



TIMOTHY J. PURNELL ED.D
EXECUTIVE DIRECTOR

 @drpurnell
 @drpurnell

MEMORANDUM

TO: EXECUTIVE COMMITTEE

FROM: DR. TIMOTHY J. PURNELL, EXECUTIVE DIRECTOR

DATE: March 15, 2024

SUBJECT: DEPARTMENTAL UPDATES

Each department director provided an update on activities that have taken place since the January 5, 2024, Executive Committee meeting. Time will be provided at the March 15, 2024, meeting for any questions or clarification.

TJP: pb
Attachment

New Staff: Welcome to NJSBA!

Lauren Liu

Lauren comes to NJSBA as our new Administrative Assistant – Legal, Labor, and Policy. Her cubicle will be on the third floor near Kathleen and Kathy and will report to Kathleen Asher. Lauren comes to us as a recent graduate from Rutgers New Brunswick with a B.A in English Literature. At Rutgers, she was an Editorial Intern where she planned publications and evaluated and edited manuscripts. Before NJSBA, Lauren worked at a non-profit school in Warminster, PA, and worked at Bancroft in Mount Laurel, working with students with Autism using ABA therapy.

Caitlin Pletcher

We are excited to announce that Caitlin Pletcher will join the General Counsel/Legal, Labor, and Policy team as our new Legal Counsel! Caitlin will report to Kathleen Asher and her office will be located on the third floor next to Kathleen and Kathy. Caitlin comes to us from Florio Perrucci Steinhardt Cappelli Tipton where she was Partner & Co-Chair of the Education Practice Group since 2020. Before that she worked for the Department of Education in the Office of Legal and External Affairs and Division of Field Services. She also received a bachelor's degree in communications from Boston College and attended Rutgers University School of Law-Camden for her Juris Doctor.

Jeanne Cleary

We are excited to announce that Jeanne Cleary will join the Field Services team as our new Field Service Representative! Jeanne will report to Gwen Thornton; her office will be on the second floor. Jeanne comes to us from Scotch Plains-Fanwood Public Schools where she was Director of Operations & Special Projects, and School Safety Specialist since 2021. Before that, she worked for JCC of Central NJ as their Director of Operations. Jeanne was on the Scotch Plain-Fanwood school board since 2011 and served as vice president. She also received a bachelor's degree in psychology from CUNY, Brooklyn College.

Pete Castellano

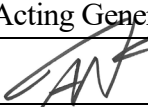
We are excited to announce that Pete Castellano will join the General Counsel/Legal, Labor, and Policy team as our new Senior Manager of Policy! Pete will report to Kim Gatti and his office will be located on the second floor. Pete comes to us from FAA Technical Center where he was an attorney and advisor to multiple Technical Center Directors since 1995. He also was a board member for Egg Harbor Township Board of Education from 2001-2021 (3 years as president, 3 years as vice president) where he served on the policy committee every year. He served for 10 years as a member of the NJSBA legislative committee and served on the resolution subcommittee during the same time. He also served on the nominations committee, bylaws review committees and was a group leader for New Board Member Orientation Training. He received a bachelor's degree in business administration from Richard Stockton College, an MBA from Rutgers University in Public Administration, and his Juris Doctor from Temple University School of Law.



MEMORANDUM

To: Timothy J. Purnell, Executive Director

From: Carl Tanksley, Jr., Esq., Acting General Counsel

Date: March 4, 2024 

Re: Executive Committee – January – February 2024 Update

I. Alliance for Competitive Energy Services (ACES)

- a. The General Counsel's office completed the RFP publication and award process. As lead agency for the ACES Energy Savings Improvement Program, NJSBA is responsible for ensuring that the contract for administrative services is publicly bid and awarded pursuant to statutory and regulatory requirements. The contract is advertised every five years. After negotiating the award of the contract an ACES member required clarifications of the contract which extended the award period somewhat.

II. School Ethics Reporting

- a. The General Counsel's office worked collaboratively with Call Center and Field Services to notify and encourage over 1,000 board members to complete their governance training within statutory time limits. While not all board members completed their training within a timely fashion, there are currently seventy-one members that have yet to complete training. NJSBA is required to report these members to the School Ethics Commission by the end of March of this year. Significant time was expended on working through delinquency lists and monitoring the progression of members through their training requirements.

III. Delegate Assembly

- a. The general counsel's office has initiated the May 2024 delegate assembly process and has begun scheduling the tasks and duties of the meeting. The policies and bylaws adopted and/or revised from the December 2, 2023, DA have been finalized.



- b. The cutoff for the submission of resolutions is March 18, 2024. As of the date of this report, three resolutions were filed, two were returned to the sponsoring boards due to material deficiencies in the filing with recommendations on correcting said deficiencies. One board has since filed a revised resolution which has been determined to satisfy NJSBA's filing requirements.
- c. Work continues on the DA video and reformatting document to make the resolution filing process simpler.

IV. **Amicus Curiae**

- a. The General Counsel's office has received two requests for *amicus* participation. Both requests are currently under review as to NJSBA *amicus* standards. The first request involves an attorney who was penalized by the Disciplinary Review Board of the New Jersey Supreme Court for a violation of the Rules of Professional Conduct. The second matter involves a matter coming out of the Public Employees Relations Commission and involves an unfair practice charge where the union's negotiating committee consisted of the entire membership.

V. **Procurement**

- a. On February 27, the General Counsel's office convened a public bid opening for RFP 2023-05 to replace the boiler at 413 West State Street. Bids were received from five respondents and evaluations are currently underway.

VI. **Personnel**

- a. Two new employees have joined the departments, Lauren Liu, appointed as an administrative assistant to Legal, Labor and Policy and Caitlin Pletcher, appointed as counsel in the Legal/Labor department. Peter Castellano is scheduled to begin March 5. All are welcome and needed additions to the departments.

VII. **ELFNJ**

- a. The General Counsel's office participated in negotiating and finalizing the contract for ELFNJ's new executive director, David Hespe. As a former Commissioner of Education, David lends considerable expertise and innumerable contacts to ELFNJ.



VIII. **Contracts**

- a. The General Counsel's office continues to review and participate in the negotiation of NJSBA contracts and implementation and monitoring of the terms of multiple agreements.
- b. The office is currently negotiating a new lease of parking space for visitors to 413 West State. The lot at 407 West State had been utilized prior to the pandemic, but the lease was allowed to expire during the pandemic due to a decreased need for additional parking.

IX. **TEACHNJ**

- a. Pursuant to *N.J.S.A.* 18A:6-7.1, NJSBA, along with other educational entities, is directed to appoint nine (9) arbitrators to the TEACHNJ panel. The arbitrators are charged with making issuing arbitration decisions in tenure dismissal matters of tenured teachers and administrators. After an extended negotiation with the New Jersey office of the American Arbitration Association, the General Counsel's office was able to secure the names of New Jersey arbitrators for placement on the panel. The office is now reviewing names of arbitrators as replacements on the panel.

Vincent R. De Lucia

Educator- in-Residence/Special Assignments

Executive Committee Report- March 5, 2024

ESSA

Jesse Young and I are representing NJSBA on the NJDOE ESSA Advisory Committee. As discussions evolve, it is important to note that suggestions made over the past few years are being included in the new plan. As an example, student growth will be the indicator which is more informative than reporting the final scores.

Firearms Safety Task Force

Among the “list serves” that I subscribe to is the UCLA Howard Adelman focus on students, climate, culture, health and learning. In response to a request for safety strategies, I forwarded the NJSBA Firearms Safety Report to UCLA who have included that work in among their resources for districts, schools and educators across the USA and internationally.

Mandated Training

Governances 1 and 3 continue to be revised to ensure they address both established and more current challenges that BOEs face in NJ. Revisions include discussions on the meaning of the Oath of Office, the important role that BOEs have in their local economies, the direct correlation to 21st century job skills of collaboration, SEL, and the democratic process of public meetings.

Participant responses to the revised Gov 1 introduced at both NBMO weekends were enthusiastic.

Unconscious Bias

On March 22, Kean is sponsoring their 4th annual Equity-Centered Open Access (OA) Design Conference. Keynoter is Dr. Walter Greason who has been a volunteer consultant to the NJSBA Equity Council for several years. Additionally, Kean VP Brian Zychowski and I are presenting a program on the impact of unconscious bias on students, their families and districts with processes, strategies and programs to address it.

County Meetings.

Building Trust with the Community – Leadership in Turbulent Times was presented to the Bergen SBA in January

The Firearms TF Report plus Strategies to Build Self Esteem was the topic for the January Burlington SBA meeting.

Collaboration Project

Montclair

In 2019, the Montclair BOE empowered Trustee Eric Schwerzer to collaborate with me to bring this work to Montclair. He and current President Melanie Dysher have actively been participating in every District Leadership Team meeting since the beginning. On February 28th, the School Leadership Teams of every Montclair school met at Kean to formally begin their

collaborative school-based work. This success is based on 5 years of work at all levels in the district.

It is very important to note that the catalyst for the success of this work has been the BOE. They have participated in every training, every district leadership team meeting and have advocated for this paradigm shift in Montclair.

NJSBA has been the professional learning catalyst and the facilitator of communications to nurture the professional relationships among/between the board, superintendent and staff.

South Africa

On March 15 @ RU, there will be a joint RU/KEAN Collaboration Conference. In attendance will be the 7 South African provincial secretaries of education and 7 leaders of the seven teachers' unions. This is an opportunity for districts in the collaborative to share successes, challenges and strategies.

Other Pathways

Discord among the state associations regarding the role of Rutgers has required several meetings of facilitation to help the leaders of collaboration understand what that means. There continues to be three distinct pathways for districts to participate.

- Independent Guidebook: The national labor council that includes NSBA has released a guidebook for districts to use as a resource. In conversations with the facilitator of the National Labor Management Council, Jo Anderson, we learned that they also advocate facilitators with expertise in collaboration to implement this program.
- The NJEA/ "State Partners" pathway is a pay it forward model where after being trained, participants volunteer to be coaches/facilitators with future groups. This pathway is not connected to higher education. While it is a pathway that some districts will find appropriate for them, it has none of the benefits associated with the University connection nor does it have a formal evaluator component.
- The Academic Rutgers and Rutgers/Kean pathways are the preferred pathway for most districts. Under the guidance of Rutgers Professor Saul Rubenstein, board members, Superintendents, Principals, and Teachers are facilitators for districts as they experience the collaboration professional learning. Kean has adopted this collaborative approach as part of their total school improvement work in districts.
- The research questions contribute to the value of this pathway. RU is investigating the influence of formal collaboration on learning. Kean, NJ's first urban research university, has added a second inquiry which is the influence of formal collaboration on learning, climate, culture specifically in urban districts.
- On March 4, NJSBA (Marcia Lavigne and me) will be collaborating with NJPSA, NJASA, and NJEA to introduce this work to 100 educators, including one BOE trustee, to provide the opportunity for districts to participate.

RU – School of Management & Labor Relations

The RU – School of Management & Labor Relations was established by legislation in 1947 that requires an advisory council representing the public and private sector be established to oversee the School. While the staff of the state NJEA and NJASA have had representation, NJSBA has

not. Awaiting the formal approval of the RU Board of Governors, Dean Adrienn Eaton has nominated me to serve on the SMLR Advisory Council.

Transition

Our new organizational chart has created new teams – the Strategic Planning group that includes WORKSHOP under the leadership of Lauren Cuervo has been experiencing professional learning I've been facilitating on building a team, understanding communications styles and our responses to them, and learning how to communicate more effectively and less emotionally. Anonymous feedback from the team has been extraordinary and requesting that we have less time between our sessions.

ARTS ED NJ

A major revision of the Governor's Awards is underway.

SEL4NJ

In addition to publicizing the annual March 8th DEL Day, we are discussing the messaging to make SEL less threatening to those who may not understand its importance. SEL4NJ is adding the NJSBA messaging that emphasizes the role that SEL has in preparing students for the workforce. Since formal collaboration is an expectation in most careers, knowing the 21st Century Job Skills reported by Fortune, Forbes, and the NEA that include empathy, compassion, emotional intelligence and storytelling (effective communications) has been our emphasis for several years that has not caused controversy at our trainings.

Teachers: Recruitment & Retention

NJ centric associations have formed a task force to comprehensively identify the roadblocks to those entering the profession or staying. Working with a group of leaders from NJ, Texas and NC. Currently doing a landscape analysis that will inform our recommendations.

ELFNJ

Discussions with Dave Hespe to provide PL for the ELF Board's March Retreat.

Young Audiences-NJ

A meeting scheduled with YA Executive Director Michelle Russo to discuss the roles of YA, SEL and the impact of their work in districts.

Executive Committee Report

Charles Muller – Business Administrator in Residence

- February was a busy month. I did a combination of Workshops, panel discussions and a Podcast.

As February progressed, there seemed to be a interest in the 2% tax levy. The more I spoke with individuals I thought it would be a good idea to explain the process. I developed a spreadsheet that shows step by step what is included to calculating the Total Tax Levy. The spreadsheet further explains how the various adjustments are calculated.

As most people are concerned with how it affects them personally, I have a spreadsheet that shows the impact of a tax levy increase or decrease as well as municipality valuations.

I will continue to develop a finance “Library” for future reference as questions arise, answers can be found quickly. An example is what would a district look for in a superintendent’s contract. The “library” currently has a Q&A and a checklist for what should be in a contract.

Workshops/panel discussions for March:

- Meeting with the BA from Lenape Regional March 6th to discuss the impact of the loss of state aid.
- March 5th – Panel discussion on school finance, virtual
- March 16th – workshop on school finance in Salem County.



STRATEGIC DEVELOPMENT EXECUTIVE COMMITTEE REPORT

March 2024

Workshop 2024

- **Sponsorship Opportunities/First Right of Renewals** – The sales team revamped some of the sponsorship opportunities and is currently reaching out to 2023 Workshop sponsors to renew for Workshop 2024. Sponsorships and booth space open on April 1.
- **Artwork and Theme** – The theme was rolled out to the membership in late February through email, social media, and School Board Notes. Vendors and members received a separate set of important upcoming dates.
- **Marketing campaigns in the works** - videos, postcard mailing, call for student performances, teasers for registration opening (Apr. 1)
- **Timeline** – All tasks are on or ahead of schedule.
- **Technical Backend** – Finalizing the backend setup of the exhibit management platform, working with the new registration company, ATS on the integration of registration information for badges.
- **Website Development** – The Workshop 2024 website is currently being developed. It will open on April 1 with registration and housing.

New Website

Here is what has been completed since the last Executive Committee meeting:

Content Purging, Archive Site and Initial Migration – After thoroughly reviewing content data, the core team purged more than 3k pages from the existing website to ensure stale information was not carried into the new site. An archive site with all “pre-purge” content is available to staff. Allegiance started an initial migration of content on February 27.

Wrapping up design– Allegiance is finalizing designs based on our feedback.

Launch of the Development Phase – Development starts this month. During this phase, the graphic designs are turned into responsive templates, and the CMS (WordPress) along with any modules and custom coding required to support the new features and user experience are installed. Allegiance will create development and production environments, implement web forms, build in the jobs board, set redirects, and build single sign-on integrations.

Upcoming Revenue-Generating Programs

Women’s Leadership Conference (4/19) – Sponsorships sold out within 3 hours and registration sold out in 5 weeks. Currently working on finalizing content and reaching out to registrants for input on what they want to see.

Spring Conference (5/10) – The spring conference combines school safety, public relations, and student success in one day of training. Registration has launched, sponsorships are being secured, and content is being finalized.



IT Projects

- IT has developed new compliance reports for new board members (complete GOV1 in 90 days) and for April election districts.
- Supporting Workshop registration and integrations.
- Serving as NJSBA's technical lead on the website development project.
- Transition planning for Microsoft's forced move to the new Teams app by the end of the month.
- Implementing 37 new security configurations/policies.

STEAM Tank

- Application Totals - 578 team applications from 70 districts and 101 schools representing 19 counties.
- STEAM Tank Regional Rounds – 350 scheduled for March.

Member Engagement and Training

January/February is a very busy time of the year. There are so many programs going on during that time, plus the planning for more work in March through June.

Mandated Training/Professional Learning – January and February we obviously had the two weekend NBMO's. They both went very well. It should be noted that despite a snowstorm for the first one almost 90 people showed up. These in-person programs are valuable to the members and help to build a stronger relationship between the new members and NJSBA. There were a few attendees that attended the weekend who this was their third contact with NJSBA. They had attended the 3R's in the County plus a virtual county meeting. Now the attention will shift to the other new members who must get their training within 90 days. As well as those in Gov 2, 3, or 4.

Those who did not complete their 2023 training (About 70) were sent to the SEC.

County Activities – January/February is the month that the county meetings are virtual. They all went very well, and attendance was good. In February we had the CAL meeting and that went extremely well. We had a special training program for County leaders as well as BOD members on public speaking skills. I think it was a great success. The feedback at least was extremely positive.

The great amount of work was in doing the prep work for the student programs coming up. A few were held the first few days of March, and they were so successful. There is a significant increase in district participation. Some counties have near 100% participation. That means that the programs may run a bit long.

Field Service - Field Service has been busy this month in districts primarily doing ethics programs. This is very typical as much of their work is cyclical and driven by the board calendar. In addition, they have provided support for numerous programs. They present at the weekend orientation along with virtual Gov 1 and 2. They also help Professional Learning by getting people to take their mandated training.

The two new FSRs are doing great, and we have just added a new person. We are going to be realigning the county territories again. We do have a more structured onboarding which seems to be working out well.

Finally, we had a department retreat, and we took a different approach to team building by having the newest employees take the lead on developing and implementing the exercise. It was a great success.



NJSBA Executive Committee Meeting
Communications/ Public Affairs Department Update
Janet Bamford
March 15, 2024

School Leader

The spring issue of School Leader has been sent to the printer and will be posted online shortly. The cover story provides a look at school ratings and rankings, how they are calculated and their advantages and drawbacks.



Board members are often called upon to understand and explain to their community members differing school rankings that are publicized. The writers are two New Jersey superintendents—from Dunellen and Ridgewood.

This issue also features articles on the role of school counselors, tips on promoting school security, NJSBA’s advocacy agenda for the 2024-2025 legislative session, navigating non-renewals and RIFS, threat assessment team policies, an award-winning program in Clifton that prepares students with disabilities for adulthood, a Scotch Plains-Fanwood program to encourage students to become teachers, and board member questions and answers from

NJSBA field service reps.

School Board Notes

In recent weeks, School Board Notes has covered the governor’s budget address and the State of the State address. In each case we were able to provide full coverage of those events within a few hours after they occurred. Other articles of note include coverage of the January and December special school elections, recent School Ethics Commission decisions and opinions, the enactment of new legislation (measures that include the expansion of eligibility for school meals, providing emergency bonding authority to districts which have experienced a natural disaster, addressing the needs of students with disabilities during security drills and emergency situations and more), School Board Recognition Month activities, the nomination of a new acting commissioner of education, the appointment of Dave Hespe as ELFNJ executive director. School Board Notes remains one of the leading sources of education news for all New Jersey education stakeholders—not just board members.

Videos

We have released several of videos in the recent weeks. There is a Workshop promotional video for vendors that was developed to help market sponsorships and booth sales at Workshop. Robin has posted the footage from two of Dr. Purnell’s “The Boardroom” video podcasts. She also completed a video introducing the 2024 Unsung Superheroes awards, and the expansion of categories in the programs. She

has also been hard at work on a video explaining and promoting participation in the NJSBA Delegate Assembly, which we expect to debut within days. She is also working on a video of STEAM Tank highlights.

Special Projects

We have tweaked Daily Clips slightly. Daily Clips is the news service sent to all board members that highlights education news in New Jersey. We have added a section that shines a spotlight on an NJSBA service as part of our continuing efforts to remind board members of the wide range of services offered by the Association. Ann Marie is also involved in running the annual Innovations in Special Education Awards, which are presented in May.

Robin Kampf has been working with the Garden State Film Festival to choose the student film winner in a category that NJSBA sponsors annually. Ann Marie has spearheaded the development of a new webpage featuring the student film awards. In addition to a video about the Delegate Assembly, we have also developed a question and answer document detailing the process of writing and submitting an effective DA resolution which has been posted on the NJSBA website.

Press and Public Queries

Recent inquiries have come from the Star Ledger/NJ.com, the Bergen Record/northjersey.com, the Asbury Park Press, NJ Spotlight News, the Philadelphia Inquirer/Philly.com, Patch and more.

Topics addressed include the governor's proposed budget, the "Freedom to Read" bill, the SCI report on the effectiveness of the "pass the trash" legislation, the legality and/or appropriateness of certain measures taken by specific school boards, the progress of N.J. students in recovering from pandemic learning loss, the appointment of the new acting commissioner of education and more.

Thank you for your continued support of NJSBA's communications efforts.

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FINANCE, OPERATIONS + LOGISTICS' SUPPORT SERVICES

DEPARTMENTAL UPDATE

March 15, 2024, Executive Committee Meeting

- **2023 – 2024 Financial Performance**

- January 2024's year-to-date net income of \$2,096K is \$1,825K favorable to budget.
- Workshop '23 was a resounding financial success.

Revenues:

- Workshop '23 exceeded its registration, exhibitors' and sponsorship revenue targets individually and in total by \$698K.
- Fee-based services such as Superintendent Searches and Strategic Plans have outpaced their budget targets by \$108K.
- PAA (Personnel Administrators' Association) membership dues exceed the budget by \$41K.
- Commissions of \$245K earned from the NJSBA Cooperative Purchasing System far exceed the budget of \$102K, primarily due to large fees received from SHI International as members heavily relied on this cooperative purchasing system to secure their technology needs to plan for the current school year.

- With January's large receipt from Diligent (owner of BoardDocs' software), BoardDocs' commission revenues exceed the year-to-date budget by \$104K.
- Investment income has surpassed its budget by \$101K as a result of higher return rates and a larger cash position due to the success of Workshop (2022 + 2023) and the strong performance of the other revenue streams previously noted.

Expenses:

- Wages and employee health care costs are underrunning the budget since it has taken time to recruit for and fill the five new positions recently created.
 - No consulting services have been required through the first seven months of the year.
 - Travel expenses continue to ramp up as Covid travel restrictions have eased, enabling NJSBA to have a favorable budget impact so far this year. The officers' decision not to attend certain out-of-state programs has also contributed to this favorable variance.
- **2024 – 2025 Budget**
 - NJSBA's proposed budget for 2024 – 2025 will be presented to the Board during tonight's meeting.
 - The same proposed budget was presented to the Finance Committee on January 25th, with no objections raised by the Committee.

- If the budget is approved, members' dues will increase by an average of 2% over 2023 – 2024 levels. There will be a wide range of increases and decreases in dues, since each member's local operating budget is used to calculate dues. On average, each member's dues will increase by \$267.
 - Some of the large expense categories - over which NJSBA has little control - are expected to increase at a rate greater than inflation. These costs include health care costs, insurance and the employers' PERS (Public Employees' Retirement System) contribution.
 - Additionally, the proposed budget includes the reinstatement of the Deputy Executive Director position and the creation of two new positions: a Paralegal and a Quality Controls position.
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- **Other Items:**
 - A Request for Proposal (RFP) for the replacement of one of the boilers at our Headquarters building has been issued. Bids were due by February 27th and they are currently being reviewed and evaluated. The funding for this was approved by the board at its meeting in September 2023.