



State of New Jersey

DEPARTMENT OF EDUCATION
PO Box 500
TRENTON, NJ 08625-0500

JON S. CORZINE
Governor

LUCILLE E. DAVY
Commissioner

February 2, 2009

TO: Board Secretaries and Charter School Designees
FROM: Joanne Boyle, Executive Director
School Ethics Commission
RE: Financial and Personal/Relative Disclosure Statements

Each year the School Ethics Commission requires all school officials to file financial and personal/relative disclosure statements pursuant to N.J.S.A. 18A:12-25 and 26 of the School Ethics Act. The Commission has provided your county office with deadlines that it is asking you to adhere to in order to assist with the process of collecting disclosure statements. Along with this memo is a sample reminder letter, a Board Secretary Report form, and a Certification by Board Secretary form. You will note that the Board Secretary Report specifically requires the home addresses of school officials so we can communicate directly with them. The Commission appreciates your assistance in accomplishing this task.

LOCAL TIMELINES

DATE	ACTIONS
February 2, 2009	Board secretaries and charter school designees should advise school officials that they can access the disclosure statements on the Department’s website at www.nj.gov/education/ethics/fdform.htm .
February 17, 2009	Board secretaries and charter school designees submit to the county a complete list of all school officials required to file disclosure statements. Any questions regarding who is required to file should be directed to schoolethics@doe.state.nj.us . Also, see box on page 2 , <i>Who Must File?</i>
By March 9, 2009	Remind school officials of the need to download the disclosure statements and instructions from the Commission’s website (above). <ul style="list-style-type: none"> • Establish a deadline for local submission which permits sufficient time for you to review the disclosure statements and, where necessary, return the statements to the school official for completion by April 30, 2009. (See “Review” box below.) • When submitted, the Commission recommends that the board secretary or charter school designee date-stamp the original disclosure statements. • A copy of the date-stamped disclosure statements should be made for the

	board secretary's office and a copy should be made for the school official.
Review of Disclosure Statements For Completeness	Review disclosure statements for completeness to ensure that: (1) both the Personal/Relative and the Financial Disclosure Statements have been completed; (2) <i>all questions have been answered</i> or indicated as not being applicable ("N/A"), except for Section I, Item 1 in the Financial Disclosure Statement, which must be completed ; and (3) each copy is signed with an original signature. Where it is necessary for the board secretary/charter school designee to return the statements to the school official for completion, please indicate on the "Certification by Board Secretary".
April 6, 2009	Board secretaries and charter school designees should send out reminder letters (using the sample) to school officials who have not filed.
April 30, 2009 to May 11, 2009	Board secretaries and charter school designees must submit to the county office: <ol style="list-style-type: none"> 1) the original disclosure statements in alphabetical order; 2) a completed "Board Secretary Report" which lists the names, positions and home addresses of school officials who have failed to file or filed incomplete statements; and 3) a signed "Certification by Board Secretary." <i>Please do not forward the names of board members who are no longer in office.</i>
June 1, 2009	Board secretary and charter school designee must provide county office with a list of the new board members, trustees and appointees who have 30 days from taking office to file the statements. Once submitted, please review for completeness. (See "Review" box, above)
July 1, 2009	Board secretaries and charter school designees must provide county office with the following for <u>newly-elected and appointed school officials</u> : <ol style="list-style-type: none"> 1) the original disclosure statements in alphabetical order; 2) a completed "Board Secretary Report" which lists the names, positions and home addresses of school officials who have failed to file or filed incomplete statements; and 3) a signed "Certification by Board Secretary." <i>Please do not forward the names of board members who are no longer in office.</i>
July through December 2009	Provide county offices with original disclosure statements for any school official who files disclosure statements after July 1.

WHO MUST FILE?

All school officials are required to file financial and personal/relative disclosure statements. "School official" means a board member, an employee or officer of the New Jersey School Boards Association, but not including any member of the secretarial or maintenance staff of the association, or an administrator. "Administrator" means any officer, other than a board member, or employee of a local school district who: (i) holds a position which requires a certificate that authorizes the holder to serve as school administrator, principal, or school business administrator; or (ii) holds a position which does not require that the person hold any type of certificate but is responsible for making recommendations regarding hiring or the purchase or acquisition of any property or services by the local school district; or (iii) holds a position which requires a certificate that authorizes the holder to serve as supervisor and who is responsible for making recommendations regarding hiring or the purchase or acquisition of any property or services by the local school district. N.J.S.A. 18A:12-23. These provisions apply to an administrator and member of the board of trustees of a charter school. N.J.S.A. 18A:12-23.1.

→ School officials who serve in more than one school district should file statements in each district.

→ Board attorneys employed by private firms are not school officials required to file disclosure statements under the Act.

See the Commission's "Q & A" at: <http://www.nj.gov/education/ethics/fds/faq.htm>

E/JB/Financial Disclosures/2008submissions/BdSecmemo.chart