goes with it."

Roberts' motivation?

"To practice what I preach," she said. "To lead the charge. My motive was to be a good role model as the leader of the Professional Development Committee."

"On a personal level," she added, "I just enjoy being a lifelong learner. Though I've been in the business a long time I have a lot more to learn. And focus to my learning on areas that the organization has defined as important. As a group we designed the content."

The stature of MeASBO and its members, as vital contributors and administrators in the educational system, is key to the entire certification process.

It's a status that would give MeASBO "a place at the table" in statewide decision-making.

Their absence was notably and visibly evident when then-Education Commissioner Susan Gendron and then-Gov. John Baldacci did not consult a single business manager when deciding with to consolidate school units.

**"I feel that our role is becoming more important. We aren't just the 'bean counters' anymore."**

**— Sue Lambert, SAD #49  
in Fairfield  
Fall 2013**

**"It's something that we as business managers look at with pride... It's a statement: 'I do this job and am certified to do this job.' No other reason."**  
**— Terry Gauvin,  
business manager  
Biddeford/Dayton**



"It [certification] gives credibility to the significant roles we play every day to make a school district function," Roberts said. "I'm hoping one day it will have enough significance that .... when a superintendent is looking for a new business manager he'll look for a candidate who has this certification, using it as criteria for a business manager. We're not there yet."

#### Rewarding

"It's a great program," said Auburn's Johnson. "The sessions I've gone through really help identify areas in this position and offer background and fore-thinking. It gives you a chance to hear others, their experiences, etc. I like going to the sessions."

*Continued on page 19*



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# 'It [Obamacare] has become a monster'

— Terry Gauvin

## MeASBO packs them in

### Breathing room for some, not others

Congress has unanimously passed a bill, signed by President Barack Obama on Oct. 7, that redefines small businesses as ones with 50 or fewer employees.

The Protecting Affordable Coverage for Employees (PACE) Act effectively is a key victory for school units with 51 to 100 employees. The ACA as written was forcing these schools leave existing MEA health plans.

Still, 85 Maine school districts have fewer than 50 employees and will, indeed, lose existing coverage.

The bipartisan effort marked the first time Democrats and Republicans have come together to alter the ACA, or Obamacare.

If Obama had not signed the legislation, the ACA could have forced some districts to offer more generous benefits than they do now. In addition, the change would have meant insurers could no longer set certain premiums for districts based on the reclassified sizes, industries or claims histories, which are typically used to determine premium rates for small employers.

The definition change was included in the law because some believed that reclassifying small businesses would bring millions of new customers into the insurance market and stabilize the industry for small employers. However, according to California Healthline, the American Academy of Actuaries predicted the change could have "result[ed] in significant premium-rate changes for some groups," especially among employers with relatively young and healthy employees.



Past President Dan O'Shea of the Yarmouth School Department, second from right in black, were among well over 100 school officials who attended MeASBO's September meeting. Christopher Stevenson, an attorney with the Portland law firm Drummond Woodsum, Benefits Trust.

## ACA reporting mandates for school districts

By Chris Stevenson, Esq.  
Drummond Woodsum

**A**s we know, the so-called ACA "Play or Pay" penalties require school districts that are "large employers" to:

- offer "substantially all" (generally meaning 95 percent, but relaxed to 70 percent for qualifying schools for the current school year) of their "full-time" employees (30 hours/week or 130 hours/month) the opportunity to purchase health insurance for themselves and their dependents through the district's health plan, or else face the so-called "Sledgehammer Penalty"; and
- offer health insurance that provides minimum value and is "affordable" to the full-time employee or else face the so-called

"Affordability Penalty."

The Treasury Regulations include a safe harbor whereby an employee's health insurance will be deemed to be "affordable," and the employer will not face a penalty, provided the cheapest self-only health insurance offered to the employee would cost the employee no more than 9.5 percent of his/her monthly rate of pay (the "Rate of Pay Safe Harbor").

One of the most common questions I receive is, "How is the IRS going to track whether an employer triggers these penalties?"

In large part, the answer is through the new IRS Form 1094-C and 1095-C reports.

*Continued on page 16*



**'Everything changes in 2016. Everything.'**  
— Christine Burke

# to hear latest about ACA



ght in front, and current Treasurer Sherrie Small of SAD #61 in Bridgton, center in  
ember meeting which focused on the Affordable Care Act (ACA). Speakers included  
dsum, and Christine Burke, executive director of the Maine Education Association

Some incentives to get it right:

- ✓ **Cadillac Excise Tax**
- ✓ **Sledgehammer Penalty**
- ✓ **Play or Pay Penalty**
- ✓ **Affordability Penalty**
- ✓ **Failure-To-File Penalty**
- ✓ **Late-filing Penalty**
- ✓ **Improper-filing Penalty**
- ✓ **Employer Shared Responsibility Penalty**

## Small Group Migration rules changing

By Christine Burke

**A**n esoteric part of the Affordable Care Act (ACA) initially required Association Groups with 50 or fewer employees to leave their association health insurance plan (even if it was a “gold” plan and affordable) and move to the small group market, the Small-business Health-insurance Options Program (SHOP), or to the Exchange.

This move, referred to as the Small Group Migration, was initially required in 2014.

This same provision also expanded the definition of Small Group Market to include groups of 51 to 100, and initially also required these groups to move to the Small Group Market, the SHOP or the Exchange in 2015. Referred to as the Small

Group Expansion, it, too, would be subject to the Small Group Migration.

However, when the ACA also required individuals to give up their individual plans that did not meet the Bronze, Silver, Gold or Platinum levels required by the ACA (referred to as the Individual Mandate), the result was a hue and cry from many Americans in the Individual Market.

President Obama responded by issuing an order delaying both implementation of the Individual Mandate and the Small Group Migration.

The Small Group Migration was delayed until plan years that started after Oct. 1, 2016. Since Maine Education Association

*Continued on page 17*

Continued from page 14

Beginning in January, school districts that are “large employers” (50 or more “full-time equivalent” employees) will be required to submit a Form 1095-C to the IRS and to each employee who was considered “full-time” for one or more months during calendar year 2015 and a Form 1094-C Transmittal Form to the IRS.

The forms are due to the employee by Jan. 31 and to the IRS by Feb. 28 following year-end (or March 31 if filing electronically).

There is a penalty on the school district of up to \$500 per full-time employee for

failure to file Form 1094-C and Form 1095-C. In addition, if a school district incorrectly completes one of these forms, it may inadvertently trigger the assessment of a Play or Pay penalty on the school district.

Although there is transition relief that will allow certain school districts with 50-99 full-time equivalent employees, and who meet certain other requirements, to delay application of the Play or Pay penalties until July 1, 2016, these districts will still be required to comply with the Form 1094-C and Form 1095-C requirements, beginning with calendar year 2015.

The major purpose of the Form 1094-C transmittal is to demonstrate to the IRS whether a Sledgehammer Penalty should be assessed on the school district for the given year. The school district will indicate whether it complied with the Sledgehammer Requirement by completing Part III of the 1094-C Form.

For a school district that offered health insurance to at least 95 percent of its full-time employees (or 70 percent if the school district qualifies for transition relief) for all 12 months of 2015, the school district will mark “x” in “yes” box of Form 1094-C, Part III, line 23, column (a). That indicates to the IRS that it should not assess a Sledgehammer Penalty on the school district for any month during the 2015 calendar year.

A major purpose of the Form 1095-C is to show the IRS whether or an Affordability Penalty should be assessed on a school district with respect to the full-time employee. The Form 1095-C will require the school district to indicate which months during the calendar year the employee was considered “full-time,” whether the employee was offered coverage for himself and his dependents during each month; what was the employee’s cost of the cheapest self-only health insurance coverage option offered to that employee each month; whether the employee elected health coverage through the district; and whether the school district qualified for one of the IRS-prescribed safe harbors to shield the school district from a possible Play or Pay penalty, such as the Rate of Pay Safe Harbor.

From this information, the IRS will determine whether to assess an Affordability Penalty on the school district for the employee in question.

How a school district will complete Form 1095-C for each of its employees will vary based upon the individual facts and circumstances (which months the employee was considered full-time, what level of health benefits was offered to the employee, whether the school district complied with the Rate of Pay or other safe harbors, etc).

However, some noteworthy details regarding 1095-C Reporting follow:

- Only “Large Employers”: 1095-C Reporting for 2015 is only required for school districts that are “large employers” (50 or more full-time equivalents during 2014);

Continued on page 18

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*Continued from page 15*

Benefits Trust's (MEABT) plan renews on July 1, the Migration will not occur until July 1, 2017, unless the impacted groups materially changed their plan.

Any material change in the plan will cause the impacted groups to lose their "grandfather" status, and they will be required to move to the Private Small Group Market, the SHOP, or the Exchange.

Since we were informed of all of these requirements under the ACA, the MEA Benefits Trust has been trying to obtain clarification that this esoteric provision of the ACA did not apply to us. Since we had been considered one plan under a different part of the ACA, we believe that we should be considered one plan under all parts of the ACA.

We spoke with the White House Office on Health Care Reform, the Department of Health and Human Services, the Department of Labor, and our congressional delegation. Many of these officials indicated they believed that this provision was not intended to capture groups like ours. After all, these "sub-groups" liked their plans and wanted to keep them (as promised by the President).

However, because of the political stalemate around the ACA, there was little political will to submit legislation to clarify the language, until very recently.

In early October, Congress passed the PACE (Protecting Affordable Coverage for Employees) Act and on Oct. 7, the President signed it into law. It is the first piece of legislation that changes the ACA that has passed both houses of Congress and has been signed into law by the President.

The PACE Act makes the Small Group Expansion optional for the States. In other words, it removes the requirement that the Small Group Market be expanded from 50 to 100, and leaves it completely up to the States as to whether they wish to expand the Small Group definition.

By removing the expansion, the PACE Act also removes the migration of these groups. This is really good news for 24 of Maine's districts.

However, we still have 85 districts that have fewer than 50 employees. As a result, we are still pursuing obtaining clarification that this provision of the ACA does not apply to groups under our plan.

While we continue to seek that clarification, we are also reminding those districts that they should not make any material changes to their plans and inadvertently lose their grandfather status, which would require them to migrate immediately.



*Christine Burke explains migration changes to the ACA.*

Material changes to the plan generally are considered a change that creates a 2-percent actuarial-value change to the plan (by adding or deleting benefits of 2 percent actuarial value, or by offering plans that they did not offer in 2013).

MEABT wants districts to know that we will do everything in our power to keep our group together. It is the size of our group that allows us to keep the rates stable and absorb the impact of high-cost claimants in a way that smaller groups could not.

We certainly would encourage any district with 50 or fewer to write to Maine's congressional delegation to express your frustration.

Sen. Angus King has taken the lead on this issue for us. He particularly needs to know that it is causing great consternation for collective bargaining, for retirees and for schools' stability in terms of health-insurance premiums. •••

*Christine Burke is executive director of the MEA Benefits Trust.*

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Continued from page 16

• **“Full-Time” for One or More Months:** A Form 1095-C is required to be furnished to anyone considered to be a “full-time” employee for one or more months during the calendar year.

For example, a substitute teacher who worked 130 hours or more in a given month for the district would receive a Form 1095-C (unless possibly the school district is operating under a “look-back approach” and the substitute teacher is considered part-time under the look-back approach for the entire year in question);

• **Delivery:** Electronic delivery is permitted, provided rules similar to the rules for electronic delivery of an employee’s Form W-2 are met and the employee consents to electronic delivery. Also, Form W-2 and Form 1095-C may be combined in one mailing to the employee.

• **Electronic Filing:** Electronic filing with the IRS is required if the school district files 250 or more forms.

• **Third-Party Reporting Permitted:** School districts are permitted to arrange for third parties to prepare the form, but the employer will still be required to file the authoritative transmittal form. An agent may be listed as the contact person on Form 1095-C. However, the employer



**“It’s always a matter of timing. That said, districts should begin the education process now to ensure everyone involved understands the opportunities for different coverage plans and individual needs. A health plan can be tailored to different ages and different incomes.”**

**— Tony Payne of Clark Insurance**  
**Winter 2012-13**

would still be ultimately responsible for any failure to file, or related IRS penalties.

• **No Transition Relief for 2015 For Mid-Sized Employers:** Although certain qualifying mid-sized school districts with between 50 and 99 full-time employees are not subject to the Play or Pay penalties for 2015, these employers must still complete Form 1094-C and Form 1095-C in January for the 2015 calendar year.

It is imperative that school districts that are large employers timely and accurately file IRS Form 1094-C and Form 1095-Cs in January. The IRS may impose significant penalties on untimely filed forms.

Also, improperly completed forms could inadvertently trigger Play or Pay Penalties

on the District.

In an effort to help school districts meet their 1094-C and 1095-C reporting obligations, Drummond Woodsum will hold two webinars scheduled Thursday, Dec. 10, from noon to 1:30 p.m. and Thursday, Jan. 7, from noon to 1:30 p.m. Sample completed Form 1095-Cs will be provided to attendees. To register visit [www.school-law.com](http://www.school-law.com) and click on the “Events” link. ...

## Charter schools hearing scheduled

AUGUSTA – On Oct. 26, from a 11 a.m. to 1 p.m. the public will have the opportunity to weigh-in on Acadia Academy of the Lewiston-Auburn area and Snow Pond Arts Academy in Sidney, both proposed to open in the fall of 2016.

The Maine Charter School Commission will now consider the proposed public schools and hold in-person interviews and public hearings on each application before voting on Nov. 17.

An in-person interview for the applicants proposing the Snow Pond Arts Academy charter school will be held at the Burton Cross State House Office Building, Room 103. A public hearing will follow from 11 a.m. to 1 p.m.,

The in-person interview for the applicants proposing the Acadia Academy will also be held on Oct. 26, from 2 to 4 p.m. at the Burton Cross State Office Building, Room 103. A public hearing will follow at the same location from 4 to 6 p.m.

Written public comments on any of the applications can be sent to [mesc@maine.gov](mailto:mesc@maine.gov) or the Maine Charter School Commission, 182 State House Station, Augusta, ME 04333-0182. Submissions can also be delivered in-person to the 5th Floor of the Burton Cross State House Office Building, 111 Sewall Street.



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Continued from page 13

"Plus, networking is huge and you get that," she added. "It's a family-type atmosphere. They're very supportive. You meet different people and they're all so open and say, 'If you have a question, just call me.'"

"It's helped me to look at all the areas of my own knowledge base," said Moody, who is two-thirds of her way to completion. "It's (3rd level) a very comprehensive education and has made me aware there are areas I need to know more about, or areas I've never dealt with (bonds, for instance). So this has been extremely helpful in educating me. I also looked at areas I've been doing for years and realize how much I already know."

"It's very rewarding," said Gauvin. "It's forced me to go into areas I don't deal with on a daily basis. For instance, I oversee nutrition but not in-depth, so when I took the class I learned a lot about how different aspects of food-and-beverage come together."

"I think it's a wonderful thing," she added. "It's great they work so hard at doing it. It would be nice if a lot of business managers would get it, but I understand timing and getting a lot of this done is difficult. For me, things got hectic and crazy at work."

### Obstacles, Obstacles

**T**ime constraints and course availability stand in the way for many business managers.

"For me it's a slow process because I'm so busy trying to get the programs I want. I need just a few," said Johnson.

"The difficulty I've had with ASBO certification," said RSU #50's Vining, "is that there are many requirements that can only be met through attending ASBO-sponsored professional development."

Facing and overcoming these and other obstacles is a major task facing the Professional Development Committee consisting of Roberts, Cathy Mesmer, Karla Miller and new member Stacy Field.

"I think the committee has done a great job of identifying areas for certification and the evaluation process is fair," said Vining. "I truly appreciate the time involved and the commitment that the committee has made to furthering our education and making certification a possibility."

"I'd like to see the program continue and improve," Roberts said. "We welcome any feedback people would give us to improve it, or cause them to be interested in following through. We have no

**To have something from our own organization is valuable. Recognition is why I'm doing it, as recognition from my peers more than anything else.'**  
—Sherry Moody,  
business manager  
Mid-Coast School of Tech.



new applicants this year. I have a standing offer to sit down and meet with people before they put their application together."

That feedback continues as the program grows.

### Suggestions

"My suggestion?" Vining said. "Make it easier to obtain training through webinars and other means that wouldn't require being away from work as often."

"Maybe if there are opportunities to get classes elsewhere, the committee could get the list of them out to us," offered Johnson. "It's a new program and they've done well putting it together. It just needs to get to the next level, scheduling, so people know what's coming up, or have options to find it online."

"The only thing I've had a hard time with is, you have to wait for the committee to review everything and all these folks are busy," said Moody.

"From the beginning, we knew it was going to take time," Vaitones said. "We're trying to provide so many areas of certification that aren't easily met. The leadership is trying to develop those areas into one big workshop, or whatever it might take."

MeASBO members have been able to teach a couple of those workshops the last couple of years, and Vaitones suggested tapping into that expertise more often.

"We've always argued within our organization that our greatest resources are sitting around us at every meeting. One of us has been there and done that."

Stay tuned, Roberts said. Improvements are coming. ...



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# MeASBO Magazine



## Best of the Best

MeASBO has been celebrating 2015 as the 20th anniversary of our newsletter's transformation into a full-fledged magazine, filled with news, features and graphics.

Doing so, we have voted on our Best Cover and Best Feature Story. It so happens that the Best Cover—two Adirondack chairs in a stormy sea—graced the same issue that contained the Best Cover Story. That story, “Recipe for Divorce,” delved into the many cases of Maine communities trying to “divorce” themselves from “marriages” into which they had consolidated.

School consolidation, a move which forced communities to find a partner within 18 months, was an ongoing struggle which is still causing consternation within many towns.

Oddly, the President and First Lady in far-away Washington, D.C., were at the center of two other controversies that received

many votes for Best Cover Story. First is the Affordable Care Act, known as Obamacare, an issue grabbing our continuous attention for six years.

Problem is, because of the bill's immense size and comprehensiveness, we never covered the whole convoluted legislation in any one article.

Second is Michelle Obama's baby: the federal Healthier Hunger-Free Kids Act of 2010 which demands exhaustive and seemingly inflexible regulations on schools' food-service programs.

So, here are our Best-Of choices.



# celebrates 20 years

## Shotgun Marriages



### ‘Divorces’ increasing among RSUs

By Mark Leslie

In America the average length of first marriages that end in divorce is eight years. The leading reasons for the breakups: finances and “irreconcilable differences.”

Many of Maine’s new Regional School Units — called “shotgun marriages” by more than one observer — have not or will not last that long. The reasons: usually “local control” and finances.

When in 2007 then-Gov. John Baldacci and the Maine State Legislature gave Maine communities 18 months to consolidate their 290 school systems into 80 or face financial penalties, the aim was 1) to reduce the costs and improve the efficiency of providing education and 2) to expand educational opportunities and equity. The results for both are arguable, but a growing number of communities are giving the effort a flunking grade.

While many of the new Regional School Units (RSUs) are reporting savings and others are spending about the same, a number of individual towns have been hard hit by vastly increased education costs because of the school funding formula.

Whatever the reasons, when the required three-year waiting period for withdrawals expired in 2012, 38 communities began the lengthy process of leaving their school districts. Since then, 16 towns have completed withdrawal, another seven have voted to withdraw but fallen short of the required ballots cast, and others have

#### **Have withdrawn from RSUs:**

Athens, Brighton Plantation, Cherryfield, Dayton, Ellsworth, Eustis, Frankfort, Glenburn, Hancock, Lamoine, Mars Hill, Portage Lake, Saco, Starks, Veazie, Wiscasset

#### **Completed AOS Withdrawals:**

Bancroft, Bridgewater, Calais, SAD 14, SAD 20, SAD 42, SAD 70, Orient

#### **Withdrawal Committees have been authorized:**

Buckfield, Dixfield, Palermo, Westport Island, Windsor, St. George

#### **Withdrawal Committees Disbanded:**

Dixfield, Westport Island

#### **Withdrawal votes failed for insufficient ballots cast:**

Andover, Belfast, Belmont, Monmouth, Morrill, Northport, Searsmont, Swanville

#### **Withdrawal defeated by voters:**

Arundel

#### **Withdrawal Petition has been filed:**

Durham, China, Ludlow, Steuben



started the 21-step withdrawal process.

“Marriage” and “divorce” are recurring words in discussions of Maine’s consolidations.

“These marriages, some of them were doomed from the beginning,” said Jack Turcotte, former superin-

**“These marriages, some of them were doomed from the beginning.”**  
— Jack Turcotte, former superintendent for the Ellsworth, Sanford and Old Orchard Beach school systems



tendent for the Ellsworth, Sanford and Old Orchard Beach school systems, who has worked with Ellsworth, Freeport, Arundel and Andover in their withdrawal processes. “It’s hard work to resolve conflict. Look how difficult it is in a marriage. Now communities that never fell in love in the first place have to work through it. Or, if they’re not in love any longer, they’re better off apart.

“Some of these withdrawals are in the best interest of both parties.”

“These forced marriages made people resentful,” said Dr. Gehrig Johnson, full-time superintendent at the SAD 1 in Presque Isle and part-time superintendent for RSU 32 in Ashland. “I tried to tell Gov. Baldacci that you can not force communities to join together, that it’s not going to work. He did force them and caused a boatload of issues. We’re suffering the consequences and will for the foreseeable future. Look at the number of systems pulling out.”

From each corner of the state, many echo Johnson’s disgruntled remarks.

Lolisa Windover, who represents Peru on the RSU 10 School Board, compared the consolidation to “blackmail and extortion.” Yet, because of the difficulties in rebuilding a school system such as purchasing school buildings and buses, and “the risk of the state not helping us build a new school,” Peru has given up its withdrawal efforts.

“The grand experiment has not worked uniformly,” said Gary Fortier, a city councilor since 1992 in Ellsworth which, along with Lamoine and Hancock, voted last November to withdraw from RSU 24. “When you have a gun to your head and you’re being told to consolidate, it changes your mind.”

### The Financial Results

The consequences of Maine’s consolidations are widely varied, but Gov. Baldacci’s prediction that consolidation would save the state \$250 million over the first three years was “pie in the sky,” said one school official.

The Education Policy and Research Center at the University of Southern Maine was engaged

to study the overall results of the consolidation, but funding ran out before the financial analysis was begun, according to Director David Silvernail.

Asked if he thought the new units were saving money, Silvernail said any analysis is complicated by the fact that at that time federal stimulus moneys were appropriated and the state school subsidies were declining.

“Too many factors were too mixed [to determine if there were savings],” he said. “Our backup strategy was to look out three to four years at a group of districts that did reorganize and some that either didn’t or didn’t have to; and then compare them.

“My premise,” Silvernail added, “was that consolidation was not necessarily going to lead to cost savings in all areas. In some cases it would just slow down the increase. My hypothesis was that administration costs in the consolidated districts should not be increasing as much.”

Indeed, school administration costs average only 3.5 percent of school districts’ expenditures, Silvernail said, “So even if you had big savings in administration, you wouldn’t save big bucks in the total costs.”

Silvernail said another projection from Baldacci was that the first year was supposed to bring a 5-percent reduction in special-ed costs and transportation costs. The next two years 2-1/2 percent and 2-1/2 percent.

“They did the cut in the first year but not the other cuts,” he said.

### Business Managers Weigh In

School business managers have report varied results.

David L. Bridgham of RSU 24, which will see Ellsworth, Lamoine and Hancock withdraw, effective July 1, asserted, “The consolidation really did save money.”

People in the withdrawing towns “acknowledged that it’s not about money or education, but local control,” he said. “From our perspective, our budget is \$1.5 million less than the budgets of the school systems that formed the RSU in 2008-09. And if you add up all those savings it comes to \$9.5 million in local taxpayer money that didn’t get raised and appropriated for education; and that doesn’t count the inflation we would have had to begin with.”

Bridgham explained that property values around Frenchman’s Bay, Flanders Bay and the Schoodic Peninsula are rising faster — and some places much faster — than statewide. And its population is a high percentage of older retirement age.

“There’s a big sucking sound and the subsidy is going south on



**“There’s a big sucking sound and the subsidy is going south on us. Budgets were going down but taxes going up. The average Joe sees his tax bill go up and thinks it’s related to the school budget.”**  
— David L. Bridgham of RSU 24



**“Too many factors were too mixed [to determine if there were savings],” — David Silvernail, USM**

us,” he said. “Budgets were going down but taxes going up. The average Joe sees his tax bill go up and thinks it’s related to the school budget.”

Fortier, of Ellsworth, agreed, saying, “For whatever reason, Ellsworth’s contribution to education increased \$2 million over three years. I don’t place all the blame on the RSU. It’s just that the public saw a \$2-million increase.

“Some of that can go back to the changes in the funding formula; some to increases in our valuation now that we’re over a \$1-billion community. The RSU did very well in some areas: IT, food and beverage, special ed, the central office.”

Mary Dailey, the former business manager with SAD 21 now with Western Foothills RSU 10, said each member town’s cost may have changed according to valuation, but the total budget remained unchanged through the first three years of the merger between SADs 21, 39 and 43. This last year saw an increase, she said.

At 5-year-old Sheepscot Valley RSU 12, where Wiscasset is withdrawing on July 1 and Windsor and Palermo have initiated the procedure, Business Manager Belinda Waterhouse reported the district has saved money.

The member towns’ total budgets before RSU 12 was created were \$28 million to \$29 million, Waterhouse said. “Consolidating, our first budget was \$27 million and now it’s \$26 million. It’s going down every year — partially because of the number of students, partially efficiencies. It takes awhile to find efficiencies — energy being a big one.”

Waterhouse said three central offices were merged into one, losing one finance manager and a full-time receptionist. “We reduced hours and next will lose another full-time business-office person because of Wiscasset leaving.”

It’s a different story for a number of individual towns, however.

Wiscasset’s state subsidy has been reduced from \$1.5 million in 2008-09 to \$1 million this year, Waterhouse said.

Cherryfield, which withdrew last year from RSU 37 in western Washington

County because the district wanted to close the town’s elementary school, is halfway through its first academic year back standing alone.

Its report?

“The other towns thought we would go broke, but as it turns out, it’s relatively the same,” said Art Tatangelo, a self-employed mason who led the effort to pull out.

He said the major financial hit has come from the state’s “Draconian” penalty for keeping the school open: \$420,000 the first year and \$300,500 the second.

Jonesport-Beal is providing Cherryfield

with central-office services as well as Superintendent William Shuttleworth’s expertise, and Tatangelo foresees that “will continue with that relationship for some time as long as it’s benefiting both parties.”

In RSU 26, Veazie and Glenburn both voted in November 2012 to withdraw, leaving Orono as the district’s lone surviving community.

Veazie withdrawal committee members expected to save \$170,000 a year in taxpayer allocations.



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The withdrawal agreement allowed the three towns to continue sharing some administrative services as well as some teachers.

"It's absolutely not saving us money. It's costing us money, no question about it," said Jon Holmes, who was active in Dixfield's failed attempt to leave RSU 10, a 3-year-old system that married the Dixfield area's SAD 21, Buckfield area's SAD 39, Rumford area's SAD 43 and Hanover.

Dixfield, Carthage, Peru and Canton — the former SAD 21 — are all paying more, he said. But while all the first three have voted in favor of withdrawing from RSU 10, none can do so because of a peculiarity in the reorganization law. The law states that an SAD merges with other districts, in order to withdraw, all the communities from that former SAD must agree. In this case, Canton remains the lone holdout.

"It's as plain as the nose on their face it won't work," Holmes said. "Even when they first mentioned merging there was standing-room-only in the gymnasium. It just wasn't feasible for us. Simply the distance to bus all the kids to Rumford and the high school kids from Rumford to Dixfield is asinine."

Johnson at Presque Isle noted that he actually recommended to Portage Lake residents that they withdraw from SAD 32 in Ashland in 2012.

"They saved \$235,000 a year right out of the gate," he said, explaining that Portage Lake, like many towns with high-valued properties, saw its valuation driven up.

"Their value as a portion of the whole five-town district was disproportionate to the point that for 46 kids they were paying out \$13,000 per student, while the rest of the towns were paying about \$3,800 per student," Johnson said.

Asked if the new districts are realizing savings, Johnson said: "That's debatable. In the systems I've had experience with, I hear superintendents saying they're not seeing savings. Very few are saying it's successful and they're happy."

He pointed out that Aroostook County did not respond well to the governor's initiative "and we are one of the counties it was aimed at. We have 11 school systems that have less than 500 students each."

### A Local 'Voice'

While many are advocating withdrawal of their communities, perhaps the more poignant, potent argument regards local control.

"It's true that some of the towns' tax burdens have gone up, but that has been more a product of the distribution of the money — a greater amount shifted to another town," said USM's Silvernail. "People have legitimate concerns about that sort of thing, but the arguments you hear to pull out tend to be around voice and local control, not around this or that costing much more."

"Local control is a huge issue," agreed Johnson. "A number of systems felt they had a gun to their heads to join with a neighboring system, with a penalty which nobody could afford. As soon as the penalty went away they started taking steps to withdraw."

"It's like a prearranged marriage that didn't work. It's going on all over the place... In our systems we feel we did the right thing. We didn't consolidate. If we needed to take the penalty, we would."

He said that to avoid the penalty, Mars Hill joined with Ft. Fairfield, but "as soon as the penalty went away they started the process. And last July 1 they withdrew."

Saying that RSU 12 members Palermo and his town of Wind-

sor "got the brunt" of a change in the funding formula, Tom Squiers added that he and others are so upset that even if the finances were more favorable "it would have no effect on my vote. It will probably cost us to get out, but I'm OK with that."

After overwhelming preliminary votes in favor of withdrawal, Windsor is waiting for the November elections to ensure the town gets the required 50-percent turnout of the last gubernatorial election. Beginning in 2015, a two-thirds vote to withdraw will become necessary.

Peru's Windover drove home the point of a "local voice." RSU 10 encompasses eight towns and she is the only Peru resident among 17 school board members.

In Ellsworth, Fortier said, "A majority of citizens felt Ellsworth had lost all control of our local education system. Although we're the largest community with the most students, we only had three out of 14 or 15 votes on the school board."

Several of the towns attempting to withdraw, including Monmouth, balked at the idea of sending their taxpayer dollars to repair another RSU partner's school roof or boiler when they themselves had taken better care of their own buildings.

But Monmouth — like seven other towns including Belfast, Belmont, Morrill, Northport, Seasmont and Swanville from RSU 20 and Arundel from RSU 21 — voted in favor of withdrawal but fell 22 votes short of the required number of ballots to make it happen.

Doug Ludwig, one of the leaders of Monmouth's effort, lamented that because only 57 percent of the voters (three percent below the 60-percent threshold) favored withdrawal, the town now has to wait two years before another vote. He indicated citizens may be too exhausted from the lengthy first effort to try again.

"We've gotten through the withdrawal agreement so it will be easier because there is a framework," Ludwig said. "But we still would have to go through the petitioning process, get it on ballot, get it passed to form a withdrawal committee. That's a lot of hard work."

### School Closures Raise Ire

Elsewhere, like Cherryfield, other communities rebelled against their RSUs because of proposed school closures.

Turcotte, the retired superintendent who also has been helping Andover withdraw from Bethel-based RSU 44 for the past year, said the battle has raged over the district's attempt to close Andover's K-5 school with 30-plus students.

"The only way to keep the school open is to withdraw," he said. "But Andover is not the norm. Their reason is clearcut. They want to keep the school. Usually it's local control. I've been a Mainer all my life and I have an understanding of how Maine people dislike enforced organization."

Saying that many new RSUs "might make sense on paper," he added, "but if you don't understand the communities and their relations between communities you can almost predict they're like oil and water and will never accept each other as partners."

### Penalties Versus 'Carrots'

Turcotte bemoaned the fact that Gov. Baldacci's consolidation attempt was penalty-driven and not carrot-driven like the Sinclair Act.

In 1957 the Maine state Legislature passed the Sinclair Act, creating SADs, and "giving huge incentives to consolidate," Turcotte said. "They'd build you buildings and other rewards for forming an SAD. Many towns did because the rewards were



**Consolidating, our first budget was \$27 million and now it's \$26 million. It's going down every year.**  
**— Belinda Waterhouse, business manager, RSU 12**

enticing. But if you look at it, many of those communities still have yet to accept the all-for-one and one-for-all concept. Every town still likes to think they're independent."

Baldacci's law carries with it "no carrots, no reason to feel good about it," he said. "It's the opposite. It's been penalty-driven. 'Do this or else.'"

"Everybody felt 'We don't want to marry them but we don't want to lose the money' in penalties. It's proven the old adage: 'It's not what you do, it's how you do it.'"

Turcotte, with experience from Penobscot Valley to Southern Maine, said, "Some communities have done a great job and worked together and probably saved money. Other communities say it cost them more."

He bemoaned the fact that millions of dollars have been spent putting the consolidation together.

"It disrupted the focus on education's objective," he said. "They threw a big monkey wrench [into the education system]. There are only so much energy and many dollars to go around and it all had to go into the 'marriage.' Then you say, 'Nope, now we've got to take it apart' and all your energy is going toward destroying what you put together."

"Many of the towns are talking about withdrawal. It's showing up in every weekly paper."

#### What To Do?

Asked what could improve the situation, Silvernail said, "It's very difficult. I know school districts constantly try to see where they are spending and where they could realize savings, such as in more telecommunications. That will continue because we have declining enrollments and limited resources. I think we're going into another period of time where the focus is on how to provide an education that is reasonable to taxpayers but also ensures quality education."

Quality education at optimum cost. That is the bottom line — for school administrators and staff as well as parents and taxpayers. A glimpse at how the past year has evolved for Cherryfield may be uplifting in an otherwise depressing story.

Asked if the town's withdrawal from RSU 32 has been a good move, Tatangelo, whose wife sits on the school board, said, "We've only been through one budget cycle, but we've made it so far. We went through this year with two used buses — one bought for \$20,000 and the other less than that."

"It's amazing now to go to a Cherryfield School Board meeting," he continued. "It's so different. Parents are welcome. You don't have to sign up beforehand if you have something to say. You can actually talk about education. It's not just about how to run things. Even Christmas and Veterans Day programs are up for discussion."

"You can see that this town feels more invested in this element of schools. It's staggering. It's standing room only. This is the way, in my mind, that education is supposed to be. It's part of the community — not some separate entity where your kids are being sent off here or there." ...

## Fall 2015 'divorce' update

### List of towns already withdrawn from Regional School Units since 2011:

Starks withdrew from RSU 59/SAD 59 6/30/2012 – joined RSU 09 7/1/2012  
 Portage Lake withdrew from RSU 32/SAD 32 6/30/2012 – Individual Municipal School Unit (UMSI)  
 Frankfort withdrew from RSU 20 6/30/2013 – joined RSU 22 7/1/2013  
 Glenburn withdrew from RSU 26 6/30/2013 – IMSU  
 Veazie withdrew from RSU 26 6/30/2013 – IMSU  
 Cherryfield withdrew from RSU 37/SAD 37 6/30/2013 – IMSU  
 Eustis withdrew from RSU 58/SAD 58 6/30/2013 – IMSU  
 Athens withdrew from RSU 59/SAD 59 6/30/2013 – IMSU  
 Brighton Plt. withdrew from RSU 59/SAD 59 6/30/2013 – IMSU  
 Wiscasset withdrew from RSU 12 6/30/2014 – IMSU  
 Dayton withdrew from RSU 23 6/30/2014 – IMSU  
 Saco withdrew from RSU 23 6/30/2014 – IMSU  
 Ellsworth withdrew from RSU 24 6/30/2014 – IMSU  
 Hancock withdrew from RSU 24 6/30/2014 – IMSU  
 Lamoine withdrew from RSU 24 6/30/2014 – IMSU  
 Andover withdrew from RSU 44/SAD 44 6/30/2015 – IMSU  
 St. George withdrew from RSU 13 6/30/2015 – IMSU  
 Winterville Plt. withdrew from MSAD 27 6/30/2015 – IMSU  
 West Bath withdrew from RSU 01 6/30/2015 – IMSU  
 Northport withdrew from RSU 20 6/30/2015 – IMSU  
 Belfast withdrew from RSU 20 6/30/2015 – Formed RSU 71  
 Belmont withdrew from RSU 20 6/30/2015 – Formed RSU 71  
 Morrill withdrew from RSU 20 6/30/2015 – Formed RSU 71  
 Searsmont withdrew from RSU 20 6/30/2015 – Formed RSU 71  
 Swanville withdrew from RSU 20 6/30/2015 – Formed RSU 71

### The following will be voting on their Withdrawal Referendum on Dec. 15, 2015:

Cary Plt. voting to withdraw from RSU 70/SAD 70 – to be 6/30/2016 (planning to deorganize)

### Other towns that have formed a withdrawal committee, but have not yet submitted a plan to DOE:

Byron – RSU 10  
 Canton – RSU 10  
 Carthage – RSU 10  
 Dixfield – RSU 10  
 Peru – RSU 10  
 Burlington – RSU 31/SAD 31  
 Oxbow Plt. – RSU 32/SAD 32  
 Newry – RSU 44/SAD 44  
 Mount Chase – RSU 50  
 Embden – RSU 74/SAD 74



# With schools buildings' changing functionality, quality control more important than ever

By Leo Bifulco

**I**n the service industry, providers are always seeking out new ways to improve the quality of their services to clients. Quality, at times, can be difficult to measure because it is subjective in nature and varies on the perspective of the individual who is measuring performance.

This is even truer when measuring quality across an entire school district. Expectations of what is important vary from school to school. To achieve the highest level of performance possible, managers must implement quality-control measures to help evaluate the end result of the cleaning services they provide. A comprehensive quality-control program aids in the effort of creating a responsible workforce that is accountable for its performance.

When developing a quality-control program, four elements should be implemented to ensure the highest level of performance possible. They are:

- a systematic cleaning program;
- a clear understanding of goals and expectations;
- proper training; and
- follow-up.

Systematic cleaning programs help lay the foundation of per-

formance in that each task an employee is responsible for helps the team achieve its overall objective. Well-defined responsibilities standardize production and aid in understanding expectations.

When assessing quality, it is important for staff to understand client and team expectations and what performance standard measures are in place to measure quality. An early understanding of expectations and quality-control measures improves performance and moral.

Custodial inspection sheets provide a platform, which explains how their performance will be measured while the early development of positive work habits can be achieved through a value-added training program.

Value-added training programs not only help define goals and expectations but also provide employees with guidelines on how to reach predetermined performance benchmarks.

As responsibilities and expectations are developed through training, it is important to frequently follow up with staff to gauge consistency and performance. High-frequency performance checks improve communication and align employees with the company's overall objective of meeting the client's needs.

*Continued on next page*

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## MeASBO meetings

**Nov. 20** — At Keeley the Caterer in Portland.  
**Feb 26** — Lewiston School Department's Green Ladle.  
**April 29** — Bangor United Technology Center.  
**May 18-20** — 24th Annual Tri-State Conference - May 18-20, Mt. Washington Resort, N.H.

## Quality control crucial

*Continued from previous page*

The functionality of schools has changed dramatically over the years. They now serve as meeting places and host a variety of town functions and events after traditional operating hours. As such, the cleaning standards and procedures have also changed.

Through implementing quality-control programs, managers create a responsible workforce capable of meeting the wide range of expectations set for them. In providing employees with a systematic program, which is based on predetermined goals and in-depth training while implementing frequent performance checks. In turn this creates higher employee performance and moral, and reduces turnover.

*Leo Bifulco is president of Benchmark Cleaning & Supply.*



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