

# MeASBO

The official publication of the Maine Association of School Business Officials  
Winter 2017-18

## Pinnacle Awards

Stabilizing Health Costs  
Big-time Rebates  
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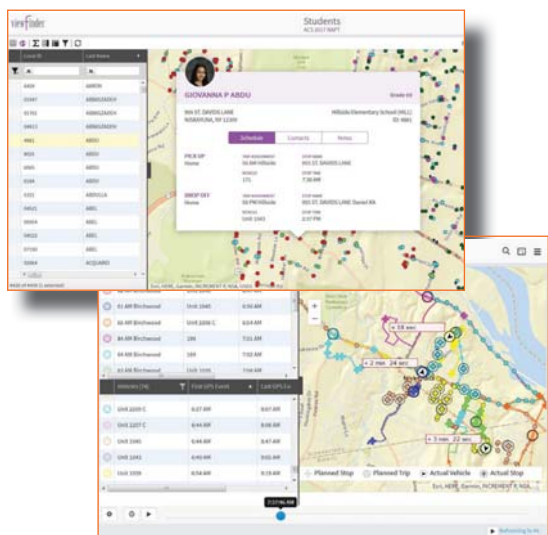


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# INSIDE MeASBO

## FEATURES



### Member Profile

When your school changes lives to the degree that CTE Region 8 does in the Rockland area, why would you want to work anywhere else? For Sherry Moody, she's in the perfect place.

### 21 Time Is Looking to Play or Pay

For many school districts ACA penalty notices are looming and, due to the law's extraordinary complexities, likely mistakes may generate additional penalties, says Chris Stevenson of Drummond Woodsum.

### Op-Ed... What Would Sue Do?

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## COVER STORIES

### 10 Pinnacle Awards Share Ideas To Copy

Four grand projects that can be replicated across the country — and even in Maine — earn honors from ASBO International. They range from stabilizing health-care costs to using credit-card rebates on a major scale, teaming with cities and civic groups, and changing veterans' lives.



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Maine DOE will make payments directly to CTEs in one of the major changes in the state's new biennial budget.

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## PRESIDENT'S MESSAGE

# Creative methods needed in budgets

**H**aving passed the halfway mark of both the school and fiscal year, we are all in full swing of budget season. The ED 279s have arrived and everyone is holding their breath that these “preliminary” reports are just that and hoping the state Legislature will find a way to put more funding in the “education pot.”

While the Department of Education (DOE) continues to encourage schools to pursue additional regionalization efforts, several school units are in the withdrawal process again this year.

This budget season will be one of the toughest yet, as we find creative methods to make up for the lower funding many of us are seeing and trying to find ways to meet the DOE initiatives. We are also waiting on health-insurance rates to see what effect those will have on our budgets.

All in all, this year is continuing to be a challenge. And yet, the role of the business manager, finance director, or “insert your title here,” is one that demands commitment, perseverance and fortitude.

Year after year, our membership continues to prove themselves in this way! Much as we consider the school secretaries to be the gatekeepers of the school, the business managers are the gatekeepers of the districts. We hold the keys, we hold down the fort, we make it possible for the teachers, support staff and administrators to do their jobs, and what they need to do in order to provide the

best education for our students.

And whether you started in school business because you needed a paycheck, or because you truly wanted to see your students and schools achieve great things, you are in your position today because you are resourceful, dedicated and resilient.

So, as we move into the second half of the year, and push through what sometimes feels like an uphill battle, remember that you have made some great connections in MeASBO that have hopefully become not just colleagues, but friends.

Know that you can reach out to each other for encouragement and support. Maybe you have been in school business for several years, or maybe you are just starting out. Do you have a question? I bet another member has an answer and would love to share that knowledge with you.

This is part of what makes MeASBO a terrific organization — the people — the willingness to connect and share knowledge and experience. Please join us for our last two meetings of this year and connect to someone new. I look forward to seeing you on March 2 at Keeley's Banquet Center in Portland and April 27 at Le Club Calumet in Augusta. •••



*Luci Milewski*

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# What would Sue do? A lot!

By Sue Lambert

**H**ello to my former business manager associates. I'm sure this issue finds that you are deep in the middle of budget time. I am still involved in that process a little here and there but for the first time in many, many years that is mainly now someone else's responsibility.

I have mixed emotions, of course. My current "semi-retirement" position as a school secretary in a tiny elementary school is wonderful. I enjoy being back with the kids and I have lots more time off and never work nights and weekends and rarely even a 40-hour week.

I love it but there are some things I miss:

- creating complex spreadsheets;
- the challenge of learning how to develop and implement new software systems;
- the adrenaline of meeting a deadline when an unexpected task presents itself; and
- planning, collaborating and participating in a great association like MeASBO.

It seems like only yesterday I was attending my first MeASBO meetings. More than likely you already attend MeASBO, or are at least a member.

Another business manager once told me they had not attended MeASBO meetings in the past because they had thought it was just a "social time."

Well, there is that aspect but it is so much more. The Executive Committee strives to bring meaningful content, scheduling speakers from the Department of Education, MainePers, Maine School Management Association, Drummond Woodsum and more.

Some of my favorite sessions involve impromptu questions and responses from members around the room, chiming in on how they handle different issues. Creative thinking at its finest!

I encourage you to participate, even if just to give feedback on topics and speakers and maybe even to eventually become involved on one of the committees. When I volunteered to be on the Technology Committee so many years ago, little did I realize that down the road I would be asked to be on the Executive Committee, which as you know often leads to a turn as president of the organization.

I am not the typical person to want to be at the front of the group. Like many of you (a few excluded) I dreaded public speaking or being in front of a large group, but the challenge was good and it gave me the opportunity to push myself a step at a time and overcome that roadblock.

It is something I now know I can do and I'm glad I conquered it. The process of holding MeASBO office is a multi-year process and that gives you the time to feel ready. Like every challenge we face, a step at a time.

My tenure as a business manager/finance director at SAD #45 in Fairfield has had its challenges. I really don't need to tell most of you how challenging our positions can be.

You've dealt with many, too, but there are some lessons

I learned, that I wish I had acquired earlier in my career.

I'll share a few. So many of you could add so many words of wisdom and your own list, but here is mine:

✓ Expect and require the respect that you deserve! If your leader/boss/superintendent refers to you and/or your department as "pencil pushers," or "bean counter types," then you may want to consider moving on.

This is an issue of respect for what business departments do. Maybe you can change the attitude, but it's often ingrained.

We don't, after all, deal with the curriculum, or the testing, or the other educational aspects.

MeASBO has strived to give business managers a stronger voice at the table with the superintendents, the DOE and other educational agencies.

✓ Make your voice heard!

Politics is not my favorite thing. Some of you feel differently and maybe relish that aspect of your position, but even if you don't like the political aspect of school boards, keep in mind you need to keep those relationships fresh.

It may feel great that the superintendent allows you to skip many board meetings and doesn't include you in Finance Committee meetings, but in the end, you need those connections.

You need those people to see your face, know your work ethic and understand your perspective.

Superintendents come and go, board members come and go, and the board's personality as a whole can change as different people take leadership and roles.

✓ Learn when to delegate up!

Learn when you need to ask for help. Learn when you need your boss to take on some of the problem.

Don't try to be the only one and just keep trudging on through extreme staff shortages, unusual workloads and extenuating circumstances.

You are a rock star, but you are not super human. We've been taught to disburse the workload, to delegate and to assign duties to our staff, but are we always asking for help from up the chain when we should, or do we often feel like we are left to be an island?

Expect and require the respect that you deserve.

Make your voice heard!

Learn when to delegate up.

I wish you all the best, my friends. Happy retirement to some of you and best wishes to you who are just starting out.

— Sue Lambert is a former MeASBO president. She "retired" last fall from her position as business manager at MSAD #49 in Fairfield and is working as school secretary in Albion.



Sue Lambert

## New MeASBO website is jam-packed

**R**olled out in early November, MeASBO's new website — [www.measbo.org](http://www.measbo.org) — has a fresh look and feel. Still packed with lots of information relevant to the business office, there are also links to frequently used websites

and resources, an event section to keep members up-to-date on MeASBO meetings and those documents provided at the meeting, as well as an updated Member Center for members to log into for additional resources.

In the new Member Center, users can update their personal information, search other members in the directory, download an up-to-date membership list spreadsheet, post questions and comments in the forum, and view documents that have been shared by other members, in hopes that they don't have to re-create the wheel.

Business officials will also be able to renew their membership online this summer and have an invoice automatically e-mailed to them to submit with payment, register for MeASBO meetings and events that may require a headcount, as well as complete any polls or surveys offered

through the website.

If business officials would like more information on MeASBO Certifications: SBO I, II or III, they are in luck. A page is dedicated just for certification information.

For vendor members, MeASBO is offering an opportunity to advertise on the website with their logo on the home page which links to company website as well as its contact information on the Our Sponsors page of the website.

For more information, please visit the Our Sponsors page or e-mail Luci Milewski at [lmilewski@emmm.org](mailto:lmilewski@emmm.org).

The log-in for the new site has changed and a new username has been created for members.

If members don't still have the welcome e-mail sent out in November and need some assistance to log on for the first time, please e-mail [maineasbo@gmail.com](mailto:maineasbo@gmail.com) and we can help you get started.

The 2017-18 dues must be paid to access the member center. Anyone unsure if their dues have been paid should e-mail [maineasbo@gmail.com](mailto:maineasbo@gmail.com) for verification. ...




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# Big funding changes due in 2018-19

## DOE: Biennial budget targets more classroom spending

**7**he Maine Department of Education (DOE) has announced a number of EPS funding-formula changes enacted as part of the 2018-19 biennial budget enacted by the Maine State Legislature, which includes \$1.1 billion for education.

Highlighting those changes, many of which increase educational funding or target more funds toward classroom expenditures, are:

- Essential Programs and Services (EPS) operating transition percentage. What is recognized as essential programs and services has increased from 97 percent to 100 percent due to a repeal of the EPS transition percentage.

This means the formula now recognizes 100-percent total cost allocation as calculated by the formula for each district. The 3-percent increase has resulted in more than a \$42 million growth in increased funding.

The fiscal year 2018-19 ED 279 subsidy printouts are now available: <http://www.maine.gov/doe/eps/>

*Continued on page 21*

## State to begin direct payments to CTE centers and regions

By Mark Leslie

**7**he announcement that the Maine Department of Education this fall would begin sending subsidy payments directly to Career and Technical Education (CTE) centers and regions won approval from school business directors.

Using the new charter school subsidy model beginning with fiscal year 2018-19, the state CTE allocation will be program-driven, replacing both the state and local shares of the costs.

Designed to relieve “sending” schools, the subsidy will be based on direct instruction, central administration, supplies, operation and maintenance of plant, other student and staff sup-

port, and student enrollment.

The DOE said that going forward, local assessments will only be necessary for costs outside or above the model, such as new equipment or costs not covered by the model.

*Continued on next page*



*Technical education is a key funding area in Maine's new biennial budget.*

# CTE funding taken over entirely by Maine's DOE

*Continued from previous page*

"The model is intended to spread the cost across the entire state like the charter school model," according to DOE Commissioner Robert Hasson. "The changes will provide financial relief to most, if not all districts... and equalize opportunities for students."

Since a CTE Center is attached to a high school it is part of that school's budget. But CTE Regions are quasi-municipalities, separate entities with

separate governing boards.

School units connected to CTE Regions are, therefore, most affected by this change and most happy about it.

"This is extremely helpful," said MeASBO President Luci Milewski of the East Millinocket School Department. "Some of us are being assessed and have to pay the centers directly. East Millinocket paid more than \$134,000 last year for CTE services, so we wouldn't have to pay that much. Hopefully not any of it."

**It takes us [districts] out of the conversation which makes a lot of sense.'**

**— Dan O'Shea, business manager  
Falmouth School Department**

"Since everyone's [Essential Programs and Services] formula is different the impact will be different," said Alan Kochis, director of business services for the Bangor School Department. "With CTE funding now we pay our prorated share and are reimbursed by the state, so it's a wash ... We pay monthly so that's 10 checks we don't have to pay."

Dan O'Shea, business manager for the Falmouth School Department, said, "It takes us [districts] out of the conversation which makes a lot of sense."

"The centers will get all the money they need and it will be a full reduction in my budget which is always a good thing."

Kochis pointed out that the DOE has always been two years behind in reimbursing the school units. For instance, Bangor sends around 100 students to the regional CTE and paid \$550,000 last year, but got reimbursed \$430,000 — the cost two years ago.

Will the new procedure simplify matters?

"Yes," Kochis said. "They're trying to stabilize costs from one region to another."

O'Shea, whose department sends 14 to 20 students each year to the Portland Arts and Tech Institute, said he pays \$90,000 and gets reimbursed only 39 percent.

Asked if the new method will save Falmouth that difference in spending, he replied, "I'd say so, but it will probably come out of the EPS formula."

"Let's say I'm cautiously optimistic."

Milewski pointed out that some CTEs, like that at RSU 9 in Mt. Blue, do not currently assess fees to their sending schools because they fully fund it and get all the subsidy from the state.

The DOE released FY 2018-19 ED279 subsidy printouts on Feb. 1, recommending that school units and school boards should consider these changes as they review their state allocation and move toward setting a 2018-19 budget. •••

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# Second round of EMBRACE grants awarded

AUGUSTA – The Maine Department of Education (DOE) has announced 11 new EMBRACE grants have been awarded to school districts and other education agencies.

The round-two EMBRACE grants, part of a statewide regionalization initiative, prioritize regional and coordinated approaches to improve educational opportunities for students.

DOE received 19 applications for the Fund for the Efficient Delivery of Educational Services (FEDES) grant, which was made available to districts last fall.

Based on the funding requests, totaling \$4.6 million, the 11 awardees are projected to save more than \$10 million over five years.

In the first round of EMBRACE grants in 2017, 10 grantees were awarded a total of \$4.5 million, and in 2019 an additional \$5 million in EMBRACE funds will be available.

Round two EMBRACE (FEDES) grant project descriptions:

## Creating a Strong and Sustainable Regional Collaborative for Professional Development in Washington County

This project will re-establish the Washington County Consortium by creating a sustainable infrastructure for offering professional development there. This is intended to provide students with excellent school leaders and teachers.

- Lead SAU – Calais Public Schools
- Also, Cherryfield Public School, Maine Indian Education, RSU 37/MSAD 37, AOS 77, RSU 85/MSAD 19, AOS 90.

- And, East Range CSD,, RSU 30/MSAD 30.
- And, AOS 96, Washington Academy, UM Machias, Washington County Consortium, Washington County Leadership Team

## Great Falls Reg'l Support for Pre-schoolers with Disabilities

This project will support the transition of special-education services for 3- to 5-year-olds into the Lewiston School Department, with full implementation by August 2020 to ensure a successful early integration of students into district schools.

- Lead SAU – Lewiston Public Schools
- Also, Auburn Public Schools, RSU 16, RSU 52/MSAD 52

## Greater Biddeford CDS Regional-

## ization Project

This project will support the transition of special-education services for 3- to 5-year olds into the Biddeford School Department, with full implementation by school-year 2021 to ensure a successful early integration of students into district schools.

- Lead SAU – Biddeford Public Schools
- Also, Dayton Public Schools

## Kennebec Valley Expanded STEAM Outreach Project

This project will build on clear evidence of improved student outcomes to support the expansion of the current STEM program, which was funded through the round-one EMBRACE grant. STEM-related arts will be added to the curriculum and student access will be increased. The STEM program will introduce middle school students to STEM educational experiences and career pathways.

- Lead SAU – RSU 74
- Also, RSU 83/MSAD 13, RSU 59/MSAD 59

## Kennebec Valley Whatever It Takes School

This project will support a middle school alternative education program that aims to reduce dropout and truancy rates by providing new and improved opportunities for at-risk students with multiple pathways for achievement.

- Lead SAU – RSU 59/MSAD 59
- Also, RSU 74

## Northern Penobscot Regional Partnership

This project will support the development of a flexible regional service center that initially focuses on increasing program opportunities for students by creating an alternative education program, a shared world language program, and providing access to regional student support services.

- Lead SAU – RSU 67
- Also, East Millinocket Public Schools, Medway Public Schools, Millinocket Public Schools, RSU 30/MSAD 30

## PBIS Regional Professional Development Cohort

This project will create a sustainable, regional professional development



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program with a multi-tiered Positive Behavior Interventions and Supports (PBIS) framework using evidence-based behavioral practices shown to improve academic achievement and social-emotional growth among students as well as improving overall school climate.

- Lead SAU – RSU 3/MSAD 3

- Also, Brewer Community School, Indian Island School, RSU 20, Wiscasset Elementary School, University of Maine

### **Southern Aroostook Area Regional Alternative Center**

This project will create a high school alternative education program that will provide students with learning opportunities in career and technical education with the aim of increasing individual achievement levels and graduation rates in a personalized learning environment.

- Lead SAU – RSU 29/MSAD 29
- Also, RSU 50, RSU 70/MSAD 70, RSU 84/MSAD 14

### **Unified Valley Cooperative Project**

This project will support the development of a regional service center that will share central administration services and resources. This increased efficiency will allow resources to be reallocated to student programming including career education, world language classes, skill certification, and an innovation lab.

- Lead SAU – MSAD 27

- Also, Madawaska Public Schools, RSU 33/MSAD 33

### **Westbrook-Gorham Adult CTE Program**

This project will support the creation of a regional adult education program

that will provide adult learners access to career and technical education that will prepare them for high-skill, high-demand occupations that have defined pathways for advancement.

- Lead SAU – Westbrook Public Schools
- Also, Gorham Public Schools

### **Western Maine Standard Analysis**

This project will support an audit of the programming and graduation standards across the regional members. The analysis will lead to greater uniformity of standards across districts to support seamless transfer of student achievement from school to school and collaborative staff development.

- Lead SAU – RSU 73 • Also, Lisbon Public Schools, RSU 9, RSU 10, RSU 44/MSAD 44, RSU 56, RSU 58, RSU 59/MSAD 59, RSU 74, Western Maine Educational Collaborative. ...

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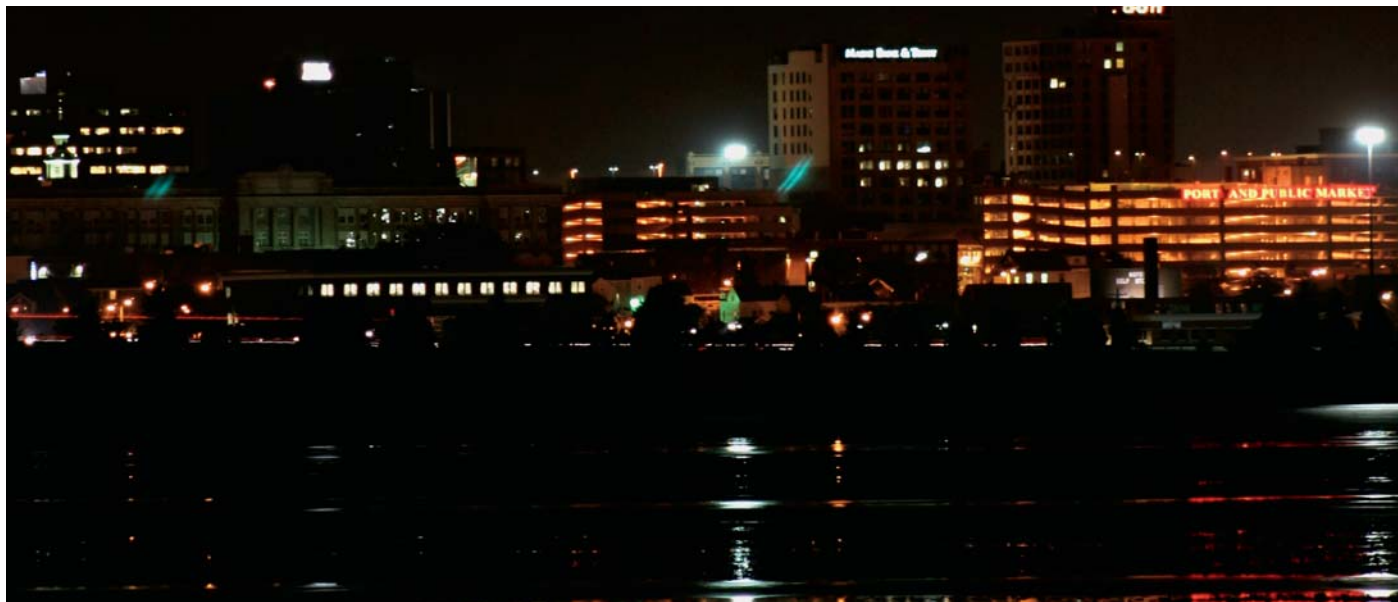


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## Maine hosting exciting Tri-State Conference

**P**ORTLAND — Between the “wild guitar comedy” of keynote speaker Mike Rayburn and the humor of Maine’s own king of comedy, Bob Marley, the Tri-State ASBO Conference promises to be a raucous as well as educational event.

Focusing on the theme Navigating Rough Waters, the 26th annual Maine, New Hampshire and Vermont gathering will be held Wednesday through Friday May 23 -25, at Holiday Inn By The Bay here.

Organizers have moved the Maine Lobster Bake back onto Peaks Island on Thursday following the annual Vendor Showcase.

Meanwhile, educational sessions will run the gamut from Problem Solving Inside Out by Dr. Tammy Lenski of Peterborough, N.H., to Negotiation Strategies by Joe Blanchette; Understanding Every Student Succeeds Act (ESSA) by Sharie Lewis, CPA, of Parkrose, S.D; GASB 86 (Government Accounting Standards Board 86) by Sheryl Pratt; Controlling Building Rentals by Josh Peach; Google Suite for Managers by Dennis Crowe; Making Finance Understandable by John Hutchinson; Trends in Special Education by a representative of Drummond Woodsum Law Firm in Portland; and Understanding Financial Reports by a representative of Scott-Plodzick & Sander-son of Concord, N.H.

The annual banquet has been moved this year to Wednesday evening fol-

lowing the wellness program and preceding Marley’s performance.

Rayburn, who has performed at Carnegie Hall and in Las Vegas, has received high marks for his “transformational, hilarious talk, “*What If?*”

The message: Change the way you think because the way you used to think, to get you where you are today, isn’t going to get you any further, unless you reprogram your brain to ask “What if?”

He uses his guitar work and comedy as a metaphor to illustrate three tools designed to turn a team into an army of innovators with the peak performance skills to transcend the status quo to stop managing change, and lead by creating change.

Rayburn’s idea is that every major invention, accomplishment and victory in human history began with the simple, almost childlike curiosity of a “What If...?” question. So, it is a question that should be asked daily.

He will teach:

- three simple, powerful tools to use immediately and forever to access unrealized potential;
- to start creating change rather than it, which is not only stupid, it’s dangerous; and
- the most powerful motivational force on this planet is neither power, sex, money, nor fame.

Marley, whose comedy mostly revolves around life in Maine, has performed around the country and on The David

Letterman Show, Late Night with Conan O’Brien, and Comedy Central.

A Portland native, he appeared as Detective Greenly in the movie *The Boondock Saints*, and reprised that role in *The Boondock Saints II: All Saints Day*.

Lenski brings to her Problem Solving presentation two decades of experience as a mediator, coach and conflict-resolution speaker helping people have “transformative conversations about the things that really matter.”

A Middlebury College graduate with master’s and doctoral degrees from the University of Vermont, she is a former college vice president, a guest lecturer at Lipscomb University’s Institute for Conflict Management in Nashville and a faculty member in Marlboro College Graduate School’s Health Care Administration program, where she teaches organizational communication, negotiation, and conflict resolution.

Lenski’s award-winning book, *Making Mediation Your Day Job*, is available in print and digital editions worldwide.

Blanchette, meanwhile, brings to his Negotiation Strategies talk two decades of experience as an advocate with The National Education Association.

He will share valuable information and advice that will allow management to function more effectively in the labor relations arena, with a focus on collective bargaining, supervising and disciplining employees, and crisis management. •••



# Sherry Moody's view of CTEs: 'We help kids find their way'

By Mark Leslie

**P**roof of success? For Career and Technical Education (CTE) Region 8, that proof lies in the 2-to-1 vote of residents across the region's 21 towns to build a \$25-million facility to update and expand its services, entirely at their expense.

No government help? No problem. Success promotes success, as proven by the Rockland-based CTE's graduates walking out of the door ready to step into jobs or onto a post-graduate campus. And Business Manager Sherry Moody, in her 10th year at the school, is thrilled to be part of the story.

"For some kids, this school is a saving grace," Moody says. "A lot of parents have told us that coming here is the only thing that kept their son or daughter in school. That is very meaningful... We help kids find their way."

That is, 350 to 400 students every year from six high schools and five islands. They are learning job skills from culinary arts to auto collision repair, auto technology, building trades, design technology, firefighting and EMT, health occupations, hospitality, horticulture, machine tools, residential construction, pre-engineering, small engine and diesel engine technology, and welding and fabrication.

Moody, who was business manager for the Richmond School Department for six years before its consolidation, says, "Career and Technical Education is a very different animal than regular education in the way you administer to the kids. You're dealing with a population of kids that is different than your typical high school setting. These kids are learning hands-on and taking skills away with them."

"I love knowing I'm a part of moving them either onto a meaningful career or onto a post-secondary educational scene that will put them into the workforce or something they love doing."

Some students, Moody says, have no idea where they're headed until they walk through CTE Region 8's doors.



*Sherry Moody, left, looks over budget figures with Administrative Assistant Tricia Start.*

"Then, all of a sudden they're saying, 'Oh my gosh, I love doing this!' In our environment, these kids actually get a chance to play with careers. Where else can they do that?"

Some 25 percent of CTE Region 8's alumni go on to earn postgraduate degrees, Moody says, adding that because the Region has matriculation agreements with colleges, its students are already earning credits toward degrees.

### The New Campus

The outcome of a vote to build the \$25 million, 90,000-square-foot school to replace the current 57,000-square-foot facility showed the region's parents share Moody's feelings

toward the school's success.

Every single town in the Region's voted for a locally funded bond to build the facility, so they all have a debt service, even after the change this fall that has the Maine Department of Education (DOE) directly paying CTEs' subsidies.

"We found out how much this school meant to our communities by going out to bond," Moody says.

"We're very small and lean operation and Sherry is critical to what we do, but especially getting the new bond approved," says Region 8 Director Elizabeth Fisher, who has worked with Moody for nine years. "She had to work with all the towns to make sure the election was set up cor-

*Photo by Brandon Soards*

**I love knowing I'm a part of moving these kids either onto a meaningful career or onto a post-secondary educational scene that will put them into the workforce or something they love doing.**  
— Sherry Moody



Photos by Brandon Soards

Sherry Moody, left, and CTE Region 8 Director Elizabeth Fisher check out the construction of the new 90,000-square-foot school which opens in September 2019.

rectly, and do all the paperwork associated with the bond. Around 300 documents had to be organized and sent in all the right directions. It was quite a task.”

Fisher explains that Region 8’s new school was 50th on the state’s list of capital projects, so no state help was in sight.

“We knew the needs of our building and after we had a professional study we knew it was more critical than thought before, so we couldn’t wait,” she says.

Ground was broken last fall, crews are putting up steel and the school will open September 2019 on oceanfront property with “an awesome view of Rockland Harbor.”

For the foreseeable future Moody’s “view” will be filled with line items, Excel sheets and invoices as she deals with all the paperwork for that construction while a project manager oversees the boots on the ground.

“That’s the focus of my world right now,” she says.

And when the new school opens, “It will be a whole new world for us,” Moody

says. “The new school will have a cafeteria. It will be excellent — a change in the whole culture.”

Today, Region 8 has no cafeteria, so its students are limited to half-day programs. Starting in 2019-20, they will have full-day programming.

“That’s one of the biggest issues now,” Moody says, “that the kids don’t get here now. They have to leave.”

The new schedule will have students attending all day every other day, alternating with their home schools: Camden Hills Regional, Islesboro Central School, Lincoln Academy, Medomak Valley, North Haven, Oceanside and Vinalhaven. The dozen or so postgraduate and homeschool students, who are accepted on a space-availability basis, will attend every day.

Moody says officials expect student

population to increase by 25 percent when the new school opens.

### Funding Change a Good Thing

Moody thinks it an excellent decision to have the Maine DOE replace both the state and local subsidies with direct payments.

“It’s something our local schools had been wanting for a long time. Statewide a lot of communities thought CTE was unfair because it was an assessment and they didn’t have a say [in its operations],” she says. “Everybody wants to be able to vote ‘yay’ or ‘nay.’ That was a sticking point. It’s hard for them to be told, ‘This is how much you pay and that’s that.’”

The state, she says, has created a program-based formula they feel is a fair way of paying CTEs.

*Continued on page 20*

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# Defeating the nemesis of health-care unpredictability

It took months-long negotiations before employee-union approval, but Assistant Superintendent for Business Michael G. Frank creatively beat the old calendar-year nemesis and cracked his district's problem of health-insurance unpredictability with a solution that saved \$110,000 in the first year alone. And Frank says his process at the New Hyde Park, N.Y., school system can be easily replicated.

Frank explained that for those six months, the district continues to share the cost of insurance with the employee, based on a percentage split.

For January-to-June the district created a way to establish a “presumed rate” which the district pays its contribution (75 percent) towards. When the actual rate is established, the employee pays the difference between the district’s contribution on the presumed rate and the actual premium charged from the insurance provider.

Frank said this can result in the employee paying more or less than their typical 25 percent. But the crucial result is that the budgeting is now precise.

Negotiation took many months before the New York State United Teachers and Civil Service Employees Association approved and signed-off on the process, but it has proved a unqualified success.

Frank, who worked at the World Financial Center for Deloitte and Touché, where he earned his CPA license and then at JP Morgan Chase on Park Avenue on the trading floor for Emerging Markets Credit Derivatives, explained that in the past he would forecast a premium percentage increase liberally so as not to be short on the budget line. However, if the actual rate came in significantly lower than predicted, a major operational surplus remained on that line of the budget. Historically that was a good thing as it helped the district fund its reserves, but in light of New York State's Tax Cap, budgets have become much tighter. Allocating too much to a line such as health insurance could greatly impact programs being delivered to students.

Since rolling out the new budget process, Garden City Park Schools has seen “budget savings” as well as the “real dollar savings,” according to Frank.

The budget savings happen because Frank knows precisely how much to budget instead of predicting a rate to find out later was wrong.

The “real dollar savings” occur in years where the real rate comes in higher than the presumed rate. Since the district only pays its contribution percentage on the presumed rate, the district saves by not contributing in that year on the actual rate.

Frank said this can work the other way as well, but in those years the district is still simply paying its contribution percentage on the presumed rate, so the budget is accurate.

The direct benefit is the reallocation of the historic “surplus” toward textbooks, support for students with special needs, new equipment, and STEAM initiatives.

“Had the budget not freed up these surpluses to reallocate to other areas then the tools provided to aid in student achievement would be lacking and student achievement would suffer,” Frank said.

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Assistant Superintendent for Business  
New Hyde Park-Garden City Park UFSC (Union Free School District)  
New Hyde Park, New York

**Adult & Veteran Educational Outreach**  
Dr. Clark J. Godshall, Ed.D., RSBA  
District Superintendent  
Orleans-Niagara BOCES  
Medina, New York

**City-built, District-rented Innovative Learning Space**  
Paul G. Harrell, CPA  
Deputy Super. for Finance and Operations, retired  
North Kansas City School District  
Kansas City, Missouri

## Financing technology purchases with the help of rebates

By Mark Leslie

**A** little here, a little there and before you know it, you're talking "real money." Case in point: Fortville, Indiana's Mt. Vernon Community School Corp. using a credit card's 1-percent cash-back rebate to offset most of the interest of a \$2.5-million loan to purchase nearly 4,000 devices as part of a 1:1 initiative to issue each student an electronic device. "The way we financed and paid for our 1:1 devices through a loan and textbook rental was not unique, but what we did next set us apart," said then-Chief Financial Officer Brian Tomamichel. Tomamichel, now CFO at Westfield Washington Schools, explained that Mt. Vernon Community Schools uses a credit card for many of its purchases and receives at least 1 percent cash back on those purchases. "With the loan from our bank secured, we began working with our local credit-card representative to find out how we could pay for most of this project while capturing our rebate," Tomamichel said. The result? The district, bank, credit-card company and vendors set up a process whereby the district could make large purchases with its credit card — such as \$1.8 million worth of technology equipment from two main vendors — and take advantage of the rebate.

"In the end," Tomamichel said, "we were able to leverage almost 100 percent of our loan with purchases through our credit card.

Since many school districts have some type of credit card or procurement card program that offers them a rebate, they can replicate what Mt. Vernon accomplished, Tomamichel said.

Mt. Vernon Community Schools "simply just used that program to leverage any debt that we took on in the district," he said. "Currently the district is getting ready to start a \$10-million addition to its middle school and is in talks with vendors discussing payment options. The district often uses this time to discuss paying with credit cards. If vendors do not wish to accept the credit card then the district can often negotiate a 1-percent discount on its services to offset the rebate that it would otherwise receive."

Meanwhile, the district continues the success in its device management. The district has had to set up a self-insurance fund to maintain the quality and functionality of its 4,000 devices and is replacing roughly 10 percent of them every year to keep up with technology.

Tomamichel has already begun to implement a similar program at Westfield Washington.

*Continued on page 17*

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Michael Frank



# School district, city, university join to build Innovative Campus

By Mark Leslie

In a project that then-Deputy Superintendent for Finance and Operations Paul Harrell says can be replicated across the country, North Kansas City Schools partnered with the city of Gladstone and Northwest Missouri State University to create Innovation Campus, which is dedicated specifically to gifted students' learning.

The city financed and built the campus and rents it to the district, allowing the school system to add classroom space without construction costs, while providing the city a ready client. Meanwhile, moving gifted programming to the Innovation Campus freed up additional classroom space at existing school locations which greatly helped accommodate a growing district-wide student population.

"School districts, by developing strong relationships of trust with the communities that support them, have great opportunities to achieve goals they couldn't attain on their own," said Harrell, who retired last June from his long-time position at the school district and now works for Navitas, LLC, an energy service company. "With a little out-of-the-box thinking, projects that were once seen as improbable can find life in mutually benefi-



Students get hands-on training in a recording studio.

cial partnerships... and projects that are mutually beneficial to maximize resources."

Innovation Campus occupies two stories of the five-story building constructed as a space for innovative, technology-driven learning, giving students opportunities to pursue their interests in areas such as Science, Technology, Engineering, Art and

Math (STEAM), animation, robotics, 3-D printing and broadcast journalism.

Harrell said the school district has been viewed as progressive in developing relationships and partners with local municipalities to achieve results that would be unlikely if each entity operated on its own.

Operated since 1975, the program allows gifted students to become independent learners and decision-makers who "recognize their potential and responsibilities in a changing global society."

Most of the furniture is movable and there are few walls, so students can easily find an area to huddle for cooperative project planning or spread their work out.

This is the first "gifted center, so for the first time, gifted

*Continued on page 18*

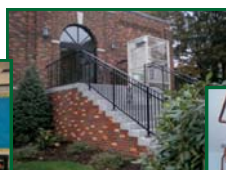
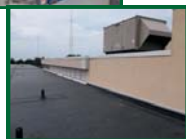


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# Kids follow their hearts and connect with veterans in need



**M**edina, N.Y. — When elementary school students in Orleans Niagara Board of Cooperative Education Services (BOCES) “followed their hearts,” it led to heights of which they hadn’t dreamed. A simple food drive for military veterans blossomed into a collaboration among educators, community organizations, veterans’ agencies, and the public to help thousands of local veterans in need of food, shelter, skills and support.

“Many times the adult student population concentrates on their own needs exclusively,” said district Superintendent Dr. Clark J. Godshall, former president of New York ASBO. “This project afforded these students the opportunity to give back to other adults who have served their country and have met with hard times.”

At the same time, the project had a fiscal impact, Godshall said, adding, “The financial and social cost of training adults to reenter the work force and become gainfully employed is difficult to measure except for their drag on welfare costs. This project perhaps opened access to some people in the culinary field.”

The Orleans Niagara BOCES represents 13 districts in Niagara and Orleans counties, so the endeavor was no small feat.

And according to Godshall, the journey that ended up pointing to “lifelong learning at its best” began simply with Kids Breaking Free Foundation, a group of 4th-through 6th-graders, and the book *December Stillness* by Mary Downing Hahn, which enlightened the children about how and why men and women who fought for their country could be homeless.

The kids wanted to help and help they did.

The ensuing drive not only collected thousands of food and hygiene products, it energized the community and its timing was perfect. It just so happened that Kids Breaking Free and the Orleans Niagara Board of Cooperative Education Services were starting a cooking class for male adults participating in the community’s Literacy Zone.

Meeting once a month to learn cooking techniques, etiquette, manners, and



*Dr. Clark J. Godshall, center, enjoys a gathering inspired by elementary school students, community and veterans’ groups to help homeless veterans.*

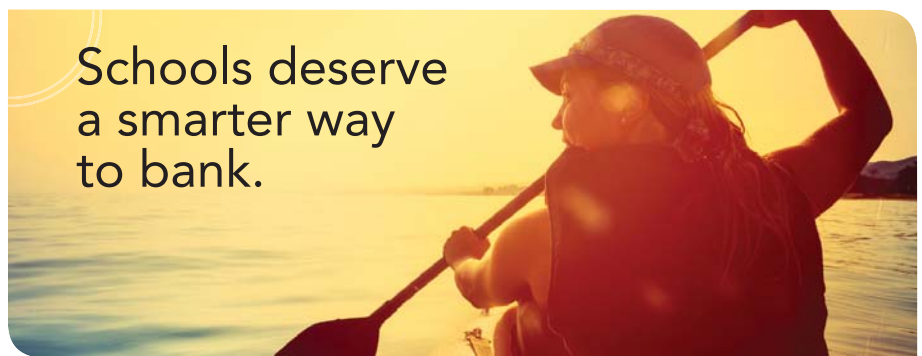
food presentation, these men decided to “Cook for a Cause” and invited the same homeless and disabled veterans that the children wanted to help.

Soon, students and instructors were talking to agencies and community-based groups to identify veterans who would

like to participate.

Then on July 5 at the Elks Club in Lockport, N.Y., veterans and their families were invited to participate in a day filled with food, fun and, most of all, support from the community and veterans’ support

*Continued on page 22*



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## Beat health-care unpredictability

*Continued from page 14*

Frank pointed toward 2017 to prove his case.

The increase in health-insurance premiums for the 2017 calendar year was approximately 12.17 percent greater than 2016. Under its previous budgeting method, the district would have projected a 13-percent increase for the 2018 premium to ensure enough funding.

Under the new methodology the district calculates a presumed rate (based on criteria agreed to by the district and the CBA) and the district knows the precise amount it will pay for health insurance.

The \$110,000 savings represents 16 percent of the district's \$687,000 budget increase for 2017-2018. Also, if the actual rate increase from the health insurance provider is greater than the presumed rate, the district will see an additional savings in January-to-June 2018 because it is not responsible for any of the additional cost.

Noting that other districts in his area have inquired about his process, Frank said, "Replication is relatively easy. Our model can consistently be used with other districts' unique variables."

"The calculation of the presumed rate, along with the percentage of contribution by the district, can be altered. And scenario analysis can easily be done to allow for calculations of the worst and best case, allowing transparent negotiations with the bargaining units." ...



*Michael Frank*

# Credit-card rebates pay off big-time when used right

*Continued from page 13*

"This district has almost twice as many students as Mt. Vernon's 4,000, so it's going to take a little longer," he said. "We won't be able to do the lump sum like we did at Mt. Vernon, but we're still going to use the same concept."

"We'll probably still do an equipment lease, or some type of financing on the front end to get the devices, and right now we're rolling out a procurement card/credit card program to capture rebate on purchases."

Calling the idea "pretty easy," Tomamichel said, "There are obviously a few hoops to jump through on our side with state regulations and making sure the board approved everything before we went into it. But then also, on the back end there's a bit of playing a game sometimes."

He explained that a company like Apple might say they won't accept a credit card on a large order. "But if you call their 800 billing number they'll usually take your credit card," Tomamichel said. "You play the game, working with different companies. Dell was a big one for us. If we told them up front we wanted to purchase with our credit card, we could do the purchase."

"But if we didn't tell them up front they would tell us we couldn't use the credit



*Brian Tomamichel with a few of the recipients of his 1-to-1 initiative.*

card. So in some cases we had to make a phone call to work with people, but most we could get most of our stuff with a credit card."

## **Savings Galore**

Using its credit card program has led to a difference in how Mt. Vernon Community Schools markets many of its contracts, Tomamichel said.

During its request for proposals on larger projects, it often factors into its scoring whether vendors will take a credit card as a payment option.

"If they do not accept a credit card, the district negotiates a lower rate to com-

pensate for the 1-percent cash back that it's foregoing by choosing them," he said. "There are still many vendors who the district pays by check and that is okay."

The project has made district employees think about their total cost before ordering, Tomamichel said, adding that between 2015 and 2016 it received \$71,786 in cash back from its program. That amount more than covers the \$61,712 in total interest on the project.

"It has set a tone for how Mount Vernon Schools will operate financially as a district, while allowing them to reach their goal of being a 21st century technology district," he said. •••



# Innovative campus

*Continued from page 14*

teachers are now able to collaborate with one another on a daily basis. They do not have their own classrooms, but are able to reserve specific areas at different points of the day.

Harrell said the space is innovative as well, with flexibility the key. Student and teacher seating rolls, pivots and transports with ease. With so few walls, students are allowed to easily find an area to huddle for project planning, find a space to spread out a project, divvy up responsibilities and then meld each person's contribution, as well as quickly clear an area for another purpose and more.

Teachers' "desks" have the ability to morph into moveable standing-height carts that roll along with them all day long.

## Replication

This is not the first time North Kansas City Schools and the city have partnered on a project. The district had long needed a competitive swimming venue, so when the city was constructing its community center, talks led to enhancing the center with a natatorium.

"As we've seen with the Innovation Campus, as well as with the community center and natatorium, entire communities benefit from working together," Harrell said. •••



*An architect's rendering of the new Innovative Campus dedicated specifically to gifted students' learning in North Kansas City. The facility includes top-of-the-line computer labs.*

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# Biennial budget aims at classroom funding

*Continued from page 5*

- **Funds for Special Education.** Several changes resulted in an increase of \$30 million for special-education students. Among them:

- ✓ The weight for special-education students increased from 1.27 to 1.50 per student.

- ✓ The Special Education Adjustment made for minimum receivers has increased from 33 percent to 40 percent.

- ✓ Incentives are provided to public schools that place special-education students in regional special-purpose schools closer to home versus private schools further away.

- ✓ The Special Education Budgetary Hardship Fund is now available for districts to apply for additional special-education funding when they receive high- cost special-education students during the current school year, rather than wait for the coming year to receive extra funding.

- **Career & Technical Education (CTE).** Allocation for Career and Technical Education (CTE) is now based on a program-driven cost model. (*See accompanying story.*)

- **Additional public preschool funding.** Another \$10 million has been allocated toward new and expanded public preschool programs.

- **Town valuation.** Each town's valuation is provided by the Maine Revenue Service each year and is part of the calculation that determines the town's ability to pay local share. Previously the amounts used were determined based on the average valuation of the previous three years. Next fiscal year they will be

based on an average of the previous two years. This change has created an increased "ability to pay" for some towns, resulting in a higher required local share.

- **Student-to-Teacher ratio for New Early Childhood programs.** The student-to-teacher ratio for programs for 4-year-old through kindergarten has changed from 17-1 to 15-1. The result is an \$8 million more funding.

- **Funding for system administration.** Allocation for system administration has gone from a rate of \$135 per pupil in FY18 to \$92 per pupil in FY19. Districts pursuing a Regional Service Center as part of Chapter 123 were allotted an additional \$46 per pupil, pending approval of round II applications.

- **Basic pupil count.** The pupil count used in EPS calculations is based on an average of the previous two years' October pupil counts. Previously, it was based on the average of the most recent October and April counts.

- **State share percentage has grown.** The average state share percentage has grown to 53.02 percent. The previous year was 52.02 percent.

Other important factors that impact EPS calculations:

- The mil rate, which is used as part of the calculation that determines each town's ability to pay its required local share is 8.51. Previously the mil rate was 8.19.

- A dramatic increase or decrease in student enrollment has a major impact on funding because the EPS funding formula's major driver is student population.

- Changes in debt-service payments. Districts that have either paid off or begun to pay principal or interest payments for equipment (new school, new bus, etc.) that the state has allocated funds to pay, those payments could see dramatic changes in calculations if either payments no longer need to be made or if payments have begun. ...



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Continued from page 11

“CTE programs are a lot more expensive than, say, a high school math classroom,” Moody adds. “For example, our welding and culinary arts programs cost a lot. The food costs alone for culinary arts is \$10,000 a year. At a public school, their supplies line for a class is probably \$500 a year.”

Director Fisher says Region 8’s operating budget is \$3 million per year and while there are others on the administration team, “Sherry and I make all the financial decisions together... She has an incredible sense of detail.”

### Queen for a Day

Asked what would be her first three actions if she were in charge of Maine’s DOE, Moody made three potent suggestions:

- Make the position of commissioner of education hired, not appointed.

“I would love to see continuity in our educational leadership that is not based on a political appointment,” she says.

- Slow down and back off on all the initiatives.

“I think our public schools are reeling from all the changes that have been proposed and/or initiated over the past five years,” she says. “From proficiency-based learning to changes in assessments, most schools just can’t keep up.”

- Go back to the drawing board on how school units are structured in Maine.

“The school consolidation plan that was implemented by Governor Baldacci in 2007 has not saved millions of dollars as predicted,” she says. “The plan has now placed many communities in limbo as they try to get out of their ‘union’ under the consolidation.”



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Concerning DOE’s upcoming direct subsidy to CTEs: “It’s something our local schools had been wanting for a long time.”

— Sherry Moody

“I happen to live in a town currently doing just that,” she adds. “Many towns have already withdrawn. We need to have consensus at all levels (from educators to parents to town officials) before a successful system can be implemented at the legislative level.”

### Her Journey

Moody’s road to Rockland included a few curves.

Born and raised in Richmond, she graduated from Richmond High School in 1984 and studied nursing for two years at the University of Maine-Augusta (UMA) before deciding that wasn’t her calling.

Instead, she held clerical positions at Maine State Retirement and the Developmental Disabilities Council for a few years before entering the world of public education.

Six years as school secretary at Dresden Elementary was followed by a promotion to positions handling benefits and payroll at the Wiscasset School Department superintendent’s office in 1997 and at the Maranacook School Department (now RSU #38) in 2000.

In 2003 Moody moved to Richmond as business manager, where she earned a bachelor’s degree in business administration from UMA.

When RSU #2 brought together Richmond, Dresden, Monmouth and Farmingdale, she was hired at Region 8 CTE in 2009. She is part of a central office team that includes a director, assistant director, curriculum coordinator, computer systems coordinator, maintenance director, adult-education director, administrative secretary and adult-ed secretary.

“I do a lot of things that others have staff for,” Moody says. “We’re not huge at all, but efficient.”

Along the way besides earning her college degree, she and husband Dan raised two daughters: Danielle, 30, who works in the NorDx lab at Maine Medical Center in Portland, and Kristen, 24, who is in chiropractic school in Missouri.

Moody is also on the verge of earning school business official certification from MeASBO.

When she and Dan, a crane operator at Bath Iron Works, want to get away, outdoors is where they head.

Snowshoeing, hiking, fishing, walking their three dogs and spending time at their camp in the woods in Medford.

The best part of camp?

“Total silence,” Moody says. “It’s far enough north that you’re in a truly different world.”

Her choices:

Skiing or softball?

“Skiing, for sure.”

A day on the coast or in the mountains?

“Mountains.” (Said without hesitation.)

Whatever her choices when off the job, Region 8’s staff is thrilled she’s at their side five days a week.

“Sherry’s an awesome business manager, but we probably shouldn’t say too much about it because someone might try to steal her away,” says Fisher. ...



# Play or Pay penalty assessments looming

By Chris Stevenson

**7**he Affordable Care Act's so-called "Play or Pay" rules became effective Jan. 1, 2015, requiring any school district that is a "large employer" to, each month, offer all full-time employees health insurance that is affordable or face significant IRS penalties.

These penalties are triggered when a full-time employee who was not offered the requisite health coverage through the school district, instead purchases health insurance coverage on the Health Insurance Exchange and qualifies for IRS health insurance premium subsidies.

Although the Play or Pay rules have been in effect for almost three years, the IRS has not yet assessed any penalties on employers for Play or Pay violations. But this is about to change.

The IRS website was recently updated to provide that it planned to issue employers notices for potential Play or Pay violations related to 2015 "in late 2017."

For many school districts in Maine, this likely means that ACA penalty notices are looming.

The good news is that most school districts in Maine offer year-round employees health insurance, at a low cost to the employee, that likely complies with the Play or Pay rules.

However, most school districts in Maine also have a handful of "variable hour employees," such as substitute teachers and certain other employees, who are not offered any health insurance through the school district, but who may work for 130 hours or more in a particular month and therefore be considered a "full-time" employee for ACA purposes.

These variable hour employees create potential Play or Pay violations for many school districts. Some school districts have limited this potential liability by switching to the optional "look-back approach," where an employee's full-time status for ACA purposes is determined based upon average hours worked during a prior 12-month period, rather than on a month-to-month basis.

However, school districts may expect an IRS notice of penalty if they have not switched to a look-back approach and had a "full-time employee" who was not offered health insurance through the dis-



trict and received IRS-subsidized health insurance on the Exchange.

Also, due to the extraordinary complexities associated with ACA reporting generally, it appears likely there will be mistakes in the Play or Pay penalty assessments, which may generate additional penalty notices.

The initial ACA penalty notice will be titled "Letter 226J" and will include the

amount of the proposed Play or Pay penalty, as well as a table summarizing which employees triggered the penalty and how the penalty was calculated.

The initial notice will also include an employer response form (Form 14764 ESRP) and instructions on what employers should do if they disagree with the proposed penalty assessment. Employers

*Continued on page 22*



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# Kids connect with veterans in need

*Continued from page 17*

services to thank them for their service.

An offshoot of the event is a website ([servniagara.org](http://servniagara.org)) was established to support, empower and respect veterans and their families. A directory of resources for veterans and their families is included on the website.

"The future goal of the school district and others involved," Godshall said, "is to establish a shelter for homeless veterans as they transition to self-sufficiency.

"The Literacy Zone Welcome Center has invited all veterans and their families to participate in its activities, to increase literacy levels, obtain a GED, learn computer skills, and improve job-readiness skills."

Godshall added that one important goal to the students is giving back to the community by volunteering at its food pantry,



**'This project afforded these students the opportunity to give back to other adults who have served their country and have met with hard times.'**  
— Dr. Clark Godshall

Salvation Army food kitchen, clothes closet, etc.

"It is important for the students to see that while they are being supported by many agencies and organizations to help them better their own lives, there are those individuals who are also in need of the basics," he said. ...

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## Time for districts To Play or Pay

*Continued from page 13*

disagreeing with the proposed penalty will have 30 days to return the response form to the IRS to begin the penalty appeal process.

Any school district receiving Letter 226J should do the following:

1) Immediately forward it to the appropriate individual(s) in the school business office for review. Because school districts will have only 30 days to notify the IRS that they wish to appeal the assessment, it is imperative school district acts quickly.

2) The appropriate school official(s) should carefully review the penalty assessment calculation for accuracy. This should include identifying each employee listed on the letter as triggering a Play or Pay penalty. The district should locate payroll and related records to verify whether the employee was in fact a full-time employee of the district for the month(s) in question. The school district should also determine whether the employee was offered affordable health insurance coverage through the school district in accordance with the ACA for the period in question.

3) For penalty assessments that appear accurate, the district should determine whether switching to a "look-back approach" for identifying full-time status as opposed to a month-to-month determination, may limit or eliminate penalties.

4) Determine whether to appeal the proposed penalties in whole or in part and notify the IRS within the prescribed 30-day time limit on Form 14764 ESRP. School districts appealing a penalty assessment must provide a full explanation of their disagreement with the penalty assessment in their response.

5) Districts appealing a penalty assessment will be assigned a particular agent at the IRS to consider their appeal.

Drummond Woodsum will continue to closely monitor all developments concerning the Affordable Care Act that impact schools and is available to assist school districts in answering any questions about, and responding to, any IRS penalty assessments.

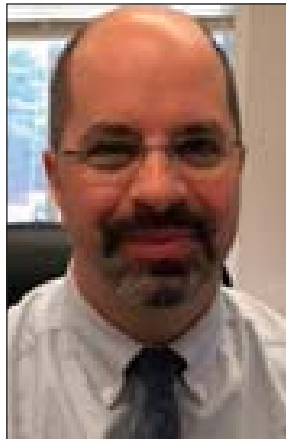
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# 2017-18 MeASBO leadership



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## Upcoming MeASBO meetings

**March 2** — “ED279: Where We Stand and Why Did the Mil Rate Go Up?” by Tyler Backus, DOE, at Keeley’s Banquet Center, Portland, 8:30-12:30.

**April 27** — TBD. 8:30-12:30

**May 23-25** — Tri-State (Maine, New Hampshire and Vermont) ASBO Conference, Downtown Holiday Inn, Portland.

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**Editorial Director**  
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MeASBO encourages all of its members to participate in the publication. It welcomes their thoughts and opinions.

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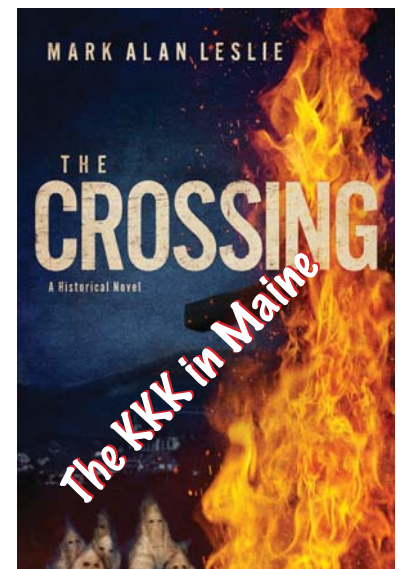
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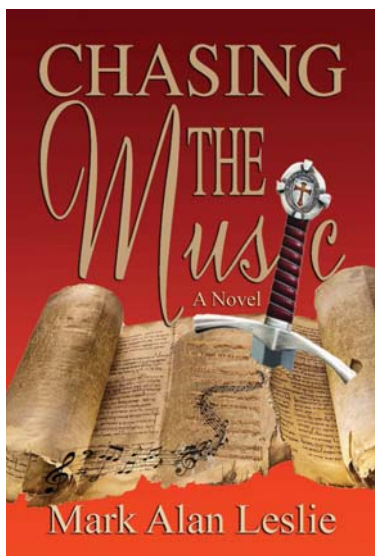
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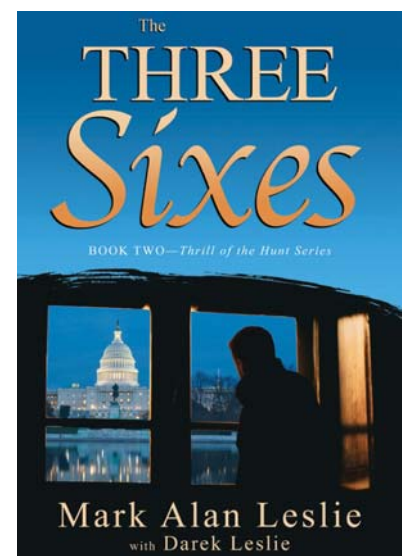
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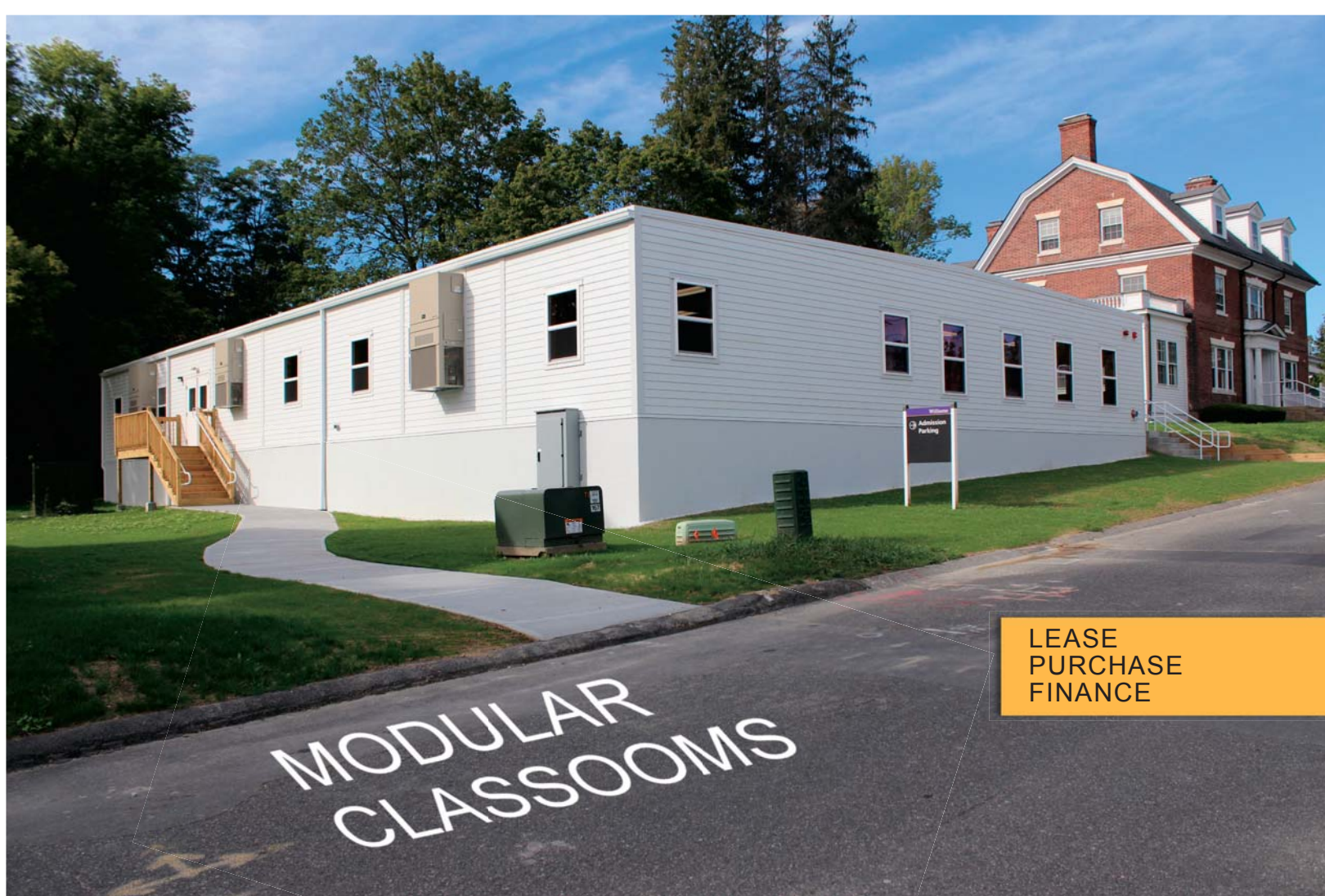
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