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# PROGRAM BOOK

*Content, Connections, Conversation*

2012 Annual Meeting & Expo  
Phoenix, Arizona  
October 12-15



Association of School Business  
Officials International

ASBO International  
11401 North Shore Drive  
Reston, VA 20190-4200

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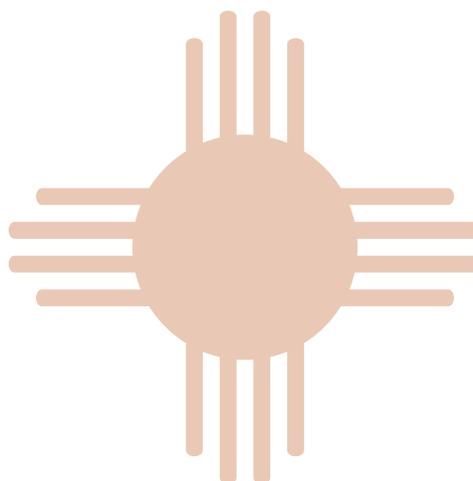
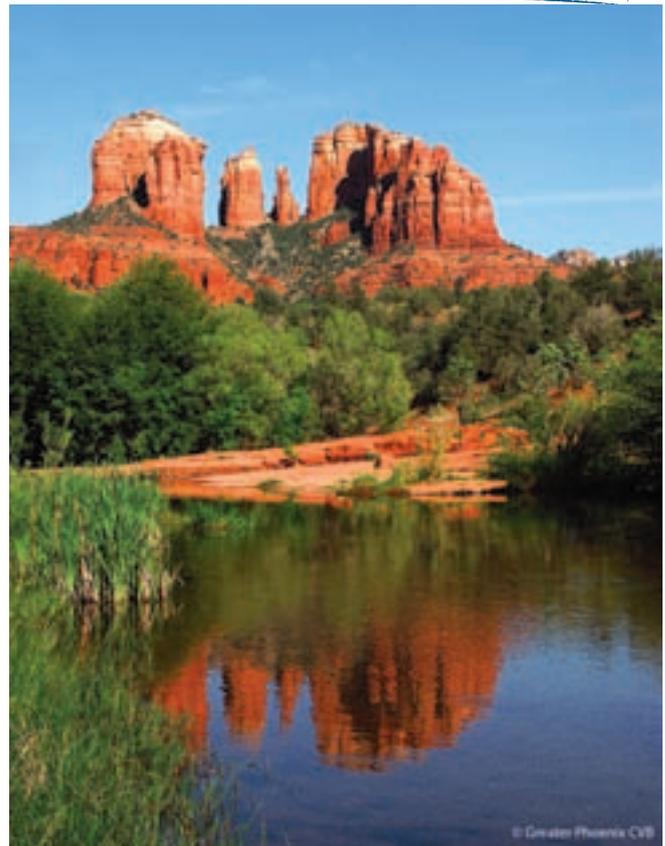
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# GENERAL INFORMATION

## Registration Hours

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

## Exhibit Hall Hours

Saturday: 3:00 p.m. – 6:00 p.m.  
Sunday: 10:30 a.m. – 2:15 p.m.

## Be in the Know

For the latest information on daily AM&E activities, visit the ASBO International Annual Meeting & Expo registration area located on the Lower Level of the Convention Center's North Building.

ASBO International staff will be wearing blue shirts and badges with the ASBO logo, and will happily assist you.

## Complimentary Wireless Internet

The Phoenix Convention Center provides complimentary Wi-Fi in the Metro Marche, West Atrium, and the South Building lobbies of the Ballroom and Halls F and G. Grab a comfy seat, check email, update your Live Learning Center Itinerary Planner, and peruse the electronic Annual Meeting Daily.

## Badges

An official 2012 AM&E badge is required for admission to all functions, including General Sessions, educational sessions, Workshops and Seminars, the Exhibit Hall, and social events. Your badge is also your ticket to earn CPE credits, so be sure to have your badge scanned when entering the room for a CPE-bearing session.

## ASBO Booth, Bookstore, and Comfort Zone

See page 71 for details about these and other Exhibit Hall highlights.

## Live (In-Person) Chat Room

Here's your chance to claim a meeting room and conduct a session of your choosing. Room 127C is set informally to provide for a more intimate, in-depth presentation format where presenters and attendees can engage in a robust Q&A session or take a deeper dive into topics of interest. Use ASBO ConnectEd or ASBO social media sites, Twitter and Facebook, to put out the call for participants to join you for an on-site chat. Alternatively, jot down the topic you'd like to discuss and a discussion day and time on the dry erase board outside the room. Check back often to see what SBOs are buzzing about.

## Leadership Lounge

Linger in the Leadership Lounge, gather information about ASBO's recognition programs, and check out job postings. The Leadership Lounge is located on the first floor of the Convention Center along the Washington Street windows.

## Deep Dig Sessions

**New this year!** These two-hour Discussion Groups were designed to provide ample time to dig deep into the topic.

## Session Recordings

Can't decide which session to attend? No problem! Unless otherwise noted, all AM&E Discussion Groups and Deep Dig Sessions will be recorded and made available to conference registrants on ASBO's Live Learning Center.

## Some Like It Hot

Help yourself to unlimited ribbons at the ribbon bar located across from registration. The city of Phoenix is known for its Southwestern fare. Visit TIAA-CREF's Booth 434 to "vote" for your preferred salsa type—mild, medium, or hot—by picking up a special spice intensity ribbon. Votes will be tallied at the close of the Exhibit Hall and ASBO members' preferred level of heat will be revealed at the Closing General Session.

*Sponsored by TIAA-CREF*

## ASBO Annual Meetings = Pins

Long-time ASBO members know that part of the history and culture of our association is the pin trading that goes on at every Annual Meeting. This year, we'll add two pins to the ASBO chronicles and your collection.

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## Refillable Water Bottles

450 years. That's how long it takes a plastic bottle to decompose. Now, imagine 90,000 of those bottles just from a meeting like ours. To help minimize our environmental impact, please use the refillable water bottle provided with your registration materials. Watch for water-filling stations around the Convention Center.

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## First Aid

In the event of a medical emergency, please call 602.262.7271 or dial extension 85 from any Convention Center house phone. You can also ask any uniformed Convention Center employee with a radio to assist you.

**Programming Note:** The ASBO International 2012 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.

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## STRATEGIC PARTNERS



Equipment for Educators

## EVENT PARTNERS



# SCHEDULE OF EVENTS

\$ = Additional Fee, IO = Invitation Only

## Friday, October 12, 2012

6:00 a.m. - 10:00 a.m.	Hot Air Ballooning (\$)
7:00 a.m. - 6:00 p.m.	Registration Open
8:00 a.m. - 12:00 p.m.	Hummer Desert Adventure (\$)
8:00 a.m. - 5:00 p.m.	Workshops and Seminars
8:00 a.m. - TBD	Optional Golf Outing (\$)
8:00 a.m. - 5:00 p.m.	Sedona/Oak Creek Excursion (\$)
11:00 a.m. - 3:15 p.m.	Bridges to the Future Scholarship Workshop (IO)
1:00 p.m. - 2:00 p.m.	Orientation Workshop—Great for Newcomers!
1:00 p.m. - 5:00 p.m.	Architectural Digest—Frank Lloyd Wright's Desert Masterpiece (\$)
2:30 p.m. - 4:00 p.m.	ASBO Choir Rehearsal
6:00 p.m. - 7:30 p.m.	Welcome Reception

## Saturday, October 13, 2012

7:00 a.m. - 4:00 p.m.	Registration Open
7:30 a.m. - 8:30 a.m.	ASBO Choir Rehearsal
8:30 a.m. - 10:30 a.m.	Opening General Session—Richard Gerver
10:45 a.m. - 1:30 p.m.	Affiliate Executive Directors Meeting and Luncheon (IO)
11:00 a.m. - 12:00 p.m.	Discussion Groups
11:00 a.m. - 12:00 p.m.	Guest Program: Book Club— <i>The Glass Castle</i> by Jeannette Walls
12:00 p.m. - 1:30 p.m.	MBA Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:15 p.m. - 1:30 p.m.	Committees Meeting and Luncheon (IO)
12:45 p.m. - 2:45 p.m.	Discussion Groups
3:00 p.m. - 6:00 p.m.	Exhibit Hall Opening Reception
3:30 p.m. - 6:00 p.m.	Information Technology Showcase
8:00 p.m. - 11:00 p.m.	Joint Affiliate Reception: Alice Cooperstown

## Sunday, October 14, 2012

7:00 a.m. - 4:00 p.m.	Registration Open
8:00 a.m. - 10:15 a.m.	Discussion Groups
10:30 a.m. - 11:30 a.m.	Open Bylaws Meeting
10:30 a.m. - 2:15 p.m.	Exhibit Hall Open
10:30 a.m. - 2:15 p.m.	Information Technology Showcase
10:45 a.m. - 12:00 p.m.	Clinic Tables
11:30 a.m. - 1:00 p.m.	COE Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:00 p.m. - 1:00 p.m.	Lunch in the Exhibit Hall
1:15 p.m. - 2:00 p.m.	COE Award Recipients Reception (IO)
2:15 p.m. - 3:15 p.m.	Eagle Award Recipients Reception (IO)
2:15 p.m. - 3:30 p.m.	Gold Mine Sessions
2:30 p.m. - 4:45 p.m.	Discussion Groups
7:00 p.m. - 11:00 p.m.	Arizona ASBO Reception: Rawhide at Wild Horse Pass

## Monday, October 15, 2012

7:00 a.m. - 10:00 a.m.	Registration Open
8:00 a.m. - 10:15 a.m.	Discussion Groups
10:30 a.m. - 12:30 p.m.	Closing General Session—Tom Flick
1:00 p.m. - 5:00 p.m.	Desert Horseback Riding (\$)
1:00 p.m. - 5:00 p.m.	The Heard Museum and Desert Botanical Gardens Tour (\$)
1:30 p.m. - 5:00 p.m.	Positive Impact Program: St. Vincent de Paul Home Makeover

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# WORKSHOPS AND SEMINARS

Explore critical school business management issues in depth at the Workshops and Seminars.

Visit [www.asbointl.org/AnnualMeeting/Workshops](http://www.asbointl.org/AnnualMeeting/Workshops) for session descriptions and to find out which sessions offer CEU and CPE credit. Remember, your signature is your ticket to earn credits. Please make sure to sign the roster when you enter and exit the session room.

## Friday, October 12

### Workshops

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### Full-Day Workshop

#### 8:00 a.m. - 5:00 p.m.

Workshop 1  
Secrets to Successful Labor Negotiations Room: 121A

### Two-Hour Workshops

#### 8:00 a.m. - 10:00 a.m.

Workshop 2  
Update on the Law of Special Education Room: 121B

Workshop 3  
Turning SIS/LMS Data into Action Room: 121C

#### 10:15 a.m. - 12:15 p.m.

Workshop 4  
Educating Elected Officials on the Audit Room: 121B

Workshop 5  
Is the Frenzy to Save Energy and Go Green Working? Room: 121C

#### 1:00 p.m. - 3:00 p.m.

Workshop 6  
Making Your Way in a Multi-Generational World Room: 121B

Workshop 7  
Technology, the Law, and Schools Room: 121C

### Four-Hour Workshops

#### 8:00 a.m. - 12:00 p.m.

Workshop 8  
Health Care Reform—Comply Today and Plan for the Future Room: 122C

Workshop 9  
School Tour of Paradise Valley Unified SD Room: 125A

Workshop 10  
Grant Writing: Basic Tool Box Room: 122A

#### 1:00 p.m. - 5:00 p.m.

Workshop 11  
Internal Controls to Reduce Fraud in Booster Clubs and PTOs Room: 122A

Workshop 12  
Best Practices for Staff Efficiency Studies Room: 122B

### Program Seminars

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### Full-Day Program Seminar

#### 8:00 a.m. - 5:00 p.m.

Seminar 13  
Skills Refresher for ASBO's SFO® Certification Exam Room: 125B

### Four-Hour Program Seminars

#### 8:00 a.m. - 12:00 p.m.

Seminar 14  
How to Prepare a Comprehensive Annual Financial Report Room: 122B

#### 1:00 p.m. - 5:00 p.m.

Seminar 15  
How to Create an Award-Winning Budget Room: 125A



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<sup>1</sup> Source: LIMRA, Not-for-Profit Market Survey, second-quarter 2012. Average assets per participant based on full-service business. Based on a survey of 30 companies; TIAA-CREF assets under management by market segment estimated; segment breakdown based on 20 companies representing 97% of the total reported full service assets. Market share ranking does not reflect current investment performance. TIAA-CREF products may be subject to market and other risk factors. See the applicable product literature, or visit [tiaa-cref.org](http://tiaa-cref.org) for details. TIAA-CREF Individual & Institutional Services, LLC and Teachers Personal Investors Services, Inc., members FINRA, distribute securities products. Annuity contracts and certificates are issued by Teachers Insurance and Annuity Association (TIAA) and College Retirement Equities Fund (CREF), New York, NY. C50224 © 2012 Teachers Insurance and Annuity Association-College Retirement Equities Fund (TIAA-CREF), New York, NY 10017.



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## SESSION TRACKS



### Educational Enterprise

Focuses on public policy, intergovernmental relations, and the legal frameworks that affect schools.



### Financial Resource Management

Provides expertise on the effects of financial management on budgeting, financial planning and reporting, accounting, investments, debt management, and business technology.



### Human Resource Management

Addresses personnel management concepts and leadership styles, including personnel and benefits administration, professional development, labor relations, and employment agreements.



### Facility Management

Focuses on the latest in school planning and construction, school maintenance, and the environmental aspects of school operations.



### Property Acquisition and Management

Focuses on purchasing, supply and fixed-asset management, and real estate management.



### Information Management

Deals with critical information on strategic planning, instructional support programs, and management information systems.



### Ancillary Services

Addresses issues involving transportation, risk management, and food service.



### International Aspects

Focuses on global school business management issues.



### Leadership Development

Focuses on aspects of developing leadership skills in the field of school business management.



### Social Responsibility

Addresses a principle that integrates social, environmental, and financial successes into operations and policies, including building green school facilities, purchasing local produce for the cafeteria, creating volunteer tutoring programs, encouraging quality of life for your employees, and explaining your budget to your community.

## CPE Continuing Professional Education

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



### CPE Information

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. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org)

The instructional delivery method for Workshops and Seminars is Group-Live and no prerequisites or advance preparations are necessary for participation, unless otherwise indicated. ASBO will offer CPE credit for select discussion group sessions at the Annual Meeting using the Group-Live instructional delivery method. Visit the ASBO website at [www.asbointl.org/Annual Meeting](http://www.asbointl.org/AnnualMeeting) for more information about these sessions.

To receive CPE credit for select discussion groups, attendees must verify attendance by having their badge scanned when entering the room and by completing the session evaluation online after the meeting. CPE certificates can be printed at your home computer after completing the online evaluation.

### Complaint Resolution and Refund Policy

For more information regarding administrative policies, such as complaints and refunds, contact our office at ASBO International, 11401 North Shore Drive, Reston, VA, 20190 or call 866.682.2729 x7080. ASBO International reserves the right to cancel a session due to low enrollment.

## DAILY SCHEDULE: FRIDAY - SATURDAY

### Friday, October 12

**6:00 a.m. – 10:00 a.m.**

#### **Hot Air Ballooning**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

**7:00 a.m. – 6:00 p.m.**

#### **Registration**

North Building, Lower Level

**8:00 a.m. – 12:00 p.m.**

#### **Hummer Desert Adventure**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

**8:00 a.m. – 5:00 p.m.**

#### **Workshops and Seminars**

(See page 10 for complete listing.)

**8:00 a.m. – 5:00 p.m.**

#### **Sedona/Oak Creek Excursion**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

**11:00 a.m. – 3:15 p.m.**

#### **Bridges to the Future Scholarship Workshop**

By Invitation Only  
Room: 129A

**1:00 p.m. – 2:00 p.m.**

**Orientation**—All welcome; newcomers encouraged to attend

Room: 124AB

**1:00 p.m. – 5:00 p.m.**

#### **Architectural Digest—Frank Lloyd Wright's Desert Masterpiece**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

**2:30 p.m. – 4:00 p.m.**

#### **ASBO Choir Rehearsal**

Room: 132B

**6:00 p.m. – 7:30 p.m.**

#### **Welcome Reception**

Sheraton Phoenix Downtown Hotel, Phoenix Ballroom,  
Third Floor

### Saturday, October 13

**7:00 a.m. – 4:00 p.m.**

#### **Registration**

North Building, Lower Level

**7:00 a.m. – 8:00 a.m.**

#### **TASBO Breakfast**

By Invitation Only  
Sheraton Phoenix Downtown Hotel, Paradise Valley,  
Second Floor

**7:30 a.m. – 8:30 a.m.**

#### **ASBO Choir Rehearsal**

Room: 132B

**7:45 a.m. – 8:30 a.m.**

#### **General Session Coffee Break**

North Ballroom Foyer (Third Street Side)  
*Sponsored by Tyler Technologies*

**8:30 a.m. – 10:30 a.m.**

#### **Opening General Session**

Room: North Ballroom CD

#### **Welcome to Phoenix**

Brian L. Mee, RSBA, SFO  
President, ASBO International

#### **ASBO International Choir**

Director: Michael A. Jacoby, Ed.D., Illinois ASBO

#### **Business Meeting**

Brian L. Mee, RSBA, SFO

#### **Presentation of the 2012 ASBO International Eagle Awards**

John D. Musso, CAE, RSBA  
Executive Director, ASBO International

Bernadette Mitchell

Vice President, AXA Equitable

#### **Introduction of Speaker**

Richard R. Schulenburg  
Vice President National Sales,  
The Horace Mann Companies



#### **Richard Gerver:**

#### **Leading a Culture of Innovation**

A celebrated educator known for his work in leading a school on the brink of closure to becoming one of the most innovative in the world, Richard Gerver will share his unique insights on how leadership and innovation will serve children's

## DAILY SCHEDULE: SATURDAY

education needs in the 21st Century world. An internationally recognized speaker and author of the global best-selling book *Creating Tomorrow's Schools Today*, Gerver has helped shape the education policy of governments around the world and has helped some of the world's largest organizations understand the visioning needed to overcome the emotional uncertainty caused by the current economic crisis.

Sponsored by *The Horace Mann Companies*

**10:45 a.m. – 1:30 p.m.**

### Affiliate Executive Directors Meeting and Luncheon

By Invitation Only

Sheraton Phoenix Downtown Hotel, Encanto B, Second Floor

**11:00 a.m. – 12:00 p.m.**

### Guest Program

Book Club: *The Glass Castle*

North Ballroom Foyer (Monroe Street Side)

Join us for a lively discussion of Jeannette Walls' remarkable memoir, *The Glass Castle*, a *New York Times* best-seller and winner of the Christopher Award, the American Library Association's Alex Award, and the Books for Better Living Award. Set in Phoenix, *The Glass Castle* is a moving story of resilience and redemption, and a revelatory look into a family at once deeply dysfunctional and uniquely vibrant.

**11:00 a.m. - 12:00 p.m.**

### Live (In-Person) Chat

The Superintendent as CEO

Room: 127C

**Facilitator:** Rick Gay, Purchasing Manager, Baltimore County Public Schools, Timonium, MD

## DISCUSSION GROUPS (1-Hour)

**11:00 a.m. – 12:00 p.m.**

### Be Ready for the Auditor: How to Document Your Internal Controls and Compliance Requirements, DG733



**CPE**

Room: 121A

CPEs: 1.0

Program Level: Basic

Field of Study: Auditing (Governmental)

Program Prerequisites: None

Advance Preparation: None

Tweet ASBO: @asbointl #AME12

**Welcome** to ASBO International's 2012 Annual Meeting & Expo in Phoenix. Virco's long-standing support for school business officials includes serving as an ASBO International Corporate Strategic Partner, as well as sponsoring the ASBO Pinnacle Awards for 20 consecutive years. We invite you to stop by Virco's Booth 401 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.



Equipment for Educators

This session will present practical ways to document federal grant program internal controls and compliance requirements in order to ensure compliance and be prepared for the auditor.

**Learning Objectives:** 1. Identify the federal program internal controls. 2. Discuss efficient methods of documenting the internal controls. 3. Explain common federal program compliance requirements. 4. Discuss efficient methods of meeting and documenting the compliance requirements.

**Speakers:** Gary Heinfeld, Founding Partner, Heinfeld, Meech & Co., PC, Tucson, AZ; Phillip W. Saurman, Shareholder - Government Services, Hungerford, Aldrin, Nichols and Carter, PC, Grand Rapids, MI

**11:00 a.m. – 12:00 p.m.**

### Boot Camp to Raise the Bar for Effective and Professional School Business Officials, DG103



Room: 122B

NMASBO piloted a week-long boot camp for school business office personnel that provided total immersion into the world of school finance and politics. With time spent away from cell phones and the daily fires, the participants quickly developed a sense of camaraderie as well as survival skills needed in a school district. Learn about this strategy to enhance professional development and strengthen networking.

**Speakers:** Caron Bryant Snow, Retired School Business Official, Instructor/Consultant, Alto, NM; Leslie Smith, Retired School Business Official, Instructor/Consultant, Roswell, NM

## DAILY SCHEDULE: SATURDAY

**11:00 a.m. – 12:00 p.m.**

### **Winning Before You Start: Engaging the Community in Financial Planning, DG153**



**CPE**

Room: 122C

CPEs: 1.0

Program Level: Basic

Field of Study: Social Environment of Business

Program Prerequisites: None

Advance Preparation: None

More than ever, it is important to develop a long-range plan for school district goals and finances and build solid and robust support from the community. This session is about combining those two things. The presenters will discuss best practices and real-world examples for engaging the community in district planning in a manner that builds support for important district initiatives.

**Learning Objectives:** 1. Identify high-touch ways to translate and communicate budget and financial information to the public. 2. Describe ways in which the district can use financial planning to engage the community. 3. Explain how research, community engagement, and communications can help foster a solid foundation for passing ballot proposals.

**Speakers:** Anne Noble, Senior Vice President, Stifel Nicolaus, St. Louis, MO; Rodney Wright, President, UNICOM • ARC, St. Louis, MO; Gloria Davis, Superintendent, Decatur Public Schools, Decatur, IL; Todd Covault, Director of Business Affairs, Decatur Public Schools, Decatur, IL

**11:00 a.m. – 12:00 p.m.**

### **Demystifying Cloud Computing, DG257**



**CPE**

Room: 121B

CPEs: 1.0

Program Level: Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

If you're like most school business officials, you have heard the term "cloud computing" bandied about and may have some idea of what the term means. In fact, it is very likely that you already leverage a cloud computing

solution somewhere within your district. In this session we will discuss just what cloud computing is and why you should care. We will review terminology, benefits, concerns, and how to address those concerns. CoSN is vendor neutral, and this session is designed to inform, not sell.

**Learning Objectives:** 1. Describe cloud computing and enumerate its various forms. 2. Discuss the advantages of leveraging cloud computing. 3. Discuss key considerations in implementing cloud computing.

**Speaker:** Rich Kaestner, Project Director, CoSN, Philomath, OR

**11:00 a.m. – 12:00 p.m.**

### **IRS Perspective on Matching Your 403(b) Plan Operation to Your Written Plan, DG955**



**CPE**

Room: 122A

CPEs: 1.0

Program Level: Basic

Field of Study: Personnel/HR Taxes

Program Prerequisites: None

Advance Preparation: None

School districts are now required to have a written 403(b) plan. Does your plan operation match the provisions of the plan? Hear the latest information from the IRS and obtain guidance about how to correct form defects.

**Learning Objectives:** 1. Evaluate the operation of your plan vs. provisions included in the plan. 2. Discuss the consequences of operational failures. 3. Describe the resources available to assist in compliance.

**Speaker:** Ed Salyers, Senior Employee Plans Specialist, Tax Exempt & Governmental Entities, Internal Revenue Service, Memphis, TN

**11:00 a.m. – 12:00 p.m.**

### **Developing High Performance Through Technology, DG515**



Room: 126B

Learn how one school was able to demonstrate an improvement in staff and educator performance through the latest technology. Best practices in utilizing technology for performance appraisals are featured. Participants

## DAILY SCHEDULE: SATURDAY

will learn how to immediately access information about current staff, find best performers, help prepare for succession planning, and assist in professional growth opportunities.

**Speaker:** Ed Cavazos, Development, NEOGOV, El Segundo, CA

**11:00 a.m. – 12:00 p.m.**

### Keeping Your Performance Spaces Safe, DG925



Room: 127B

Auditoriums, theaters, gyms, cafeteriums, and their adjunct support areas are complex spaces that present numerous safety challenges to school staff and administration. They require specialized maintenance programs, safety knowledge and training, and personnel management. The safe operation of these facilities requires a robust scheduled maintenance program, training for staff and students, and supervision of guests. Learn how you can keep your performance spaces safe and up to code.

**Speaker:** Erich Friend, Theatre Consultant, Teqniqal Systems, Fort Worth, TX

**11:00 a.m. – 12:00 p.m.**

### Learnings from a Shared Services Model for Transportation, DG046



Room: 125A

The shared services transportation demonstration project that was implemented for the 2011–2012 school year in Montgomery County, Pennsylvania, benefited several districts that shared resources, expertise, and staff. Five districts committed themselves to working together with a consultant to share services for transporting certain students. But it wasn't all smooth sailing. This session will detail what went wrong, lessons learned, and how this information can be transferred to many other shared services initiatives.

**Speaker:** Stan Wisler, CFO, Montgomery County Intermediate Unit, Norristown, PA

**VALIC** welcomes you to the 2012 ASBO International Annual Meeting & Expo. Take the opportunity to connect with old acquaintances, make new ones, and most importantly, learn and exchange ideas with your colleagues. VALIC, as a leading provider of retirement plans to public K–12 employers, has proudly sponsored ASBO International for over 20 years. Please visit us in the Exhibit Hall at Booth 203, and plan to hear about the latest in 403(b) plans at the Deep Dig on Saturday at 12:45 p.m.

**VALIC**

**11:00 a.m. – 12:00 p.m.**

### Print Procurement in the K–12 Environment, DG003



Room: 125B

Learn more about cost savings and efficiencies in managing your district's print environment. Evaluate true costs of site-based solutions versus on-site or near-site outsourced solutions. Determine key metrics for vendor selection and understand the advantages of cooperative solutions versus RFP and pricing methodology. Finally, review a district's printing model and cost-saving opportunities and share best practices with your peers.

**Speaker:** Troy Hamilton, National Program Manager - Public Sector Print, Office Depot, Kent, WA

**11:00 a.m. – 12:00 p.m.**

### Program Evaluation: A Practical Approach, DG143



Room: 128A

Learn about a practical, multi-year approach to program evaluation that serves as a tool for analyzing educational effectiveness, operating efficiency, and cost savings for LEA programs. This program evaluation process takes a long-term approach to addressing organizational changes required by the current fiscal environment, and has been used in a Pennsylvania school district to reduce operating expenses and eliminate programs that no longer have value to the district.

**Speaker:** Alan Vandrew, CFO, Mechanicsburg Area School District, Mechanicsburg, PA

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**11:00 a.m. – 12:00 p.m.**

**Redrawing Attendance Boundaries, Closing and Repurposing Schools to Balance the District Budget, DG676**



Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Learn about the process one school district undertook to redraw attendance boundaries, close campuses, and repurpose buildings, saving the district millions of dollars. The process included the creation of a long-range facilities committee that included business partners, parents, students, teachers, and administrators.

**Learning Objectives:** 1. Outline the steps involved in creating a cost-saving plan that involves redrawing attendance boundaries, closing campuses, and repurposing buildings. 2. Discuss the considerations necessary in creating a long-range facilities committee and selecting its members. 3. Explain the effects of each of the cost-saving measures on the district budget.

**Speaker:** Florencio Zepeda, Director of Management Information Systems, Edgewood ISD, San Antonio, TX

**11:00 a.m. – 12:00 p.m.**

**The Impact of the School's Financial Value Standard in the UK, DG952**



Room: 128B

Introduced in September 2011, the Schools Financial Value Standard completely shifted the way in which schools and districts had to account for their finances in the UK. This session looks at the past five years, what is happening today, and what is likely to happen in the next five years. It will include examples from qualified assessors of the standard, political reasons for change, and some shocking mistakes made in the delivery of this standard.

**Speakers:** Howard Jackson, Managing Director, HCSS Education, Bollington, Cheshire, UK; Matt Birch, Consultant, HCSS Education, Bollington, Cheshire, UK

**12:00 p.m. – 1:30 p.m.**

**Meritorious Budget Award Advisory Committee and Reviewers Meeting and Luncheon**

By Invitation Only

Room: 131C

**12:15 p.m. – 1:30 p.m.**

**Committees Meeting and Luncheon**

By Invitation Only

Room: 124AB

### DEEP DIG SESSIONS (2-Hour)

**12:45 p.m. – 2:45 p.m.**

**An Analyst's Walk Through the Comprehensive Annual Financial Statements, DD067**



Room: 121B

CPEs: 2.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Take a walk through the elements of financial statements on which credit analysts focus. Find out what sections are important and how they factor into the overall credit analysis.

**Learning Objectives:** 1. Explain how to identify what's important in financial statements. 2. Outline the proper order for reading financial statements. 3. Discuss how to interpret findings uncovered during the analysis of a financial statement.

**Speaker:** Karl Jacob, Senior Director, Standard & Poor's, New York, NY

**12:45 p.m. – 2:45 p.m.**

**The SBO and the Strategic Planning Process: Collaboration, Communication, and Transparency, DD979**



Room: 121A

Strategic planning has long been a part of school district operations. In many cases, however, districts have several different plans created by the many groups that operate within a district. The strategic plan must provide an integrated story that describes districts' goals within

## DAILY SCHEDULE: SATURDAY

financial realities. This session focuses on the responsibilities of the school business official related to strategic planning and some of the tools available to help meet those responsibilities.

**Speakers:** Lisa Morstad, CFO, Fayetteville Public Schools, Fayetteville, AR; Betty Zimdars, Assistant Superintendent, Business Services, Howard-Suamico School District, Green Bay, WI; Gary Frisch, CFO, Barrington Community School District, Barrington, IL; Michele Wiberg, PMA Financial Network, Milwaukee, WI

**12:45 p.m. – 2:45 p.m.**

### Three Paths to Risk Management Maturity, DD255



Room: 121C

Learn about the benefits of risk management maturity, the principles of risk intelligence that effective school business officials use to control direct and indirect costs in decision making, and how they can make it easier to talk about risk. Methods of categorizing risk will be explained so participants understand and can explain when to apply a “rules-based” approach or “dialogue-based” approach to managing risk. Take part in a hands-on exercise with a scalable communication tool to help employees become “risk owners.”

**Speaker:** Lee Gaby, Executive Director, Public School Risk Institute, Inc., Atlanta, GA

**12:45 p.m. – 2:45 p.m.**

### Your 403(b) Progress Report: How to Make Sure Your Plan Is Still Making the Grade, DD403



Room: 122A

CPEs: 2.0

Program Level: Basic

Field of Study: Personnel/HR, Taxes

Program Prerequisites: None

Advance Preparation: None

Your 403(b) plan must continue to adapt based on IRS regulatory initiatives and school budget pressures. Learn about the IRS prototype program, safeguards and administrative procedures, plan correction measures, plan portability, fee disclosure concerns, whether you have fiduciary responsibilities for your plan, and considerations for selecting providers that meet your district’s needs.

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Learn about the latest strategies and best practices for successfully managing school district retirement plans and get answers to your questions.

**Learning Objectives:** 1. Discuss key features of the anticipated IRS prototype plan program. 2. Describe safeguards and administrative procedures that your plan should put in place for compliance with IRS regulations. 3. Identify current IRS plan correction measures if your plan encounters an operational issue. 4. Explain fee disclosure concerns for public school plans and how they are being addressed. 5. Learn whether you are a fiduciary for your 403(b) plan, and, if so, what that might mean to you and your governing board. 6. Discuss core considerations for selecting 403(b) providers to meet your district’s and your employees’ needs.

**Speakers:** Harry Mitchell, Vice President, Strategic Market Relations, The Horace Mann Companies, Springfield, IL; Ellie Lowder, President, TSA Training and Consulting for AXA Equitable, Tucson, AZ; Phillip J. Haslam, Division Sales Director, MetLife Resources, Carlsbad, CA; Linda Segal Blinn, Vice President of Technical Services, ING, Windsor, CT; Bob Architect, Vice President, Compliance and Market Strategy, VALIC, Houston, TX

**Moderator and Speaker:** Melody Douglas, Past President, ASBO International, Kenai Peninsula, AK

**1:45 p.m. – 2:45 p.m.**

### Live (In-Person) Chat

Staff Salary and Benefit Negotiations

Room: 127C

**Facilitator:** Matthew J. Malinowski, RSBA, Director of Business Affairs, School District of Cheltenham Township, Elkins Park, PA

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### DISCUSSION GROUPS (1-Hour)

**1:45 p.m. – 2:45 p.m.**

**Health Care Reform—What You Need to Know to Comply Today and Plan for the Future, DG780**



**CPE**

Room: 122B

CPEs: 1.0

Program Level: Basic

Field of Study: Specialized Knowledge and Applications

Program Prerequisites: None

Advance Preparation: None

Many employers are overwhelmed by the challenges ahead as they work to implement the new plan design and administrative requirements of the Health Care Reform law. Others have questions about how the law is going to affect their plans long term. This session will provide an overview of the major provisions affecting employer-sponsored health plans and a road map for how to organize and tackle them. We'll also break down the requirements into more manageable pieces and provide a timeline for when each needs to be addressed. Finally, we'll help participants understand an organization's long-term options for providing health coverage and provide an action plan to develop a long-term strategy.

**Learning Objectives:** 1. Outline an approach for timely implementation of each of the major provisions affecting employer-sponsored health plans. 2. Explain a school district's long-term options for providing health coverage to its employees. 3. Describe a five-step action plan for developing a long-term health plan strategy.

**Speaker:** Susan Relland, Vice President, Law and Government Affairs, American Fidelity Assurance Company, Oklahoma City, OK

**1:45 p.m. – 2:45 p.m.**

**Bonded Debt Continuing Disclosure—Getting It Right to Satisfy the Regulators, DG079**



**CPE**

Room: 126B

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Federal regulators, rating agencies, the media, and the public are scrutinizing public finances more than ever. Key elements of a debt issuer's compliance with covenants and tax exempt requirements are the continuing disclosures. This session will help school business managers understand the continuing disclosure requirements, learn about new requirements, learn to prepare the disclosures, and seek assistance from auditors to check the accuracy of the information.

**Learning Objectives:** 1. Detail the kinds of information contained in your school district's continuing disclosures. 2. Identify techniques used to gather and prepare this information. 3. Discuss the latest changes from the federal regulators, including penalties for non-compliance. 4. Explain how your auditors can help you with the disclosures.

**Speakers:** Bert Nuehring, Executive, Crowe Horwath LLP, Oak Brook, IL; Linda Matkowski, Managing Director/Public Finance, Raymond James, Warrentville, IL

**1:45 p.m. – 2:45 p.m.**

**Build New or Renovate? The Process of Evaluation, DG312**



Room: 128A

With fluctuating student populations, advances in education, and in some cases deteriorating infrastructure, school districts are caught between the desire for a new facility and the ability to fund it. Several key factors should weigh in on your decision. The presenters will provide proven methodologies used to weigh these factors and describe at what point the scales tip in providing the school district with the best possible return on its investment.

**Speaker:** Kim Hassell, Partner, Plunkett Raysich Architects, Milwaukee, WI

**1:45 p.m. – 2:45 p.m.**

**Control and Manage the Highest Cost Portion of the Budget: Personnel Costs, DG947**



**CPE**

Room: 122C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

## DAILY SCHEDULE: SATURDAY

Synergy and teamwork must exist between human resources and financial professionals as they define the issues to be solved by an integrated solution, including work flow processes, and determine how to identify and select the application that will best meet the needs of the district. Topics will include position control, the tools required to manage personnel, the importance of a core data repository, the meaning and definition of “accountability,” authorization prior to timesheet transactions, and visibility.

**Learning Objectives:** 1. Explain the role of position control in coordinating a team of human resources and financial professionals. 2. Discuss considerations for determining the level of integration needed for key functions performed by the team. 3. Describe how to organize and manage a combined human resources–financial team.

**Speaker:** Craig A. Schilling, Associate Professor, Concordia University-Chicago, River Forest, IL

**1:45 p.m. – 2:45 p.m.**

**Eight Imperatives for School Business Officials, DG699**



Room: 128B

The findings of research conducted in 2010 and 2011 focusing on school business management from around the developed world conclude that school business management is on the brink of imminent massive change. Learn about eight imperatives that will require concerted professional effort to ensure that educational pursuits are enhanced through prudent business decisions and management.

**Speaker:** Karen E. Starr, Chair, School Development and Leadership, Deakin University, Melbourne, Australia

**1:45 p.m. – 2:45 p.m.**

**Emerging Technology and Long-Range Planning, DG042**



Room: 125B

New technologies allow for real-time analysis and mapping of critical student/demographic, space, finance, and program information. The emerging technologies allow for immediate answers to the “what if” questions that surround long-range planning. This session presents examples of technologies that facilitate the planning process

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with a focus on the relationships among data elements and the answers to the critical questions school districts face when engaged with the community in long-range strategic planning.

**Speaker:** Roger Giroux, Educational Consultant, ASBO Past President, Champlin, MN

**1:45 p.m. – 2:45 p.m.**

**Managing Employment Laws for Teachers and Non-Teaching Personnel, DG051**



Room: 127A

From benchmarking compensation to finding competitive benefits, from managing employee and independent contractor relationships to managing teachers, substitutes, and non-teaching personnel, employee oversight has become a complicated endeavor. This session will provide an overview of potential pitfalls that come with overseeing such a diverse workforce and offer solutions for managing these employees.

**Speaker:** Robert Simandl, Attorney, Simandl & Prentice, SC, Waukesha, WI

**1:45 p.m. – 2:45 p.m.**

**OPEB Redux: Utilizing Creative Retiree Benefits to Manage Liabilities, DG059**



Room: 127B

While the GASB rules are not new, bonding requirements

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and state laws have brought the idea of managing OPEB liabilities back to the forefront. Learn about creative benefit solutions that help make the cost of retiree benefits more palatable without undermining near-retirement employees.

**Speaker:** Bret McKittrick, Attorney, Simandl & Prentice, SC, Waukesha, WI

**1:45 p.m. – 2:45 p.m.**

**What Is a School Business Official?, DG537**



Room: 125A

A panel of school business officials from several states will define what it means to be a school business official, discuss how the role has changed, and consider the states' ability to delineate the school business official's scope of activity.

**Speakers:** Marvin Dereef, Executive Director of Budget Services, Fulton County Schools, Atlanta, GA; David B. Janak, Director of Finance, Rapid City Area Schools, Rapid City, SD; Melissa A. Fettkether, Business Manager/Board Treasurer, Valley Community SD, Elgin, IA; Robert A. Morales, CFO, Fulton County SD, Atlanta, GA

**3:00 p.m. – 6:00 p.m.**

**Exhibit Hall Open**

**3:00 p.m. – 6:00 p.m.**

**Exhibit Hall Opening Reception**

Exhibit Halls 5 and 6, Lower Level

*Sponsored by Horizon Software*

**3:30 p.m. – 6:00 p.m.**

**Information Technology Showcase**

Exhibit Hall Booth 639

(See page 57 for complete listing.)

**8:00 p.m. – 11:00 p.m.**

**Rockin' Reception and Candidate Meet-and-Greet**

Alice Cooperstown

101 E. Jackson Street, Phoenix, AZ

\*Badge Required

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## Sunday, October 14

**7:00 a.m. – 4:00 p.m.**

**Registration**

North Building, Lower Level

**7:30 a.m. – 8:15 a.m.**

**Coffee Break**

121-123 Foyer (Third Street Side)

*Sponsored by Tyler Technologies*

**8:00 a.m. – 9:00 a.m.**

**Live (In-Person) Chat**

Leveraging the Leadership of Your School Business Team

Room: 127C

**Facilitator:** Deborah F. Frazier, Assistant Superintendent of Finance, Madison County Schools, Richmond, KY

## DISCUSSION GROUPS (1-Hour)

**8:00 a.m. – 9:00 a.m.**

**Using the iPad to Create a Sustainable Ecosystem Without Sacrificing the Budget, DG111**



Room: 128B

Going into its third year with mobile devices, Township High School District 214 is using instruction to drive the use of the iPad. Learn why the district chose the iPad as the most effective instructional tool and how the district is moving from a traditional desktop-based computing environment to mobile devices by shifting budget allocations. Ideas will be shared on how to effectively roll out and sustain a mobile device program without spending extra funds and how to overcome obstacles such as deployment and licensing of apps.

**Speakers:** Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL; Rudy

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Gomez, Technical Systems Supervisor, Township High School District 214, Arlington Heights, IL; Debra Parenti, Associate Superintendent of Finance and Operations, Township High School District 214, Arlington Heights, IL

**8:00 a.m. – 9:00 a.m.**

**A Day in the Life of a School Business Manager, DG537**



Room: 121A

Do boards of education and other administrators really know what school business managers do? With broad yet detailed job responsibilities, business managers often have finances and a whole lot more going on. This session will help you learn how to effectively communicate and relate with your board members and other administrators. You will also learn some techniques and tips you can share in your district to maximize your productivity and value to others while reducing your stress.

**Speakers:** David Bein, Executive Director of Business Services, East Maine School District 63, Des Plaines, IL; Jennifer Hermes, Assistant Superintendent of Business Services, Lake Forest School Districts 67 and 115, Lake Forest, IL

**8:00 a.m. – 9:00 a.m.**

**Community Involvement: Dealing with the Current Financial Realities, DG644**



Room: 121B

CPEs: 1.0

Program Level: Basic

Field of Study: Social Environment of Business

Program Prerequisites: None

Advance Preparation: None

Starting a Citizen's Finance Committee can help change the expenditure trajectory and gather support to modify the built-in cost escalators that outpace revenues. This session will address the structural deficit due to an increasing share of expenditures in salaries and benefits and techniques to reduce the share of salaries and benefits.

**Learning Objectives:** 1. Describe how to start a Citizen's Finance Committee. 2. Produce a worksheet that identifies an expenditures trajectory. 3. Explain how to modify the share of salaries and benefits and reduce expenditures.

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**Welcome** to ASBO International's 2012 Annual Meeting! MetLife is proud to sponsor ASBO's Bridges to the Future program, which provides new school business administrators with opportunities for professional growth and development. We invite you to visit us at our Clinic Table on Sunday and at Booth 501 to learn how MetLife can provide the long-term support you need to help your employees enjoy a better life in retirement.

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**Speaker:** Mohsin Dada, CFO, North Shore School District, Highland Park, IL

**8:00 a.m. – 9:00 a.m.**

**Creating a Safe School Environment, DG911**



Room: 128A

Safety is of paramount importance in schools. This session will outline the work undertaken in the UK in terms of safer recruitment and its impact.

**Speaker:** Trevor Summerson, Head of School Business Management, National College for School Leadership, Nottingham, UK

**8:00 a.m. – 9:00 a.m.**

**Increasing Classroom Technology: A Case Study Follow Up, DG255**



Room: 122B

With so much pressure to put more technology in the hands of students, staff, and the community, the network and information technology infrastructure needed to support it is often forgotten in the process. This session discusses how a small school district found itself with more technology than the IT infrastructure could handle, how this affected its educational and business operations, and how the district developed and implemented an action plan.

**Speaker:** Stephen F. Martin, Business Administrator, Litchfield School District, Litchfield, NH

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**8:00 a.m. – 9:00 a.m.**

**Meritorious Budget Awards Program Discussion Group, DG124**



Room: 127B

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Get answers to your questions and guidance regarding the MBA program that was not covered in the Seminar or Gold Mine Session. This discussion group will focus on specifics of entities' situations and offer sound advice for those planning to submit as a first-timer or wanting to improve current submissions.

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

**Speaker:** Donna D. Peterson, Senior Associate, Heinfeld, Meech & Co., PC, Phoenix, AZ

**8:00 a.m. – 9:00 a.m.**

**Properly Classifying Employees and Independent Contractors, DG057**



Room: 126B

If a teacher is also the football coach, should his coaching stipend come out of accounts payable? How do we pay a debate judge? Or a basketball ref? School districts around the country have become the target of IRS audits regarding the misclassification of independent contractors. This session will examine the analysis of the IRS and Department of Labor, as well as common state laws, to help answer the tough questions school business officials face when classifying a school district's workforce.

**Speaker:** Bret McKittrick, Attorney, Simandl & Prentice, SC, Waukesha, WI

**8:00 a.m. – 9:00 a.m.**

**School District Credit Ratings—Putting Your Best Foot Forward, DG652**



Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Your district's credit rating is more important now than ever. This session will provide the unique perspective of the business manager, credit rating analyst, and financial advisor, as they address how best to communicate your district's credit features during the rating process. Other topics will include key rating agency metrics and how internal and external variables can influence rating outcomes.

**Learning Objectives:** 1. Describe how to successfully communicate the district's credit feature during the rating process. 2. Explain how a financial advisor can help through the rating process. 3. Identify key internal and external variables.

**Speakers:** Fenil Patel, Vice President, PMA Financial Network, Inc., Naperville, IL; Helen Samuelson, Ratings Analyst, Standard & Poor's, Chicago, IL; Jonathan Lamberson, Superintendent, Riverside School District 96, Riverside, IL

**8:00 a.m. – 9:00 a.m.**

**Successfully Managing Your District's Health Care Program, DG474**



Room: 127A

Successfully managing a health care program requires a collaborative and transparent process that involves representatives from all employee groups. Learn how the Princeton City School District in Cincinnati responded to an unfair labor practice charge filed by its unions over the management of its health care program and transitioned to a collaborative model that will allow the district to achieve more than \$1 million a year in savings through self-insurance and medical plan design changes.

**Speakers:** James Rowan, CFO/Treasurer, Princeton City School District, Cincinnati, OH; Steve Moore, Board Member, Princeton City School District, Cincinnati, OH

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8:00 a.m. – 9:00 a.m.

**Using Palm Scanning to Increase Lunch Time for Students, DG919**



Room: 125A

Wouldn't it be great if you could cut in half the time it takes students to get through the lunch line? Palm scanning is quick, easy, and reliable, and takes approximately 20 seconds. Learn how one district has benefited from using this software.

**Speaker:** Arthur F. Dunham, Food Service Director/FASBO (BOD), Pinellas County School Food Service, Largo, FL

### DEEP DIG SESSIONS (2-Hour)

8:15 a.m. – 10:15 a.m.

**Governmental Audit Update, DD752**



**CPE**

Room: 122A

CPEs: 2.0

Program Level: Basic

Field of Study: Auditing (Governmental)

Program Prerequisites: None

Advance Preparation: None

This session will provide information on how standard setters in the governmental audit sector will impact your school district's annual audit over the next several years. Topics will include GASB standards that will change future financial reporting, potential changes to audit requirements related to Federal programs, ways changes to auditor independence requirements may affect audits, and the governing body's changing role.

**Learning Objectives:** 1. Explain how the "trickle down" effect plays a role in auditor rotation considerations to governmental audits. 2. Demonstrate how changes to auditor independence requirements may impact your audit. 3. List Potential changes to audit requirements related to Federal programs.

**Speaker:** Corey Arvizu, Partner, Heinfeld, Meech & Co., PC, Tucson, AZ

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Respectfully, The ING Team



8:15 a.m. – 10:15 a.m.

**Health Care Reform's Pay or Play: Get Your Head in the Game, DD017**



**CPE**

Room: 122C

CPEs: 2.0

Program Level: Basic

Field of Study: Specialized Knowledge and Applications

Program Prerequisites: None

Advance Preparation: None

This session will address the U.S. Supreme Court decision on the Affordable Care Act (ACA), the resultant regulatory environment, and what will be required of educational organizations to mitigate risk and ensure necessary compliance amid significant change and uncertainty. Participants will examine the strategic business decisions that will need to be made to effectively manage scarce resources and maintain labor competitiveness as we look toward more regulatory mandates, the pending Congressional and presidential elections, and beyond. We'll also discuss the evolving negotiation dynamic given shrinking budgets, an unpredictable legislative landscape, and competing local political pressures.

**Learning Objectives:** 1. Describe ways to mitigate benefits compliance risk in the wake of the U.S. Supreme Court decision on the ACA. 2. Identify effective strategic business decisions regarding labor competitiveness, budgets, and resource allocation related to ACA implementation. 3. Describe a strategy for approaching future collective bargaining negotiations from a more informed, stronger position.

## DAILY SCHEDULE: SUNDAY

**Speakers:** Jim Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN; Darcy Hitesman, Attorney, Hitesmann and Wold, PA, Maple Grove, MN

**8:15 a.m. – 10:15 a.m.**

**School Security: Technology Threats and Solutions, DD731**



Room: 125B

Your school is faced with the daunting challenge of protecting students, staff, and visitors under increasingly difficult circumstances. Join us in identifying and taming the latest technology risks. We will address everything from social networking to cyberbullying. At the same time, learn how to provide a safer learning environment with the help of technology. This interactive session will present proactive solutions, many of which can be implemented at little or no cost.

**Speakers:** Brian Moore, Supervisor of Public Safety, Red Clay Consolidated School District, Wilmington, DE; Paul Timm, Security Consultant, Reta Security, Lemont, IL

**9:15 a.m. – 10:15 a.m.**

**Live (In-Person) Chat**

Budgeting at the Building Level  
Room: 127C

**Facilitator:** David Bein, SFO, Executive Director, Business Services, East Main School District 63, Des Plaines, IL

### DISCUSSION GROUPS (1-Hour)

**9:15 a.m. – 10:15 a.m.**

**Building Community Consensus to Finance School Construction, DG880**



Room: 121C

Three years of public debate and a community engagement process led the Fayetteville Public Schools to request the public's support for increasing the taxpayer burden to build a new high school. Voters defeated the proposed new tax in 2009 by nearly 65%. This session will describe the strategy used to regroup, engage the community with a totally new approach, stretch to find the most creative financing strategies available, use every

conceivable communication vehicle, and succeed just one year later.

**Speakers:** Lisa Morstad, CFO, Fayetteville Public Schools, Fayetteville, AR; Susan Norton, CIO, Fayetteville Public Schools, Fayetteville, AR

**9:15 a.m. – 10:15 a.m.**

**Communication Chain: Linking Numbers and Narratives, DG535**



Room: 121B

Communicating during the budget process isn't just about displaying numbers; it's also about explaining how these numbers affect stakeholders and decision makers. The budget process is also a time to articulate the services and accomplishments of school district departments. This session will provide tips to improve communication during the budget process.

**Speakers:** Marvin Dereef, Executive Director of Budget Services, Fulton County Schools, Atlanta, GA; Ramona Thurman, Director of Budgeting, Atlanta Public Schools, Atlanta, GA

**9:15 a.m. – 10:15 a.m.**

**How to Prepare a Comprehensive Annual Financial Report for a COE Award, DG943**



**CPE**

Room: 127A

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This workshop will explore what a Comprehensive Annual Financial Report (CAFR) is and what it contains, including the introductory, financial, and statistical sections. The session also covers the process of submission to ASBO's COE award. Finally, get a school business official's perspective on the benefits for your district of preparing a CAFR and receiving the COE award.

**Learning Objectives:** 1. Describe a CAFR and each of its components. 2. Identify the steps for submitting the CAFR for the COE award. 3. Explain the benefits of preparing a CAFR and of receiving the COE award. 4. Identify common efficiencies noted by COE reviewers.

## DAILY SCHEDULE: SUNDAY

**Speaker:** Sara Kirk, Audit Manager, Heinfeld, Meech, & Co., PC, Phoenix, AZ

**9:15 a.m. – 10:15 a.m.**

### Leadership in the 21st Century—The P4 Phenomenon, DG932



Room: 126B

In Lethbridge, Alberta, partnerships are a way of life. The West Lethbridge Centre Project—the planning and construction of a new neighborhood with a 45-acre parkland and sports fields' site, new public library, and two high schools—is a collaborative effort between the city, Lethbridge Library Board, and the public and Catholic school boards. Learn how this collaboration developed and how it continues to be successful in implementing multiple projects while minimizing the tax burden.

**Speakers:** Don Lussier, Associate Superintendent, Business Affairs, Lethbridge School District No. 51, Lethbridge, AB, Canada; Lisa L. Palmarin, Secretary Treasurer, Holy Spirit RCRD No. 4, Lethbridge, AB, Canada; Barry Beck, Community Services Director, City of Lethbridge, Lethbridge, AB, Canada

**9:15 a.m. – 10:15 a.m.**

### Managing FMLA and ADA Compliance for Ill and Injured Employees, DG044



**CPE**

Room: 122B

CPEs: 1.0

Program Level: Basic

Field of Study: Business Law

Program Prerequisites: None

Advance Preparation: None

School districts are faced with protecting employee rights under workers compensation, the Americans with Disabilities Act (and its recent Amendment), Family Medical Leave laws, as well as other individual state ill and injured employee protection laws. Where does the school business official begin? School districts can and must develop a reasoned and understandable approach to this tangled web of compliance obligations.

**Learning Objectives:** 1. Explain selected complex areas of leave and accommodation laws. 2. Describe tactical methods of administering leave requests and

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anticipating problem areas. 3. Compare with peers, leave policy language and procedures for benchmarking.

**Speaker:** Robert Simandl, Attorney, Simandl & Prentice, SC, Waukesha, WI

**9:15 a.m. – 10:15 a.m.**

### Professional Success by Building Your Brand, DG547



Room: 127B

Are you looking to differentiate yourself from your peers? Are you looking to expand your personal success while building greater success for your school district? Do you want to increase your visibility? Do you want to increase your income/revenue? As an educational leader, knowing your personal brand is critical to your success. If you are committed to expediting your success by discovering your uniqueness, this session will help you in your professional success.

**Speaker:** Marshall Brown, Certified Career and Executive Coach, Marshall Brown & Associates, Washington, DC

*Career Central sponsored by AIS*

**9:15 a.m. – 10:15 a.m.**

### Not Going Quietly: One District's Story of Government Relations, DG383



Room: 128A

When Sears threatened to move its 6,000 corporate jobs

## DAILY SCHEDULE: SUNDAY

out of recession-weary Illinois if the state did not grant massive breaks on the company's school property taxes, local school leaders stood up to the political-corporate power structure and adopted the movie tagline, "We will not go quietly into the night." Learn how district leaders overcame their political learning curve to unite their community and earn a seat at the negotiating table with the state's top brass, ultimately achieving a bittersweet victory in their historic fight against corporate tax breaks. This session will provide lessons learned and replicable tactics that district leaders of all experience levels may consider in their own legislative campaigns.

**Speakers:** Allison Strupeck, Director of Communication Services, Community Unit School District 300, Carpentersville, IL; Cheryl Crates, CFO, Community Unit School District 300, Carpentersville, IL; Michael T. Bregy, Superintendent, Community Unit School District 300, Carpentersville, IL

**9:15 a.m. – 10:15 a.m.**

### Ten Tips for Managing Financial Resources During a Period of Austerity, DG912



Room: 128B

The next decade will require school business officials to manage increased expectations regarding the quality of education services against a backdrop of flat or declining resources. Learn 10 tips based on recent work undertaken in the UK.

**Speaker:** Trevor Summerson, Head of School Business Management, National College for School Leadership, Nottingham, UK

**9:15 a.m. – 10:15 a.m.**

### Which Risk Financing Method Is Best for Your District?, DG514



**CPE**

Room: 121A

CPEs: 1.0  
Program Level: Basic  
Field of Study: Management Advisory Services  
Program Prerequisites: None  
Advance Preparation: None

Does your district have the appropriate risk financing method in place to deal with a high-risk exposure? In

this session, we will discuss the advantages and disadvantages of different risk financing methods available to districts, whether it be through insured plans, self-insurance, or pooling. We will also draw on the experience of a school administrator whose school was struck by a small-engine plane and the risk financing method the district had in place to deal with the incident.

**Learning Objectives:** 1. Specify differences among insured plans, self-insurance, and pooling. 2. Regarding insured plans, differentiate among guaranteed cost plans, large deductible plans, and retrospective rating plans. 3. Identify the type of risk financing method that is best for your district. 4. Describe the risks and exposures that exist within your district and how best to finance insurance for them.

**Speakers:** James E. Brown, Business Manager, Round Valley Unified School District No. 10, Springerville, AZ; Jennifer Howell, Pool Manager, Arizona School Risk Retention Trust, Inc., Phoenix, AZ

**9:15 a.m. – 12:30 p.m.**

### Professional Development Staff Networking Group

By Invitation Only

Sheraton Phoenix Downtown Hotel, Paradise Valley, Second Floor

**10:30 a.m. – 11:30 a.m.**

### Open Bylaws Meeting

Room: 128B

**10:30 a.m. – 2:15 p.m.**

### Exhibit Hall Open

**10:30 a.m. – 2:15 p.m.**

### Information Technology Showcase

Exhibit Hall Booth 639

(See page 57 for complete listing.)

**10:45 a.m. – 12:00 p.m.**

### Clinic Tables

Room: 124AB

(See page 50 for complete listing.)

**11:30 a.m. – 1:00 p.m.**

### Certificate of Excellence Advisory Committee and Reviewers Meeting and Luncheon

By Invitation Only

Room: 131C

**12:00 p.m. – 1:00 p.m.**

### Lunch in the Exhibit Hall

*Sponsored by BMO Financial Group*

## DAILY SCHEDULE: SUNDAY

**1:15 p.m. – 2:00 p.m.**

**Certificate of Excellence Award Recipients Reception**

By Invitation Only  
Room: 132B

**2:15 p.m. – 3:15 p.m.**

**Eagle Award Recipients Reception**

By Invitation Only  
Room: 131B

**2:15 p.m. – 3:30 p.m.**

**Gold Mine Sessions**

Room: 129A  
(See page 53 for complete listing.)

### DISCUSSION GROUPS (1-Hour)

**2:30 p.m. – 3:30 p.m.**

**Automating HR Systems for Better Accountability, Ensured Compliance, and Reduced Costs, DG031**



Room: 125A

When Marysville Schools wanted to have better accountability of its safety compliance programs and lower its workers compensation costs, it turned to an online integrated system that automates, manages, and sustains all safety processes. Find out how the implementation has positively affected several areas of school management.

**Speakers:** Dolores Cramer, Consultant and Curriculum Writer/Organizational Management Substitute Professor, OASBO/Bluffton University, Marysville, OH; Tom Strasburger, Vice President, WORKS International DBA Public-SchoolWORKS, Cincinnati, OH

**2:30 p.m. – 3:30 p.m.**

**GASB Update, DG 583**



Room: 122C

CPEs: 1.0  
Program Level: Basic  
Field of Study: Auditing (Governmental)  
Program Prerequisites: None  
Advance Preparation: None

Learn from GASB about the new accounting changes and what else is on the horizon. This session will also cover methods to consider when addressing GASB standards.  
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**Learning Objectives:** 1. List current projects addressed by the Governmental Accounting Standards Board that could affect schools. 2. Describe the requirements of recently issued GASB pronouncements. 3. Give examples of current GASB requirements that concern your district.

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

**2:30 p.m. – 3:30 p.m.**

**What You Should Expect from Your Facilities Director, DG482**



Room: 127A

Facility management is crucial to the success of the school district. The condition of school facilities affects teaching and learning, impacts student health and safety, protects the capital investment of the community, and reflects the credibility of the school leadership. This session will identify and describe reports that will enable district leaders to know the condition of facilities and how costs are being managed. Topics will include work orders, use of staff, surveys, preventative maintenance planning, capital planning, facility use and cost recovery, and utility tracking.

**Speaker:** Roger Young, Retired Assistant Superintendent for Finance/Facilities, K12Masters.com, Andover, MA

## DAILY SCHEDULE: SUNDAY

**2:30 p.m. – 3:30 p.m.**

### **Best Practices for Improving Financial and Operational Performance, DG669**



Room: 121A

How can you optimize your district's financial and operational performance? What key performance indicators and trends indicate current and future financial management status? What are helpful practices in other school districts that may be adapted for your district? How should information on various reports be interpreted on financial and operational status? Learn best practices to effectively monitor and improve your district's financial and operational performance.

**Speakers:** Gwen Santiago, Executive Director, Texas Association of School Business Officials, Austin, TX; Rebecca Bunte, Director of Professional Development/CFO, Texas Association of School Business Officials, Austin, TX; Thomas Canby, Director of Research and Technology, Texas Association of School Business Officials, Austin, TX

**2:30 p.m. – 3:30 p.m.**

### **Are International Comparisons in Education Valid?, DG958**



Room: 125B

Should all countries really be striving to have education systems like Finland or South Korea? And if we all want to be more like top-performing Shanghai, why do they want to be more like us? Get some insight into the international comparisons, talk about why the "creativity gap" is just as important as the "achievement gap," and discuss what this means to education leaders in the United States.

**Speaker:** Ron Skinner, Assistant Executive Director, ASBO International, Reston, VA

**2:30 p.m. – 3:30 p.m.**

### **Golf Lessons—Life Lessons—Work Lessons, DG955**



**CPE**

Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Personal Development

**2012 ANNUAL MEETING & EXPO**

Program Prerequisites: None

Advance Preparation: None

Balance, tempo, and tension awareness are three key factors in achieving optimal outcomes in sports, life, and work. The creators of VISION54 developed strategies based on the concept of visualizing a birdie on every hole and carried them over to a perspective on life that is invaluable to the work environment. Through positive practice and visualization, you become more focused on attainable outcomes. In doing so, you can also make all aspects of your life more enjoyable and rewarding.

**Learning Objectives:** 1. Explain how focused practice leads to attainable outcomes. 2. Describe the process by which positive visualization can drown out negatives. 3. Describe how controlling balance, tempo, and tension awareness may limit risks. 4. Explain why activities are perceived as more rewarding with positive experiences.

**Speaker:** Jim Froemming, Director of Business Services, Port Washington-Saukville School District, Port Washington, WI

**2:30 p.m. – 3:30 p.m.**

### **New Techniques for Capital Asset Accounting and Reporting, DG084**



**CPE**

Room: 127B

CPEs: 1.0

Program Level: Basic

Field of Study: Accounting

Program Prerequisites: None

Advance Preparation: None

Capital assets are often the largest account balances on a school district's financial statements and tracking them provides a significant challenge to school business officials. Traditional approaches often don't work and with fewer resources available, new techniques to track these assets may be necessary. The session will include best practices and new approaches to improving capital asset accounting and reporting practices.

**Learning Objectives:** 1. Identify effective methods for keeping track of your school district's capital assets. 2. Explain how to implement stronger internal controls over capital assets. 3. Describe design procedures that help safeguard your district's assets.

**Speakers:** Bert Nuehring, Executive, Crowe Horwath LLP, Oak Brook, IL; Christy Mead, CFO, Albertville City Schools, Albertville, AL; Daryl J. Okrzesik, Controller, Chicago Public Schools, Chicago, IL

## DAILY SCHEDULE: SUNDAY

2:30 p.m. – 3:30 p.m.

### Small Changes to Make a Big Impact, DG900



Room: 128A

Through a case study and working practice approach, this session will address the issues of sustainability and innovative resourcing from a variety of angles, including energy efficiency, sustainable leadership models, and efficient use of facilities.

**Speakers:** Debra Scourfield, Operations Director, Anglia Ruskin University, Essex, UK; Trevor Summerson, Head of School Business Management, National College for School Leadership, Nottingham, UK

2:30 p.m. – 3:30 p.m.

### The Financial Viability of Fee-Based Transportation, DG686



Room: 128B

The use of fee-based transportation to offset costs is an increasingly common consideration for school districts. This session will evaluate the methods for establishing a rate for services, assessing the viability of the rate, and determining how changes in demand can be attributed to the established rate. National examples will be provided to indicate the potential opportunities and pitfalls of fee-based services.

**Speaker:** Tim Ammon, Vice President, Management Partnership Services, Inc., Rockville, MD

2:30 p.m. – 3:30 p.m.

### View from the Business Office: The End of Collective Bargaining in Wisconsin, DG037



Room: 122A

School business officials had a unique view of the end of most public sector collective bargaining as it was enacted in Wisconsin in the early months of 2011. Officials across the state began creating new patterns for sharing governance, discussing compensation structures, and re-examining smart use of benefit dollars while working to retain staff confidence that their concerns will be treated justly

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**Welcome** to ASBO International's 2012 Annual Meeting! As a leader in insurance benefits and services for school districts, we are here to support your efforts and educate you in matters affecting your school. We hope you will join us for our Health Care Reform workshop on Friday at 8:00 a.m. You're also invited to visit us in the Exhibit Hall at Booth 213. We are proud to be part of this significant meeting!



in the new environment. What was the background of this law? What challenges and opportunities came with it? Why the fierce reactions? What can and must business officials do to maximize the positive aspects of the change? This session will present a range of issues and reactions, as well as some lessons learned about the positive and negative aspects of collective bargaining.

**Speaker:** Emily O. Koczela, Director of Finance, School District of Brown Deer, Brown Deer, WI

## DEEP DIG SESSIONS (2-Hour)

2:30 p.m. – 4:30 p.m.

### Mastering the Storm by Keeping Spirits Up, DD196



Room: 121B

CPEs: 2.0

Program Level: Basic

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation: None

During times of economic uncertainty, everyone worries about the security of their jobs, their incomes, and the welfare of their families. Consequently, productivity suffers, profitability falls, customers are neglected, and employees start looking for other opportunities. Learn how to counter these negative effects with proven techniques that increase productivity, improve profitability, raise customer satisfaction levels, and reduce employee turnover. You'll get easy-to-use tools to help you keep employee spirits up when everything else is looking down.

[www.asbointl.org/AnnualMeeting](http://www.asbointl.org/AnnualMeeting)

## DAILY SCHEDULE: SUNDAY

**Learning Objectives:** 1. Identify 12 critical supports to improve productivity and reduce turnover. 2. Explain how to help employees maintain a high level of HARO® (Healthy And Realistic Optimism). 3. Discuss ways to motivate employees when you can't use money.

**Speaker:** Larry Johnson, President, Johnson Training Group, Longmont, CO

**2:30 p.m. – 4:30 p.m.**

**Planning for Student Mobile Learning, DD255**



**CPE**

Room: 122B

CPEs: 2.0

Program Level: Intermediate

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

Student mobile devices: Ready or not here they come. Properly implemented, student- or district-owned mobile devices can be used to enhance student learning, increase attendance, and reduce disciplinary issues. From a district business perspective, this session will examine the benefits of implementing mobile devices, evaluate alternative approaches, determine needs and related costs for preparation and continued support, and review and discuss policy issues. Participants will learn how learning management systems and cloud computing tie together as a part of the planning process and will explore planning issues in small-group discussions.

**Learning Objectives:** 1. Discuss costs and benefits of student mobile devices. 2. Identify best approaches for implementing mobile learning. 3. Explain how to effectively contribute to or guide the planning process. 4. Describe strategies for addressing policy and compliance issues.

**Speakers:** Rich Kaestner, Project Director, CoSN, Philomath, OR; Ann Ware, CoSN Project Director, Washington, DC; Michael Flood, Vice President, Kajeet, Bethesda, MD; Elliot Soloway, Professor, University of Michigan, Ann Arbor, MI; Arthur F. Thurnau, Professor, University of Michigan, Ann Arbor, MI; Cathleen Norris, Regents Professor, College of Education, University of North Texas, Denton, TX

**3:45 p.m. – 4:45 p.m.**

**Live (In-Person) Chat**

Declining EAV and Rising Tax Rates

Room: 127C

**Facilitators:** David Hill, Assistant Superintendent for Business Services, Community Consolidated School District 93, Bloomingdale, IN; Susan L. Harkin, CFO, Community School District 300, Carpentersville, IL

### DISCUSSION GROUPS (1-Hour)

**3:45 p.m. – 4:45 p.m.**

**Making the Case for Sustainable K–12 School Environmental Health Programs, DG881**



Room: 128B

The U.S. Environmental Protection Agency's Model K–12 School Environmental Health Program can help your school or school district implement or enhance an existing environmental health program. Learn from EPA's Office of Children's Health Protection and the ENERGY STAR program how to personalize the model program to address your school or school district's needs, as well as the benefits and cost savings that an integrated approach to energy and resource efficiency and school environmental health can provide.

**Speakers:** Marcia Kargbo, Public Liaison Specialist, U.S. Environmental Protection Agency, Washington, DC; Nils Klinkenburg, Senior Analyst, The Cadmus Group, Arlington, VA; Cynthia Merse, Public Liaison Specialist, U.S. EPA, Office of Children's Health Protection, Washington, DC

**3:45 p.m. – 4:45 p.m.**

**A Success Story: Electric Distribution Fleet, DG603**



Room: 127B

In 2010 the Lee's Summit R-7 School District purchased an all-electric truck fleet for distribution. The entire fleet delivers up to 200,000 items annually and is operated on 100% electricity. This new program will save the district an average of \$12,000 per year in fuel expenses. One of the best features of this program is that a federal grant financed up to \$500,000 to purchase the four trucks. Learn more about this success story.

**Speakers:** Scott Carson, VP of Business Development, Smith Electric, Kansas City, MO; Tom Kurucz, Deputy Superintendent of Operations, Lee's Summit R-7 School District, Lee's Summit, MO

## DAILY SCHEDULE: SUNDAY

3:45 p.m. – 4:45 p.m.

**Employee Benefits Insurance: To Pool or Not to Pool, DG213**



Room: 125B

What is a pooled approach to procuring programs, including medical, dental, vision, disability, administrative insurance services, and voluntary programs? Look at the advantages and disadvantages of a pooled approach to insurance procurement as well as compliance issues. This is not a panacea for all public entities, but it could save you scarce budget dollars in this tight economy.

**Speakers:** Andrea Billings, Plan Administrator, Valley Schools Employee Benefit Trust, Phoenix, AZ; Bill Munch, Director of Purchasing, Mesa Unified School District, Phoenix, AZ

3:45 p.m. – 4:45 p.m.

**Financial Survival Strategies for School Nutrition Programs, DG957**



**CPE**

Room: 122A

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Discover strategies to help your district school nutrition program survive new regulations, budget cuts, and additional mandated services. Learn tips for developing menu-driven labor, reducing food costs, generating additional revenue streams, and calculating operational efficiency.

**Learning Objectives:** 1. Evaluate the efficiency of your school nutrition program. 2. Identify opportunities for additional revenue streams in your district. 3. Explain the concept of menu-driven labor and its advantages.

**Speaker:** Barbara Nissel, Food Service Supervisor, Great Valley School District, Malvern, PA

**We welcome** you to Phoenix and the 2012 AM&E.

As ASBO's newest Strategic Partner, we would like the opportunity to inform and educate you about a new insurance product for school districts: substitute teacher insurance. We hope you can join us at a Clinic Table on Sunday at 10:45 a.m. Also, please visit us in the Exhibit Hall at Booth 713 for a chance to win a trip to Spain!



3:45 p.m. – 4:45 p.m.

**GASB 54 and Fund Balance Policy Issues: What Did We Learn from Implementation?, DG081**



**CPE**

Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Auditing (Governmental)

Program Prerequisites: None

Advance Preparation: None

GASB Statement No. 54 significantly changed how school districts presented fund balances. The GASB standard also provided more disclosures surrounding the presentation of fund balances. This session will help you determine what changes you may want to consider for your school district's fund balance policy. You'll also explore the lessons learned related to special revenue and capital projects funds reporting in the school district's financial statements. Example fund balance policies will also be discussed.

**Learning Objectives:** 1. Identify practical lessons from GASB fund balance standard implementation efforts. 2. Explain what the standard has meant for fund balance policies. 3. Identify fund balance policy best practices.

**Speakers:** Laura Cowburn, Assistant to the Superintendent for Business Services, Columbia Borough School District, Columbia, PA; Linda Matkowski, Managing Director of Public Finance, Raymond James, Warrenville, IL

## DAILY SCHEDULE: SUNDAY

**3:45 p.m. – 4:45 p.m.**

### **Good to Great for U.S. Schools: Mining Data and Predicting Performance, DG927**



Room: 121A

Education is changing faster than it has since 1950. How do we move from good to great given the Great Recession, the infusion of technology in our lives, the increasing needs due to rising poverty and diversity, and the intense globalization that has shrunk our world as we knew it? Learn some strategies (and share some) with a seasoned business official.

**Speaker:** Erin Green, Director of Business Services, Greendale School District, Greendale, WI

**3:45 p.m. – 4:45 p.m.**

### **Increased School Autonomy in Victoria, Australia, DG947**



Room: 126B

Schools in Victoria, Australia, have one of the most highly devolved school financial management systems in the world, empowering schools and their communities to respond dynamically to the specific needs of students. Financial resources are provided in a transparent and equitable manner to enable flexible school-based management. Professional development for principals and business managers is an essential component of ensuring effective school resource management.

**Speaker:** Nino Napoli, Assistant General Manager, Financial Services Division, Department of Education and Early Childhood Development-Victoria, East Melbourne, Australia

**3:45 p.m. – 4:45 p.m.**

### **Integrated Management of Bed Bugs, Roaches, and Other Pests, DG545**



Room: 127A

You can manage high-priority pests through integrated pest management (IPM). IPM is a risk-reduction strategy that minimizes hazards associated with pests and pest management practices. This session will provide the

latest information on head lice, how to develop a battle plan for bed bugs, and how to assess your site for pest-related asthma triggers.

**Speaker:** Dawn Gouge, Urban Entomologist/IPM Specialist, University of Arizona, Maricopa, AZ

**3:45 p.m. – 4:45 p.m.**

### **Managing Chaos: The Critical Elements of Handling School Safety Incidents, DG614**



Room: 128A

The school business official's role goes beyond ensuring the physical safety and security of our schools and operations—it includes providing training to school personnel on how to properly respond should an incident occur. This session will explore why today's schools need a management system to handle safety-related incidents and the key elements of a national standardized incident command system. It will play through a scenario that puts the elements in motion and will introduce a tool developed jointly by school administrators and local/national public safety officials.

**Speaker:** Daniel M. Romano, Former Treasurer/CFO, Toledo City Schools, Toledo, OH

**3:45 p.m. – 4:45 p.m.**

### **Successful Negotiations: The "How" Behind the "What," DG725**



Room: 122C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

When a new superintendent and business manager entered District 69 in Skokie, Illinois, in July 2010, the district was in need of some dramatic structural changes. As the economy continued to weaken, the district was deficit spending and the outlook was getting worse. With fewer than two years until teacher negotiations, it was clear how important the relationship between the administration and the union was. Come and hear how the district used positive relations with the union to settle an agreement with a sustainable compensation package, which included abandoning the traditional salary schedule.

# DAILY SCHEDULE: SUNDAY - MONDAY

**Learning Objectives:** 1. Describe the utility of the financial timeline as a planning tool. 2. Discuss strategies for facilitating discussion effectively. 3. Explain how to utilize planning to redirect the financial picture.

**Speakers:** Eric Miller, Director of Finance and Operations, Skokie/Martin Grove 69, Skokie, IL; Quintin Shepherd, Superintendent, Skokie District 69, Skokie, IL

**3:45 p.m. – 4:45 p.m.**

**Supporting Education Through a Better Classroom Environment, DG755**



Room: 125A

Greater Clark County Schools successfully implemented a facility modernization plan to improve the classroom learning environment. Upgrades included renewable energy, sustainability, and maintenance projects that improved building efficiency while reducing the district-wide operating budget by \$3.5 million. Learn more about the district's plan and why the combination of efficient building systems and a comprehensive preventative maintenance program is the best way to achieve high performance schools that link the district's academic mission to the physical environment.

**Speakers:** Chris Jagers, Account Executive, Harshaw Trane, Louisville, KY; Tom Galovic, CFO, Greater Clark County Schools, Jeffersonville, IN

**7:00 p.m. – 11:00 p.m.**

**Arizona Reception at Rawhide at Wild Horse Pass**

5700 West North Loop Road Chandler, AZ

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Bus transportation will leave from the Sheraton Phoenix Downtown Hotel beginning at 6:30 p.m.

## Monday, October 15

**7:00 a.m. – 10:00 a.m.**

**Registration**

North Building, Lower Level

**7:30 a.m. – 8:15 a.m.**

**Coffee Break**

121-123 Foyer (Third Street Side)

*Sponsored by Tyler Technologies*

**8:00 a.m. – 9:00 a.m.**

**Live (In-Person) Chat**

Collective Bargaining—Eliminating the Traditional TEP and Line Configuration and Tying Compensation to Performance

Room: 127C

**Facilitator:** Luann T. Mathis, Business Manager, Prospect Heights School District 23, Prospect Heights, IL

## DISCUSSION GROUPS (1-Hour)

**8:00 a.m. – 9:00 a.m.**

**Building Capacity on the Front Lines with Professional Development, DG337**



**CPE**

Room: 122A

CPEs: 1.0

Program Level: Basic

Field of Study: Communications

Program Prerequisites: None

Advance Preparation: None

Let's face it, when you live and breathe budget codes, expenditure reports, and compliance requirements, it's hard to imagine anyone not wanting to join in the fun. However, as many a school business official has discovered, what may be second nature to one might as well be a foreign language to another. The Manor ISD Department of Federal and State Programs provides ongoing, targeted, interactive training workshops for all stakeholders. Not only has this decreased the number of frustrated phone calls, denied purchase requisitions, and back and forth "coding wars," it empowers individuals.

**Learning Objectives:** 1. Identify stakeholders in your district and their typical training needs. 2. Describe how building capacity among stakeholders could translate to

## DAILY SCHEDULE: MONDAY

better stewardship of resources. 3. Outline an interactive training program that would meet the needs of your district.

**Speaker:** Jamie Stone, Department of Federal and State Programs, Manor Independent School District, Manor, TX

**8:00 a.m. – 9:00 a.m.**

**Economic Update and Market Conditions, DG737**



Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This session includes a review of current economic and market conditions, specific applications of key indicators for school district officials, and a discussion of past, present, and future trends and their impact on a school district's fiscal condition.

**Learning Objectives:** 1. Summarize current market and economic conditions. 2. Describe how to apply economic factors to the fiscal well-being of a school district. 3. Outline key elements of your school's potential response to the changing economic environment.

**Speakers:** Matthew Malinowski, Director of Business Affairs, School District of Cheltenham Township, Elkins Park, PA; Rajesh Chainani, Director, RBC Public Fund Services, Lancaster, PA

**8:00 a.m. – 9:00 a.m.**

**Getting Safety Through Culture Change and Involvement, DG519**



Room: 126B

Preventing work-related injuries is often the most overlooked aspect of a district's risk management program. Developing and fostering a safety culture that embraces program involvement, commitment, and consistency is critical. This session will provide information and tools about what a safety culture is, tools for change, and programs that lead to accountability and savings.

**Speakers:** Bob Wennersten, Senior Loss Control Consultant, Arizona School Risk Retention Trust, Inc., Phoenix, AZ; Vincent Scarfo, Safety Coordinator, Phoenix Union High School District, Phoenix, AZ

**8:00 a.m. – 9:00 a.m.**

**Greening Your Cleaning: Why, Who, and How, DG805**



Room: 125B

A holistic indoor air quality strategy is the cornerstone for high-performance schools to ensure healthy, non-toxic air for students and teachers. An essential building block in a school's indoor air quality strategy is "green" cleaning. Green cleaning is not simply a switch to greener products, but a change in design, construction, and maintenance cultures. Learn about contributing factors to quality air in our schools, cleaning industry statistics regarding health, costs, and how to adopt green cleaning.

**Speaker:** Paul Bates, LEED AP, BD&C National Outreach and Education Manager, UL Environment, Marietta, GA

**8:00 a.m. – 9:00 a.m.**

**Identifying and Recovering Available Slack Resources, DG045**



Room: 122C

Slack resources are marginal or excess resources in an organization and may be in the form of underutilized capital or excess personnel necessary to fulfill an organization's mission. This session examines ways that school business leaders capture underutilized slack resources for redeployment elsewhere in their school districts, especially during times of fiscal emergencies, contingencies, or crises. The session defines and describes slack resources and reports findings of a survey of 290 New York State school district managers on what practices they use to increase available slack resources in their respective districts. Finally, it focuses on tactics used to implement these practices.

**Speaker:** John A. Williams, CFO, Uinta County School District #1, Evanston, WY

# DAILY SCHEDULE: MONDAY

8:00 a.m. – 9:00 a.m.

## Insure Thyself: A Look at the Alternatives, DG377



Room: 127A

If you are facing double-digit increases in premiums and work in a state that has not enacted health care reform, self-insurance may be your answer. You can build a customized plan to meet the specific health care and wellness needs of your workforce, as opposed to purchasing a pricey “one-size-fits-all” insurance policy. Learn how you can organize and manage an effective self-insurance program and re-direct budgeted funds targeted for insurance companies back into your classrooms.

**Speaker:** Richard Weeks, Business Manager, Northeast Metro Tech Regional Vocational School, Wakefield, MA

8:00 a.m. – 9:00 a.m.

## International Strategic Planning, DG904



Room: 127B

Take an in-depth look at the inextricable link between the budget and the school improvement and district improvement plan. We will cross-examine how this model is changing in the UK and the United States at a time when it is more critical than ever to build the strategy of the school around the resources available. Review the strengths, weaknesses, opportunities, and threats of this process before delivering a proven, established, and working strategy that is being implemented in schools in the UK, Northern Ireland, and now the United States.

**Speakers:** Howard Jackson, Managing Director, HCSS Education, Bollington, Cheshire, UK; Matt Birch, Consultant, HCSS Education, Bollington, Cheshire, UK

8:00 a.m. – 9:00 a.m.

## It Takes Leadership to Find the Hidden Money, DG172



**CPE**

Room: 122B

CPEs: 1.0  
Program Level: Basic  
Field of Study: Finance  
Program Prerequisites: None  
Advance Preparation: None

Tweet ASBO: @asbintl #AME12

Many districts are experiencing the financial impact of reduced property valuations, growing cost of goods, and reduced state funds. This session will explore how districts have evaluated their current situation, identified ways to increase revenue, and used current budgets to their maximum value, while at the same time holding the current tax and levy rates the same.

**Learning Objectives:** 1. Describe the reasons for and impact of reduced school funding. 2. Identify approaches to increasing revenue applicable to your district. 3. Explain mechanisms by which revenue can be increased while tax and levy rates remain stable.

**Speakers:** Robert Hasman, Business Development Manager, ConEd Solutions, Peoria, AZ; Shari Zara, CFO, Queen Creek Unified School District, Queen Creek, AZ

8:00 a.m. – 9:00 a.m.

## Manual of Procedures Revision and Update: A Legislative Initiative, DG036



Room: 128A

When New Mexico's *Manual of Procedures for Public School Accounting and Budgeting* needed critical updating and revision, two retired school business officials undertook the project as a legislative initiative. Learn about the scope of the work, the project's ultimate goal, the methodology used, the review and delivery process, and how practical, wise, and efficient stewardship of district resources can be demonstrated by using the manual.

**Speakers:** Caron Snow, Retired School Business Official, Instructor/Consultant, Alto, NM; Leslie Smith, Retired School Business Official, Instructor/Consultant, Roswell, NM

8:00 a.m. – 9:00 a.m.

## Planned Maintenance--Does It Really Save Money?, DG002



Room: 128B

We all know that planned maintenance is beneficial for our organizations, but have you ever been asked to quantify exactly how? A white paper study was published in 2011 documenting the effect planned maintenance has on operational costs. Join us to learn statistics you need to know to quantify to stakeholders/decision makers how

## DAILY SCHEDULE: MONDAY

much of an effect planned maintenance could have on your bottom line. From reducing emergency work requests and overtime costs to decreasing energy costs, the data show unequivocally that implementing a planned maintenance program is a great way to maximize your resources.

**Speaker:** Jed DeGroot, Client Services Data Specialist, SchoolDude.com, Cary, NC

**8:00 a.m. – 9:00 a.m.**

### **Risk Transfer Techniques for the School Business Official, DG150**



**CPE**

Room: 125A

CPEs: 1.0

Program Level: Basic

Field of Study: Management Advisory Services

Program Prerequisites: None

Advance Preparation: None

School business officials wear many hats, and one of the most important is risk management. In this session, participants will learn the basic risk management concepts with particular focus on risk transfer. They will walk away with the tools necessary to help safeguard the district's assets in dealing with vendors, construction companies, outside groups utilizing the facilities, ancillary contracted services, and various professional services.

**Learning Objectives:** 1. Outline the risk management process and the role of SBO as risk manager. 2. Identify common risk transfer situations in the business office operations and how best to manage the various types of agreements. 3. Identify insurance specification contract language that protects the district's assets by transferring risk. 4. Discuss the various types of certificates of insurance and their limitations.

**Speakers:** Barbara M. Salatto, Associate Superintendent for Management Services, ESBOCES, Patchogue, NY; Shelley M. Levine, Executive Vice President and Managing Director, School Insurance Group, New York, NY

### **DEEP DIG SESSIONS (2-Hour)**

**8:00 a.m. – 10:00 a.m.**

### **School Business Leadership and Career Pathways: What Do They Mean to You?, DD014**



**CPE**

Room: 124A

Note: This session will not be recorded

CPEs: 2.0

Program Level: Basic

Field of Study: Personal Development

Program Prerequisites: None

Advance Prerequisites: None

Join your colleagues in an insightful discussion about school business career pathways and what it means to be an educational leader. Learn what motivates professionals to start a career in school business or to leave! The panelists will discuss their personal experiences in their careers and how they characterize their role as educational leaders. Bring your inquisitive mind and questions for the panel as we dive deeper into the unique challenges you face and how you can set yourself and your school system up for success.

**Learning Objectives:** 1. Describe the various career pathways for the school business management profession. 2. Identify ways you can evolve from technician to active voice on the leadership team and in the decision-making process. 3. Identify techniques and resources available to help you communicate the importance of your role as an educational leader.

**Speakers:** Susan Harkin, CFO, CCSD No. 47, Crystal Lake, IL; John Crafton, Executive Director, Massachusetts ASBO, Chelmsford, MA; Trevor Summerson, Head of School Business Management, National College for School Leadership, Nottingham, UK; Erin Green, SFO, Director of Business Services, Greendale School District, Greendale, WI

**Facilitator:** Carolyn Warner, Founder and President, Corporate Education Consulting, Inc., Phoenix, AZ

**8:00 a.m. – 10:00 a.m.**

### **Negotiation Strategies for Retiree Benefits, DD048**



Room: 121A

All states establish rules for the administration of the employment relationship between the school district, employees, students, the community, and unions. Given the tight constraints school districts face, it is becoming increasingly difficult to provide competitive retiree benefits in a cost-effective fashion. This session will examine mutually beneficial approaches to negotiating retiree benefits in a challenging political and economic climate.

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**Speaker:** Robert Simandl, Attorney, Simandl & Prentice, SC, Waukesha, WI

**9:15 a.m. – 10:15 a.m.**

### Live (In-Person) Chat

The New Healthy Hunger Free Kids Act: How Will It Affect Your School District?

Room: 127C

**Facilitator:** Barbara Nissel, Food Services Supervisor, Great Valley School District, Malvern, PA

## DISCUSSION GROUPS (1-Hour)

**9:15 a.m. – 10:15 a.m.**

### Continuing Disclosure Requirements for Bond Issuers, DG049



**CPE**

Room: 122B

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

When bonds are issued through an underwriter, school districts, as a tax-exempt issuer, must adhere to continuing disclosure requirements or file specific information regularly. This session will provide information about how to register on the Municipal Securities Rulemaking Board's Electronic Municipal Market Access (EMMA) website and will provide directions for the submission process.

**Learning Objectives:** 1. Identify continuing disclosure requirements. 2. Outline how to register on EMMA and complete filings. 3. Describe types of filings and filing requirements.

**Speakers:** Lorenzo M. Boyd, Senior Vice President, Stifel Nicolaus, St. Louis, MO; Ron Orr, CFO, Pattonville School District, Saint Ann, MO; Cindy Reilmann, Director of Finance, Francis Howell School District, Saint Charles, MO.

**9:15 a.m. – 10:15 a.m.**

### A Window View to School Financial Management: Budgeting, DG536



**CPE**

Tweet ASBO: @asbointl #AME12

Room: 122A

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This session is devoted to educating new personnel on the functions of school financial management and focuses specifically on budgeting.

**Learning Objectives:** 1. Explain the budgeting function. 2. Describe the various elements of financial management. 3. Outline topics covered in a course intended to teach others the basics of budgeting.

**Speaker:** Marvin Dereef, Executive Director of Budget Services, Fulton County Schools, Atlanta, GA

**9:15 a.m. – 10:15 a.m.**

### Districts and Contractors Collaborating for Successful Transportation, DG660



Room: 127B

School districts and transportation carriers must work together to ensure that students are safely transported to and from school. This session will share how Cook-Illinois Corporation and the Northwest Suburban Special Education Organization partnered to provide high-quality transportation services to special-needs students. A positive partnership enabled them to find a more effective way to train school bus drivers and aides.

**Speakers:** Julie Jilek, Director of Business Services and Facilities, Northwest Suburban Special Education Organization, Mt. Prospect, IL; Sharon Pierluissi, Regional Director of Operations, Cook Illinois Corporation, Waukegan, IL

**9:15 a.m. – 10:15 a.m.**

### Site-Based Decision Making and the Allocation of Responsibility, DG200



Room: 128A

Join a panel of school business professionals as they share their experience with the allocation of responsibility throughout their school district. Learn about their guiding principles and beliefs that provide the foundation for

## DAILY SCHEDULE: MONDAY

their shared decision-making model. Hear how student weighted funding supports the allocation of responsibility.

**Speaker:** Thomas Olson, CLGM, President, CEO, MyBudgetFile, Inc., Stony Plain, AB, Canada

**9:15 a.m. – 10:15 a.m.**

**Green Ribbon Schools: Getting Recognition for Your Sustainability Efforts, DG000**



Room: 127A

With the launch of the Department of Education's Green Ribbon Schools program, schools and school districts have the opportunity to gain recognition for hard work undertaken to make their schools resource-efficient, healthy places for students to learn and teachers to teach. The Green Ribbon Schools program also helps lend clarity and structure to what can sometimes look like a confusing array of green schools programs and offerings from federal agencies and non-profits. Learn about the components of Green Ribbon Schools, how to apply, and what tools can help you and your staff.

**Speakers:** Anisa M. Baldwin Metzger, Manager, Fellowship Program, U.S. Green Building Council, Washington, DC; Michael Walsh, Deputy Secretary of Administration, Pennsylvania Department of Education, Harrisburg, PA; Anthony Stevenson, Radnor Middle School, Wayne, PA; William Peisner, Wellington Middle School, Wellington, CO

**9:15 a.m. – 10:15 a.m.**

**Improving Safety in School Transportation Through Training, DG518**



Room: 125B

School bus accidents are a major source of risk for any school district. Reviews of safety trending for districts in Arizona revealed that school transportation losses were not only at the top of the list, but were steadily increasing. Learn how the implementation of a significant training program increased bus safety and enhanced the safety culture in Arizona school districts.

**Speakers:** David Frandsen, Loss Control Manager, Arizona School Risk Retention Trust, Inc., Phoenix, AZ; Ernie Meza, Transportation Director, Isaac Elementary School District, Phoenix, AZ

**9:15 a.m. – 10:15 a.m.**

**Internal Controls to Reduce Fraud in Booster Clubs and PTOs, DG973**



Room: 121C

CPEs: 1.0

Program Level: Basic

Field of Study: Accounting

Program Prerequisites: None

Advance Preparation: None

A panel of school system officials and auditors of school systems will share steps schools and school districts can take to help avoid fraud and improve internal controls and accountability of booster clubs and PTOs.

**Learning Objectives:** 1. Describe best practices for avoiding fraud. 2. Describe best practices for internal control and accountability. 3. Discuss common problem areas. 4. Learn how to streamline the accountability of booster clubs and PTOs.

**Speakers:** Gary Heinfeld, Partner, Heinfeld, Meech, & Co., PC, Tucson, AZ; Mary Ann Brown, Business Manager, Byron Community Unit School District #226, Byron, IL; Phillip Saurman, Shareholder - Government Services, Hungerford, Aldrin, Nichols and Carter, PC, Grand Rapids, MI; Ramona Thurman, Director of Budgeting, Atlanta Public Schools, Atlanta, GA

**9:15 a.m. – 10:15 a.m.**

**Leveraging the Leadership of Your School Business Team, DG561**



Room: 126B

Learn about opportunities to develop and implement leadership programs and foster team building at little to no cost to your district. Participants are encouraged to share ideas that have been effective in their own school districts.

**Speaker:** Deborah F. Frazier, Assistant Superintendent/CFO, Madison County Board of Education, Richmond, KY

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9:15 a.m. – 10:15 a.m.

### Negotiating in a Challenging Economic Environment, DG597



Room: 122C

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Review steps school districts have taken relative to negotiating agreements in light of long-term economic challenges and uncertainty. Discuss concessionary bargaining techniques to achieve a positive outcome and learn about successful models in contract negotiation.

**Learning Objectives:** 1. Review steps school districts have successfully taken relative to negotiating agreements in times of long-term economic challenges and uncertainty. 2. Discuss concessionary bargaining techniques to achieve a positive outcome. 3. Describe successful models in contract negotiation.

**Speaker:** Matthew Malinowski, Director of Business Affairs, School District of Cheltenham Township, Elkins Park, PA

9:15 a.m. – 10:15 a.m.

### School Solutions Through Strategic Procurement, DG018



Room: 128B

Procurement professionals are in the right seat to make choices that will strengthen and grow schools by building strong partnerships with those who share in their mission. Learn how utilizing a cooperative purchasing program focused on delivering school solutions can help your school district during this tough economic time.

**Speakers:** Corey Imhoff, Program Manager, U.S. Communities, Walnut Creek, CA; Jeff LaPorta, Supervisor of Purchasing, Harford County Public Schools, Bel Air, MD

9:15 a.m. – 10:15 a.m.

### Tax-Free Plans for Retirees—HRAs Mitigate Employer Costs, DG972



Room: 125A

Health Reimbursement Arrangements (HRAs) are ideally suited to save employers money when used to complement or incentivize employees' retirements. The most common sources of funds for HRAs are unused sick, vacation, or personal leave payouts. Learn more about HRAs and how to establish a plan with turnkey implementation. TPA services are available that off-load all the implementation and ongoing work from the employer—complete with plan documents.

**Speakers:** Aaron A. Casper, Director of Market Development, National Insurance Services, Inc., Eden Prairie, MN; Larry Stein, President, Retirement Plan Services of America, Inc., Marietta, GA

10:30 a.m. – 12:30 p.m.

### Closing General Session

Room: North Ballroom CD

#### Business Meeting

Presiding: Ron McCulley, CPPB, RSBO  
Vice President, ASBO International

#### Installation of Officers

Charles E. Linderman, RSBA  
Immediate Past President, ASBO International

#### Presentation of the 2012 ASBO International Pinnacle Awards

Ron McCulley, CPPB, RSBO

Robert Virtue  
President, Virco Inc.

#### Introduction of Speaker

Ron McCulley, CPPB, RSBO

## DAILY SCHEDULE: MONDAY



### **Tom Flick: Get to Your Go Side**

Leadership expert Tom Flick has garnered a reputation as an authority on leadership, helping a “who’s-who” list of clients that includes Microsoft, Starbucks, and the

Pentagon develop leaders, lead change effectively, and increase teamwork, communication, and performance skills. Flick draws on his leadership experience as a former NFL quarterback and his extensive work in corporate America to provide actionable solutions that allow people to become peak performers both personally and professionally.

**1:00 p.m. – 5:00 p.m.**

### **Desert Horseback Riding**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

**1:00 p.m. – 5:00 p.m.**

### **The Heard Museum and Desert Botanical Gardens Tour**

Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere



**1:30 p.m. – 5:00 p.m.**

### **Positive Impact Program: St. Vincent de Paul**

Advance Registration Required  
Buses depart from the Sheraton Phoenix Downtown Hotel  
Main Porte Cochere

Positive Impact Program projects, designed to give back to our annual meeting host city and its citizens in need, are great examples of service—and leadership—in action. Along with insights to take back to your district, ASBO’s AM&E offers another kind of takeaway: the opportunity to make a difference.

This year, we’re thrilled to partner with St. Vincent de Paul to provide home makeovers for two Phoenix families in need. In the space of a few hours, we’ll transform two barren houses into warm, welcoming homes.

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## LIVE (IN-PERSON) CHAT SESSIONS

Room: 127C

Live (In-Person) Chat Sessions provide an intimate, in-depth discussion format. Head to Room 127C for an impromptu brainstorming or networking session. Start up your own discussion on a topic of your choice or attend one of the scheduled sessions. To choose your own subject, jot down the topic you'd like to discuss and discussion time on the dry erase board outside the room to invite colleagues to join you. Check back often to see what SBOs are buzzing about.

### Saturday

**11:00 a.m. - 12:00 p.m.**

The Superintendent as CEO

**1:45 p.m. - 2:45 p.m.**

Staff Salary and Benefit Negotiations

### Sunday

**8:00 a.m. - 9:00 a.m.**

Leveraging the Leadership of Your School Business Team

**9:15 a.m. - 10:15 a.m.**

Budgeting at the Building Level

**3:45 p.m. - 4:45 p.m.**

Declining EAV and Rising Tax Rates

### Monday

**8:00 a.m. - 9:00 a.m.**

Collective Bargaining—Eliminating the Traditional Step and Lane Configuration and Tying Compensation to Performance

**9:15 a.m. - 10:15 a.m.**

The New Healthy Hunger Free Kids Act: How Will it Effect Your School District?

## DEEP DIG SESSIONS

**New this year!** These two-hour discussion groups were designed to provide ample time to dig deep into the topic at hand.

### Saturday

**12:45 p.m. - 2:45 p.m.**

An Analyst's Walk Through the Comprehensive Annual Financial Statement, **CPE**

**Room: 121B**

The SBO and the Strategic Planning Process: Collaboration, Communication, and Transparency

**Room: 121A**

Your 403(b) Progress Report: How to Make Sure Your Plan Is Still Making the Grade, **CPE**

**Room: 122A**

Three Paths to Risk Management Maturity

**Room: 121C**

### Sunday

**8:15 a.m. - 10:15 a.m.**

Health Care Reform's Pay or Play:

Get Your Head in the Game, **CPE**

**Room: 122C**

Governmental Audit Update, **CPE**

**Room: 122A**

School Security: Technology, Threats, and Solutions

**Room: 125B**

**2:30 p.m. - 4:30 p.m.**

Mastering the Storm by Keeping Spirits Up, **CPE**

**Room: 121B**

Planning for Student Mobile Learning, **CPE**

**Room: 122B**

### Monday

**8:00 a.m. - 10:00 a.m.**

Negotiation Strategies for Retiree Benefits

**Room: 121A**

School Business Leadership and Career Pathways:

What Do They Mean to You?, **CPE**

**Room: 124A**

**Come have an iced  
coffee on us!**  
Sunday, 11:15am – 2:15pm  
Lounge 613

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# CLINIC TABLES

## Sunday, October 14

10:45 a.m. – 12:00 p.m.

Room: 124AB

A Clinic Table session features round tables, each with a discussion topic presented by exhibitors and focused on a specific aspect of school district management. Session participants change tables every 20 minutes, with 10 people at a table each time. Presenters direct the discussion and serve as a source of information on topics such as facilities management, health care costs, cooperative purchasing, budgeting, and retirement plans.

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### Table 1

Budget Certainty and Risk Transfer for Substitute Teacher Costs via a New Insurance Policy

**Speaker:** John Brady, President, AIS, New York, NY

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### Table 2

How to Manage Health Care Without Breaking the Budget

**Speaker:** Rod Spangler, Regional Operations Manager, American Fidelity, Tecumseh, KS

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### Table 3

Tailoring the Best Benefits Package for You and Your Employees

**Speaker:** Curt May, Senior Vice President, Retirement Benefits Group, AXA Equitable, Deerfield, IL

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### Table 4

Free Benefits You Can Offer Your Staff and a Benefit That Can Help Your District Save Money

**Speakers:** Paul Corsi, Vice President, Field Market Alliance, Horace Mann, Bel Air, MD; Kelly Connor, Market Alliance Consultant, Northeast Region, Horace Mann, Yadkinville, NC; Steve Harder, Market Alliance Consultant, Great Lakes Region, Horace Mann, Des Moines, IA

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### Table 5

Have Questions About the Operation for Your District's Voluntary Retirement Plan? Get Your Questions Answered

**Speakers:** Linda Segal Blinn, Vice President, ING, Windsor, CT; Ketul Thaker, Vice President, ING, Windsor, CT

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### Table 6

Budgets and Benefits—Improve Benefits Effectiveness and ROI for Your District

**Speakers:** Matt Sledge, National Distribution, Workplace Benefits, MetLife Resources, Chandler, AZ; Ginger Panepinto, Director of Sales Implementation, MetLife Resources Workplace Benefits, Somerset, NJ

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### Table 7

Print Procurement in the K–12 Environment

**Speaker:** Troy Hamilton, National Program Manager, Office Depot, Kent, WA

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### Table 8

How to Determine the Right Cooperative Purchasing Program—The Cooperative Compliance Checklist

**Speaker:** Jennifer Sulentic, Program Manager, US Communities, Chicago, IL

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### Table 9

What's New in 403(b) Plans

**Speaker:** Bob Architect, Vice President of Compliance and Market Strategy, VALIC, Silver Spring, MD

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### Table 10

Roth 403(b) Contributions: Advantages and Disadvantages

**Speaker:** David Blask, Senior Pension Consultant, Lincoln Investment Planning, Inc., Wyncote, NJ

### Table 11

Ensuring Your Food Service Program Supports Healthy Students and Healthy Returns: Managing Through the Implications of the USDA Final Rule

**Speakers:** Linda Scurman MS, RD, LDN, Director, Nutrition and Menu Development, ARAMARK Education, Philadelphia, PA; John Kandemir, Vice President of Marketing, ARAMARK Education, Philadelphia, PA

### Table 12

Avoiding E-Rate Problems and Preparing for an Audit

**Speaker:** Dan Riordan, President, On-Tech E-Rate Consulting, Red Bank, NJ

### Table 13

Inventory Management/KeepStock®

**Speaker:** Chad Urban, Government Program Manager, Grainger, Indianapolis, IN

### Table 14

Are Voluntary Benefits Really Voluntary Anymore?

**Speakers:** Andrew Rubino, Assistant Vice President of Voluntary Business, The Hartford, Simsbury, CT; Grant Van Der Beken, Regional Sales Manager, The Hartford, Phoenix, AZ

### Table 15

Integrated Online Payments and Cashless Solutions

**Speaker:** Sherry Ephraim, Account Executive, Horizon Software, Chicago, IL

### Table 16

Maximize Your Energy Savings

**Speakers:** Charles L. Cohen, Building Education Program Director, Siemens, Deerfield, IL; Steve Hoiberg, Global BT Market Manager, Higher Education, Siemens, Buffalo Grove, IL

### Table 17

Assessing Reasonableness of 403(b) Retirement Plan Fees

**Speaker:** Kevin Orr, Senior Director, K-12 Market, TIAA-CREF, Carmel, IN

### Table 18

SaaS Models

**Speaker:** Brett Cate, President, Local Government Division, Tyler Technologies, Lubbock, TX

### Table 19

Web-based Budgeting as an Alternative to Spreadsheets

**Speaker:** Tony Olson, Vice President of Marketing, MyBudgetFile, Toronto, ON, Canada

### Table 20

WellCard Health and ASBO

**Speakers:** Jack Feingold, Vice President, Account Development, WellCard Health, Centennial, CO; Adam Soloman, Sales, Well Dyne, Denver, CO

### Table 21

Documents and Small Changes=Sustainability, Security, and Cost Savings

**Speaker:** Stu Parker, National Account Manager, Ricoh Americas Corporation, Highlands Ranch, CO

### Table 22

Panoptix: A Cloud Solution for Building Efficiency

**Speaker:** Gwenn McDaniel, Director of Sales for the Education Market, Johnson Controls, Milwaukee, WI

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Check the shelf one more time!

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# GOLD MINE SESSIONS

## Sunday, October 14

2:15 p.m. - 3:30 p.m.

Room: 129A

The Gold Mine Sessions feature round tables, each focused on a different aspect of school district management. Participants change tables every 20 minutes, with 10 people at a table each time.

### Table 1

#### SFO® Certification: When Will You Earn It?

Learn about the Certified Administrator of School Finance and Operations® (SFO®) program from a current SFO-certified professional. Not sure how to prepare for the exam or want to learn more about the steps to earn the certification? Visit this Gold Mine session for a chance to have your questions answered in a small-group setting.

**Speakers:** Christi J. Schaeffbauer, CPA, SFO, Business Manager, Meridan School District, Meridan, ND; Pam Weber, Director of Certification, ASBO International, Reston, VA

### Table 2

#### School Business: It's a Wonderful Life

Join us as we address all the topic areas of school business administration. Learn how to engage workforces and discuss how each area of school business management relates to student learning.

**Speaker:** Ellen R. Skoviera, SFO, RTSBA, Leander Independent School District, Leander, TX

### Table 3

#### Writing for SBA

This interactive session will provide school business officials with a basic working knowledge of how *School Business Affairs (SBA)* is produced and what it takes to get published in *SBA*. Learn how to select a topic and develop it into an article for publication, paying particular attention to providing busy practitioners with tips that can help them be more effective professionals.

**Speaker:** Siobhan McMahon, Director of Membership, Marketing & Communications, ASBO International, Reston, VA

**Tweet ASBO:** @asbointl #AME12

### Table 4

#### How to Prepare a Comprehensive Annual Financial Report (CAFR)

Learn about the ASBO Certificate of Excellence in Financial Reporting recognition program for the Comprehensive Annual Financial Report (CAFR). Receive practical information about the application and submission process, common mistakes made in CAFRs, and hints to ensure a successful submission.

**Speakers:** ASBO International Certificate of Excellence Advisory Committee

### Table 5

#### Utilizing Technology for Affordable and Effective Capital Planning

Now more than ever, educational leaders must properly forecast the capital replacement and renewal needs of their organizations to ensure facilities are well-maintained and to provide an environment that supports teaching and learning. With tight budgets limiting funds available for capital planning, technology is the key to cost-effectively projecting and managing your capital needs.

**Speaker:** Wayne Blazek, Facilities and Construction Manager, Douglas County Schools, Castle Rock, CO

### Table 6

#### Integrating ENERGY STAR into Your K-12 Energy Management Program

K-12 schools are improving the efficiency of their buildings with the help of the U.S. Environmental Protection Agency's ENERGY STAR program. EPA provides tools, resources, and expert assistance to help you manage your district's energy use—all at no cost. Hear real-world success stories from K-12 districts that have benchmarked their buildings and saved money with ENERGY STAR.

**Speaker:** Nils Klinkenberg, Senior Analyst, The Cadmus Group, Inc./ENERGY STAR, Arlington, VA

# GOLD MINE SESSIONS

## Table 7

### IRS Update on 403(b) Compliance

Hear the latest on IRS activity in the 403(b) and other retirement programs in the K-12 venue. Ask questions about the operation of your 403(b) plan under the final regulations.

**Speaker:** Ed Salyers, Senior Employee Plans Specialist, Tax Exempt & Governmental Entities, Internal Revenue Service, Memphis, TN

## Table 8

### ASBO International's Meritorious Budget Award Program

Learn about the Meritorious Budget Award (MBA) program and what it takes to earn this prestigious recognition. This presentation will include practical advice on how to assemble data and complete the application, and how your district will benefit from the process.

**Speakers:** ASBO International Meritorious Budget Award Advisory Committee

## Table 9

### Public-Private Partnerships: Value for Each Partner

Sahuarita Unified School District, one of the fastest growing K-12 school districts in Arizona, had no property inventory for new schools. The district entered into three very beneficial public-private partnerships through which it received three school sites from two different developers in the district. Consequently, the district was able to meet the challenge of a school district that doubled in size in six years. Learn how public-private partnerships are a benefit to both parties and critical to all districts.

**Speakers:** Jay St. John, Retired Superintendent of Schools, Sahuarita Unified School District, Green Valley, AZ; Charlotte Gates, Director of Business Services, Sahuarita Unified School District #30, Sahuarita, AZ

## Table 10

### Working During a Period of Financial Austerity

This session will involve several SBMs/SBOs from the United Kingdom, Australia, Canada, the United States, and, potentially, South Africa. The session will build on the previous Discussion Group, enabling colleagues to share openly the problems and issues they are confronting while exchanging effective management practices.

**Speaker:** Trevor Summerson, School Business Director, National College for School Leadership, Nottingham, UK

## Table 11

### Using the iPad to Create a Sustainable Ecosystem Without Sacrificing the Budget

Going into its third year with mobile devices, Township High School District 214 is using instruction to drive the use of the iPad. Learn why the district chose the iPad as the most effective instructional tool and how the district is moving from a traditionally based desktop computing environment to mobile devices by shifting budget allocations. Ideas will be shared on how to effectively roll out and sustain a mobile device program without spending extra funds and how to overcome obstacles such as deployment and licensing of apps.

**Speakers:** Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL; Rudy Gomez, Technical Systems Supervisor, Township High School District 214, Arlington Heights, IL; Debra Parenti, Associate Superintendent of Finance and Operations, Township High School District 214, Arlington Heights, IL

## Horace Mann congratulates Annual Meeting drawing winners!

As part of our partnership with ASBO International, these school business officials received a free registration pass to the 2012 Annual Meeting & Expo (AM&E), along with other benefits:

**Jim Froemming**, Port Washington, Wis.

**Suzanne Millon**, Sault St. Marie, Mich.

**Ronald Hack**, Tacoma, Wash.

**Leslie Peterson**, Arlington, Va.

**Rachel Hopper**, Ontario, Ore.

**Kathy Preeshl**, Rudyard, Mont.

**Maureen Joyce**, Washington, N.J.

**Pete Schuyler**, Phoenix, Ariz.

**Margaret Kalmanowicz**, Rock Hall, Md.

**Denise Seger**, Mishawaka, Ind.

**Brett Lago**, Harrison City, Pa.

**Trina Snyder**, Orofino, Idaho

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**Dale Mellor**, Steamboat Springs, Colo.

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# INFORMATION TECHNOLOGY SHOWCASE

Join your colleagues at **Booth 639** in the heart of the Exhibit Hall for the Information Technology Showcase, featuring ASBO ConnectEd, online payment solutions, mobile learning technology, and paperless board meetings using the iPad.

## Saturday, October 13

3:30 p.m. – 4:00 p.m.

### IT Session 1

#### Leveraging Online Payment Technology to Reduce Paperwork, Promote Accountability, and Manage Payments

Learn how online payment technology can help you establish consistent processes for managing registration and payment for student fees and activities and provide convenient access to athletic participation forms, permission slips, and more. The software easily interfaces with any financial software system currently in use. It provides access to separate reporting for school fee/activity payments and school meal payments and helps parents manage payments in one secure, online location.

**Speakers:** Tina Bennett, Vice President—Online Payment Solutions, Horizon Software International, Duluth, GA; Sherry Ephraim, Account Executive, Horizon Software International, Duluth, GA

4:00 p.m. – 4:30 p.m.

### IT Session 2

#### Moving to Mobility—Stepping Outside These Four Walls

With the help of mobile and other digital technologies, educators can limit geographical barriers to learning and enhance classroom instruction. However, implementing an online learning program requires an infrastructure that is flexible, easy to maintain, and capable of accommodating changing technology. Mobile learning technology gives students and teachers interactive and innovative tools that encourage collaboration and enhance the learning experience.

**Speaker:** Kevin Beck, Solution Sales Manager, West Region Education, Sprint, Sacramento, CA

4:30 p.m. – 5:00 p.m.

### IT Session 3

#### ASBO ConnectEd: ASBO International's New and Improved Members-Only Website

Are you ConnectEd? Join ASBO's education media coordinator to learn about ASBO's new and improved online members-only community. Create your own profile. Join communities that are centered on your primary job function. Ask members questions. View our libraries for sample documents, and upload sample documents for other members to view—all with just a few clicks of the mouse. Remember to check Booth 639 often for a tour of ASBO ConnectEd.

**Speaker:** Tiffany Woodard, Education Media Coordinator, ASBO International, Reston, VA

5:00 p.m. – 5:30 p.m.

### IT Session 4

#### Paperless Board Meetings Using the iPad

School districts spend a considerable amount of time and resources preparing board packets for each board meeting. Using a web-based application such as Board-Docs with iPads can significantly reduce the paperwork and provide additional resources to board members. The public can access documents via the web and agendas and minutes can be securely archived in minutes. The iPad eliminates the security issues associated with using a personal computer, as all confidential information is housed online.

**Speaker:** Wayne Lindberg, Director of Finance and Operations, Bremerton School District, Bremerton, WA

## Sunday, October 14

11:30 a.m. – 12:00 p.m.

### IT Session 5

#### ASBO ConnectEd: ASBO International's New and Improved Members-Only Website

Are you ConnectEd? Join ASBO's education media coordinator to learn about ASBO's new and improved online members-only community. Create your own profile. Join communities that are centered on your primary job function. Ask members questions. View our libraries for sample documents, and upload sample documents for other members to view—all with just a few clicks of the mouse. Remember to check Booth 639 often for a tour of ASBO ConnectEd.

**Speaker:** Tiffany Woodard, Education Media Coordinator, ASBO International, Reston, VA

# ASBO INTERNATIONAL & YOU



At the Annual Meeting & Expo (AM&E) you have the opportunity to participate in some of the best professional development available. But don't forget that your ASBO membership benefits you year-round.

## Stay Connected

Connect with more than 5,000 like-minded school business managers through our members-only networking platform, ASBO ConnectEd. There, you'll find a thriving, engaged community and unlimited access to a robust resource library.

## Stay Informed

ASBO International is a trusted information hub, delivering relevant content with access to targeted news and information sources, including

- *School Business Affairs* magazine
- *Accents Online* enewsletter
- *School Business Daily* news digest
- *School Business Minute* focused on timely topics
- ASBO Radio features interviews with experts in the news
- Web Resource Center

## Get Certified

ASBO International's Certified Administrator of School Finance and Operations® (SFO®) certification gives you the leading edge and demonstrates that you have the skills, knowledge, and ability to help lead your school district out of economic distress.

## Make a Move

Take advantage of ASBO's Career Central by posting your vacancy or adding your confidential resume to discover new opportunities for professional advancement.

## Get Recognized

ASBO International recognizes excellence through awards and recognition programs including

- The Certificate of Excellence in Financial Reporting (COE) for excellence in accounting and reporting
- The Meritorious Budget Awards (MBA) for excellence in budget presentation
- The Pinnacle Awards for implementation of practices, policies, and innovative ideas
- The Eagle Awards for exemplary school business leadership
- Bridges to the Future Scholarship for new and aspiring school business officials



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**Visit booth 411!** When you fill out a card at AXA Equitable's Booth 411 we proudly make a donation on your behalf to the ASBO Research and Education Fund. It helps champion the behind-the-scenes work of school business professionals by sponsoring and advancing education and research initiatives to help them better serve students.

\*Source: LIMRA, Not-For-Profit Survey, Q2 2011 results, based on contributions.

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G29988



## GUEST ACTIVITIES

Registered guests are welcome to attend the General Sessions, visit the Exhibit Hall, and enjoy the two receptions alongside full registrants. Guests are not permitted to attend educational sessions. The following programs have been designed specifically for guests.

### Saturday, October 13

**10:30 a.m. – 3:00 p.m.**

#### **Positive Impact Program Prep**

Room: 123

Help prepare for Monday's home makeovers. Paint furniture, design wall décor, frame pictures, and more.

**11:00 a.m. – 12:00 p.m.**

#### **Guest Program**

**Book Club:** *The Glass Castle*

North Ballroom Foyer (Monroe Street Side)

(See page 17 for complete listing.)

### Sunday, October 14

**8:00 a.m. – 5:00 p.m.**

#### **Positive Impact Program Prep**

Room: 123

Help prepare for Monday's home makeovers. Paint furniture, design wall décor, frame pictures, and more.

### Social Responsibility at the AM&E

At ASBO International, we believe in embracing our responsibility to people and to the planet. We strive to create awareness about what we can do to contribute to society while simultaneously strengthening the school business management profession. Here are just a few of the ways we're demonstrating our commitment to social responsibility.



#### **Meeting Site and Vendor Selection**

We purposefully select meeting sites and vendors with commitments to green and otherwise socially responsible practices. The Phoenix Convention Center has been awarded LEED silver certification by the U.S. Green Building Council. More tangible green features at the convention center include chairs made from recycled car batteries and seat belts, tablecloths made from old plastic bottles, and meals made from locally farmed produce. There are also rooftop solar panels and a water-harvesting garden that converts condensation from the building's heating and cooling system into water for landscaping.

#### **Minimizing Our Environmental Footprint**

We're committed to hosting "paper-lite" meetings, using paper only where absolutely necessary. We've eliminated the use of disposable cups, plates, and utensils, and provide all attendees with reusable water bottles (Sponsored by Grainger). In addition, we select badge

holders and conference bags made from recycled or sustainable materials. To increase recycling and repurposing of exhibit hall materials, we ask exhibitors to sort unwanted items into bins labeled "Trash," "Recycle," and "Donate." We also invite exhibitors to highlight their green or otherwise socially responsible products, services, or practices with ASBO's Social Responsibility icon.

#### **Continuing Education**

We strive to offer a range of education sessions and speakers who demonstrate the role sustainability plays in almost every functional area of an organization. Look for ASBO's SR icon to identify sessions that speak to issues of social responsibility.

#### **Positive Impact Program: St. Vincent de Paul**

*Sponsored by ARAMARK Education*

(See page 44 for complete listing)

Can't participate in the Positive Impact Program? Join us in Room 123 on October 13 from 10:30 a.m. to 3:00 p.m. and October 14 from 8:00 a.m. to 5:00 p.m. to help prepare for Monday's home makeovers. Paint furniture, design wall décor, frame pictures, and more.

#### **Give the Gift of Butterflies**

(See page 71 for complete listing)

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# EAGLE AWARD RECIPIENTS

## 2012 Eagle Awards

The ASBO International Eagle Award—the highest tribute ASBO bestows on its members—recognizes individuals who have exhibited outstanding and visionary leadership in school business management. For 20 years, this lifetime achievement award has honored exceptional leaders. AXA Equitable proudly sponsors the Eagle Awards and the Eagle Institute. This year's recipients will be recognized at the Eagle Award Ceremony during the Opening General Session on Saturday, October 13.



### INTERNATIONAL EAGLE AWARD



**Jeffrey K. Platenberg, RSBA, REFP**  
Assistant Superintendent  
Loudoun County Public Schools  
Ashburn, VA

### DISTINGUISHED PROFESSIONAL EAGLE AWARD



**Earl P. Burke**  
Chief Financial Officer  
Hinds County School District  
Raymond, MS



**John C. Butler, CPA**  
Chief Financial Officer  
Lexington County School District One  
Lexington, SC



**Aubrey Kirkpatrick**  
Director of Finance and Administration  
Anglophone East and North School Districts  
Moncton, New Brunswick, Canada



# PINNACLE AWARD RECIPIENTS

## 2012 Pinnacle Awards

The ASBO International Pinnacle Awards program recognizes school business officials for implementing innovative practices as models for others in the profession of school business management. Virco, Mfg. Corporation is proud to sponsor the Pinnacle Awards since its inception in 1993. The Pinnacle Awards ceremony takes place during the General Session on Monday, October 15.



### PINNACLE OF EXCELLENCE AWARD



**Douglas E. Meade**

Director of Information Technology  
York County School Division  
Yorktown, VA

### PINNACLE OF ACHIEVEMENT AWARD



**Erin K. Green, SFO, RSBA**

Director of Business  
Greendale School District  
Greendale, WI



**Terry K. Haas, CPA**

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## Hope to see you in Phoenix for the 2012 AM&E

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*Christie Schaeffbauer, CPA, SFO, Business Manager  
Mandan School District, Mandan, ND*

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# Don't Miss One of ASBO's Career Coaches at the AM&E



**Marshall Brown**, certified career and executive coach, will present a session on building your personal brand on Sunday, from 9:15 a.m. - 10:15 a.m. in Room 127B.



## Ever think about enhancing your career experience?

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[www.asbointl.org/CareerCentral](http://www.asbointl.org/CareerCentral)



Association of School Business  
Officials International

# EXHIBIT HALL HIGHLIGHTS

## Exhibit Hall Hours

Saturday: 3:00 p.m. – 6:00 p.m.  
Sunday: 10:30 a.m. – 2:15 p.m.  
(Lunch 12:00 p.m. – 1:00 p.m.)

## Saturday, October 13

**3:00 p.m. – 6:00 p.m.**

### Opening Reception

*Sponsored by Horizon Software*

Entertainment graciously provided by the Nogales High School Mariachi Apache.

## Sunday, October 14

**11:00 a.m. – 11:45 a.m.**

### Hip-Hop and Folklorico Performances by the Fiesta Mexicana Dance Company

**11:15 a.m. – 2:15 p.m.**

### Iced Coffee Bar in Lounge 613

*Courtesy of Horizon Software*

**11:45 a.m. – 11:50 a.m.**

### Performance by the Garcia Wildcat Cheerleaders

**12:00 p.m. – 1:00 p.m.**

### Lunch in the Hall

*Sponsored by BMO Financial Group*

### Recharge at the Massage Lounge

Exhibit Lounge 217

Take a moment to relax with a complimentary upper body massage provided by professional massage therapists. Visit Booth 318 to pick up a massage ticket.

*Sponsored by The Hartford*

### Wear Your ASBO Pride

**New this year!** The ASBO store is in the exhibit hall by Booth 138. Visit during exhibit hall hours to pick up gifts for your staff and colleagues and souvenirs for yourself.

### ASBO Booth, Bookstore, and Pin Trading Zone Exhibit Hall Booth 138

The ASBO Bookstore features top-selling publications, ASBO staff to assist you with conference information, and ASBO program and membership details. Visit daily to turn in your Exhibit Hall game cards for a chance to win prizes!

### SFO® HQ

Exhibit Hall Booth 138

Thinking about ASBO's new Certified Administrator of School Finance and Operations® (SFO®) program? Visit with SFO professionals and browse books from the official SFO certification authoritative references list.



### Give the Gift of Butterflies

ASBO's Gift of Butterflies Program seeks to provide underprivileged students in the host city of the ASBO AM&E with the school supplies and support they need to start the school year ready and excited to learn—with butterflies in their stomachs.



### Exhibit Hall Game

**New this year!** We've transformed Sunday's exhibit hall game to benefit the Gift of Butterflies Program. In addition to an opportunity to win great prizes, the first 500 participants to turn in a completed game card on Sunday will have a fully stuffed backpack donated in their name, courtesy of participating exhibitors. Look for your Exhibit Hall game cards in your registration packet.



### Exhibitors with a Commitment to Social Responsibility Highlighted

ASBO has invited companies to highlight their green or otherwise socially responsible products, services, or practices with ASBO's Social Responsibility (SR) icon. ASBO does not endorse these companies nor does it confirm the reliability of the companies' SR commitments. Members should undertake whatever investigation they feel necessary to ensure that participating companies meet their established criteria for SR business practice.

## Looking for Quality Professional Development? *Press Play!*

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\*When provided by the presentation speaker.



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# EXHIBITORS

(As of August 10, 2012)



## 247 Security

### Booth 629

4400 North Point Pkwy., Suite 158  
Alpharetta, GA 30022

247Security is a leading provider and manufacturer of mobile digital video recording equipment, security cameras, and GPS data management applications.



## Absence Insurance Services

### Booth 713

810 7th Ave., Suite 1701  
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Teacher absence and sickness no longer need to be a costly gamble. Get budget certainty with risk transfer, available now from AIS. Stop by to find out more and try your luck on the Wheel of Fortune to win a trip to Spain for six people for seven nights. AIS is proud to be ASBO's newest Strategic Partner.

## AEPA, Association of Educational Purchasing Agencies

### Booth 630

2111 Pontiac Lake Rd.  
Waterford, MI 48328

We are purchasing professionals from school cooperatives in 26 states. Working together as the Association of Educational Purchasing Agencies (AEPA), we write the best possible bid solicitations and coordinate bids that deliver better pricing and buying power for school districts.

## Aesop - Frontline Technologies, Inc

### Booth 110

397 Eagleview Blvd.  
Exton, PA 19341

## AirWatch

### Booth 325

1155 Perimeter Center West  
Atlanta, GA 30338

AirWatch is a mobile security, device, application, and content management solution designed to simplify the mobile device lifecycle for the education industry. From deployment through support, this highly scalable, web-based solution provides an integrated, real-time

view of an entire fleet of corporate, employee and student-owned Apple iOS, Android, BlackBerry, Symbian, and Windows devices. With AirWatch, IT can automate the management and tracking of mobile assets and reduce the cost and effort of device deployments.



## Ameresco

### Booth 339

60 E. Rio Salado Pkwy,  
Suite 1001  
Mesa, AZ 85213

Ameresco, Inc. (NYSE:AMRC) is one of the leading energy-efficiency and renewable-energy services providers. Our energy experts deliver long-term customer value, environmental stewardship, and sustainability through energy efficiency services, alternative energy, supply management, and innovative facility renewal—all with practical financial solutions. Ameresco and its predecessors have constructed billions in projects throughout North America.



## American Fidelity Assurance Company

### Booth 213

2000 N. Classen Blvd.  
Oklahoma City, OK 73106

American Fidelity Assurance Company, an ASBO Strategic Partner, provides employee benefits, Section 125 Plan services, flexible spending account services, and health care reform assistance to school districts across the country. Our goal is to relieve your administrative load and help your district manage the effects of budget cuts and the rise of health care. Stop by to discuss how our expertise can be of value to your district.

## American Logistics Company

### Booth 129

101 S. El Camino Real, Suite 107  
San Clemente, CA 92672

ALC serves U.S. school districts with solutions for students with special transportation needs, including students covered under the McKinney-Vento Act. Through proprietary route optimization technology, ParaMax®, and Intelligent Transportation Systems (ITS), ALC is able to deliver on its promise of reduced costs and improved service.



## ARAMARK

### Booth 513

ARAMARK Tower  
1101 Market St.  
Philadelphia, PA 19107

ARAMARK Education provides a complete range of food, facility, uniform, and other support services to more than 500 K-12 school districts across the country. We offer on-site and off-site breakfast and lunch meal programs, after-school snacks, catering, nutrition education, and facilities management services, including maintenance, custodial, grounds, and energy management. Our programs are designed to encourage healthy eating habits, increase meal participation, and create safe, clean, comfortable learning environments for your students and district community.

## ARCHIBUS, Inc

### Booth 342

18 Tremont St., Suite 12  
Boston, MA 02108

ARCHIBUS, Inc. is the #1 global provider of real estate, infrastructure, and facility management solutions and services. With 30 years of continuous innovation, our industry-leading enterprise software provides the visualization, planning, analysis, and reporting tools that deliver superior operational insight, cost control, and savings. Schools of all sizes are using the ARCHIBUS solution to make informed strategic decisions that optimize return on investment, lower asset lifecycle costs, increase productivity, and reduce TCO.



## ASBO International

### Booth 138

11401 North Shore Drive  
Reston, VA 20190



## AssetWorks, Inc.

### Booth 135

4955 Steubenville Pike, Suite 401  
Pittsburgh, PA 15205

With over 25 years of experience in K-12 education, AssetWorks has unparalleled capabilities and expertise

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**AXA Equitable**  
**Booth 411**  
500 Plaza Dr.  
Secaucus, NJ 07094



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**BMO Financial Group**  
**Booth 705**  
111 West Monroe St.,  
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Chicago, IL 60603

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**BSN Sports**  
**Booth 105**  
1901 Diplomat Dr.  
Dallas, TX 75234

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**CBIZ Valuation**  
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W227N16867 Tillie Lake Court,  
Suite 201  
Jackson, WI 53037

CBIZ Valuation Group provides insurance valuation and underwriting data collection services designed to meet the property insurance reporting requirements of entities, brokers, underwriters, and re-insurers.

**Chartwells School Dining Services**  
**Booth 700**  
3 International Dr.  
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Chartwells School Dining Services brings fresh ideas and innovative concepts to school dining services. Chartwells currently manages over 500 public school districts. We serve approximately 2.3 million students in over 4,000 elementary, middle, and high schools across the country. Our customers include K-12 students, school staff, administration, parents, and community members. Most of the foodservice operations are governed by the National School Lunch and Breakfast Program and require strict compliance. With over 8,000 associates, we are dedicated to providing our customers with the best school dining program possible. For more information, please visit [www.eatlearnlive.com](http://www.eatlearnlive.com)

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Dallas, TX 75231

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**CORE Construction**  
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Phoenix, AZ 85032

CORE Construction, Inc., is a 75-year-old leading national construction management, design-build and job order contracting firm with over 1,000 employees providing annual revenue in excess of \$600 million. Our business is the business of building. CORE's mission is to earn the trust of our employees, building partner, and clients. Our commitment to customer service and teamwork is to credit for our success in the education, municipal, energy, and federal markets.



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 Irvine, CA 92618

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**Booth 723**  
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 Maumee, OH 43537

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**Booth 605**  
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 Monroe, CT 06468

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 Irvine, CA 92602

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## Gallagher

### Booth 239

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### Booth 131

4726 Western Ave.  
Knoxville, TN 37921

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## Georgia Pacific

### Booth 230

133 Peachtree St.  
Atlanta GA 30135



## Grainger, Inc.

### Booth 707

100 Grainger Pkwy.  
Lake Forest, IL 60045

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### Booth 113

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### Booth 118

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San Diego, CA 92131

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Suite 501  
Tempe, AZ 85282

Heartland School Solutions is the leading provider of secure online payment solutions to K-12 school districts. Through our services mySchoolBucks, MyStudentStore, and MyLunchMoney, we support online payments for more than 29,000 schools across the nation for student purchases, donations, meals, and more. Heartland is the fifth-largest payment processor in the United States, providing our K-12

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**Booth 432**  
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Tucson, AZ 85704

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**Home Depot**

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Tampa, FL 33634



**The Horace Mann Companies**

**Booth 601**  
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Mail #C803  
Springfield, IL 62715



Horace Mann, an insurance company founded by Educators for Educators®, provides school districts and their employees with solutions designed to maximize savings, enhance benefits, and support the mission of public education. We offer retirement system workshops, flexible benefit plan services, and convenient payroll payment options for auto and life insurance and 403(b) annuities. And we help support educators through teacher recognition programs, student attendance incentive programs, and DonorsChoose.org (funding for classroom projects).



**Horizon Software International, LLC**

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Windsor, CT 06095-4774



ING welcomes you to ASBO International's 2012 Annual Meeting! We are proud to support your profession as a Strategic Partner of ASBO International and the exclusive sponsor of the ASBO Meritorious Budget Award (MBA). We encourage you to visit us at Booth 303

to learn about how we can help make retirement planning and administration easier for you and your employees. Also, to this year's MBA recipients, congratulations on your achievement! Respectfully, The ING Team

**Ingersoll Rand Security Technologies**

**Booth 430**  
11819 N. Pennsylvania  
Carmel, IN 46032

Ingersoll Rand Security Technologies is a global provider of complete opening solutions, improving performance for institutions, students, and security professionals. Our market-leading brands include Schlage®, Von Duprin®, and LCN®. Our access-control solutions include doors, frames, locking hardware, credentials, as well as wireless web-based access control. We offer complete opening solutions, credential management, seamless integration with software platforms, national consultant network, site surveys, product support, grant funding information, and support and tools for crisis management.



**IntelliChoice Energy**

**Booth 441**  
19420 N. 59th Ave.,  
Suite A-104  
Glendale, AZ 85308

**InTouch Receipting**

**Booth 616**  
4415 Pacific Highway East  
Fife, WA 98424

The top-rated InTouch Receipting Suite is the new best-of-breed fee processing and on-line web payment portal for all your fee processing requirements! Covers all funds, all sites, from building point of sale, to web credit cards fully integrated real-time to the building point of sale, to community education, pools, tax credits, district office, and more. 100% Microsoft tools, SQL Centralized. Save time and money while making your world a little easier!

## IRS

### Booth 728

290 N. D St.  
San Bernardino, CA 92401

Employee Plans provides free services and information on retirement plans through its workshops/conferences, educational products, guidance/publications, newsletters and website ([www.irs.gov/ep](http://www.irs.gov/ep)).

## Johnson Controls

### Booth 611

507 East Michigan St., M19  
Milwaukee, WI 53202

Johnson Controls delivers products, services, and solutions that increase energy efficiency and lower operating costs in buildings for more than one million customers. Operating from 500 branch offices in more than 150 countries, we are a leading provider of equipment, controls, and services for heating, ventilating, air-conditioning, refrigeration, and security systems. We have been involved in more than 500 renewable energy projects. Our solutions have generated savings of \$7.5 billion since 2000.

## Kelly Educational Staffing

### Booth 438

132 Fairway Landings Dr.  
Canonsburg, PA 15317

Kelly Educational Staffing is the largest provider of instructional and non-instructional staffing to school districts nationwide. Since 1997, KES has been dedicated to helping K-12 schools around the country operate at peak capacity through cost savings and gains in operational efficiency. More than 1 million classrooms are filled by a Kelly Educational Staffing substitute teacher each year. Contact us to see how we can save your district money.

## KEV Group Inc

### Booth 735

6221 Riverside Dr., Suite 102  
Irving, TX 75039

## Keystone Purchasing Network

### Booth 331

90 Lawton Lane  
Milton, PA 17847

The Keystone Purchasing Network is a cooperative purchasing program with many national contracts for schools covering furniture, floor coverings, athletic surfaces, modular and portable classrooms, and more. Membership is free by visiting [www.theKPN.org](http://www.theKPN.org).



## KI

### Booth 423

1330 Bellevue St.  
PO Box 8100  
Green Bay, WI 54302

KI makes furniture and movable wall systems specifically designed for high-performance learning environments. We recognize the unique demands of the K-12 and higher education markets. Get cutting-edge innovation, great design, and the most comprehensive furniture offering from KI—your one source for innovative educational solutions.

## KleenSlate Concepts

### Booth 730

PO Box 4796  
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KleenSlate's all-in-one dry erase response system is a two-sided, hand-held whiteboard with marker and eraser in the handle. Saving districts on paper and proven to raise test scores across the board, these kid-friendly paddles engage every student in every subject area. Low odor/nontoxic markers are certified CPSIA and hold up to frequent use. Clean with soap and water! Stop by Booth 730 for a free sample. Customizable to fit your needs.



## MetLife Resources

### Booth 503

400 Atrium Dr.  
Somerset, NJ 08873



MetLife Resources is a division of Metropolitan Life Insurance Company that specializes in providing retirement plan products and other financial products and services to health care, educational, governmental, and other non-profit employers and their employees. For more information visit our website at [www.MetLife.com/mlr](http://www.MetLife.com/mlr)

## MidAmerica

### Booth 719

211 East Main St., Suite 100  
Lakeland, FL 33801

MidAmerica provides innovative employee benefit programs to over 2,000 plan sponsors and close to a million employees across the country. Founded in 1995, we serve primarily the education and governmental marketplace. Our programs include: Independent 403(b) and 457 TPA services, Social Security opt-out plans, VEBA/HRA/FSA plans, and GASB 45 funding solutions. Call 800.430.7999 to learn more about us, or visit us online at [www.midamerica.biz](http://www.midamerica.biz)

## Millennium Trust Company

### Booth 130

2001 Spring Rd., Suite 700  
Hinsdale, IL 60523

Millennium Trust Company is an industry leader in administrative and custodial services. Millennium custodies alternative and traditional assets in IRAs, Solo 401(k)s, and custody accounts; offers private fund custody services; creates customized automatic rollover programs; provides integrated Health Savings Account solutions; and designs unique trading platforms for investment advisors. Millennium Trust Company custodies more than 170,000 accounts. For more information, please visit our website at [www.mtrustcompany.com](http://www.mtrustcompany.com)

## Motorola Solutions

### Booth 635

3220 Spruce St.  
Denver, CO 80238

Motorola Solutions is a leading provider of mission-critical communication solutions and services for enterprise and government customers. Through leading-edge innovation and communications technology, it is a global leader that enables its customers to be their best in the moments that matter. Motorola Solutions trades on the New York Stock Exchange under the ticker "MSI." To learn more, visit [www.motorolasolutions.com](http://www.motorolasolutions.com)



### MYBudgetfile.com

#### Booth 220

50072 Boulder Blvd.  
Stony Plain, AB T7Z 1V7  
Canada

MyBudgetFile.com 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 Alliance for Insurance Education & Research

#### Booth 202

3630 N Hills Dr.  
Austin, TX 78731

Creating, developing, and delivering practical continuing education programs for everyone involved in the insurance and risk management industries is the challenge and purpose of The National Alliance for Insurance Education & Research. More than 142,000 participants are attending the 2,500+ programs, conducted in all 50 states and throughout the Caribbean. With a legacy that began in 1969, The National Alliance is recognized across the nation as the best source for continuing education credits, designation opportunities, and concrete knowledge for insurance and risk management professionals of every experience level.

### National Cooperative Purchasing Alliance

#### Booth 540

PO Box 701273  
Houston, TX 77270

NCPA (National Cooperative Purchasing Alliance) is a leading national government purchasing cooperative working to reduce the cost of goods and services by leveraging the purchasing power of public agencies in all 50 states. Our process results in competitively bid contracts your agency can purchase off instead of doing the bid process on your own.

### National Insurance Services

#### Booth 224

250 South Executive Dr., Suite 300  
Brookfield, WI 53005-4272

National Insurance Services (NIS) is a leading provider of group insurance and retiree benefits for school districts. As a specialist in public sector employee benefits since 1969, NIS helps employers align their unique and complex benefit challenges with the hard-to-understand language and practices of insurance and investment products. Our expertise results in innovative benefit solutions that help: (1) use taxpayer dollars efficiently, (2) build bridges between bargaining units and committees, (3) avoid employer liability and grievances.

### National IPA

#### Booth 122

1600 Westgate Circle, Suite 275  
Brentwood, TN 37027

National IPA is a cooperative purchasing organization established through a collaborative effort of public agencies with the specific purpose of reducing procurement costs by leveraging group volume. All master agreements are publicly solicited, awarded through a Request for Proposal (RFP) process, and held by a public agency. National IPA serves as the nationwide channel to offer the awarded agreements to public and non-profit agencies. This cooperative purchasing strategy offers cost, time, and resource savings to participating agencies. National IPA is an optional program with no minimum purchase requirements and no fee to participate.

### National Joint Powers Alliance

#### Booth 417

200 First St., NE  
Staples, MN 56479

The National Joint Powers Alliance is a governmental agency operating under the legislative authority of M.S. 123A.21. We are a member-owned cooperative serving all public and non-public educational systems, governmental agencies, and non-profits. NJPA establishes and provides nationally leveraged and competitively solicited purchasing contracts in cooperation with the Uniform Municipal Contracting Law. At NJPA we are driven to provide efficient public service through our National Cooperative Purchasing Program.

### National School Transportation Association

#### Booth 631

113 S. West St., 4th Floor  
Alexandria, VA 22314

### North America Central School Bus

#### Booth 711

1818 W Jefferson St., 2nd Floor  
Joliet, IL 60435

North America Central School Bus offers complete contract student transportation services to/from school, regular/special education, and charters. With 54 locations throughout the country, transporting over 250,000 students daily.

### On-Tech E-Rate Consulting

#### Booth 519

53 Elm Place  
Red Bank, NJ 07701

On-Tech is a full-service E-Rate consulting firm, offering schools and libraries a full range of services to maximize E-Rate funding. Since 2002, On-Tech has obtained millions of dollars of E-Rate funding for over 100 districts, schools, and libraries across the country. On-Tech's focus is maximizing E-Rate funding for districts which have not received the funding they deserve.



### Office Depot, Inc.

#### Booth 606

6600 N. Military Trail,  
MS C314N  
Boca Raton, FL 33496

### Office Max

#### Booth 330

150 Pierce Rd.  
Itasca, IL 60143

OfficeMax is a leader in both business-to-business office product solutions and retail office products. Providing office supplies, paper, technology products, and furniture, OfficeMax delivers an unparalleled customer experience—in service, product, and timesaving value—through a relentless focus on its customers. Have you received your Retail Connect card yet? Ask your OfficeMax sales representative today!

## The OMNI Group

### Booth 525

Watertower Office Park  
1099 Jay St., Building F  
Rochester, NY 14611

The Omni Group is a premier Tier I third-party administrator (TPA) for 403(b) and 457(b) plans in the public K-12 marketplace. With over 1,000 plans serviced in 22 states, Omni is one of the nation's largest independent TPAs. Omni was recently awarded the RFP for the State of New Mexico and has recently been endorsed in the State of Texas by TACS as part of the U.S. Employee Benefits Services Group.

## Palmer Hamilton

### Booth 223

143 S. Jackson St., #1  
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We take your vision from concept to completion with exceptional environments that are gorgeous, versatile, and inviting. Our diverse services and extensive selection of top-quality furnishings and custom décor solutions transform your dining rooms, multipurpose spaces, and outdoor areas into choice campus destinations. Whether in the midst of a full transformation or earliest planning phase, our experts work with your staff, designers, engineers, architects, and construction team to make your renovation successful.

## PaySchools

### Booth 132

6000 Grand Ave.  
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Collecting fees just got easier with PaySchools. Your school collects payments for lunches, athletic tickets, community education, yearbooks, other registration fees, and activities. PaySchools is a secure online payment processing system that allows schools to receive payments by e-check, debit, and credit card. Parents appreciate the convenience of paying their children's school expenses anytime, anywhere. Districts experience improved internal controls and office efficiencies. Learn how your school district can begin using PaySchools by calling 866.729.5353 or visiting [www.payschools.com](http://www.payschools.com).

## PEPPM

### Booth 607

90 Lawton Lane  
Milton, PA 17847

PEPPM is a national technology bidding and purchasing program for K-14 schools and agencies, libraries, four-year colleges and universities, government agencies, and other non-profit organizations. PEPPM aggregates buyers and demand across the country to get the lowest prices while also saving time and money on the bidding process for eligible buyers. Go to [www.peppm.org](http://www.peppm.org) to start saving time and money now.

## PMA Financial Network, Inc.

### Booth 428

2135 City Gate Lane, 7th Floor  
Naperville, IL 60563

PMA Financial Network (PMA), a trusted financial partner to over 1,450 public entities, offers a diverse lineup of customized financial solutions, including cash flow, bond proceeds management, and long-term financial forecasting services. PMA is a leading provider of administration, distribution, and fixed-rate investment program services to seven local government investment pools.

## Premier Inc

### Booth 102

1349 Tilton Dr.  
Franklin, TN 37067

## Progressive Roofing

### Booth 206

23 N. 35th Ave.  
Phoenix, AZ 85009

Progressive Roofing is a large family-owned commercial roofing company that has been in business since 1978. We are a certified/approved applicator in all roofing systems and have multiple national locations.

## The Public Group

### Booth 305

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The Public Group provides web-based solutions to government agencies striving to improve the effectiveness and efficiency of their surplus, e-pro-

curement and contract management programs. The Public Group enables agencies to increase public participation, streamline operations, comply with all regulations, and establish an audit trail. Let's talk about your needs and our solutions. [www.publicsurplus.com](http://www.publicsurplus.com), [www.publicpurchase.com](http://www.publicpurchase.com)

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### Booth 701

WORKS International  
2010 Madison Rd.  
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Reducing risk! Mobile, automated, and managed! Compliant online training, compliant MSDS programs, staff and student accident management systems, and more! The only complete, fully automated health, safety, and behavioral management solution for schools.

## Quill.com

### Booth 429

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Lincolnshire, IL 60069

## RevTrak, Inc.

### Booth 523

10700 Lyndale Ave., S., Suite 200  
Bloomington, MN 55420

RevTrak helps districts manage any payment for any school fee by providing a personalized web store. RevTrak's web-based software enables districts to process payments in person, online, over the phone, or by mail. Districts can rest assured that their data will be handled safely according to Payment Card Industry Data Security Standards. RevTrak's full-service solution includes the complimentary setup of the web store as well as unlimited, complimentary support, training, and web store updates.

## Ricoh Americas Corp.

### Booth 100

9475 Painted Canyon Dr.  
Highlands Ranch, CO 80129

Ricoh helps K-12 schools in four key areas that most public organizations have key initiatives in addressing: document security, sustainability, governmental transparency, and cost reduction. Improvements in these areas can make a tremendous impact

on the product an individual school or an entire district can provide to its community. Our award-winning technology and world-class service can keep your school running smoothly. In addition, Ricoh can assist your organization in moving closer towards FERPA and HIPAA compliance.

### SafeSchools

#### Booth 440

1776 Mentor Ave.  
Cincinnati, OH 45212

Nation's leading online staff training and compliance management system serving 3,500 districts.

### SchoolDude

#### Booth 404

11000 Regue Pkwy.  
Cary, NC 27518

In the past 12 years, SchoolDude has become the education market leader in enterprise asset management, delivering our mission-critical applications entirely via the Internet (Software-as-a-Service). Today, we help more than 1 million education professionals from more than 5,800 institutions streamline maintenance work order management, schedule preventive maintenance tasks, improve IT help desk and asset management, increase inventory accountability, extend useful building life and plan for capital replacements, maximize after-hours facility use, and decrease utility consumption while increasing conservation.

### School Specialty

#### Booth 619

W6316 Design Dr.  
Greenville, WI 54942

School Specialty is an education company that provides innovative products, programs, and services to help PreK-12 educators engage and inspire students of all ages and abilities to learn. Supporting educators isn't just our specialty—it's our passion. We design, develop, and provide educators with the latest and very best core curriculum, supplemental learning resources, school supplies, and furniture. Our unmatched selection of quality education products, services, and

programs has been assembled to help educators ensure students succeed.

### Security Benefit Group

#### Booth 204

5482 Antler Run  
Littleton, CO 80125

Security Benefit, a Guggenheim Partners company, has been helping people prepare for the future since 1892. Today, Security Benefit is a diversified financial services holding company providing retirement plans, 403(b) administration, annuities, and asset management with nearly \$51 billion in assets under management and administration. SBC, through independent advisors and agents, is a top provider of retirement plans in the K-12 education marketplace.



### Siemens Industry Inc., Building Technologies Division

#### Booth 302

1000 Deerfield Pkwy.  
Buffalo Grove, IL 60089

The Siemens Building Technologies Division is the world's market leader for safe and energy-efficient buildings ("green buildings") and infrastructure. As a service provider, system integrator, and product vendor, Building Technologies has offerings for building automation, heating, ventilation and air conditioning (HVAC), fire protection, and security.

### Simplified Online Communication System (SOCS)

#### Booth 114

1300 O St.  
Lincoln, NE 68508

SOCS offers an easy website solution for nonprofit organizations. Packed with web-based features and tools for interaction, this system transforms community communication to a level that keeps everyone informed while saving time and money. Plus, our live customer support will help you manage your website with ease.

### Single Path

#### Booth 734

905 Parkview Blvd.  
Lombard, IL 60148

At Single Path, our focus is on solving business issues with technology solutions. For our educational partners, we have become a market leader in the delivery of enabling technologies such as unified communications, advanced wireless solutions, network security, and managed IT services. We have built a first-class, managed services practice for our clients who are looking for technology accountability from us.



### Skyward, Inc.

#### Booth 424

5233 Coye Dr.  
Stevens Point, WI 54481

Since 1980, Skyward has been serving the K-12 administrative software needs of school districts. Skyward's School Management System represents an integrated student and financial management software system designed to keep administrators, educators, and families connected. Skyward's software is found in over 1,500 school districts throughout the world. Skyward is committed to providing products that meet or exceed the complex needs and the high expectations of the ever-changing K-12 environment.

### Southwest Foodservice Excellence

#### Booth 533

9304 E. Raintree Dr., #110  
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SFE specializes only in K-12 child nutrition. We are a unique breed of food service experts who share the same culture and belief: "Putting Child Nutrition First!" We will enhance your students' quality of life through fresh and wholesome food, a strong focus on nutrition, and unparalleled customer service. SFE will become your food service partner of choice by building personalized, long-lasting relationships within your school district and community.

**SRB Education Solutions****Booth 642**

200 Town Centre Blvd., Suite 400  
Markham, ON L3R8G5 Canada

SRB Education Solutions empowers school districts in managing education and student success. As K-12 education software and services leaders, SRB serves close to 3 million students in over 8,000 schools across North America. SRB's 35-year history of providing high-value, education-specific solutions supports our commitment to provide cost-effective and high-quality software. This fact, combined with our experience and unparalleled support, assures our customers of the right solution at the right cost. Information: [www.srbeducationsolutions.com](http://www.srbeducationsolutions.com)

**SSC Service Solutions****Booth 704**

1845 MidPark Rd., # 201  
Knoxville, TN 37921

**Staples, Inc.****Booth 317**

15813 Maple  
Shawnee Mission, KS 66223

Staples Advantages' goal is to provide our education customers with the highest level of service, value, and full range of products and services. We can work with you to develop a comprehensive program that complies with your local and state laws and regulations, saving you time and money. And to make it even easier for you, your program will be managed by our experienced education experts, who have significant tenure working with the education sector.

**Steelcase****Booth 124**

901 44th St., SE  
Grand Rapids, MI 49508

For over 100 years, Steelcase has been bringing human insight to business by studying how people work, wherever they work. Those insights can help organizations achieve a higher level of performance by creating places that unlock the promise of their people. Our goal is to help organizations create spaces that support how they work. Our

passion is to help people love how they work.

**Subway****Booth 512**

325 Bic Dr.  
Milford, CT 06461

The SUBWAY® School Lunch Program is available in three options: off-site delivery, onsite with a SUBWAY® franchisee, or onsite with you as the SUBWAY® franchisee. Whichever option you choose, you'll have the full support from our development agent and HQ.

**Summa Group****Booth 128**

9 Tai Lane, #B-1  
Bozeman, MT 59715

Summa is a nationally recognized group purchasing organization with a focus on the education sector. We are affiliated with Provista—one of the nation's leading supply chain improvement companies—and Novation, the country's largest supply contracting firm. Summa is dedicated to achieving cost avoidance for thousands of members.

**Summit Food Service, LLC****Booth 334**

2703 Broadbent Pkwy., Suite F  
Albuquerque, NM 87107

**SunGard K-12 Education****Booth 622**

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Bethlehem, PA 18018

SunGard K-12 Education software solutions serve one out of six students nationally! Experience the benefits of working with a single vendor and a fully integrated solution. Featuring student information, curriculum and assessment, special education, and financial and human resource management, our software products can be deployed to work together to meet district-wide goals and requirements or implemented as powerful stand-alone systems. We are The Efficiency Experts! Call 866.905.8989 for a demonstration, or visit [sungard.com/K12](http://sungard.com/K12) today!

**Sunland Asphalt****Booth 210**

775 W. Elwood St.  
Phoenix, AZ 85041

Sunland Asphalt and Sports provides both new construction and maintenance for asphalt, concrete, running tracks, tennis and basketball courts, and constructs the infrastructure required when installing an artificial turf field of any type. Sunland provides services for the following states: AL, AR, AZ, CA, CO, FL, GA, LA, MS, NC, NM, NV, OK, SC, TN, TX, and UT. Sunland also uses several cooperative contracts to ease purchasing procedures and is an authorized dealer for Porter-Gill Athletic Equipment.

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**TCPN (The Cooperative Purchasing Network)****Booth 212**

7145 West Tidwell Rd.  
Houston, TX 77092

TCPN is a national governmental purchasing cooperative able to leverage the purchasing potential of governmental entities in all 50 states. We make cooperative purchasing as simple as possible by competitively bidding and awarding contracts to vendors in accordance with purchasing procedures mandated by state procurement laws and regulations.

**Telecor****731**

1114 Westport Crescent  
Mississauga, ON L5T1G1  
Canada

Telecor is an established industry-leading manufacturer of an extensive line of communications products. They will

be exhibiting their IP Communications System, Crisis Notification System, and Visual Console for K-12 Schools.

**Tennant Company**

**Booth 541**  
701 North Lilac Dr.  
Minneapolis, MN 55422

**Thomas Edison State College**

**Booth 521**  
101 W. State St.  
Trenton, NJ 08608

Thomas Edison State College offers flexible, high-quality educational programs for adults, and is a national leader in the assessment of learning. *Forbes* identified the college as one of the top 20 schools in the nation in the use of technology for education. Regionally accredited by the Middle States Association of Colleges and Schools, the school offers graduate degree programs in school business administration and school district leadership that are 100% online.

**Thomas Findlay, Inc**

**Booth 717**  
1728 State Ave., NE, Suite 104  
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We have proven solutions for cash counting and cash management systems for school districts of all sizes. Whether you handle lots of cash every day or a large amount at peak periods, let us help you count and secure your cash now. Come see what we have to offer you!



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5th Floor  
MS 730/5/40  
New York, NY 10017

**TimeClock Plus**

**Booth 216**  
3322 West Loop 306  
San Angelo, TX 76904

**TransAct Communications**

**Booth 324**  
5105 200th St., SW, #200  
Lynnwood, WA 98036

ActPoint KPI business intelligence tools include state-of-the-art key performance indicators (KPI), smart surveys, automated calculations, dashboards, and benchmarking and predictive modeling tools that can power the improvement of non-instructional operations of public school districts nationwide. Desktop, laptop and iPad/tablet-friendly. Measure- Compare- Manage. For more information, visit [www.actpoint.com](http://www.actpoint.com)



**Transfinder**

**Booth 612**  
120 Erie Blvd.  
Schenectady, NY 12305

Transfinder is a national leader in student transportation management systems and services, offering routing, scheduling, and communication solutions for optimal transportation logistics.

**Tremco**

**Booth 329**  
3735 Green Rd.  
Beachwood, OH 44122

Tremco Roofing and Building Maintenance is committed to providing ASBO members with roofing and weather-proofing solutions on time, on budget, and with minimal class disruption. We've saved schools time and money when planning roofing and building envelope projects for decades. Tremco also offers energy management solutions to help meet your sustainable goals including leading renewable energy and cost reducing solutions. Mike Rangos, Market Development Manager, U.S. Education, Tremco Roofing & Building Maintenance, 248.770.8286 mobile, [mrangos@tremcoinc.com](mailto:mrangos@tremcoinc.com)

**TSA Consulting Group**

**Booth 133**  
28248 N. Tatum Blvd., B1 #222  
Avenue Creek, AZ 85331



**Tyler Technologies, Inc.**

**Booth 311**  
370 US Route One  
Falmouth, ME 04105



Schools and school districts of all sizes can focus more on your students and less on your data by implementing Tyler Technologies' comprehensive school software and service solutions designed with an insider's understanding of the K-12 market. Financial, student information, transportation, special education, and district planning made efficient.



**U.S Communities**

**Booth 101**  
2033 N. Main St.,  
Suite 700  
Walnut Creek, CA 94596



U.S. Communities cooperative purchasing program partners with school districts to find solutions that benefit school procurement professionals. U.S. Communities goes beyond providing outstanding contracts. Together with their supplier partners, they are committed to offering comprehensive business solutions that help school districts maximize cost-control while also improving operational efficiencies and performance. U.S. Communities is the gold standard when it comes to public procurement, as well as partnerships dedicated to providing best-in-class procurement solutions. Visit [www.uscommunities.org](http://www.uscommunities.org) to learn more!

**United Rentals**

**Booth 306**  
23535 Overland Dr.  
Sterling, VA 20166

**US EPA Office of Children's Health Protection**

**Booth 333**  
1200 Pennsylvania Ave., NW  
Mailcode 1107A, Room 2512  
Washington, DC 20004



**VALIC**  
**Booth 203**

2929 Allen Pkwy.  
Houston, TX 77019



VALIC, an ASBO Strategic Partner, is a leading provider of retirement plans and investments to employees of education, health care, public sector, and other not-for-profit and for-profit organizations.



**Virco Mfg. Corporation**  
**Booth 401**

2027 Harpers Way  
Torrance, CA 90501



Virco's industry-leading furniture and equipment selection for K-12 schools includes: the ergonomically contoured ZUMA®, Sage™ and Metaphor® seating collections for healthy movement in the classroom; technology-ready TEXT® tables; and Parameter® workstations for teachers and administrators. Hundreds of Virco items are GREEN-GUARD® certified. For large-scale furniture purchases, Virco's complimentary, hassle-free PlanSCAPE® service delivers on-time, on-budget solutions.

**WasteManagement**

**Booth 228**

1001 Fannin St., Suite 4000  
Houston, TX 77002

**Waxie**  
**Booth 517**

4136 E. McDowell Rd.  
Mesa, AZ 85215

Waxie Sanitary Supply provides sustainable supply chain solutions to the public sector through a variety of local, state wide, and GPO contracts throughout the western United States.

**Weidenhammer Systems Corp.**

**Booth 618**

935 Berkshire Blvd.  
Wyomissing, PA 19610

Weidenhammer is an established education management software leader serving the information technology needs to more than 1,500 school districts in 40 states since 1978. With nearly 200 IT professionals in seven locations through 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 system, and Synergy, the Student Information System.



**WellCard, LLC a Division of WellDyne, Inc.**

**Booth 218**

472 S. Tucson Way  
Englewood, CO 80112

WellCard Health provides members with access to pre-negotiated discounts on prescription drugs and a wide range

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**Wenger Corporation**

**Booth 323**

555 Park Dr.  
Owatonna, MN 55060

Wenger Corporation, founded in 1946, provides innovative, high-quality solutions for music and theater education and performance, elementary education, and athletic equipment storage. In new construction and renovation projects, Wenger works in partnership with the project team to deliver outstanding long-term value with a beautiful blend of form and function.

**Zonar Systems**

**Booth 531**

18200 Cascade Ave., South  
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- Disability Income Insurance
- Accident Only Insurance
- Cancer Insurance
- Life Insurance
- Critical Illness Insurance
- Annuities

**Visit us at Booth #213 during the 2012 Annual Meeting & Expo October 12-15th**

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