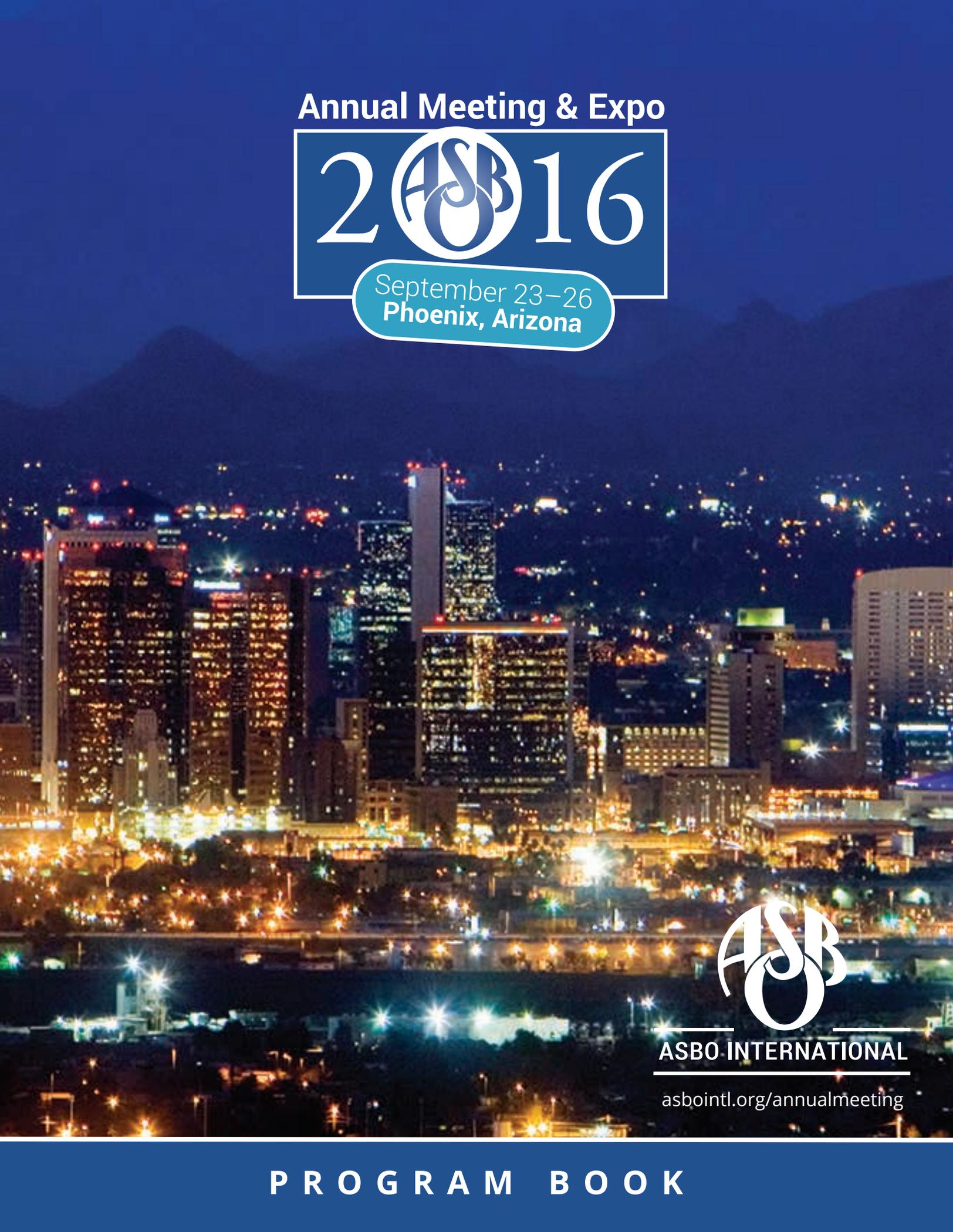


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**ASBO International**  
11401 North Shore Drive  
Reston, VA 20190-4232  
P 866.682.2729 • F 703.708.7060

# General Information



## REGISTRATION HOURS

Friday . . . . . 7:00 a.m. – 6:00 p.m.  
Saturday . . . . . 7:00 a.m. – 4:00 p.m.  
Sunday . . . . . 7:30 a.m. – 4:00 p.m.  
Monday . . . . . 7:30 a.m. – 10:00 a.m.

## EXHIBIT HALL HOURS

Saturday . . . . . 2:30 p.m. – 5:30 p.m.  
Sunday . . . . . 11:30 a.m. – 2:15 p.m.

## ■ BE IN THE KNOW

For the latest on daily Annual Meeting & Expo activities, visit Registration located on the Lower Level of the Phoenix Convention Center's North Building.

ASBO International staff will be wearing black or navy shirts and will happily assist you.

## ■ COMPLIMENTARY WIRELESS

Wi-Fi is available in Convention Center public areas and meeting rooms.

Network: **ASBO International**  
Password: **ASBO2016**  
(case sensitive)

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## ■ CHARGING STATION

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## ■ BADGES

An official 2016 Annual Meeting & Expo badge is required to enter General Sessions, educational sessions, Workshops and Seminars, the Exhibit Hall, and social events. To earn CPE credits for designated sessions, be sure to have your badge scanned to verify attendance. Attendees will receive an email with CPE login and evaluation information.

## ■ ASBO BOOTH, BOOKSTORE, AND PIN TRADING ZONE



ASBO INTERNATIONAL

See page 57 for details about these and other Exhibit Hall highlights.

## ■ 2016 ANNUAL MEETING & EXPO APP



Back by popular demand! The annual meeting program is available for smart phone and tablet users with the Annual Meeting & Expo App. Search **ASBO Intl 16** in the App Store or Google Play to connect with attendees and create your personal conference itinerary.

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## ■ SESSION RECORDINGS

Can't decide which session to attend? No problem! All Discussion Groups and Deep Dig Sessions will be recorded and made available to conference registrants on Education On Demand in October. Visit [asbointl.org/EducationOnDemand](http://asbointl.org/EducationOnDemand)

## ■ WRITE IT DOWN

Use the learning notebook found in your registration bag to keep your notes and insights all in one place.

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## ■ FIRST AID

In the event of a medical emergency, please ask any uniformed Convention Center employee to assist you.

**NOTE: ALL EVENTS TAKE PLACE IN THE NORTH BUILDING OF THE PHOENIX CONVENTION CENTER UNLESS OTHERWISE NOTED.**

**PROGRAMMING NOTE:** ASBO International's 2016 Annual Meeting & Expo, its programs and materials, including the views and opinions expressed therein, are those of the individual speakers, presenters, and authors, and do not necessarily represent the views and opinions of the Association of School Business Officials International, any of its respective affiliates, officers, directors, board members, or employees. As a courtesy to your colleagues, please turn off all cell phones while in the sessions. The schedule is subject to change.

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# Schedule of Events

IO = Invitation Only    \$ = Additional Fee Required

## Friday, September 23

---

- 6:30 a.m. – 1:00 p.m. Golf Tournament | \$
- 7:00 a.m. – 6:00 p.m. Registration Open
- 8:00 a.m. – 5:00 p.m. Workshops and Seminars
- 9:00 a.m. – 1:00 p.m. Desert Jeep Tour and Hike | \$
- 9:30 a.m. – 3:00 p.m. Certification Commission Meeting and Lunch | IO
- 6:00 p.m. – 7:30 p.m. Welcome Mixer
- 7:30 p.m. – 10:30 p.m. Affiliate Reception

## Saturday, September 24

---

- 7:00 a.m. – 4:00 p.m. Registration Open
- 7:30 a.m. – 8:30 a.m. SFO® Recipient Breakfast | IO
- 8:45 a.m. – 10:45 a.m. First General Session—Presentation by Phil Hansen
- 11:00 a.m. – 12:00 p.m. Discussion Groups
- 11:00 a.m. – 12:00 p.m. Guest Program
- 11:00 a.m. – 1:30 p.m. Affiliate Executive Directors Group Meeting and Lunch | IO
- 12:00 p.m. – 1:30 p.m. MBA Advisory Committee Meeting and Lunch | IO
- 12:30 p.m. – 2:30 p.m. Deep Dig Sessions
- 1:15 p.m. – 2:15 p.m. Discussion Groups
- 2:30 p.m. – 5:30 p.m. Exhibit Hall Opening Reception
- 6:00 p.m. – 8:00 p.m. Affiliate Reception
- 6:00 p.m. – 8:00 p.m. Pinnacle Awards Dinner | IO
- 6:30 p.m. – 8:30 p.m. Eagle Awards Dinner | IO

## Sunday, September 25

---

- 7:30 a.m. – 4:00 p.m. Registration Open
- 8:30 a.m. – 9:45 a.m. Clinic Tables
- 10:00 a.m. – 11:30 a.m. Second General Session—Presentation by Manny Scott
- 11:30 a.m. – 1:00 p.m. COE Advisory Committee Meeting and Lunch | IO
- 11:30 a.m. – 2:15 p.m. Exhibit Hall Open
- 12:30 p.m. – 1:30 p.m. Lunch in the Exhibit Hall
- 1:15 p.m. – 2:00 p.m. COE Award Recipients Reception | IO
- 2:15 p.m. – 3:00 p.m. Eagle Award Recipients Reception | IO
- 2:30 p.m. – 3:30 p.m. Guest Program
- 2:30 p.m. – 3:30 p.m. Discussion Groups
- 2:30 p.m. – 4:30 p.m. Deep Dig Sessions
- 3:45 p.m. – 4:45 p.m. Annual Meeting Program Committee Meeting – All encouraged to attend
- 3:45 p.m. – 4:45 p.m. Discussion Groups
- 5:00 p.m. – 6:00 p.m. Emerging School Business Leaders Scholarship Reception | IO
- 6:00 p.m. – 7:30 p.m. MBA Dinner | IO
- 8:00 p.m. – 11:00 p.m. Oklahoma ASBO Reception

## Monday, September 26

---

- 7:30 a.m. – 10:00 a.m. Registration Open
- 8:00 a.m. – 9:00 a.m. Discussion Groups
- 9:15 a.m. – 10:15 a.m. Discussion Groups
- 10:30 a.m. – 11:30 a.m. Discussion Groups

# Workshops and Seminars

Explore critical school business management issues in depth with hands-on learning at the 2016 Workshops and Seminars.

To earn CPE credits for Workshops and Seminars, you must scan your badge to verify attendance and complete the online session evaluation. Online evaluations are available immediately following Friday's Workshops and Seminars. To earn SFO® contact hours for Workshops and Seminars, you must complete your Contact Hours Record. See more information at [asbointl.org/Workshops](http://asbointl.org/Workshops).

## FRIDAY, SEPTEMBER 23

### WORKSHOPS

*Brought to you at no charge with the support of American Fidelity Assurance Company*

#### TWO-HOUR WORKSHOPS

**8:00 a.m. – 10:00 a.m.**

##### Workshop 1: Making Facilities Data Work for Education

Content Area: School Facilities Management  
Room 122A | SFOs: 2

##### Workshop 2: Narrowing the Access Gap with the Digital Equity Toolkit

Field of Study: Computer Science  
Content Area: Information Technology  
Room 123 | SFOs: 2 | CPEs: 2

**10:15 a.m. – 12:15 p.m.**

##### Workshop 3: Security and Emergency Preparedness—Active Shooter

Content Area: Risk Management  
Room 125 | SFOs: 2

##### Workshop 4: Making Cent\$: Restructuring a Food Service Program in a Collective Bargaining Environment

Field of Study: Production  
Content Area: School Food and Nutrition Management  
Room 122C | SFOs: 2 | CPEs: 2

**1:00 p.m. – 3:00 p.m.**

##### Workshop 5: Presenting School Finance in the 21st Century

Content Area: Leadership Development  
Room 122A | SFOs: 2

##### Workshop 6: Technology, the Law, and Schools: Emerging Issues

Content Area: Legal Aspects  
Room 123 | SFOs: 2

##### Workshop 7: Seven Tips for Effective Next-Generation Fiscal Leadership

Field of Study: Personal Development  
Content Area: Management Techniques  
Room 125 | SFOs: 2 | CPEs: 2

#### FOUR-HOUR WORKSHOPS

**8:00 a.m. – 12:00 p.m.**

##### Workshop 8: Arizona School Tour

Content Area: School Facilities Management  
Room 126C | SFOs: 4

##### Workshop 9: Strategic Planning in Light of the Affordable Care Act

Field of Study: Personnel/HR  
Content Area: Human Resources and Labor Relations  
Room 121A | SFOs: 4 | CPEs: 4

##### Workshop 10: Making School Finance Fun

Field of Study: Personal Development  
Content Area: Leadership Development  
Room 122B | SFOs: 4 | CPEs: 4

**1:00 p.m. – 5:00 p.m.**

##### Workshop 11: The Missing Link to Controlling Costs

Content Area: Human Resources and Labor Relations  
Room 122C | SFOs: 4

##### Workshop 12: Strengthening Internal Controls, Improving Efficiency, and Reducing Fraud Risk of Student Activity Funds

Field of Study: Auditing  
Content Area: Accounting, Auditing, and Budgeting  
Room 122B | SFOs: 4 | CPEs: 4

### SEMINARS

*Brought to you at no charge with the support of ASBO International*

#### FULL-DAY SEMINAR

**8:00 a.m. – 5:00 p.m.**

##### Seminar 13: Skills Refresher for ASBO's SFO Certification Exam

Field of Study: Personal Development  
Content Area: Accounting, Auditing, and Budgeting  
Room 121B | SFOs: 8 | CPEs: 8

#### FOUR-HOUR SEMINARS

**8:00 a.m. – 12:00 p.m.**

##### Seminar 14: How to Prepare a Comprehensive Annual Financial Report

Field of Study: Finance  
Content Area: School Finance  
Room 121C | SFOs: 4 | CPEs: 4

**1:00 p.m. – 5:00 p.m.**

##### Seminar 15: How to Create an Award-Winning Budget

Field of Study: Finance  
Content Area: School Finance  
Room 121A | SFOs: 4 | CPEs: 4

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# Daily Schedule • Friday & Saturday

## Friday, September 23

6:30 a.m. – 1:00 p.m.

### Golf Tournament

*Additional Fee and Advance Registration Required.*

Buses depart from the Main Entrance of the Sheraton Grand Phoenix at 6:30 a.m.

7:00 a.m. – 6:00 p.m.

### Registration

*Pre-Function, Lower Level*

7:30 a.m. – 8:15 a.m.

### Coffee Break

*125 – 128 Foyer*

8:00 a.m. – 5:00 p.m.

### Workshops and Seminars

(See page 8 for complete listing.)

9:00 a.m. – 11:00 a.m.

### SFO® Exam 1 Testing

*Pre-registration Required*

*Camelback, Sheraton Grand Phoenix*

9:00 a.m. – 1:00 p.m.

### Desert Jeep Tour and Hike

*Additional Fee and Advance Registration Required*

Buses depart from the Main Entrance of the Sheraton Grand Phoenix at 9:00 a.m.

9:30 a.m. – 3:00 p.m.

### Certification Commission Meeting and Lunch

*By Invitation Only*

*Room 124*

1:00 p.m. – 3:30 p.m.

### SFO® Exam 2 Testing

*Pre-registration Required*

*Camelback, Sheraton Grand Phoenix*

6:00 p.m. – 7:30 p.m.

### Welcome Mixer

*Phoenix Ballroom, Sheraton Grand Phoenix*

Badge required.

7:30 p.m. – 10:30 p.m.

### Affiliate Reception at Rawhide at Wild Horse Pass

*5700 West North Loop Rd., Chandler, AZ*

Travel back to the 1880s with your colleagues for one great night of Western fun in Rawhide! Enjoy all this town has to offer, from the world-renowned steakhouse and saloon, to the unique shops and variety of attractions. Line dancing, casino action, Wild West games, Rawhide street performances, and much more will make this an evening you won't want to miss. Don't forget your cowboy boots and hats!

Hosted by ASBO International affiliate organizations in Arizona, California, Colorado, Kansas, and Iowa. All conference attendees are welcome. Badge required.

Buses begin loading at 7:30 p.m. from the Sheraton Grand Phoenix Main Entrance and run continuously.

## Saturday, September 24

7:00 a.m. – 4:00 p.m.

### Registration

*Pre-Function, Lower Level*

7:30 a.m. – 8:30 a.m.

### SFO® Recipient Breakfast

*By Invitation Only*

*Room 124*

**Sponsored by The Horace Mann Companies**

7:45 a.m. – 8:30 a.m.

### General Session Coffee Break

*North Ballroom D Foyer*

### Earning CPE Credits and SFO Contact Hours

ASBO International is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Earn up to 16 CPE credits for the entire Annual Meeting & Expo across different fields of study. To receive CPE credit attendees must scan their badge to verify attendance and complete the online session evaluation. **All sessions are a basic program level, group live, and require no program prerequisites or advance preparation.**

Earn up to 16 SFO recertification contact hours Friday through Monday. To receive SFO contact hours, attendees must complete the Contact Hours Record and enter recertification hours in their online account.

For more details visit [asbointl.org/workshops](http://asbointl.org/workshops).

## FIRST GENERAL SESSION

8:45 a.m. – 10:45 a.m.

North Ballroom D

### Welcome to Phoenix

Brenda R. Burkett, CPA, CSBA, SFO  
President, ASBO International

### Recognition of Significant Contributions to the Association

Brenda R. Burkett, CPA, CSBA, SFO

- 2016 ASBO International Board of Directors
- Dr. Fred Hill Distinguished Service Award
- ASBO International Strategic and Event Partners

### State of the Association

Brenda R. Burkett, CPA, CSBA, SFO

### Presentation of the 2016 ASBO International Eagle Awards

Philip Kim  
Senior Vice President, Southwest Branch  
AXA Advisors

### Introduction of Speaker

Jim Kiley  
Senior Vice President, Eastern United States  
Security Benefit

.....

## KEYNOTE

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### “Embrace the Shake: Transforming Problems into Opportunities”



#### Phil Hansen

Like Phil's art, his story, and message of “Embrace the Shake” defy conventional thinking by approaching limitations as opportunities. As your district faces budget cuts, new policies, and other difficult limitations, you'll learn how to look in unexpected places for possible solutions for your district.

With jaw-dropping visuals and a special interactive project, Phil's incredible session will leave you impressed not only by his abilities, but by your own creativity capacity as well.



**REMINDER!** Please bring your clipboard from your registration bag.

ASBO International thanks General Session standby speaker **Carolyn Warner**, founder and president, Corporate Education Consulting, Inc.

## Voya Financial®



Voya Financial® welcomes you to ASBO International's 2016 Annual Meeting & Expo! We

are proud to support your profession as a Strategic Partner of ASBO International and the exclusive sponsor of the Meritorious Budget Award (MBA). We encourage you to visit us at **Booth 603** to learn how we can help make retirement planning and administration easier for you and your employees. To this year's MBA recipients: Congratulations on your achievement!

Respectfully, The Voya Financial® Team.

11:00 a.m. – 12:00 p.m.

### Guest Program—Branding Like a Cowboy

*Deer Valley, Sheraton Grand Phoenix*

Participants can make their mark in Phoenix and bring it home on a keychain! After a brief introduction on the branding process, guests choose from a large selection of authentic miniature branding irons to create a custom souvenir.

## DISCUSSION GROUPS

11:00 a.m. – 12:00 p.m.

### Getting Squeezed by Your Budget? How Cooperatives Can Help (DG01)

*Room 123*

SFOs: 1

**Content Area: Purchasing and Supply Management**

When budgets are tight, school districts look for the most cost-effective option for procurement. Using a cooperative contract can speed up the procurement process and can deliver better prices, helping schools save on both hard and soft costs. Join fellow school business officials to discuss how to use U.S. Communities' cooperative contracts as a strategic solution to deliver the overall best value for your district.

**Presenters:** Jeff LaPorta, Supervisor of Purchasing, Harford County Public Schools, Bel Air, MD; Rob Fiorilli, Program Manager, U.S. Communities, Marana, AZ

11:00 a.m. – 12:00 p.m.

### How Business Managers Can Play a Major Role in the State Legislature (DG19)

*Room 125*

SFOs: 1

**Content Area: Legislative Affairs**

Business managers understand more than anyone else that legislation can have a financial impact on their district and

consequently they are in a unique position to help shape the financial outcome. At the 2014 and 2015 Louisiana legislative sessions, testimony from school business managers helped pass, defeat, or change many key bills and saved public school systems in excess of \$323 million. Learn how to prepare to testify before a committee, what important points to bring out in your testimony, and the importance of setting up a legislative alert email protocol to get timely information to and from business managers.

**Presenter:** James Melohn, CFO & Legislative Liaison, St. Charles Parish School Board, Luling, LA

**Presenter:** Brett Ridgway, Chief Business Officer, El Paso County SD 49, Falcon, CO; Jack Bay, COO, El Paso County SD 49, Falcon, CO

11:00 a.m. – 12:00 p.m.

### Meritorious Budget Award Discussion Group (DG02)

Room 128B

**SFOs: 1 CPEs: 1**

**Field of Study: Finance**

**Content Area: School Finance**

Get answers to your questions and guidance regarding the Meritorious Budget Award (MBA) and *Pathway* to the MBA programs. This discussion group focuses on the specifics of districts' situations and offers sound advice for those who are planning to submit as a first-timer or who want to improve their current submission.

**Learning Objectives:** 1. Outline steps for ensuring the budget document is useful to the district. 2. Describe strategies for ensuring receipt of the award. 3. Discuss creative ideas/solutions to common problem areas.

**Presenters:** ASBO International MBA Advisory Committee; Karin Smith, Partner, Heinfeld, Meech & Co., PC, Phoenix, AZ; Paul Kelly, Assistant Superintendent, Business and Technology, Park Hill SD, Kansas City, MO; Ryan Ghizzoni, Treasurer/CFO, Berea City SD, Berea, OH

11:00 a.m. – 12:00 p.m.

### We Did It: The Many Benefits of Switching to Alternative Fuels (DG04)

Room 128A

**SFOs: 1 CPEs: 1**

**Field of Study: Production**

**Content Area: Pupil Transportation**

Considering switching to alternative fuel for your district transportation fleet? Learn how one Pennsylvania district migrated an entire fleet to alternative fuel. Presenters will review the process of researching, analyzing, and presenting the proposal for alternative fuel vehicles to the school board and community. They will discuss the process, cost comparisons, and challenges they overcame to migrate an entire fleet to alternative fuel.

**Learning Objectives:** 1. Discuss evaluation of an alternative fuel migration option. 2. Review the process to bid for alternative fuel vehicles, fueling stations, and other components. 3. Discuss implications of implementing a switch to propane vehicles, including training employees and community members. 4. Outline steps in seeking alternative fuels as a means to reduce operating and maintenance costs.

**Presenters:** Matthew Malinowski, Business Manager, Upper Moreland SD, Willow Grove, PA; Kelly Rhodunda, Transportation Director, Upper Moreland SD, Willow Grove, PA

11:00 a.m. – 12:00 p.m.

### Distributed Leadership to Empower Education (DG03)

Room 122A

**SFOs: 1**

**Content Area: Management Techniques**

School District 49 in Colorado Springs, Colorado, is thriving without a superintendent! D49's model of distributed leadership allows educators to do what they do best—educate kids with the support of capable and professional resources in business and operations. Learn how D49 has taken lessons and strategies from the private sector, molded them for public education, and implemented them with stunning success in terms of stabilizing the organization and allowing it to focus on real priorities in each school's education program.

11:00 a.m. – 12:00 p.m.

### Making School Finance Understandable (DG05)

Room 122B

**SFOs: 1 CPEs: 1**

**Field of Study: Finance**

**Content Area: School Finance**

Are you having difficulty getting teachers, staff, the public, and even your board of education to understand the basics of school finance, much less more complicated issues? Explore how to avoid finance jargon and explain school finance in terms anyone can understand. Clear examples and references will be presented that will engage your district's staff and community in meaningful dialogue about school finance.

**Learning Objectives:** 1. Demonstrate how to translate school finance into layman's terms. 2. Discuss how to be a creative communicator of school finance issues. 3. Explain why effective communication is a necessity for successful financial management.

**Presenter:** John Hutchison, Chief Financial and Operations Officer, Olathe Public Schools, Olathe, KS

11:00 a.m. – 12:00 p.m.

### Capitalizing on Energy Efficiency Through the Better Buildings Challenge (DG06)

Room 127B

SFOs: 1

**Content Area: Sustainability**

The Better Buildings Challenge (BBC) is a voluntary leadership initiative that aims to make commercial, public, industrial, and residential buildings at least 20% more energy efficient over 10 years. Public and private sector organizations nationwide partner with the U.S. Department of Energy to document and share innovative solutions to improve energy management and save money. Learn how BBC K-12 partners have leveraged access to technical experts and cross-sector peer networking to successfully reduce energy costs and earn national recognition for their leadership.

**Presenter:** Crystal McDonald, Policy Advisor, U.S. Department of Energy, Washington, DC

11:00 a.m. – 12:00 p.m.

### Exploring Win-Win Strategies for Labor Negotiations (DG07)

Room 127C

SFOs: 1 CPEs: 1

**Field of Study: Personnel/HR**

**Content Area: Human Resources and Labor Relations**

No single cost driver affects school budgets as much as labor contracts. The process can be arduous and difficult, but recent developments in compensation trends that have seen employees paying for an increasing share of healthcare benefit costs creates an opportunity to achieve win-win scenarios at the negotiations table. Explore the challenges and strategies in leveraging trends in healthcare benefits to shift the dynamic of negotiations toward a win-win outcome.

**Learning Objectives:** 1. Discuss trends in healthcare benefits and their impact on operating budgets and individual compensation. 2. Identify underlying challenges in current labor negotiations that are different from the usual challenges derived from a traditional win-lose negotiation. 3. Learn how to model the construction of solutions to the challenges in labor negotiations on financial aspects that lead to win-win solutions.

**Presenter:** Jim Rollo, School Business Administrator, Mendham Borough Board of Education, Mendham, NJ

## Virco, Inc.



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Welcome to ASBO International's 2016 Annual Meeting & Expo.

Virco's long-standing support for school business officials includes serving as an ASBO International

Strategic Partner, as well as sponsoring the Pinnacle Awards for over 20 years. We invite you to stop by Virco's **Booth 403** and visit with us during the annual meeting. We look forward to seeing you and to serving you whenever you need furniture and equipment for your district.

11:00 a.m. – 12:00 p.m.

### The Value of the SFO® Certification (DG08)

Room 122C

SFOs: 1

**Content Area: Leadership Development**

Join a panel of current SFO certificants to examine the benefits of pursuing the SFO credential. Topics include the value to the individual, the value to the districts served by the certificant, and the value to the school business profession.

**Presenters:** Lynn Buch, CFO, Homewood City Board of Education, Homewood, AL; Jason Helsen, Finance Director, Reeths-Puffer Schools, Muskegon, MI; Roxie Taft, Business Manager, Sheridan County SD 2, Sheridan, WY

11:00 a.m. – 1:30 p.m.

### Affiliate Executive Directors Group Meeting and Lunch

*By Invitation Only*

Room 124

12:00 p.m. – 1:30 p.m.

### Meritorious Budget Award Advisory Committee and Reviewers Meeting and Lunch

*By Invitation Only*

Room 126A

**DEEP DIG SESSIONS**

12:30 p.m. – 2:30 p.m.

**It's Jeopardy Time! Don't Play with Your Employees' Financial Future (DD01)**

Room 125

**SFOs: 2 CPEs: 2**

**Field of Study: Personnel/HR**

**Content Area: Human Resources and Labor Relations**

Join a panel of industry experts for an interactive presentation on financial best management practices for your school district's retirement plans. Unravel generational differences in attitudes toward retirement saving and gain actionable insights into diffusing negative implications of irrational financial decision making. Examine plan design elements that help employees save more for a secure retirement and learn about best practices to minimize your district's liability in the event of an IRS audit of 403(b)/457 plans.

**Learning Objectives:** 1. Explain current best management practices that can help your employees save for their retirement needs. 2. Outline strategies to best support the employees in your school district with cutting-edge information in the world of behavioral finance. 3. Identify best practices to reduce the likelihood of a lengthy IRS audit of the district's 403(b)/457 plans.

**Presenters:** Linda Segal Blinn, Vice President, Technical Services, Voya Financial®, Windsor, CT; Tom Granger, Assistant Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Mark Jackowitz, Vice President, Consultant and Industry Relations, Voya Financial®, Windsor, CT; John Kevin, Vice President, K-12 Market, VALIC, Linthicum, MD; Curtis May, Executive Vice President, AXA Advisors, Milwaukee, WI; Bruce Corcoran, Vice President-Head of Institutional Retirement Solutions, The Horace Mann Companies, Springfield, IL

12:30 p.m. – 2:30 p.m.

**Ask the Eagles (DD02)**

Room 123

**SFOs: 2**

**Content Area: Leadership Development**

Most leadership training events do a great job of discussing the principles of leadership but fail to provide a bridge between theory and practice. This interactive session, designed specifically for new CFOs with fewer than five years of experience, provides that bridge. A panel of past Eagle Award recipients will discuss difficult work scenarios that they have encountered, the leadership principles upon which they relied for guidance in handling their situation, the outcome, and what they might have done differently to achieve a better result. Participants will be encouraged to share their own real-life scenarios for which they seek guidance.

**Presenters:** Anthony Dragona, School Business Official, Union City Board of Education, Union City, NJ; Claire Hertz, CFO, Beaverton SD, Beaverton, OR; John Rexford, Superintendent, High Desert ESD, Redmond, OR

12:30 p.m. – 2:30 p.m.

**The Ins and Outs of Governmental Fund Financial Statements (DD03)**

Room 122B

**SFOs: 2 CPEs: 2**

**Field of Study: Accounting (Governmental)**

**Content Area: Accounting, Auditing, and Budgeting**

Discover the details of governmental financial statements. Presenters will provide an overview of financial statements and how to complete them with best practices for the industry, review reporting objectives of financial statement elements, and describe how to use financial statements to access the financial health of the school district.

**Learning Objectives:** 1. Explain the purpose of various financial statements. 2. Identify methods to analyze and explain information reported in the financial statements. 3. Describe the limitations of audited financial statements.

**Presenters:** Corey Arvizu, Partner, Heinfeld, Meech & Co., PC, Tucson, AZ; Marydel Speidell, Director of Finance, Dysart SD, Surprise, AZ

12:30 p.m. – 2:30 p.m.

**Utilizing Innovation to Maximize Cost Savings (DD04)**

Room 122C

**SFOs: 2**

**Content Area: Purchasing and Supply Management**

Learn about an innovative procurement model that allows institutions to procure more services in less time with fewer resources, yet increases vendor accountability, creates transparency, and results in higher customer satisfaction. Learn how to utilize expertise and track performance measurements throughout the contract, not just identify vendor pre-qualifications. Transform your RFPs, expect cost savings from experts, and don't rely on trying to translate the technical jargon. Create a system that transforms risky contracts into successful outcomes.

**Presenter:** Dean Kashiwagi, Director/Professor, Arizona State University, Tempe, AZ

12:30 p.m. – 2:30 p.m.

### Creative Benefit Strategies after Healthcare Reform (DD05)

Room 127B

SFOs: 2 CPEs: 2

Field of Study: Personnel/HR

Content Area: Human Resources and Labor Relations

In the post-ACA world, many districts are looking to implement cost-saving benefit strategies that comply with many regulatory requirements while serving as a key incentive in the recruitment and retention of top talent. Even with the delay in the Cadillac tax, it is still important for responsible school leaders to consider the creative opportunities that may help cut health insurance costs and improve employees' well-being.

**Learning Objectives:** 1. Discuss the legal aspects and cost-saving potential of wellness reward programs. 2. Describe the hidden benefits associated with partnering with other government entities and healthcare providers to sponsor onsite and near-site clinics. 3. Debate the pros and cons of a district self-funding its health plan.

**Presenters:** Bret McKittrick, Attorney and HR Consultant, Associated Financial Group, Waukesha, WI; Todd Hajewski, Director of Business Services, Greendale SD, Greendale, WI

## DISCUSSION GROUPS

1:15 p.m. – 2:15 p.m.

### Your District Emergency Management Plan: Best Practices to Create a Secure Learning Environment (DG09)

Room 126A

SFOs: 1

Content Area: Risk Management

K-12 security needs and challenges are rapidly changing, becoming more complex, and requiring greater collaboration across multiple agencies. Updating security measures can be overwhelming and confusing. Where do you start? Step one is to establish a district emergency management plan backed by detailed policies and procedures to ensure the plan's success. This interactive session will include updated data about legislative requirements, potential liabilities, and standard risk management recommendations that should be considered in your district's emergency management plan. Participants will be encouraged to share best practices adopted by their districts to ensure a safe learning environment.

**Presenters:** Michael Gagnon, Director of Marketing and Strategy for Security and Fire, Johnson Controls, Milwaukee, WI; Scott Barron, Founder and CEO, School Growth, Johns Creek, GA

## VALIC



VALIC welcomes you to Phoenix and the 2016 Annual Meeting & Expo.

VALIC, as a leading provider of retirement plans to public K-12 school districts, has proudly sponsored ASBO International for over 20 years. Please visit us in the Exhibit Hall at **Booth 302**. A VALIC 403(b) expert will join the fun interactive Jeopardy-themed panel Saturday, 12:30 p.m. – 2:30 p.m. in Room 125.

1:15 p.m. – 2:15 p.m.

### What's Up with E-Rate? (DG10)

Room 128A

SFOs: 1 CPEs: 1

Field of Study: Business Management and Organization

Content Area: Information Technology

In 2014, the Federal Communications Commission proposed sweeping changes in its E-Rate program, a source of significant funding for school and library telecommunications and Internet technology. This session will provide a review of the E-Rate program, its past benefits, its current state, and where it may go. We will focus on the major changes in the program that have just completed their first year of implementation, and what those will mean for the management of information technology finances in schools and districts over the next several years.

**Learning Objectives:** 1. Describe the E-Rate program and its purpose. 2. Explain E-Rate's financial impacts on schools and districts. 3. Identify the major changes to E-Rate resulting from the 2014 Modernization Program. 4. Discuss the process to acquire funds to ensure the greatest benefit with E-Rate.

**Presenter:** Dennis Fazio, Project Director, CoSN, Minneapolis, MN

1:15 p.m. – 2:15 p.m.

### Understanding the Impact of the Every Student Succeeds Act on School Districts (DG11)

Room 122A

SFOs: 1 CPEs: 1

Field of Study: Business Law

Content Area: Legislative Affairs

President Obama signed the Every Student Succeeds Act (ESSA) in December 2015. Get caught up on all aspects of ESSA, including the history, rationale behind the change, how this will affect your district financially, and how soon you will need to comply with new requirements. Experts will discuss the new and exciting changes facing the education environment. Let no school business official be left behind when it comes to ESSA.

**Learning Objectives:** 1. Explain the history and purpose of the ESSA federal legislation. 2. Identify fiscal implications and timetables for changes to take effect. 3. Determine the cost of the new legislation for your school district.

**Presenters:** Sharie Lewis, Director of Business Services & Operations, Parkrose SD, Portland, OR; John Musso, Executive Director, ASBO International, Reston, VA

1:15 p.m. – 2:15 p.m.

### Certificate of Excellence Award Discussion Group (DG12)

Room 128B

**SFOs: 1 CPEs: 1**

**Field of Study: Finance**

**Content Area: School Finance**

Review guidelines for ASBO's Certificate of Excellence (COE) award program. Discuss the elements contained in an award-winning Comprehensive Annual Financial Report (CAFR).

**Learning Objectives:** 1. Detail the requirements of a CAFR, providing examples and resources. 2. Explain the COE program process and requirements. 3. Describe the benefits of participating in the COE program.

**Presenters:** ASBO International COE Advisory Committee; Sara Kirk, Audit Manager, Heinfeld, Meech & Co., PC, Phoenix, AZ; Bruce Lamprecht, Director of Business Services, Marshall Public Schools, Marshall, MN; Matthew Przywara, Chief Financial and Operations Officer, School District of Lancaster, Lancaster, PA; Ginger Wischmann, Director of Accounting, Flagstaff Unified SD 1, Flagstaff, AZ

1:15 p.m. – 2:15 p.m.

### Understanding FSAs, HSAs, and HRAs as ACA Triggers Plan Design Changes (DG13)

Room 127C

**SFOs: 1 CPEs: 1**

**Field of Study: Personnel/HR**

**Content Area: Human Resources and Labor Relations**

ACA is requiring school business officials to look at plan design changes. When and why do you need to implement/change your FSAs, HSAs, and HRAs? Learn how these accounts work, the difference between them, employer/employee risks involved with these accounts, and the plan type these accounts can be offered with.

**Learning Objectives:** 1. Explain how the Cadillac tax will affect plan designs and HSAs, FSAs, and HRAs. 2. Outline the difference between HSAs, FSAs, and HRAs. 3. Discuss the plan type that has to be in place to offer HSAs, FSAs, and HRAs.

**Presenter:** Christina Van Skyock, School Benefits Specialist, American Fidelity Educational Services, Centerville, IN

2:30 p.m. – 5:30 p.m.

### Exhibit Hall Opening Reception

Exhibit Hall 6

Badge required.

**Sponsored by ABMM Financial**

6:00 p.m. – 8:00 p.m.

### Affiliate Reception and Candidate Meet-and-Greet

Valley of the Sun Ballroom, Sheraton Grand Phoenix

Join us for a reception and candidate meet-and-greet. Get to know current and future ASBO International board candidates and network with friends and colleagues while you enjoy mingling, music, appetizers, and beverages.

Hosted by ASBO International affiliate organizations in Alabama, Illinois, Oregon, Pennsylvania, Washington, and Wisconsin. All conference attendees are welcome. Badge required.

6:00 p.m. – 8:00 p.m.

### Pinnacle Awards Dinner

By Invitation Only

Oculus, Sheraton Grand Phoenix

(Weather Backup Location: Deer Valley, Sheraton Grand Phoenix)

**Sponsored by Virco, Inc.**

6:30 p.m. – 8:30 p.m.

### Eagle Awards Dinner

By Invitation Only

Valley Overlook, Sheraton Grand Phoenix

(Weather Backup Location: Paradise Valley, Sheraton Grand Phoenix)

**Sponsored by AXA**

## Sunday, September 25

7:30 a.m. – 4:00 p.m.

### Registration

Pre-Function, Lower Level

8:30 a.m. – 9:45 a.m.

### Clinic Tables

Room 124

(See page 36 for complete listing.)

9:15 a.m. – 10:00 a.m.

### General Session Coffee Break

North Ballroom D Foyer

## SECOND GENERAL SESSION

10:00 a.m. – 11:30 a.m.

North Ballroom D

### Welcome

Jennifer Bolton Carls, Ed.D.  
Vice President, ASBO International

### Saturday's Collaborative Experience Reveal

Phil Hansen  
First General Session Keynote

### Recognition of Past Presidents

Jennifer Bolton Carls, Ed.D.

### Installation of 2017 Officers

Mark C. Pepera, MBA, RSBO, SFO  
Immediate Past President, ASBO International

### Presentation of the 2016 ASBO International Pinnacle Awards

Brian True  
Director of National Sales  
Virco, Inc.

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### KEYNOTE

#### "The Power of One"



#### Manny Scott

Manny Scott shares his story and several eye-opening insights about how he went from being an "unreachable" and "unteachable" student to becoming a successful student, husband, father, entrepreneur, and public servant. Learn

how to become a change agent—a "Page Turner"—in even the most isolated circumstances, making decisions that can truly transform your district and the lives of your students.

11:30 a.m. – 1:00 p.m.

### Certificate of Excellence Advisory Committee Meeting and Lunch

By Invitation Only  
Room 126B

11:30 a.m. – 2:15 p.m.

### Exhibit Hall Open

Exhibit Hall 6  
Badge required.

## U.S. Communities



U.S. COMMUNITIES™  
GOVERNMENT PURCHASING ALLIANCE

ASBO International  
is a proud  
co-founder of U.S.

Communities Government Purchasing Alliance—the leading national purchasing cooperative that reduces the cost of goods and services for schools. By aggregating the nationwide purchasing power of public agencies and education institutions, U.S. Communities provides school solutions through a broad line of competitively solicited contracts. Our suppliers have committed to providing their lowest overall public agency pricing as well as delivering comprehensive solutions and value-added services. Visit us at **Booth 503** and online at [uscommunities.org/education-purchasing](http://uscommunities.org/education-purchasing).

12:30 p.m. – 1:30 p.m.

### Lunch in the Exhibit Hall

Exhibit Hall 6

**Sponsored by BMO Financial Group**

1:00 p.m. – 3:30 p.m.

### Professional Development Networking Group

By Invitation Only  
Room 122B

1:15 p.m. – 2:00 p.m.

### Certificate of Excellence Award Recipients Reception

By Invitation Only  
Room 132A

**Sponsored by VALIC**

2:15 p.m. – 3:00 p.m.

### Eagle Award Recipients Reception

By Invitation Only  
Room 126C

**Sponsored by AXA**

2:30 p.m. – 3:30 p.m.

### Guest Program—Su Vino Wine Tasting

Deer Valley, Sheraton Grand Phoenix

Guests will have an opportunity to do an exclusive wine tasting with their own personal sommelier from Su Vino Winery. The sommelier will teach attendees about the different types, flavors, and fermentation processes of each wine while they sip, relax, and enjoy each other's company.

## DISCUSSION GROUPS

2:30 p.m. – 3:30 p.m.

### Leading the Skill Development of School Business Leaders (DG14)

Room 127B

**SFOs: 1**

**Content Area: Leadership Development**

How do school business leaders identify the skills, knowledge, and attributes required to lead the resource planning of schools today and into the future? What is the direct impact of this on improving student learning outcomes? What is the relationship between the functions of effective school administration and financial decision making and the key competencies of the business leader? Focus on key developments in nurturing the knowledge and skills of school business leaders and explore the processes of embedding sustained practice and aligning this with professional recognition.

**Presenters:** Glenn Brown, Professional Experience Manager, Deakin University, Geelong, VIC, Australia; Matt McDonough, Finance Manager, Deakin University, Geelong, VIC, Australia; Mark Donehue, Lecturer in Education, Deakin University, Geelong, VIC, Australia; Kim Neilson, Project Coordinator, Deakin University, Geelong, VIC, Australia; Karen Starr, Professor, Deakin University, Burwood, VIC, Australia

2:30 p.m. – 3:30 p.m.

### Introduction to the Use of Lean and Lean Six Sigma in Education (DG15)

Room 127C

**SFOs: 1 CPEs: 1**

**Field of Study: Personal Development**

**Content Area: Management Techniques**

Lean and Lean Six Sigma are data-driven improvement methodologies used in high-performing organizations around the world, including school districts. Both methods are used to reduce time spent on processes, reduce costs, eliminate waste, and raise quality. Learn how these methods can raise performance in areas such as transportation, food service, purchasing, and more. Get a close look at how these tools have been used to identify problems, develop solutions, and improve budget conditions.

**Learning Objectives:** 1. Describe Lean and Lean Six Sigma methods and tools and how they are being used in education. 2. Explain how root cause analysis can be applied to school business and operations. 3. Outline the eight sources of waste in education and strategies for reducing waste. 4. Describe how to use performance measures to identify waste and quality issues.

**Presenters:** Steven Pereus, President, Enlit, Maumee, OH; Nathan Rohyans, Coordinator of Operational Excellence, Dublin City Schools, Dublin, OH

2:30 p.m. – 3:30 p.m.

### Lincoln on Leadership (DG16)

Room 128A

**SFOs: 1**

**Content Area: Leadership Development**

Over the course of the four years of his administration and during the Civil War, Abraham Lincoln's leadership held the nation together. He is now considered one of America's greatest presidents and best leaders. What can today's leaders learn from the 16th president? Are lessons from 19th century American history transferable to the 21st century? If so, how can we apply these lessons?

**Presenter:** Bob Avery, Director of Business Services, Baraboo SD, Baraboo, WI

2:30 p.m. – 3:30 p.m.

### Using Data Mining and Analytics to Detect Fraud and Misuse of District Monies (DG17)

Room 128B

**SFOs: 1 CPEs: 1**

**Field of Study: Management Advisory Services**

**Content Area: Risk Management**

"Finance Director Convicted of Embezzling \$400,000 from District!" "School District Loses \$3M in Fraud Case Involving Fake Vendors!" Have you seen headlines like these in the news? Be a superhero for your district and learn key strategies for digging deeply into financial data to detect fraud. This session presents tips and techniques for using data mining as a strategy to detect and prevent fraud and misuse of public monies. Learn easy-to-implement methods for processing and analyzing data from accounts payable, payroll, and general ledgers to detect errors, fraud, and misuse of funds.

**Learning Objectives:** 1. Explain key strategies to prevent misuse and fraud involving public monies. 2. Discuss key strategies to remove the opportunity from the fraud triangle. 3. Outline practical ways to use Excel to examine data.

**Presenters:** Karin Smith, Partner, Heinfeld, Meech & Co., PC, Phoenix, AZ; Mike Martinez, Financial Systems Operations Manager, Maricopa County Education Services Agency, Phoenix, AZ

2:30 p.m. – 3:30 p.m.

### Beyond Textbooks: Using Digital Resources to Maximize Cost Savings, Collaboration, and Student Achievement (DG18)

Room 126A

SFOs: 1 CPEs: 1

Field of Study: Computer Science

Content Area: Information Technology

Are you looking for a way to minimize costs, yet still provide teaching resources that can increase student achievement? Stop by this session and hear about Beyond Textbooks, an innovative program from the Vail Unified School District that has not only allowed Vail to save almost \$500,000 annually on the cost of textbooks, but also become one of the highest-achieving school districts in Arizona. Beyond Textbooks is an entrepreneurial, grass roots effort that is now shared by over 100 school districts in Arizona, California, Idaho, Kentucky, and Wyoming.

**Learning Objectives:** 1. Describe how to develop and sustain a quality open educational resource (OER) model. 2. Explain how creating an OER model can lower textbook costs. 3. Describe the power of teacher collaboration and empowerment.

**Presenters:** Calvin Baker, Superintendent, Vail USD, Vail, AZ; Kevin Carney, Beyond Textbooks CEO, Vail USD, Vail, AZ; Erika Aguillo, Business Manager, Morenci USD, Morenci, AZ

## DEEP DIG SESSIONS

2:30 p.m. – 4:30 p.m.

### Managing Grants and Risks: Lessons Learned from the Implementation of the Uniform Grant Guidance (DD06)

Room 125

SFOs: 2 CPEs: 2

Field of Study: Accounting (Governmental)

Content Area: Accounting, Auditing, and Budgeting

The Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards is now effective. Learn about the federal government's guidance on administrative requirements as a key component to more effectively focus federal resources on improving performance and outcomes while ensuring financial integrity of taxpayer dollars. This is complimented by additional efforts to strengthen program outcomes through innovative and effective use of grant-making models, performance metrics, and evaluation.

**Learning Objectives:** 1. Explain requirements of the new OMB Guidelines. 2. Define new terminology related to the Guidelines. 3. Identify potential effects of the standard on your

## Security Benefit



SECURITY BENEFIT®

Security Benefit is proud to be an

ASBO Strategic Partner and we applaud your commitment to your district. Join us during the Clinic Tables to learn about special options that can help increase participation in your district's retirement plan and potentially solve some budget issues with those early retirements. At the panel session on Saturday at 12:30 p.m., learn through a fun Jeopardy game format about financial best management practices for your school district's retirement plans, and visit us at **Booth 412** to explore other ways Security Benefit can help your employees To and Through Retirement.

school district's grant programs. 4. Discuss the new audit and oversight requirements for federal grants.

**Presenters:** Corey Arvizu, Partner, Heinfeld, Meech & Co., PC, Tucson, AZ; Marvin Dereef, Deputy CFO, Fulton County Schools, Atlanta, GA; Bert Nuehring, Partner, Crowe Horwath LLP, Chicago, IL; Phil Saurman, Shareholder, Hungerford Nichols, Grand Rapids, MI; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL

2:30 p.m. – 4:30 p.m.

### Bringing Your Team Along—The Art of Administrative Mentorship (DD07)

Room 122C

SFOs: 2 CPEs: 2

Field of Study: Personal Development

Content Area: Leadership Development

As leaders, we often need to rely on others within our administrative team to help us achieve our goals. However, they don't always have the requisite skills or experience to help us achieve our objectives. Learn the art of mentoring, delegating, and empowering your team members.

**Learning Objectives:** 1. Explain how to properly utilize the talents of your administrative team while also building their efficacy. 2. Discuss key components of effective mentorships and their benefits to both mentors and protegeses. 3. Explain key components of effective delegation.

**Presenters:** Naphtali Hoff, President, Impactful Coaching & Consulting, Passaic, NJ; Jill Kessler, Head of School, Pardes Jewish Day School, Phoenix, AZ

2:30 p.m. – 4:30 p.m.

### You Turned Off the Lights—Now What? Advanced Utility Planning to Cut Electricity Costs (DD08)

Room 127A

**SFOs: 2**

**Content Area: Sustainability**

You have a capital plan, a strategic plan, and a financial plan. What about your utility management plan? How can you manage energy and shift loads to reduce electricity demand and its related costs? This presentation, using a K-12 district case study from Arizona, will walk participants through the essential steps to create and implement a utility management plan that goes beyond just reducing electricity usage; it leverages utility rates to reduce energy costs today and over the long term.

**Presenters:** Ken Hicks, CFO, Peoria USD, Glendale, AZ; Auriane Koster, Sustainability Manager, Pierce Energy Planning, Phoenix, AZ; Laurel Kruke, Sustainability Manager, Pierce Energy Planning, Scottsdale, AZ; Scott Pierce, Vice President, Pierce Energy Planning, Scottsdale, AZ

2:30 p.m. – 4:30 p.m.

### Creating and Sustaining a Multiyear Strategic Finance Plan (DD09)

Room 122A

**SFOs: 2 CPEs: 2**

**Field of Study: Finance**

**Content Area: School Finance**

Finance leaders from Texas and Florida will share their experiences using resources from Smarter School Spending and a process created by school business officials, researchers, and education finance experts to increase student achievement through better alignment of financial resources. Some key components of the work include increased stakeholder involvement, a partnership with finance and education leaders, focused instructional strategies, investment metrics that are monitored in a continuous improvement cycle, a multiyear finance plan, and sustainability by evaluating results.

**Learning Objectives:** 1. Discuss the value of each of the five major areas of alignment for best practices in school budgeting. 2. Describe a plan for analyzing the current status of your district and determining where to start best practices in your district. 3. Outline a series of next steps for implementing a multiyear strategic finance plan to support instructional strategies for student success.

**Presenters:** Carol MacLeod, CFO, Lake County Schools, Lake County, FL; Michele Trongaard, CFO, Wylie ISD, Wylie, TX

2:30 p.m. – 4:30 p.m.

### 2017 and Beyond: Strategic Planning for Affordable Care Act Compliance (DD10)

Room 123

**SFOs: 2 CPEs: 2**

**Field of Study: Personnel/HR**

**Content Area: Human Resources and Labor Relations**

Walk step by step through the most important Patient Protection and Affordable Care Act (ACA) decisions facing school districts today. Review the essentials of the law and discuss moving beyond basic compliance to a more strategic approach to future planning. Discover the challenges school districts face when responding to the ACA, such as labor and employee relations issues, budgetary and cost constraints, and the need for collaboration between separate departments. Participants will create a “hit list” of important decisions that will frame each district’s ongoing compliance efforts.

**Learning Objectives:** 1. Explain lessons learned from 2015 reporting, including what worked, what didn’t work, and best practices to take into the future. 2. Discuss how to move beyond the basics of the law toward more strategic decision making on offers of coverage, affordability calculations, contributions, and plan design. 3. Explain upcoming ACA requirements, such as the Excise Tax on High Cost Plans (Cadillac tax) and how your district can prepare now.

**Presenters:** Susan Relland, CEO, American Fidelity Administrative Services, LLC, Oklahoma City, OK; Jessica Frier, Senior Health and Welfare Plan Consultant, American Fidelity Administrative Services, LLC, Long Beach, CA

## DISCUSSION GROUPS

3:45 p.m. – 4:45 p.m.

### We Can Review Your Budget to Help You Make It a Meritorious Budget Award-Winner (DG20)

Room 128B

**SFOs: 1**

**Content Area: Accounting, Auditing, and Budgeting**

Would you like your budget reviewed by professionals? Bring your budget document to this session and have it reviewed and critiqued. You’ll walk away with suggestions on how to make it worthy of a Meritorious Budget Award.

**Presenters:** ASBO International MBA Advisory Committee; Ryan Ghizzoni, Treasurer/CFO, Berea City SD, Berea, OH; Clark Godshall, District Superintendent, Orlean/Niagara BOCES, Medina, NY; Bill Sutter, CFO, Boulder Valley SD, Boulder, CO

3:45 p.m. – 4:45 p.m.

### How to Develop Community Advocacy Under Today's Intense Public Scrutiny (DG21)

Room 127B

SFOs: 1

**Content Area: Leadership Development**

Learn specific strategies you can use to promote community involvement. Focus on bond issues, site planning, as well as other areas to ultimately build support for public education.

**Presenter:** Bobette Sylvester-McCarroll, Assistant Superintendent for Business Support Services, Mesa Public Schools, Mesa, AZ

3:45 p.m. – 4:45 p.m.

### Are You Protected in the Event of an IRS Audit? (DG22)

Room 128A

SFOs: 1 CPEs: 1

**Field of Study: Management Advisory Services**

**Content Area: Risk Management**

Penalties resulting from an IRS audit of a 403(b) plan can be extreme. Make sure your plan is compliant with all IRS regulations, including information-sharing agreements; written plan document requirements; collective bargaining agreements; proper adherence to Universal Availability, Maximum Allowable Contribution (MAC), and 15-year service catch-up calculations; loan formulas; specific hardship criteria; and recordkeeping. Get an overview of the crucial requirements and common pitfalls of plan compliance and potential penalties for plan failures.

**Learning Objectives:** 1. Identify and provide information on how to resolve common audit issues and operational problems. 2. Describe best practices to follow before, during, and after an IRS audit. 3. Identify and describe the documents that help keep you compliant with IRS regulations.

**Presenters:** Mark Buckley, Director of Business Development, The OMNI Group, Inc., Rochester, NY; Louise Lynch, School Business Administrator, Highland Central SD, Highland, NY; Robert McLean, CEO, The OMNI Group, Inc., Rochester, NY

3:45 p.m. – 4:45 p.m.

### How Smart Is My IT Spending? (DG23)

Room 127C

SFOs: 1

**Content Area: Information Technology**

Introducing the CoSN SmartIT initiative, designed to help public school districts understand the true and total costs of their technology installation and operation (total cost of ownership) and justify that spending based on the quantified academic

## Office Depot, Inc.

**Office DEPOT.** At Office Depot®, we believe education is the foundation for a bright future. We're here to help you in every way we can. Our full spectrum of services and solutions, from school supplies and technology to professional development and parent engagement offerings, will help you transform your school. We're more than just office supplies. We're people, products, and solutions to help your school succeed.

and social benefits to their student populations. Learn about the concept of funding technology initiatives based on expected return or value of investment, akin to return on investment for businesses. Learn the importance of measuring qualitative benefits to student achievement, behavior, and engagement by establishing an analogous quantitative value to those benefits and to proposed or competing investment options.

**Presenter:** Dennis Fazio, Project Director, CoSN, Minneapolis, MN

3:45 p.m. – 4:45 p.m.

### Annual Meeting Program Committee Meeting

Room 124

Contribute to the 2017 Annual Meeting program and share your ideas for hot topics and future trends in school business. All encouraged to attend.

5:00 p.m. – 6:00 p.m.

### Emerging School Business Leaders Scholarship Reception

*By Invitation Only*

*District Wine Room, Sheraton Grand Phoenix*

**Sponsored by U.S. Communities**

6:00 p.m. – 7:30 p.m.

### Meritorious Budget Awards Dinner

*By Invitation Only*

*Oculus, Sheraton Grand Phoenix*

*(Weather Backup Location: Deer Valley, Sheraton Grand Phoenix)*

**Meritorious Budget Award and Pathway to the MBA  
Sponsored by Voya Financial®**

8:00 p.m. – 11:00 p.m.

**Oklahoma ASBO Reception**

*Phoenix Ballroom, Sheraton Grand Phoenix*

Celebrate with Oklahoma ASBO as we honor one of our stars, Brenda Burkett, on a successful year of being ASBO International's president. With live music provided by The Stars, a popular Oklahoma City-based band, you can enjoy the evening networking on or off the dance floor. Badge required.

8:00 a.m. – 9:00 a.m.

**Preparing and Presenting Your Annual Audit—Views from the Outside and Inside (DG25)**

*Room 122B*

**SFOs: 1 CPEs: 1**

**Field of Study: Auditing**

**Content Area: Accounting, Auditing, and Budgeting**

Independent annual audits are becoming more complicated and time-consuming due to the changing requirements of the AICPA, GASB, OMB, and state education departments. These requirements put an increasing burden on external auditors and school business personnel. Learn new and efficient ways to do a digital exchange and presentation of information between your business office and audit personnel. From pre-audit planning, through the audit field work process, to the publication and presentation of the audited financial statements, you'll learn about digital methods and procedures that will save time and resources, and create a process that is efficient for auditors and school business officials.

**Learning Objectives:** 1. Explain new and efficient ways to prepare for your annual audit. 2. Outline new techniques for utilizing digital work papers and communications. 3. Describe internal digital documentation procedures to save time, paper, and resources. 4. Discuss how to more effectively communicate audit results to the board of education and the public.

**Presenters:** Adriane Schrauben, Shareholder, Hungerford Nichols, Grand Rapids, MI; Carol Schachermeyer, Senior Manager, Hungerford Nichols, Grand Rapids, MI; Jason Helsen, Director of Finance, Reeths-Puffer Schools, Muskegon, MI

**Monday, September 26**

7:30 a.m. – 10:00 a.m.

**Registration**

*Pre-Function, Lower Level*

7:30 a.m. – 8:15 a.m.

**Coffee Break**

*125-128 Foyer*

**DISCUSSION GROUPS**

8:00 a.m. – 9:00 a.m.

**Global Perspectives in School Business (DG24)**

*Room 127C*

**SFOs: 1**

**Content Area: Global Issues**

School business officials from around the world face similar issues when managing districts and budgets. Discuss parent expectations, shrinking budgets, safety issues, privacy laws, changing risks, increased regulation, governance issues, impact of population movements, disruptive technologies, as well as information technology concerns. Join colleagues as they review data from the United States, Canada, the United Kingdom, South Africa, and Australia to learn what we all have in common with regard to our profession and how others have solved operational and environmental challenges.

**Presenters:** David Ginsberg, Director, Finance and Administration, United Herzlia Schools, Cape Town, South Africa; Trevor Summerson, Retired Director, National College for School Leadership, Sheffield, United Kingdom

8:00 a.m. – 9:00 a.m.

**Leading from the Front—Setting the Right Direction for Your Team (DG26)**

*Room 127A*

**SFOs: 1 CPEs: 1**

**Field of Study: Personal Development**

**Content Area: Leadership Development**

Not everyone in management is a leader. Get some tips on how to set the goals for your team and lead them toward those goals from the front, not the front office. Front line leadership builds loyalty and trust, builds knowledge, and builds character (yours and theirs).

**Learning Objectives:** 1. Explain the connection between setting goals and implementing goals in order to achieve team success. 2. Discuss different leadership styles. 3. Outline strategies to implement front line leadership in your organization.

**Presenter:** Brian Moore, Supervisor of Public Safety, Red Clay CSD, Wilmington, DE

LEADERSHIP DEVELOPMENT AND EVENTS

DAILY SCHEDULE • MONDAY

8:00 a.m. – 9:00 a.m.

### The 10 Most Important Things to Know About Transportation (DG27)

Room 122A

SFOs: 1

#### Content Area: Pupil Transportation

Transportation is a service made up of a million interconnected concerns. How can a business manager separate the signals from the noise? By isolating 10 critical items that address the key financial, operational, and administrative concerns of every transportation operation, school business managers can be confident that their transportation operation is functioning well. Learn how these 10 indicators can guide you in the right direction.

**Presenters:** Tim Ammon, Vice President, School Bus Consultants, Lee's Summit, MO; Don Kennedy, CFO, Baltimore City Public Schools, Baltimore, MD

8:00 a.m. – 9:00 a.m.

### Purchasing Card (P-card) Programs (DG28)

Room 123

SFOs: 1

#### Content Area: Purchasing and Supply Management

Is your district considering a p-card program? Does your district have a p-card program and is looking to minimize the risk of fraud or noncompliance? Explore and discuss internal controls for p-card programs to ensure they are used effectively to benefit your school district.

**Presenters:** Sara Kirk, Audit Manager, Heinfeld, Meech & Co., PC, Phoenix, AZ; Jennifer Shields, Partner, Heinfeld, Meech & Co., PC, Phoenix, AZ; Laura Syzmanoski, Purchasing Administrator, Dysart USD, Maricopa, AZ

8:00 a.m. – 9:00 a.m.

### Managing Active and Retiree Benefits Using Health Reimbursement Arrangements (DG29)

Room 128B

SFOs: 1 CPEs: 1

Field of Study: Personnel/HR

#### Content Area: Human Resources and Labor Relations

Health Reimbursement Arrangements (HRAs) can be used to help manage active employee benefits when integrated with the health insurance plan as well as help reduce the cost of early retiree health insurance benefits. Presenters will demonstrate the impact that Integrated HRAs and Retiree Only HRAs can have on the overall benefits package of a school district and will provide case studies from school districts that have experienced success with this approach.

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educators and all school employees achieve financial success at every stage of their lives. We also understand the importance of staying within a budget. With strategies to reduce or eliminate student loan debt, ways to secure classroom funding without using their own money, and insurance program reviews to find savings, we work with educators to maximize hard-earned dollars and help develop a path to a successful financial future.

**Learning Objectives:** 1. Describe features of HRAs, both Integrated and Retiree Only, and how they can be used in conjunction with one another. 2. Discuss how using HRAs and the Affordable Care Act can help reduce the cost of early retiree health insurance. 3. Explain how using Integrated and Retiree Only HRAs can help provide a smooth transition as employees retire. 4. Provide case study examples of various approaches to this concept.

**Presenters:** Ken Zastrow, Market Development, National Insurance Services, Brookfield, WI; Nathan Jaeger, Director of Business Services, Whitewater USD, Whitewater, WI

8:00 a.m. – 9:00 a.m.

### Managing the Millennials: Recruiting and Retaining a New Generation of Teachers (DG30)

Room 127B

SFOs: 1 CPEs: 1

Field of Study: Personnel/HR

#### Content Area: Human Resources and Labor Relations

As Baby Boomers begin retiring in large numbers, the disparity in size between the exiting workforce and Generation X has led economists to predict a 40% shortfall in available workers. This means that the populous Millennial generation is being asked to fill the employment gap in record numbers. Find out what you need to know about recruiting and managing the Millennial workforce.

**Learning Objectives:** 1. Explain the mindset and motivations of the Millennial generation. 2. Discuss specific compensation packages to recruit and retain younger teachers while still being able to attract the experienced, hard-to-find specialist educators. 3. Explain the paradigm shift in managing, evaluating, and providing benefits to a new generation of teachers.

**Presenters:** Bret McKittrick, Attorney and HR Consultant, Associated Financial Group, Waukesha, WI; Jack Bay, COO, El Paso County SD 49, Falcon, CO

8:00 a.m. – 9:00 a.m.

**Moving from Privacy to Trust (DG31)**

Room 122C

**SFOs: 1 CPEs: 1****Field of Study: Computer Science****Content Area: Information Technology**

As schools leverage technology for learning, they must also ensure that they have safeguards in place to protect the privacy and security of student data. Learn about CoSN's Trusted Learning Environment (TLE) seal for school systems, developed with ASBO International and other lead partners, including AASA and ASCD. The TLE seal defines key requirements of school system data privacy and security programs and helps school system leaders reframe the privacy conversation within their communities to one of trust and transparency.

**Learning Objectives:** 1. Discuss the fundamentals of the current climate around student data privacy and security. 2. Explain the key requirements of student data privacy and security programs. 3. Discuss how the TLE program supports your school system compliance efforts.

**Presenter:** Linnette Attai, President, PlayWell, LLC, New York, NY

8:00 a.m. – 12:00 p.m.

**Smarter School Spending Alliance Districts Worksession (DG32)**

Room 124

**SFOs: 4****Content Area: Accounting, Auditing, and Budgeting**

Interested in learning how to develop a budget that aligns resources with student achievement goals? Finance leaders from districts in Texas, Ohio, Colorado, Oregon, and Florida—members of the Alliance for Excellence in School Budgeting—will share the progress they have made over the past three years in the program. They will discuss best school budgeting practices, including developing principles and policies to guide the budget process, establishing a partnership between the finance and instructional leaders, analyzing current levels of student learning, setting instructional priorities, and identifying a communications strategy. This will be an interactive session of peer-to-peer learning with member districts sharing models and work samples from their implementation of best practices.

**Presenters:** Yousef Awaad, CFO, Portland Public Schools, Portland, OR; Scott Gooding, Executive Director of Finance, Columbus City Schools, Columbus, OH; Claire Hertz, CFO, Beaverton SD, Beaverton, OR; Craig Jones, CFO, Dayton City SD, Dayton, OH; Carol MacLeod, CFO, Lake County Schools, Lake County, FL; Matthew Malinowski, Business Manager, Upper Moreland SD, Willow Grove, PA; Michele Tronggaard, CFO, Wylie ISD, Wylie, TX; Bill Sutter, CFO, Boulder Valley SD, Boulder, CO

**DISCUSSION GROUPS**

9:15 a.m. – 10:15 a.m.

**Top Construction Project Problems and Solutions (DG33)**

Room 125

**SFOs: 1****Content Area: School Facilities Management**

Every construction project from large to small can run into problems that start with your construction contracts. A panel of top construction experts, including a school board member and construction manager, a school business manager, and school attorneys, will identify these problems, outline the consequences, provide practical solutions, and answer your questions to help ensure your projects run smoothly.

**Presenters:** Ken Florey, Attorney, Robbins Schwartz, Chicago, IL; Nelson Gray, Assistant Superintendent for Business Services, Des Plaines CCSD 62, Des Plaines, IL; Terry Fielden, Director, International Contractors, Inc., Chicago, IL; Howard Metz, Attorney, The Law Office of Howard L. Metz, LLC, Frederick, MD

9:15 a.m. – 10:15 a.m.

**Transformation to the Digital Learning Environment: K-12 Best Practices (DG34)**

Room 127C

**SFOs: 1****Content Area: Information Technology**

With 27,500 students and 4,100 employees in 51 locations, including 44 schools, the Shawnee Mission School District faced challenges with capturing, transforming, and managing information. This struggle had a high price tag and was putting a burden on IT resources and causing frustration among teachers and staff. Learn how the district implemented a centralized, integrated print solution, resulting in improved processes, new systems, a supported 1:1 initiative, and more satisfied employees.

**Presenter:** Drew Lane, Director of Information and Communication Technologies, Shawnee Mission SD, Shawnee, KS

9:15 a.m. – 10:15 a.m.

**GASB Update (DG35)**

Room 122B

**SFOs: 1 CPEs: 1****Field of Study: Accounting (Governmental)****Content Area: Accounting, Auditing, and Budgeting**

The Governmental Accounting Standards Board (GASB) is the official source of generally accepted accounting principles for school districts. GASB provides accounting guidance through

the issuance of standards and other communications to provide information to preparers and users of school district financial statements. Learn the latest information about GASB's activities and standards.

**Learning Objectives:** 1. Explain new GASB reporting requirements. 2. Describe the potential effects of proposed accounting standards on your school district's financial statements. 3. Outline future projects that GASB is considering to improve financial reporting.

**Presenter:** David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT

9:15 a.m. – 10:15 a.m.

### Return on Investment Analytics—Informing Strategic Resource Use (DG36)

Room 127A

**SFOs:** 1 **CPEs:** 1

**Field of Study:** Finance

**Content Area:** School Finance

Every school business official's goal is to lead the district in creating a financial plan that supports the school community's educational goals. Return on investment (ROI) strategies help school districts strengthen the relationship between educational investments and educational outcomes. Learn a basic approach to foster collaborative problem solving to improve ROI using data analytics. Explore the idea of educational return on investment, review data used in this type of analysis, and leave with templates and resources.

**Learning Objectives:** 1. Define and describe the concept of educational return on investment. 2. Discuss data points that will contribute to a long-term plan to increase the district's ROI. 3. Outline strategies to improve the district's financial plan to allocate resources to improve student outcomes.

**Presenters:** Jennifer Bolton Carls, Deputy Superintendent, ONC BOCES, Grand Gorge, NY; Mike English, President/CEO, Forecast5 Analytics, Inc., Naperville, IL

9:15 a.m. – 10:15 a.m.

### Understanding the Impact of Risk Management in Your Schools (DG37)

Room 122A

**SFOs:** 1 **CPEs:** 1

**Field of Study:** Management Advisory Services

**Content Area:** Risk Management

Understanding the dynamic nature of risks and managing them in schools is no easy task. Risks range from everyday occurrences such as slips, trips, and falls, to bus accidents and

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even earthquakes. How does your school district identify and mitigate these risks and control losses?

**Learning Objectives:** 1. Define risk management and discuss various elements of the process. 2. Identify and discuss the impact risk management has on the various departments within schools. 3. Explain how to educate and train staff to raise risk management awareness. 4. Discuss the value of a school risk manager and a comprehensive risk management program.

**Presenters:** Stephen Anderson, Business Manager, Proctor Public Schools, Proctor, MN; Kerry Leider, Property/Risk Manager, Duluth Public Schools, Duluth, MN; Sara Naus, Academic Director, The National Alliance for Insurance Education & Research, Austin, TX; James Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN

9:15 a.m. – 10:15 a.m.

### The Food Connection (DG38)

Room 123

**SFOs:** 1

**Content Area:** School Food and Nutrition Management

A sustainable food program connects the entire school community. What does it take to implement a sustainable food program? Learn about the key elements of building a school food program that is environmentally friendly, fosters health and wellness, and unites the whole school community. Participants will explore the process of sourcing preferred foods, reducing waste, and engaging the entire school community in the process.

**Presenters:** Karen Dittrich, Food Marketing Consultant, Creatif Leaf Marketing, New York, NY; Greg Christian, CEO, Beyond Green Sustainable Food Partners, Chicago, IL; Leslie Johnson, Vice President, Nardin Academy, Buffalo, NY

9:15 a.m. – 10:15 a.m.

### Building a Procurement Marketplace in the 21st Century (DG39)

Room 128B

SFOs: 1

**Content Area: Purchasing and Supply Management**

Cooperative purchasing groups offer financial savings through discounts, value-added benefits, and efficiency in purchasing. Hear two perspectives: one from a large school district and another from a group of school cooperatives in one state. Both have moved their contracts to an online marketplace platform to make it easy for staff to purchase through cooperative contracts integrated within the schools' financial system. Learn about the challenges school members faced with procurement, what led them to develop the service, the tools they chose, and the opportunities and challenges the project has presented.

**Presenters:** Jane Eastes, Director of Operations, Lakes Country Service Cooperative, Fergus Falls, MN; Julie Sitton, Purchasing Card Administrator, North East ISD, San Antonio, TX; Orville Bailey, CEO, Equal Level, Rockville, MD; Eric Schuld, Solutions Manager, Equal Level, Rockville, MD;

9:15 a.m. – 10:15 a.m.

### Data Analytics: Data Integration from Multiple Data Sources (DG40)

Room 122C

SFOs: 1 CPEs: 1

**Field of Study: Computer Science**

**Content Area: Information Technology**

Join Nelson County Schools and Tyler Technologies to discuss the value of data analytics in school districts today. Explore how data analytics are being used to provide K-12 districts with information needed to identify trends and determine academic needs at a district, school, classroom, or student level. Nelson County Schools have been successfully deploying data analytic methods in their district for over a decade and will share real-use cases.

**Learning Objectives:** 1. Demonstrate how to use data analytics to identify trends at a variety of levels to drive informed decision making. 2. Examine deployment of data analytics in real-life case studies. 3. Apply data to determine student improvement and statistics for your school.

**Presenters:** David Murch, Senior Support Analyst, Tyler Technologies, Falmouth, ME; Tim Hockensmith, COO, Nelson County Schools, Bardstown, KY

## DISCUSSION GROUPS

10:30 a.m. – 11:30 a.m.

### GASB Pension (DG41)

Room 127C

SFOs: 1 CPEs: 1

**Field of Study: Accounting (Governmental)**

**Content Area: Accounting, Auditing, and Budgeting**

Legislatures, constituents, policymakers, and advisors, as well as the management and members of the respective plans, all have a role in addressing the challenges that face U.S. government pension plans. GASB Statement No. 68 significantly affected the financial statements of school districts. Review some of the key implementation issues and what the future holds for pension reporting and management.

**Learning Objectives:** 1. Explain the requirements of the proposed GASB pension standard. 2. Define the terminology related to pension reporting. 3. Discuss the effects of the standard on your school district's financial statements. 4. Explain what future standard changes may be forthcoming.

**Presenters:** Corey Arvizu, Partner, Heinfeld, Meech & Co., PC, Tucson, AZ; Marvin Dereef, Deputy CFO, Fulton County Schools, Atlanta, GA; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL

10:30 a.m. – 11:30 a.m.

### What Else I Didn't Learn in Business Official School (DG42)

Room 122B

SFOs: 1 CPEs: 1

**Field of Study: Personal Development**

**Content Area: Leadership Development**

Despite their best intentions, school business officials' plans to tackle their To Do lists often get derailed. Sometimes the questions we are asked or tasks we need to accomplish seem easy and straightforward, but turn out to take much more time than anticipated. Why didn't we learn this when we were studying school finance and operations?

**Learning Objectives:** 1. Discuss strategies for addressing some common time-consuming activities in school business. 2. Outline time management approaches to make efficient use of time. 3. Explain strategies for developing a network of resources to help complete school business tasks.

**Presenter:** David Bein, Assistant Superintendent for Business and Chief School Business Official, Downers Grove Grade SD 58, Downers Grove, IL

10:30 a.m. – 11:30 a.m.

### Shift Happens: Changes in Categories and Patterns of Purchasing (DG43)

Room 122C

**SFOs: 1 CPEs: 1**

**Field of Study: Computer Science**

**Content Area: Information Technology**

When is a laptop not a laptop? When it's used as a book. When is a projector not a projector? When it provides interactive, web-enabled learning on any space. Market forces, vendor consolidation, and technology innovations are changing whole categories of goods purchased, as well as relationships with publishers. Explore five key trends that are changing how school business officials define success.

**Learning Objectives:** 1. Identify current trends in school purchasing and supply management. 2. Explain trends in technology innovation related to schools. 3. Discuss how purchasing and technology trends will affect your purchasing power with suppliers.

**Presenter:** Kevin Baird, Chairman and National Supervising Faculty, Center for College and Career Readiness, Orlando, FL

10:30 a.m. – 11:30 a.m.

### The Quality Control Commissioning Process and Preventive Maintenance Practices (DG44)

Room 127A

**SFOs: 1**

**Content Area: School Facilities Management**

The Quality Control Commissioning Process (QCxP) addresses proven best practices, the importance of project/team focus, long-range quality-building performance, and goal achievement. Participants will learn about the process and strategies to address common problems in today's building designs and operating systems. Discussions will incorporate the need for the commissioning process and its positive relationship to preventive and long-term maintenance and overall financial impacts.

**Presenters:** James Reny, Retired Facility Director/K-12 Facility Consultant, Waterville Public Schools, Waterville, ME, and K-12 Facilities, Burnham, ME; Greg Lookabaugh, Sr. Manager of Facilities Planning, Harris County Department of Education, Houston, TX

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10:30 a.m. – 11:30 a.m.

### Developing Stakeholder Financial Literacy (DG45)

Room 122A

**SFOs: 1 CPEs: 1**

**Field of Study: Finance**

**Content Area: School Finance**

School business is big business, and understanding the ins and outs of financial data can be confusing, even for the most seasoned professional. Participants will learn about different approaches and tools that school business officials may use to educate stakeholders and develop their financial literacy, whether they are senior administrators and trustees who have ultimate fiscal accountability, school administrators who monitor site budgets, or parents and community members who have an interest in how public money is spent to educate our students.

**Learning Objectives:** 1. Explain the relationship and importance of key questions to developing financial literacy. 2. Outline opportunities to engage and communicate financial information to stakeholders using different approaches and tools. 3. Identify and explain why knowing the "story behind the numbers" is key to developing financial literacy.

**Presenter:** Christine Lee, Director of Finance, Lethbridge SD No. 51, Lethbridge, AB, Canada

10:30 a.m. – 11:30 a.m.

### **Innovative Strategies for Self-Funded Medical Plans (DG46)**

Room 123

**SFOs: 1 CPEs: 1**

**Field of Study: Personnel/HR**

**Content Area: Human Resources and Labor Relations**

Self-funding affords districts the flexibility and creativity to engage members to be accountable for their own health. Fortunately, there are many exciting programs and partners available that offer real solutions to enable members to find the path to sustainable health. Learn about strategies such as onsite clinics, and telemedicine, wellness that works, and patient advocacy programs such as medication management, dialysis management, and expert second opinion programs.

**Learning Objectives:** 1. Explain various wellness strategies. 2. Discuss the pros and cons of each strategy. 3. Identify which strategies will fit your culture and benefit plan(s).

**Presenters:** Sara Hames, Vice President, Muskego-Norway Schools/Hays Companies, Muskego, WI; Julie Kelly, Assistant Superintendent of Business, Operations & HR, Muskego-Norway SD, Muskego, WI

10:30 a.m. – 11:30 a.m.

### **Developing a Safety Program—What Should You Be Including? (DG48)**

Room 127B

**SFOs: 1**

**Content Area: Risk Management**

Learn what you must include in your safety program for it to be compliant, as well as overall key elements to a safe working environment. Explore training requirements and identify the importance of safety and not just compliance with regulations. Take your safety program to the next level, ensuring you have an effective safety program and process in place.

**Presenters:** David Frandsen, Senior Risk Management Consultant, Arizona School Risk Retention Trust, Inc., Phoenix, AZ; Norma Pacheco, Business Manager, Union Elementary SD, Tolleson, AZ

10:30 a.m. – 11:30 a.m.

### **Communicating Key Audit Report Information to District Stakeholders (DG47)**

Room 128B

**SFOs: 1 CPEs: 1**

**Field of Study: Accounting**

**Content Area: Accounting, Auditing, and Budgeting**

Annual audit reports can be lengthy. What information is important to communicate to district stakeholders, including elected officials, rating agencies, banking institutions, and community members? Discuss areas of particular importance and where this information can be located in the report.

**Learning Objectives:** 1. Discuss the role of the audit. 2. Describe the information within the financial report that may be of particular interest to various district stakeholders. 3. Provide talking points for financial statement summary presentations.

**Presenters:** Sara Kirk, Audit Manager, Heinfeld, Meech & Co., PC, Phoenix, AZ; Jennifer Shields, Partner, Heinfeld, Meech & Co., PC, Mesa, AZ; Lizette Huie, Business Services Coordinator, Sahuarita USD, Sahuarita, AZ

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# Clinic Tables • Sunday, September 25

8:30 a.m. – 9:45 a.m. | Room 124

Clinic Tables feature roundtable discussions facilitated by industry experts and focused on a specific aspect of school business management. Participants change tables every 15 minutes. Presenters direct the discussion and serve as a source of information on topics such as healthcare reform, 403(b) retirement plans, budget planning, information technology, and more.

## TABLE 1

### Meeting the Challenges Ahead—Getting Value from Your Retirement Plans

**Presenters:** Lynn Sarkis, Director, Strategic Relations, AXA, Jersey City, NJ; Phil Kim, Senior Vice President, AXA Advisors, Scottsdale, AZ

## TABLE 2

### Learn How Erasing Student Loan Debt Can Improve Teacher Retention

**Presenter:** Jon Bernardy, Director, Student Loan Solutions, The Horace Mann Companies, Springfield, IL

## TABLE 3

### The Collaborative Classroom: Flexible Learning Environments for Education

**Presenter:** Kevin Baird, Chairman and National Supervising Faculty, Center for College and Career Readiness, Orlando, FL

## TABLE 4

### Employer Contributory Plans (Match, Elective, Special Pay)

**Presenter:** Tom Granger, Assistant Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS

## TABLE 5

### Benefits of Cooperative Purchasing: Resources That Can Save Money and Time!

**Presenter:** Rob Fiorilli, Program Manager, U.S. Communities, Marana, AZ

## TABLE 6

### Successfully Surviving IRS 403(b)/457 Audits

**Presenters:** Timothy “Ryan” Jenkins, Treasurer/CFO, Pickerington School and President of OASBO, Pickerington, OH; Linda Segal Blinn, Vice President, Voya Technical Services, Voya Financial®, Windsor, CT

## TABLE 7

### Managing Budget Challenges Through Retirement Planning

**Presenters:** Christopher Zingaro, Head of Marketing and Business Development, ABMM Financial, Iselin, NJ; Cristina Gallo, Director of Marketing, ABMM Financial, Iselin, NJ

## TABLE 8

### Performance-Based Relationships in K-12 Facilities Management

**Presenter:** Steve Weiser, Regional Vice President, Aramark K-12 Education, Philadelphia, PA

## TABLE 9

### Eliminating Fraud in the School Payment Card Program

**Presenter:** Kevin Noren, Vice President, BMO Financial Group, Chicago, IL

## TABLE 10

### Best Practices for Increasing Staff Satisfaction While Maximizing Your Budget

**Presenter:** Johnny Castro, Assistant Vice President, Public Sector Strategic Partnerships, Colonial Life, Columbia, SC



## TABLE 11

### The Internet of Things (IoT): What Is IoT and How Can It Change K-12?

**Presenter:** Christopher Lehmann, K-12 Vertical Market Director, Johnson Controls, Milwaukee, WI

## TABLE 12

### Do You Have What It Takes to Create an Enduring IT Infrastructure?

**Presenter:** John Stewart, Managing Director, NY/NJ/PA and K-12 Education, mindSHIFT, a Ricoh company, Ricoh USA, Inc., New York, NY

## TABLE 13

### The Value of Data Analytics and How to Achieve Data Integration from Multiple Data Sources

**Presenters:** Tim Hockensmith, COO, Nelson County Schools, Bardstown, KY; David Murch, Senior Support Analyst, Tyler Technologies, Falmouth, ME

## TABLE 14

### Boosting Everyday Parent Engagement Through One Paperless, Cashless, and Mobile Platform for Fees, Forms, and Communications

**Presenter:** Dave Dodnarchuk, President, ActivityRight by RightLabs, Edmonton, AB, Canada

## TABLE 15

### Budget Planning Improvement Through the Use of Technology

**Presenters:** Tony Olson, Vice President of Marketing, MyBudgetFile, Stony Plain, AB, Canada; Sue Crockett, Director of U.S. Operations, MyBudgetFile, Minneapolis, MN

## TABLE 16

### Fee Management: More Than Just Setting Up an Online Payment Portal: What an Innovative Fee Software Can Do for You

**Presenter:** Eric Vance, Fee Management Specialist, Acorn, Powered by Rycor, Chandler, AZ

## TABLES 17 & 18

### ACA Reporting Requirements

**Presenters:** Susan Relland, CEO, American Fidelity Administrative Services LLC, Oklahoma City, OK; Jessica Frier, Senior Health and Welfare Plan Consultant, American Fidelity Administrative Services LLC, Long Beach, CA



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# Guest Activities

Registered guests are welcome to attend both General Sessions, enjoy the welcome mixer, and visit the Exhibit Hall. An official 2016 Annual Meeting & Expo badge is required to enter the Exhibit Hall. Guests may not attend educational sessions. The following schedule has been designed specifically for guests.

## Friday, September 23

9:00 a.m. – 1:00 p.m.

### Desert Jeep Tour and Hike

*Additional Fee and Advance Registration Required*

Buses depart from the Main Entrance of the Sheraton Grand Phoenix at 9:00 a.m.

6:00 p.m. – 7:30 p.m.

### Welcome Mixer

*Phoenix Ballroom, Sheraton Grand Phoenix*

Badge required.

7:30 p.m. – 10:30 p.m.

### Affiliate Reception

*Rawhide at Wild Horse Pass, Chandler, AZ*

Badge required.

Buses begin loading at 7:30 p.m. from the Sheraton Grand Phoenix lobby and run continuously.

## Saturday, September 24

7:45 a.m. – 8:30 a.m.

### General Session Coffee Break

*North Ballroom D Foyer*

8:45 a.m. – 10:45 a.m.

### First General Session

*North Ballroom D*

11:00 a.m. – 12:00 p.m.

### Guest Program—Branding Like a Cowboy

*Deer Valley, Sheraton Grand Phoenix*

2:30 p.m. – 5:30 p.m.

### Exhibit Hall Opening Reception

*Exhibit Hall 6*

Badge required.

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6:00 p.m. – 8:00 p.m.

### Affiliate Reception

*Valley of the Sun Ballroom, Sheraton Grand Phoenix*

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## Sunday, September 25

9:15 a.m. – 10:00 a.m.

### General Session Coffee Break

*North Ballroom D Foyer*

10:00 a.m. – 11:30 a.m.

### Second General Session

*North Ballroom D*

11:30 a.m. – 2:15 p.m.

### Exhibit Hall Open

*Exhibit Hall 6*

Badge required.

12:30 p.m. – 1:30 p.m.

### Lunch in the Exhibit Hall

*Exhibit Hall 6*

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2:30 p.m. – 3:30 p.m.

### Guest Program—Su Vino Wine Tasting

*Deer Valley, Sheraton Grand Phoenix*

8:00 p.m. – 11:00 p.m.

### Oklahoma ASBO Reception

*Phoenix Ballroom, Sheraton Grand Phoenix*

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# Exhibit Hall Highlights



## EXHIBIT HALL HOURS

Saturday . . . . . 2:30 p.m. – 5:30 p.m.

Sunday . . . . . 11:30 a.m. – 2:15 p.m. (Lunch 12:30 p.m. – 1:30 p.m.)

## Saturday, September 24

2:30 p.m. – 5:30 p.m.

### Exhibit Hall Opening Reception

*Sponsored by ABMM Financial*

## Sunday, September 25

12:30 p.m. – 1:30 p.m.

### Lunch in the Exhibit Hall

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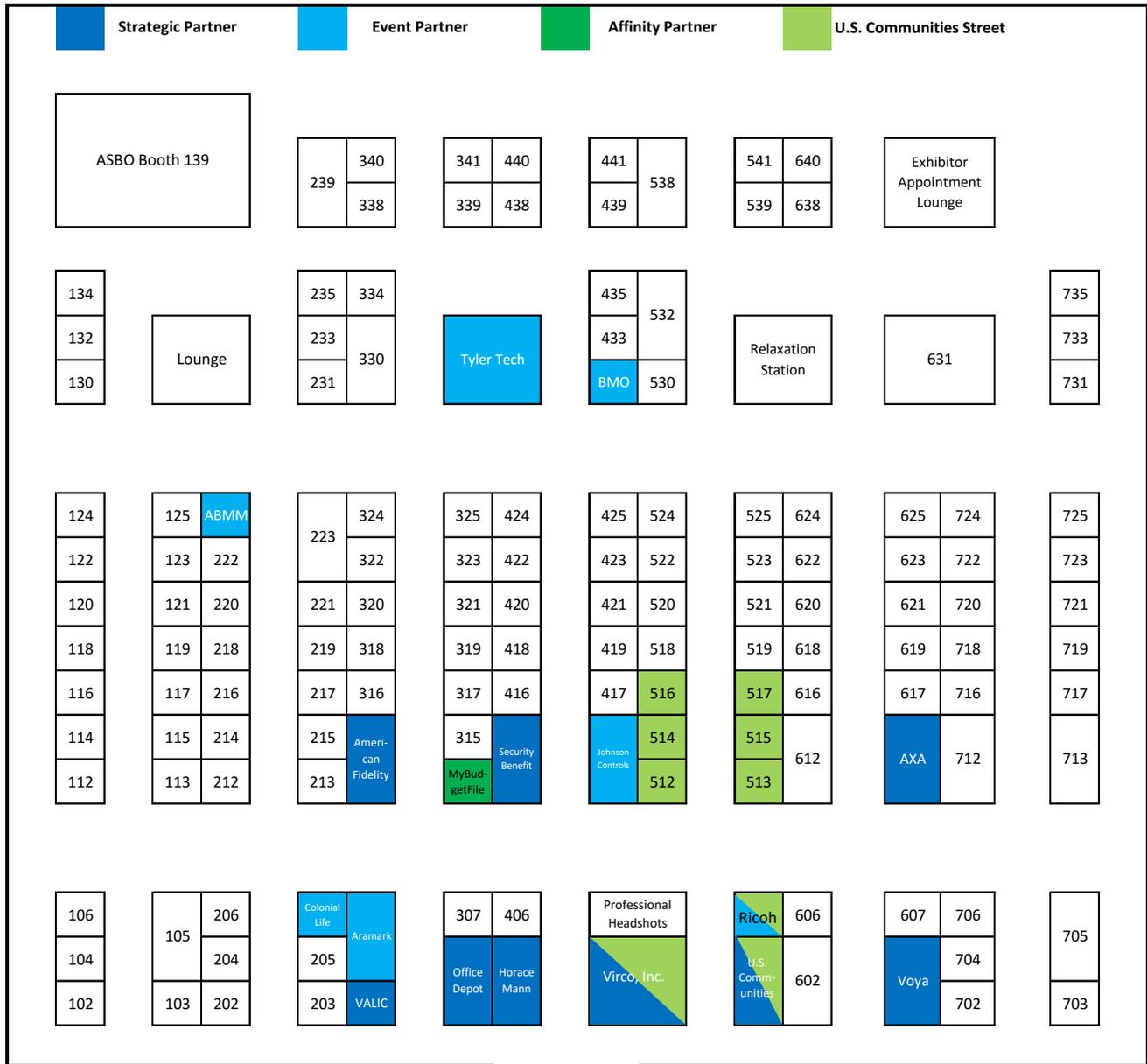
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As of July 26, 2016

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4960 S. Gilbert Rd.  
Chandler, AZ 85249

Acorn is software for district and school fee management: collect and maintain cash, check, credit card, in-person, and online payments. SIS and ERP integration provide real-time information to parents and district staff, including year-to-date and lifetime history of payments. This software allows you to manage fees and to build the foundation necessary for successful collection of all fees. It's not just a school store—it's the software to support it.

## **ActivityRight By RightLabs**

### **Booth 618**

8008 104 St., Ste. 217  
Edmonton, AB T6E4E2 Canada

ActivityRight by RightLabs was developed to boost parent engagement at every point of contact with teachers and administrators. You can manage digital permission slips, approvals, fee collection, messaging, appointment booking, and reminders in one easy-to-use mobile, paperless, and cashless application—it's everyday engagement done right!

## **Aleddra, Inc.**

### **Booth 440**

2210 Lind Ave. SW, Ste. 109  
Renton, WA 98057

## **Amazon Business**

### **Booth 425**

325 9th Ave. North  
Seattle, WA 98109

## **American Fidelity Assurance Co.**

### **Booth 312**

9000 Cameron Pkwy.  
Oklahoma City, OK 73114



American Fidelity is proud to offer supplemental benefits designed with educators in mind. Rather than using a one-size-fits-all approach, we draw from our deep understanding of the education community. With 55 years of experience serving 3,100 school districts nationwide, we're here to help. To learn more, contact us at 800.654.8489.

## **Andrews Technology HMS, Inc.**

### **Booth 424**

1213 Culbreth Dr.  
Wilmington, NC 28405

Andrews Technology is a nationwide time and attendance provider focused on selling, installing, and supporting

the Novatime system specifically for schools. Novatime keeps track of employee hours worked, sick/vacation/personal days, FMLA, and ACA, and will interface with the school's payroll system to drastically reduce the amount of time it takes to process your payroll.

## **Aramark K-12 Education**

### **Booth 304**

1101 Market St.  
Philadelphia, PA 19107



To support the K-12 educational mission, Aramark provides innovative food and facilities services management for over 500 school districts nationwide. For more information, visit [www.aramark.com](http://www.aramark.com).

## **ArbiterSports**

### **Booth 617**

126 W. Segoe Lily Dr., Ste. 190  
Sandy, UT 84070

Online payments of referees and game workers.

## **Arthur J. Gallagher & Co.**

### **Booth 239**

30150 Telegraph Rd., Ste. 408  
Bingham Farms, MI 48025

Serving over 2,500 public sector clients, Gallagher drives innovative solutions for enterprise risk and human capital management. Our total rewards approach looks beyond the benefits package. Gallagher is your strategic HR partner who understands today's challenges to position solutions that align financial realities with employee expectations and your organization's goals.

## **Aspire**

### **Booth 523**

4010 Boy Scout Blvd., Ste. 450  
Tampa, FL 33607

Aspire Financial Services, LLC, is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system for all plans. Aspire provides a best-in-class technology-enabled portfolio of pre-defined or highly customizable smart retirement solutions with private-label branding options through its proprietary technology platform and strategic partnerships.

## **ASSA ABLOY**

### **Booth 205**

110 Sargent Dr.  
New Haven, CT 06511

ASSA ABLOY, global leader in door opening solutions, is dedicated to satisfying end-user needs for security, safety, and convenience. Our product innovations span a full spectrum of security technologies ranging from conventional mechanical locks and high-security master key systems, to advanced IP-enabled locking devices built on open-architecture platforms. Visit [www.assaabloydss.com](http://www.assaabloydss.com).

## **Asset Services, Inc.**

### **Booth 625**

6750 Antioch, Ste. 300  
Merriam, KS 66204

Asset Services, a leading provider of fixed asset inventory solutions for school districts nationwide, specializes in physical inventories of fixed assets and equipment. Asset Services also provides replacement costs for each inventoried item. These services are vital for insurance and reporting purposes.

## **Association of Educational Purchasing Agencies (AEPA)**

### **Booth 315**

753 West Blvd.  
Chipley, FL 32428

## **Association of School Business Officials International**

### **Booth 139**

11401 North Shore Dr.  
Reston, VA 20190



ASBO International supports school business professionals who are passionate about quality education. We provide programs and services to equip our members with the tools and resources they need to do their jobs effectively and efficiently. Together, we're leading school business forward.

## **AXA**

### **Booth 613**

525 Washington Blvd., 27th Floor  
Jersey City, NJ 07310



AXA is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and the Eagle Institute. We strongly admire ASBO International and its members' commitment and diligent efforts to protect public school systems and the future of our children. We invite you to visit our booth and join us for our Clinic Table discussion, Meeting the Challenges Ahead: Getting Value from Your Retirement Plans, on Sunday from 8:30 a.m. to 9:45 a.m.

## **Baragar Systems**

### **Booth 525**

2324 156 St.  
Surrey, BC V4A 4V4 Canada

Baragar Systems, a Vancouver-based company, builds custom turnkey enrollment planning software solutions for school districts across Canada and the United States. For over 30 years, we have served the needs of senior school district administrators

representing 108 school districts and 1.8 million pupils.

## **BerryDunn**

### **Booth 321**

100 Middle St.  
Portland, ME 04101

BerryDunn provides school districts with years of expertise in strategic planning, business process analysis, and procurement assistance for modernizing systems. Our knowledge of your challenges, combined with proven technology planning and implementation practices, help establish a framework for information sharing and efficiency that addresses budget constraints and government mandates.

## **BMI Productivity Solutions**

### **Booth 222**

475 N. 300 West, Ste. 5  
Kaysville, UT 84037

BMI works with your existing district software and processes to enhance gathering and sharing of documents and data. BMI focuses on speeding up processes, reducing redundant tasks, increasing visibility, and ensuring compliance. With the help of BMI, school district business offices are able to do their work faster and better support the district office as well as schools in their district. Visit our booth to find out more.

## **BMI Systems Group**

### **Booth 117**

1900 W. Chandler Blvd., Ste.15-118  
Chandler, AZ 85224

BMI Systems Group's products add barcode scanning technology to many popular School FMS Systems. Our Fixed Asset Scanning Systems interface with many Tyler Technologies, SunGard, Skyward, Workday, Weidenhammer Systems and PeopleSoft Fixed Asset Modules. Our Stockroom Scanning Systems interface with many Tyler Technologies, SunGard, Weidenhammer Systems and Workday Inventory Modules.

## **BMO Financial Group**

### **Booth 431**

55 Bloor St. West  
Toronto, ON M9C 1C4 Canada



BMO Financial Group is a highly diversified financial services organization.

BMO's treasury and payment products are widely used by corporations and public sector organizations to manage and control their commercial spending. We help organizations manage cash flow efficiently with a full range of payment solutions, from commercial card products, including purchasing, travel and entertainment, fleet, and all-in-one cards, to electronic payment options. Contact us at [bmo.tps@bmo.com](mailto:bmo.tps@bmo.com) or visit our website: [bmo.com/cashmanagement](http://bmo.com/cashmanagement).

## **Bona US**

### **Booth 623**

2550 S. Parker Rd., Ste. 600  
Aurora, CO 80014

Bona remains the only company in the industry to offer a complete product line specifically designed for athletic flooring systems, from sand and finish to floor care. Our products protect a majority of the NBA and collegiate floors and have been used on the Final Four floors.

## **BRD Noise and Vibration Control, Inc.**

### **Booth 519**

P.O. Box 127  
112 Fairview Ave.  
Wind Gap, PA 18091

## **Camcode**

### **Booth 218**

18531 S. Miles Rd.  
Cleveland, OH 44128

Camcode provides fixed asset inventory services for school administrators, including on-site inventory with asset identification and labeling, data management, and accurate reporting for inventory

records and GAAP/GASB regulations. Our experienced team helps you manage school assets, generate appraisal reports, comply with GASB 35/35, and more. Contact us at [www.camcode.com](http://www.camcode.com) or 800.627.3917.

## **Canon Solutions America**

### **Booth 539**

One Canon Park  
Melville, NY 11747

Canon Solutions America, Inc., a Canon U.S.A. Company, provides industry-leading enterprise, production, and large-format printing solutions supported by exceptional professional service offerings. Canon Solutions America helps companies improve efficiency and control costs through high volume, continuous feed, digital and traditional printing, and document management solutions. Visit [www.csa.canon.com](http://www.csa.canon.com).

## **Certified School Risk Managers Program**

### **Booth 217**

3630 North Hills Dr.  
Austin, TX 78731

The Certified School Risk Managers Program (CSRMP) is a career-building, five-part designation program for school personnel responsible for the risk management function. The CSRMP faculty is represented by the field's top practitioners and leaders. Five intensive courses guide participants through the risk management process, emphasizing practice over theory. Each one-day course includes an optional multiple-choice examination. The five courses are reasonably priced and locally convenient. They are available in the classroom or through CSRMP Online.

## **Chartwells K12**

### **Booth 705**

105 S. York St., Ste. 300  
Elmhurst, IL 60126

Chartwells K12 is a proud partner to school districts ranging from large public schools to small charter and private schools, all with diverse communities and needs. Our eat. learn. live. philosophy guides our team in delivering on each component of our promise from great food (eat) to developing food and nutrition education centered on school gardens and expertise from KidsGardening.org (learn), and focusing on the whole child through partnerships with Prevent Child Abuse America (live).

## **Cintas**

### **Booth 513**

6800 Cintas Blvd.  
Mason, OH 45040

Cintas leads the industry in supplying corporate identity uniform programs and providing entrance and logo mats; restroom supplies; promotional products; first aid, safety, and fire protection products and services; and industrial carpet and tile cleaning. We operate more than 400 facilities in North America—including six manufacturing plants and eight distribution centers.

## **Civic Permits**

### **Booth 318**

1261 Travis Blvd., Ste. 270  
Fairfield, CA 94533

Automate your facility use permit application and approval process, increase staff efficiency, and improve customer service to community groups with Civic Permits, a 100% online and all-inclusive system that includes one-of-a-kind permit-processing and calendar features that cannot be found in other scheduling programs.

## **ClassWallet**

### **Booth 638**

4141 NE 2nd Ave., Ste. 203B  
Miami, FL 33137

ClassWallet addresses the pain of managing receipts and paperwork associated with tracking non-bid expenditures. Through ClassWallet, users are provided a virtual wallet in which spending budgets can be allocated. Users can select items from vendors such as Amazon, Office Depot, Scholastic, and 40+ more, and ClassWallet provides administrators real-time, SKU-level reporting of all transactions for accounting and reconciliation purposes in a completely paperless environment.

## **CliftonLarsonAllen, LLP**

### **Booth 520**

20 E. Thomas Rd., Ste. 2300  
Phoenix, AZ 85012

CLA is a professional services firm delivering wealth advisory, consulting, outsourcing, and public accounting to help our clients succeed. Dedicated industry professionals provide solutions to your compliance, regulatory, and operational needs. We'll work together to eliminate challenges and move your district forward.  
[Claconnect.com/Government](http://Claconnect.com/Government).

## **Colonial Life**

### **Booth 207**

1200 Colonial Life Blvd.  
Columbia, SC 29210



As a leader in the voluntary benefits industry for more than 75 years, Colonial Life has a rich

history and an award-winning reputation for superior service and innovative products. With our suite of cost-management solutions, we can help you manage the rising cost of employee benefits while still providing them the quality benefits and services they deserve.

## **Colorado ASBO**

### **Booth 134**

4627 W. 105th Way  
Westminster, CO 80031

Visit ASBO Colorado's booth to learn more about the 2017 Annual Meeting & Expo being held in Denver!

## **Commerce Bank**

### **Booth 334**

811 Main St.  
Kansas City, MO 64105

Commerce Bank is pleased to introduce the new prepaid expense card in 2016. This prepaid Visa card can make expense management easier for any size institution. Load and unload funds, control merchant and cash use without the requirements or risk of a corporate credit card. It's ideal for per-diem, team and employee travel, and supply expenses. Learn more at [commercebank.com/expensecard](http://commercebank.com/expensecard) or contact 866.946.3017; [prepaidexpense@commercebank.com](mailto:prepaidexpense@commercebank.com).

## **Cooperative Strategies, LLC**

### **Booth 338**

8955 Research Dr.  
Irvine, CA 92618

Cooperative Strategies is dedicated to providing local educational agencies across the nation with unique solutions and fresh approaches concerning facility planning and finance. Serving more than 350 education clients, our focus gives our clients a unique level of service that is based on the best practices in the industry.

## **Crowe Horwath, LLP**

### **Booth 316**

One Mid America Plaza, Ste. 700  
Villa Park, IL 60522

## **DecisionInsite, LLC**

### **Booth 416**

5145 Tortola Ln.  
Keller, TX 76244

As enrollment impact specialists, we integrate professionally developed enrollment forecasts and updated community demographics with an easy-to-use, map-driven, web-based application. We've put the effortless power of point-and-click analysis tools and the ability to create professional presentations into the hands of district staff responsible for making and communicating data-driven decisions.

## **Digital Schools**

### **Booth 221**

27764 Volo Village Rd.  
Round Lake, IL 60073

## **District Administration Magazine**

### **Booth 421**

35 Nutmeg Dr., Ste. 205  
Trumbull, CT 06611

*District Administration* is the leading provider of practical insights and strategies for K-12 administrators at school districts throughout the United States. The District Administration Leadership Institute produces special events and creates communities for the nation's top K-12 leadership.

## **Durham School Services**

### **Booth 602**

4300 Weaver Pkwy.  
Warrenville, IL 60555

Durham School Services, Petermann Ltd., and Stock Transportation are premiere providers of school transportation services. Combined, we operate more than 21,500 school buses, employ over 27,000 people, and serve over 550 school districts in 34 states and four provinces. Getting students to school safely, on time, and ready to learn®.

## **E&I Cooperative Services**

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### **Booth 524**

2 Jericho Plaza  
Jericho, NY 11753

Serving school districts nationwide, E&I is the only member-owned, not-for-profit sourcing cooperative focused exclusively on education. E&I delivers cost savings on products and services K-12 institutions use every day that reduce costs and optimize supply chain efficiencies.

## **Education Logistics, Inc. (EDULOG)**

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### **Booth 522**

3000 Palmer St.  
Missoula, MT 59809

Education Logistics is a company based around delivering school districts the most value for their resources. Using tools developed from a mathematical background, EDULOG has achieved millions of dollars in savings throughout North America. EDULOG offers a full range of school solutions, including integrated GPS, routing and scheduling, driver time and attendance, consulting services, and more. EDULOG has produced measurable savings for clients.

## **Education Management Systems, Inc.**

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### **Booth 724**

4110 Shipyard Blvd.  
Wilmington, NC 28403

K12 Financials is a complete, integrated solution for the comprehensive management of the small to mid-size K-12 district and school-level enterprise. From payroll, general ledger, and HR to electronic payments, school book-keeping, and a complete food service management package, K12 Financials help you keep tabs on *all* the district's finances.

## **EFI Furniture**

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### **Booth 118**

32 Lisa Pl.  
Coolaroo,  
Melbourne, VIC 3048 Australia

EFI Furniture has been supplying furniture to schools and government departments in Australia and internationally for over 30 years, and has been a proud sponsor of ASBO for the last 10 years. Focus on innovation and design are the reasons EFI Furniture is the leader in its field in Australia.

## **Elior North America**

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### **Booth 406**

1751 County Road B West  
Saint Paul, MN 55113

Elior North America focuses on culinary innovation and exemplary service. Our family of companies provide food service management for school districts, colleges, and independent schools. Our programs are tailored to the specific needs of each client and community that we serve. We do more than serve meals. We create experiences.

## **Enlit, LLC**

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### **Booth 219**

P.O. Box 2932  
Toledo, OH 43606

## **EqualLevel Inc.**

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### **Booth 340**

11140 Rockville Pike, Ste. 100-350  
Rockville, MD 20852

EqualLevel is the leader in B2G e-Commerce solutions for the public sector. The company's Shopping and Order Management modules supports a range of procurement needs, such as real-time search across multiple approved punchout sites, shopping lists, quote-to-cart, electronic order delivery, and integration to existing ERP. Optional modules such as Approvals, Budget Management, Receiving, and Invoicing can be added to modernize the entire process.

## **E-rate Online, LLC**

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### **Booth 417**

622 Clinton Ave.  
Bridgeport, CT 06611

E-rate Online is a team of professionals with one goal: to garner the maximum funding possible for the benefit of your school. With in-depth program knowledge, industry insights, and a consultative approach, we understand your unique opportunities and desired results, and work seamlessly with you to reap the benefits that you deserve.

## **Extreme Integration**

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### **Booth 112**

4657 E. Cotton Gin Loop  
Phoenix, AZ 85040

Extreme Integration designs customized, turn-key solutions that converge voice, video, and wireless into a seamless network. Our solutions leverage "best in class" products that will take you into the future. Our approach is to positively impact your business by using new technology to increase productivity, save time, and save money.

## **First Student, Inc.**

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### **Booth 418**

600 Vine St., Ste. 1400  
Cincinnati, OH 45202

First Student is the leading school transportation solutions provider in North America. We strive to provide the best start and finish to every school day for the students of school district partners. With a team of highly trained drivers and the industry's strongest safety record, First Student delivers reliable, quality services.

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**Follett****Booth 538**

1340 Ridgeview Dr.  
McHenry, IL 60050

Follett provides educationally relevant content, integrated educational technology solutions, and value-added services to over 65,000 PreK–12 schools and districts in the United States and around the world. We focus on earning our customers' trust every day and helping you impact over 35 million PreK–12 students every year.

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**Food Service Management Solutions****Booth 717**

P.O. Box 1870  
Richmond, KY 40476

Food Service Management Solutions is dedicated to helping you achieve your goals by creating comprehensive, cost-effective solutions crafted to meet your needs. Our team of consultants have extensive educational and work experience in their areas of expertise and work collaboratively to provide customized, comprehensive solutions.

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**Forecast5 Analytics, Inc.****Booth 325**

2135 City Gate Ln., 7th Floor  
Naperville, IL 60563

Forecast5 Analytics provides interactive data analytics to schools covering a spectrum of organizational performance areas. The tools allow school business leaders to identify strategic and financial opportunities in areas such as financial performance, compensation, enrollment, and student achievement. More than 900 districts are using Forecast5 to maximize their data insights.

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**Foresters Financial Services****Booth 621**

45 Wall St., 10th Floor  
New York, NY 10005

At Foresters Financial Services, we provide everyday families and individuals with financial solutions. We take pride in our strong history and commitment to servicing the retirement needs of nonprofit organizations and schools, especially K–12 educators. Today, we participate in over 2,000 403(b) plans, with over 40,000 participant accounts totaling more than \$1 billion in assets under management.

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**Frontline Education****Booth 532**

1400 Atwater Dr.  
Malvern, PA 19355

Frontline Education is an integrated insights partner serving more than 8,500 educational organizations and millions of educators in their efforts to develop the next generation of learners. Bringing the best education technologies together in one integrated solution, Frontline supports the front line of education in efficiently and effectively managing everything from recruiting, hiring, and absence management to professional learning, evaluation, and special education.

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**The Garland Co., Inc.****Booth 515**

3800 E. 91st St.  
Cleveland, OH 44105

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**GCA Services Group****Booth 640**

4702 Western Ave., Ste. 101  
Knoxville, TN 37902

GCA is a leading provider of quality facility services, including custodial services, facilities operations and maintenance, and grounds and athletic field management. GCA serves over 250 K–12 school districts and 80 higher education institutions. Its client retention rate is an exceptional

96+%. For more information, visit [www.gcaservices.com](http://www.gcaservices.com) or follow GCA on Twitter: @gcaservices.

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**The Gordian Group****Booth 124**

30 Patewood Dr., Bldg. 2, Ste. 350  
Greenville, SC 29615

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**Government Finance Officers Association****Booth 339**

203 N. LaSalle St., Ste. 2700  
Chicago, IL 60601

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**Grainger****Booth 102**

100 Grainger Pkwy.  
Lake Forest, IL 60045

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**Gray Step Software, Inc.****Booth 220**

4671 Golden Foothill Pkwy.  
Shingle Springs, CA 95682

Gray Step Software is a leader in web-based accounting for student bodies and boosters. We tailor our programs to suit the needs of the K–12 marketplace. ASBWorks and Booster Finance offer complete financial management solutions for your organization. Also check out our new crowd-funding tool to boost your donations: MyFundingPal.com.

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**Graybar****Booth 512**

11885 Lackland Rd.  
Saint Louis, MO 63146

Graybar, a Fortune 500 corporation and one of the largest employee-owned companies in North America, is a leader in the distribution of high-quality electrical, communications, security, and networking products, and specializes in related supply chain management and logistics services. For more information, visit [www.graybar.com](http://www.graybar.com) or call 1-800-GRAYBAR.

## **HD Supply Facilities Maintenance** **Booth 516**

101 Riverview Pkwy., Ste. 100  
Santee, CA 92071

At HD Supply Facilities Maintenance, we provide federal government procurement and maintenance professionals access to thousands of quality maintenance, repair, and operations products. Our GSA Schedule contract saves you time and money by streamlining the procurement process, making it easy for you to purchase products that keep you in compliance.

## **Heartland School Solutions**

### **Booth 203**

787 Elmgrove Rd.  
Rochester, NY 14624

Heartland School Solutions, the leading provider of secure online and on-campus payment solutions, helps optimize operations for 35,000+ schools throughout the United States. Our solutions ease administrative responsibilities, increase revenue, minimize risk, and improve accountability. Parents can make secure payments online or on-campus with a credit/debit card. Staff can easily collect and manage school fees and purchases for easy reconciliation. Contact us today—we can help your district.

## **Heinfeld, Meech & Co., P.C.**

### **Booth 433**

10120 N. Oracle Rd.  
Tucson, AZ 85704

With 30 years of experience in the school district industry, our experts can develop or review your district's Comprehensive Annual Financial Report or Meritorious Budget Award application. Our team of dedicated consultants understand school finance operations and have the skills to develop innovative and workable solutions for almost any issue. We are the technical advisors and reviewers to ASBO International's Certificate of Excellence in Financial Reporting and the Meritorious Budget Award.

## **Home Depot**

### **Booth 517**

2455 Paces Ferry Rd.  
Atlanta, GA 30339

The Home Depot® is the world's largest home improvement specialty retailer. The Home Depot offers customized cost-reduction solutions that target and meet the evolving needs of professional customers involved in residential and commercial construction and facilities maintenance. Get everyday services and savings like dedicated account support, procurement options with real-time pricing and availability, job-site delivery, competitive product pricing, volume discounts, and rebate incentives through The Home Depot's Pro Xtra program. To find out more about our Pro Xtra Loyalty program visit [homedepot.com/ProXtra](http://homedepot.com/ProXtra) and get \$20 off your next \$200 purchase.

## **The Horace Mann Companies**

### **Booth 402**

1 Horace Mann Plaza  
Springfield, IL 62715



Horace Mann is an insurance and financial services company that is committed to helping educators achieve financial success. We help identify existing resources and savings opportunities to fund financial goals. By reducing or eliminating student loan debt, securing classroom funding, and finding savings through insurance program reviews, we work to maximize educators' hard-earned dollars and help develop a path to a successful financial future.

## **Horizon Software International**

### **Booth 317**

2915 Premier Pkwy., Ste. 300  
Duluth, GA 30097-5241

MyPaymentsPlus, by Horizon Software, allows parents to pay for school fees, activities, and exams online. Parents have the convenience of knowing what's available, and districts have an

easy way to manage and reconcile all school payments, leading to less cash handling, reduced labor costs, and more revenue for the district.

## **Institute of Child Nutrition**

### **Booth 319**

6 Jeanette Phillips Dr.  
University, MS 38677

The Institute of Child Nutrition provides no-cost resources to help school nutrition professionals meet USDA Professional Standards Regulations! Come by our booth for free resources.

## **InTouch Receipting**

### **Booth 435**

4415 Pacific Hwy. East  
Fife, WA 98424

Streamline and standardize your receipting from buildings to online with this much-appreciated, best-of-breed system. Cut costs and save time by integrating into existing financial, library, and SIS systems with real-time reporting. Improve internal financial controls and speed reconciling. Eliminates duplication of efforts and provides one-stop shopping.

## **Johnson Controls**

### **Booth 413**

507 E. Michigan St.  
Milwaukee, WI 53202



Johnson Controls is passionate about creating a comfortable, safe, and sustainable learning environment. We can improve every aspect of your district's operation, from modernizing the equipment and systems in your facilities to using technology that increases productivity. We can even help you fund improvements and ongoing maintenance through equipment finance agreements, performance contracts, and planned service agreements. School districts continue to be under pressure to deliver a quality education while balancing competitive and economic pressures.

This requires a partner who has the experience, values, resources, and desire to support the longer-term mission of the district and the broader community. Visit [www.johnsoncontrols.com/K12](http://www.johnsoncontrols.com/K12).

### **Keenan & Associates**

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#### **Booth 130**

2355 Crenshaw Blvd.  
Torrance, CA 90501

Keenan is a multi-state school employee benefits organization providing reduced pharmacy expenses for the employees and dependents of school districts throughout the United States. We help put money back in the classroom.

### **Kelly Educational Staffing**

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#### **Booth 622**

425 N. Andalusia Ave.  
Santa Rosa Beach, FL 32459

Kelly Educational Staffing® (KES®) is a specialty service of Kelly Services, Inc., a leader in workforce solutions for 70 years. KES is the largest provider of substitute teachers nationwide with a 100% success rate in improving district performance. KES proudly offers our partner districts unique value, unparalleled experience, and expertise.

### **KEV Group, Inc.**

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#### **Booth 206**

1167 Caledonia Rd.  
Toronto, ON M6A 2X1 Canada

KEV Group is the developer of the industry-leading school cash management solution, the School Cash Suite. The suite offers an end-to-end, web-based solution that tracks every dollar that comes in and out of schools. KEV's solution seamlessly integrates online payments, POS, and back-end school accounting to provide better financial visibility for the school district while reducing school bookkeepers' workload by half.

### **Keystone Purchasing Network**

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#### **Booth 439**

90 Lawton Ln.  
Milton, PA 17847

The Keystone Purchasing Network is a national purchasing cooperative saving members across the country time and money on purchasing many of the products and services that their schools need. Contracts cover athletic surfaces and lighting, classroom furniture and whiteboards, facilities equipment and supplies, and much more.

### **Key Benefit Concepts, LLC**

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#### **Booth 104**

200 West Summit Ave., Ste. 270  
Wales, WI 53183

Key Benefit Concepts, LLC (KBC) is an actuarial and employee benefits consulting firm. We provide unbiased counsel in the evaluation, design, communication and implementation of benefit programs. We specialize in actuarial services and valuations, particularly post-employment valuations including impacting and cash flow determinations for proposed plan changes.

### **KI**

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#### **Booth 530**

1330 Bellevue St.  
P.O. Box 8100  
Green Bay, WI 54302

KI understands the distinct needs of the educational environment. We design furniture that facilitates learning and interaction between students and staff. KI's innovative furniture solutions look to the future of education, including classrooms, powered tables, desks, cafeterias, and libraries, as well as seating for auditoriums, lounges, and common areas.

### **KONE Elevators & Escalators**

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#### **Booth 514**

One KONE Ct.  
Moline, IL 61265

KONE is one of the global leaders in the elevator and escalator industry. Founded in 1910, we have been committed to understanding the needs of our customers for over a century. We provide innovative and eco-efficient solutions for elevators, escalators, and automatic building doors. Our objective is to offer the best People Flow® experience by developing and delivering solutions that enable people to move smoothly, safely, comfortably, and without waiting in buildings in an increasingly urbanizing environment.

### **Konica Minolta Business Solutions**

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#### **Booth 521**

100 Williams Dr.  
Ramsey, NJ 07446

Konica Minolta aspires to provide innovative solutions such as 3D printers, interactive classroom technologies, and enterprise content management to the education sector, solving the many challenges posed by decreasing school budgets, the need for collaboration tools, and accountability. This allows our education customers to concentrate on their core competency: teaching.

### **Lincoln Learning Solutions**

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#### **Booth 702**

294 Massachusetts Ave.  
Rochester, PA 15074

### **McCarthy Building Companies, Inc.**

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#### **Booth 123**

6225 N. 24th St., Ste. 200  
Phoenix, AZ 85016-2037

As one of the leading education contractors in the United States, we pride ourselves on making sure the schools of today meet tomorrow's needs. As your partner, we balance budget constraints with the need to

be scalable, adaptable, and transformational for the students you serve and the educators who teach them.

## Motorola Solutions

### Booth 213

224 S. Michigan Ave.  
Chicago, IL 60604

Motorola Solutions ([www.motorolasolutions.com](http://www.motorolasolutions.com)) provides mission-critical communication products and services to police, firefighters, schools, and commercial customers around the world. Our innovations, products, and services play essential roles in people's lives by connecting them to seamless communication networks, applications, and services, providing them with real-time information and intuitive, nearly indestructible handheld devices. Motorola Solutions helps people be their best in the moments that matter. For more information, visit [www.motorolasolutions.com](http://www.motorolasolutions.com).

## MyBudgetFile

### Booth 313

1805 Third Ave. South, No.301  
Minneapolis, MN 55404



MyBudgetFile is a simple, powerful, web-based budgeting and performance planning tool for K-12 school districts. Developed by a former school business official, it is designed to help you create better, more accurate budgets in less time.

## National Insurance Services of WI, Inc.

### Booth 103

250 S. Executive Dr., Ste. 300  
Brookfield, WI 53005

NIS is a full benefit consultant providing health, dental, life, disability, and vision insurance, as well as HRAs OPEB trusts (fixed or variable), special pay plans and flexible spending accounts.

## National IPA

### Booth 233

2555 Meridian Blvd., Ste. 300  
Franklin, TN 37067

National IPA is redefining the future of cooperative purchasing. The cooperative purchasing organization is dedicated to serving public agencies and educational institutions nationwide. All cooperative agreements have been competitively solicited and publicly awarded by a public agency/governmental entity. For more information, visit [www.nationalipa.org](http://www.nationalipa.org).

## National Joint Powers Alliance

### Booth 322

P.O. Box 219  
202 12th St., NE  
Staples, MN 56479

National Joint Powers Alliance® (NJPA) is a public agency that creates national cooperative contract purchasing solutions on behalf of over 50,000 member entities, including all government, education, and nonprofit agencies in the United States and in Canada. There is no cost, obligation, or liability to join or participate in NJPA's contract purchasing program.

## National Office Furniture

### Booth 235

1610 Royal St.  
Jasper, IN 47549

National Office Furniture is passionate about delivering exceptional products and personal experiences. National provides furniture solutions for spaces where people work, relax, heal, and learn. Dedicated to delivering quality, style, sustainability, and affordability, National creates spaces where people want to be.

## National Cooperative Purchasing Alliance (NCPA)

### Booth 606

P.O. Box 701273  
Houston, TX 77270

NCPA is a leading national government purchasing cooperative working to reduce the cost of goods and services for public agencies. Public agencies can purchase directly from our competitively bid contracts instead of going through the bid process on their own.

## Office Depot, Inc.

### Booth 303

6600 N. Military Trail  
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From technology to professional development, Office Depot provides a one-stop resource for schools.

## Ohyama Lights

### Booth 441

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Pleasant Prairie, WI 53158

Ohyama Lights is a division of Iris Ohyama, a global manufacturer of over 14,000 household products. Iris Ohyama originated in 1958 and expanded into the global market in 1996 with its IRIS USA facility in Wisconsin. Today, Iris Ohyama is one of the largest manufacturers of LED lighting products in Japan.

## The OMNI Group

### Booth 324

1099 Jay St., Bldg. F  
Rochester, NY 14611

OMNI is a national, independent 403b/457b third-party administrator providing compliance, remittance, and customer support services, including access to in-house legal counsel and IRS audit support—all at no cost through OMNI's P3 Exclusive Program.

## OSC WORLD

### Booth 115

170 Earle Ave.  
Wantagh, NY 11563

Digital Fly Social Media Awareness software empowers school district and college administrators by identifying potential threats made against students and staff members through social media monitoring and alerts. Digital Fly can also provide a perspective on any hot topic, improving communication among parents and schools.

## PaySchools

### Booth 422

12835 E. Arapahoe Rd., T2-500  
Centennial, CO 80112

## PEPPM

### Booth 438

90 Lawton Ln.  
Milton, PA 17847

PEPPM is a national technology cooperative purchasing program administered by the Central Susquehanna Intermediate Unit (CSIU), a political subdivision of the Commonwealth of Pennsylvania. PEPPM aggregates buyers and demand across the country to get the lowest prices while also saving time and money on the bidding process. Visit [www.peppm.org](http://www.peppm.org).

## PMA Financial Network, Inc.

### Booth 323

2135 City Gate Ln., 7th Floor  
Naperville, IL 60563

PMA Financial Network, Inc., has been a leading provider of financial services since 1984 and currently provides a diverse lineup of customized financial solutions to over 2,400 school districts and other public entities in 11 states. With services ranging from investment advisory work through Prudent Man Advisors, Inc., to public finance work with PMA Securities, Inc., among others, the PMA companies are focused on achieving long-term financial success for their clients. Visit [www.pmanetwork.com](http://www.pmanetwork.com).

## ProcureSource

### Booth 202

3520 Sugarloaf Pkwy., Ste. F03-8  
Urbana, MD 21704

ProcureSource was created with one goal: to make cooperative purchasing easier. Before the RFP, start with ProcureSource! Search cooperative contracts, conduct due diligence, and review contract documents. One location. One format. Hundreds of contracts and the information to determine what is best for your organization.

## The Professional Group Public Consulting, Inc.

### Booth 619

P.O. Box 30850  
Mesa, AZ 85275

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## The Public Group, LLC

### Booth 620

P.O. Box 50676  
Provo, UT 84605

We provide online auctions, e-procurement, and contract management software for thousands of government agencies across the country.

## Public Trust Advisors, LLC

### Booth 114

717 17th St., Ste. 1805  
Denver, CO 80202

## PublicSchoolWORKS

### Booth 330

2010 Madison Rd.  
Cincinnati, OH 45208

Risk management solution that reduces risk and drives down the related costs associated with injuries on school campuses. The solution includes systems, content, and people resources

to implement, manage, and sustain a comprehensive safety compliance program. Smarter Technology! Smarter Schools!

## Questica Budget

### Booth 607

980 Fraser Dr., Ste. 105  
Burlington, ON L7P 5P5 Canada

Questica's multi-user school budgeting software simplifies the assembly, tracking, analyzing, and reporting of operating, salary, and capital budgets. Available in the cloud or on your servers, Questica Budget will integrate seamlessly with your financial and HR systems. Easily perform fund gap analysis, FTE, monthly revenue and expenses, and budget vs. actual reports.

## RevTrak, Inc

### Booth 119

9201 E Bloomington Fwy., Ste. RR  
Minneapolis, MN 55420

Create a Cashless Campus using RevTrak. We create and maintain a personalized web store for you so you can accept any type of fee payment online in one central, secure location. Our online payment system was created specifically for school districts, providing reports for easy reconciling and increased internal controls

## Ricoh USA, Inc.

### Booth 507

503 Carr Rd., Ste.100  
Wilmington, DE 19809



Ricoh is a global technology company and leader in information mobility for today's dynamic classroom environment. With services and solutions designed specifically for education, Ricoh helps students, teachers, and faculty capture, transform, and manage information more effectively. Let Ricoh show you how we can help your district provide more to your students for less.

## **Rowman & Littlefield**

### **Booth 138**

4501 Forbes Blvd.  
Lanham, MD 20706

Rowman & Littlefield is a preeminent publisher of critically acclaimed general interest and scholarly books in the social sciences and humanities as well as college textbooks, professional titles, journals, and award-winning reference titles.

## **SafeStop, Inc.**

### **Booth 704**

885 Island Park Dr., Ste. 210  
Charleston, SC 29492

SafeStop is the mobile app that connects parents and school officials to the vehicles transporting their students. Our innovative app features (predictive arrival times, a real-time bus locator, student scanning systems, and more) give parents peace of mind and help reduce calls to your office.

## **School Health Corporation**

### **Booth 216**

865 Muirfield Dr.  
Hanover Park, IL

We are a national, full-service provider of health supplies and services for health professionals from pre-school to college. Our offering includes health supplies, sports medicine equipment, special needs aids, and early childhood products. Our promise is to deliver an exceptional customer experience so you can support the health of your students and enable them to learn and perform to the best of their abilities.

## **School Outfitters**

### **Booth 712**

3736 Regent Ave.  
Cincinnati, OH 45212

Our easy-to-use website and custom support make it simple to create the learning space you need. You'll find everything from classic products to the most recent classroom innovations—plus hundreds of top school furniture brands and School Outfitters exclusives.

## **SchoolDude**

### **Booth 214**

11000 Regency Pkwy., Ste. 110  
Cary, NC 27518

SchoolDude provides cloud-based operations and facilities management software to over 6,000 districts, schools, and universities. We help both small and large institutions save time and money by managing operations effectively and efficiently. Our solutions help you manage maintenance, inventory usage, future capital needs, after-hours events, energy usage, IT assets, and safety and security.

## **Security Benefit**

### **Booth 412**

555 Jackson St.  
Denver, CO 80206



Security Benefit is proud to be an ASBO Strategic Partner and we applaud your commitment to your district. Join us during the Clinic Tables to learn about special options that can help increase participation in your district's 403(b) retirement plan and potentially solve some budget issues with those early retirements. At the 403(b) panel session on Saturday at 12:30 pm, learn through a fun Jeopardy game format about financial best management practices for your school district's retirement plans and visit us at Booth 412 to explore other ways Security Benefit can help your employees To and Through Retirement.

## **Seon**

### **Booth 616**

#111-3B Burbidge St.  
Coquitlam, BC V3K 7B2 Canada

Seon is ranked as the world's #1 provider of innovative mobile video surveillance and fleet management solutions for the school bus industry (IHS Group Research, 2007-2015). Seon's products help transportation managers plan smarter routes, track real-time fleet performance, and

ensure on-board safety and security from one web-based platform.  
[www.seon.com](http://www.seon.com)

## **Siemens Building Technologies**

### **Booth 113**

1000 Deerfield Pkwy.  
Buffalo Grove, IL 60089

## **Skyward, Inc.**

### **Booth 223**

5233 Coye Dr.  
Stevens Point, WI 54481

Skyward has been helping school districts and municipalities improve outcomes, reduce costs, and achieve success since 1980. Skyward's SIS and ERP solutions are used by more than 1,900 public sector organizations worldwide, from small entities to statewide implementations supporting millions of stakeholders.

## **Sodexo**

### **Booth 107**

283 Cranes Roost Blvd., Ste. 260  
Altamonte Springs, FL 32701

Sodexo, leader of Quality of Daily Life Solutions, helps schools improve the learning environment by focusing on student well-being and achievement. From nutritious school meals to clean classrooms to safe playgrounds and more, Sodexo enhances every student's ability to learn and grow. For more information, visit [www.sodexousa.com](http://www.sodexousa.com).

## **SSC**

### **Booth 713**

1845 Midpark Rd., Ste. 201  
Knoxville, TN 37921

SSC partners with educational institutions to further the success and well-being of students, staff, and faculty by delivering quality facilities programs. As a trusted, specialized outsourcing provider of custodial, grounds, and maintenance services, students and staff flourish in improved surroundings, while you focus on your core objective: educating our future.

## Staples Advantage

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### Booth 612

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## Steelcase, Inc.

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### Booth 212

901 44th St. SE  
Grand Rapids, MI 49508

Steelcase is the global leader in furnishing great experiences in work and learning environments, inspired by insights from serving the world's leading organizations. Those insights can help organizations achieve a higher level of performance by creating places that attract and engage talented people. Our goal is to help organizations create spaces that amplify how they work and learn to unlock human promise wherever work and learning happen.

## Steele Benefits Services

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### Booth 320

9020 Crawfordsville Rd.  
Indianapolis, IN 46234

Steele Benefit Services' suite of services includes open enrollment and communication, benefit software configuration, ACA compliance and reporting, production of data feeds, and perpetual enrollment services. Steele is successful at administering benefits and educating employees about their benefits. Steele is located in Indianapolis and employs four former school business officials.

## SUBWAY

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### Booth 731

325 Bic Dr.  
Milford, CT 06461

Whether the school cafeteria is self-operated or run by a food service contractor, the SUBWAY® School Lunch Program provides you with flexibility to choose the program that is best for you. There is no franchise fee with the School Lunch Program. If you are considering a concept that is popular with students, the SUBWAY® brand is the one for you. The SUBWAY School Lunch Program has three options available. Visit Booth 731 to find out more.

## SunGard K-12 Education

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### Booth 419

3 W. Broad St.  
Bethlehem, PA 18018

SunGard® K-12, district success specialists, offers software solutions that serve one out of six students nationally for student information, curriculum and assessment, special education, and financial and human resource management. Experience the benefits of working with a single vendor and a fully integrated solution.

## TekVisions, Inc.

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### Booth 215

40970 Anza Rd.  
Temecula, CA 92592

## TIAA

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### Booth 132

730 Third Ave.  
New York, NY 10017

TIAA is a full-service financial services company serving the needs of those working in the academic, research, medical, cultural, religious, and governmental fields. We provide advice and guidance, and offer products that provide lifetime income options. We are mission-driven and committed to helping our more than 5 million participants plan for their financial well-being.

## TimeClock Plus

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### Booth 631

1 TimeClock Dr.  
San Angelo, TX 76904

TimeClock Plus is a leading provider of time and attendance and workforce management solutions for K-12 organizations.

## TIPS

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### Booth 307

4845 U.S. Hwy. 271 North  
Pittsburg, TX 75686

TIPS is a purchasing cooperative serving public and private school districts, colleges, universities, state, county and city municipalities, nonprofit organizations, and other entities with legislated purchasing/bidding requirements. TIPS specializes in the management of high-quality cooperative procurement solutions to reduce costs and mitigate risks! TIPS, where "purchasing is made personal."

## TRA, Inc.

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### Booth 518

5027 Wrightsville Ave.  
Wilmington, DE 28403

SchoolFunds Online is a proven cloud/web-based school activity fund accounting software. We serve over 7,000 schools in the K-12 public school market. With 28+ years of experience successfully implementing our product, we pride ourselves on a smooth and easy implementation with a face-to-face user training.

## Transfinder

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### Booth 706

440 State St.  
Schenectady, NY 12305

Transfinder is a global logistics software developer providing intelligent solutions to municipalities, schools, and adult care facilities. Transfinder, an *Inc.* magazine "fastest-growing company," has satellite offices in Austin, Texas and Shanghai, China. The company develops routing, scheduling, and

preventive maintenance solutions for optimal transportation logistics.

## **Tremco**

### **Booth 231**

3735 Green Rd.  
Beachwood, OH 44122

Tremco Roofing and Building Maintenance has been delivering roofing and weatherproofing solutions since 1928. Innovative restoration options offer long-term warranties and can save over half the cost of a traditional replacement. Visit Booth 231 or [www.tremcoinc.com](http://www.tremcoinc.com) to learn more about our compliantly bid procurement options for all our solutions.

## **Tyler Technologies**

### **Booth 331**

1 Tyer Dr.  
Yarmouth, ME 04096



Tyler Technologies provides integrated software solutions that maximize districtwide efficiency and encourage best practices in school business management. Tyler empowers districts of all sizes with comprehensive solutions for financial management, human resources, transportation, student information, and data analytics to effectively manage data and make informed decisions.

## **U.S. Communities**

### **Booth 503**

2999 Oak Rd., Ste. 710  
Walnut Creek, CA 94597



Sponsored by ASBO International, U.S. Communities is the leading government purchasing cooperative that provides school districts with cost savings for products and services that address the unique needs of schools. From science and athletic supplies to building maintenance, technology, food services, and more, schools can

access our suppliers' best overall government pricing while reducing the administrative costs of competitive bids. Registration is free and there are no commitments or minimum orders. Visit [www.uscommunities.org](http://www.uscommunities.org) to get started!

## **VALIC**

### **Booth 302**

2929 Allen Pkwy., L12-20  
Houston, TX 77019



VALIC provides customized retirement plan solutions that are tailored to your institution's needs. We offer your employees a personalized approach to retirement planning, providing solutions with a flexible mix of services, technology, and support. Serving more than 20,000 groups, VALIC is a leading plan provider for K-12.

## **Virco, Inc.**

### **Booth 403**

2027 Harpers Way  
Torrance, CA 90501



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## **Voya Financial®**

### **Booth 603**

One Orange Way B3S  
Windsor, CT 06095



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to get ready to retire better. With a clear mission to make a secure financial future possible—one person, one family, one institution at a time—Voya's vision is to be America's Retirement Company™.

## **Weidenhammer Systems Corp.**

### **Booth 204**

935 Berkshire Blvd.  
Wyomissing, PA 19610

Weidenhammer is an established education management software leader serving the information technology needs of more than 1,500 school districts in 40 states since 1978. With nearly 200 IT professionals in six locations throughout the United States, Weidenhammer is structured to align the requirements of any school district with the best-suited information technology applications, including the alio financial management and human resources system.

## **Wilkes University**

### **Booth 420**

84 W. South St.  
Wilkes Barre, PA 18766

Wilkes University offers a master's degree in school business leadership, Ed.D. in educational leadership, and other innovative, practical degree programs to improve your career and transform schools.

## **willSub/PCMI Staffing Services**

### **Booth 703**

140 Kent St.  
P.O. Box 516  
Portland, MI 48875

PCMI provides a complete contracting solution in a single vendor, including our proprietary, patent-pending, software program willSub®. Features include payroll processing and district information tracking. Combining willSub and educational contract employment, we are able to provide a complete solution in a way no other company can!

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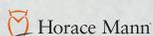
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