



PROGRAM BOOK

2015 ANNUAL MEETING & EXPO

October 23–26 • Grapevine, Texas

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ASBO INTERNATIONAL

Annual Meeting & Expo

2015

October 23–26
Grapevine, Texas

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Annual Meeting & Expo

2015

October 23–26
Grapevine, Texas



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GENERAL INFORMATION

Registration Hours

FRIDAY: 7:00 a.m. – 6:00 p.m.
SATURDAY / SUNDAY: 7:00 a.m. – 4:00 p.m.
MONDAY: 7:00 a.m. – 10:00 a.m.

Exhibit Hall Hours

SATURDAY: 2:30 p.m. – 5:30 p.m.
SUNDAY: 11:30 a.m. – 2:15 p.m.

BE IN THE KNOW

For the latest on daily Annual Meeting & Expo activities, visit Registration located on the Ballroom Level of the Convention Center.

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

COMPLIMENTARY WI-FI

Wi-Fi is available in Convention Center public areas and meeting rooms. (Note: Please select ASBO International from the list of available networks and provide the Username and Password below to complete Wi-Fi login).

> Username: **ASBO International**

> Password: **ASBO2015**

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CHARGING STATION

Need a battery boost? Stop by the charging station located near Registration to power up your mobile device. *Sponsored by Ricoh Americas Corporation*

BADGES

An official 2015 Annual Meeting & Expo badge is required to enter the General Sessions, educational sessions, Workshops and Seminars, Exhibit Hall, and social events. To earn CPE credits for designated sessions, be sure to have your badge scanned to verify attendance. Attendees who scan in for a session will receive an email with CPE login and evaluation information.



ASBO INTERNATIONAL

ASBO BOOTH, BOOKSTORE, AND PIN TRADING ZONE

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



ANNUAL MEETING & EXPO MOBILE APP

Back by popular demand! The full annual meeting program is available for smart phone and tablet users with the Annual Meeting & Expo App. Search **ASBO Intl 15** in the App Store or Google Play to connect with attendees and create your personal conference itinerary. *Sponsored by Johnson Controls*

SESSION RECORDINGS

Can't decide which session to attend? No problem! Unless otherwise noted, all Discussion Groups and Deep Dig Sessions will be recorded and made available on Education On Demand.

RIBBON BAR

Help yourself to unlimited badge ribbons at the ribbon bar located near Registration on the Ballroom Level of the Convention Center.

To celebrate the Annual Meeting & Expo in the Lone Star State, keep your eye out for the exclusive 2015 "Everything's Bigger in Texas" ribbon. Visit Motorola's Booth 805 in the Exhibit Hall to pick up your special ribbon! *Sponsored by Motorola*

ASBO ANNUAL MEETINGS = PINS

Long-time annual meeting attendees know that part of our history and culture includes collectible pin trading. To continue this fun tradition, look in your registration bag to find two new ASBO pins to add to your collection this year! *Sponsored by Siemens Industry, Inc., Building Technologies Division*

WRITE IT DOWN

Use the event journal found in your registration bag to keep your notes and insights all in one place. *Sponsored by ABMM Financial*

FIRST AID

In the event of a medical emergency or accident, please call security at extension 333 for assistance.

Programming Note

ASBO International's 2015 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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**Visit Our Booth #432
During the Conference**

Unable to stop by? To schedule an appointment call 866-401-3030, option 3.

*Source: LIMRA, Not-for-Profit Survey, based on total participants for three consecutive years (2012-2014) and contributions for two consecutive years (2013-2014).

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Strategic Partners



Event Partners



STUDENT LOANS



Erase Student Loan Debt

Help your employees create a successful financial future.

Are student loan payments keeping your employees from participating in your school's retirement plan? Or worse, are those payments forcing your teachers to leave the profession they love? Do your employees wish their students loans would magically disappear?

Learn about student loan forgiveness programs that are available to help reduce or eliminate student loan debts for qualifying education employees.

Visit booth #405 or join the discussion at our Clinic Table.



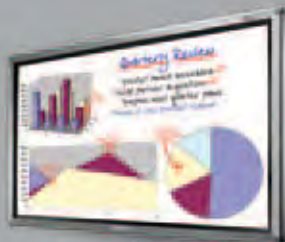
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SCHEDULE OF EVENTS

IO = Invitation Only
\$ = Additional Fee

Annual Meeting & Expo

2015

October 23-26
Grapevine, Texas

Friday, October 23

7:00 a.m. – 6:00 p.m.	Registration Open
8:00 a.m. – 5:00 p.m.	Workshops and Seminars
9:00 a.m. – 12:00 p.m.	Dallas Cowboys Stadium Tour (\$)
9:30 a.m. – 3:00 p.m.	Certification Commission Meeting and Lunch (IO)
6:00 p.m. – 7:30 p.m.	Welcome Mixer

Saturday, October 24


7:00 a.m. – 4:00 p.m.	Registration Open
7:30 a.m. – 8:30 a.m.	SFO® Recipient Breakfast (IO)
8:45 a.m. – 10:45 a.m.	First General Session— Presentation by Michelle Gielan
11:00 a.m. – 12:00 p.m.	Discussion Groups
11:00 a.m. – 12:00 p.m.	Guest Program: Book Club— <i>Mrs. Kennedy and Me</i> by Clint Hill
11:00 a.m. – 12:00 p.m.	Annual Meeting Program Committee Meeting— All encouraged to attend
11:00 a.m. – 1:30 p.m.	Affiliate Executive Directors Meeting and Lunch (IO)
12:00 p.m. – 1:30 p.m.	MBA Advisory Committee Meeting and Lunch (IO)
12:30 p.m. – 2:30 p.m.	Deep Dig Sessions
1:15 p.m. – 2:15 p.m.	Discussion Groups
2:30 p.m. – 5:30 p.m.	Exhibit Hall Opening Reception
7:00 p.m. – 10:00 p.m.	Affiliate Reception at The Ranch of Lonesome Dove

Sunday, October 25

7:00 a.m. – 4:00 p.m.	Registration Open
8:30 a.m. – 9:45 a.m.	Clinic Tables
8:45 a.m. – 9:45 a.m.	Open Bylaws Meeting
10:00 a.m. – 11:30 a.m.	Second General Session— Presentation by Matt McFadyen
11:00 a.m. – 11:45 a.m.	Guest Program: Dallas History
11:30 a.m. – 1:00 p.m.	COE Advisory Committee Meeting and Lunch (IO)
11:30 a.m. – 2:15 p.m.	Exhibit Hall Open
12:30 p.m. – 1:30 p.m.	Lunch in the Exhibit Hall
1:15 p.m. – 2:00 p.m.	COE Recipients Reception (IO)
2:15 p.m. – 3:00 p.m.	Eagle Award Recipients Reception (IO)
2:30 p.m. – 3:30 p.m.	Discussion Groups
2:30 p.m. – 4:30 p.m.	Deep Dig Sessions
3:45 p.m. – 4:45 p.m.	Discussion Groups
5:00 p.m. – 6:00 p.m.	Emerging School Business Leaders Scholarship Reception (IO)
5:15 p.m. – 6:00 p.m.	MBA Recipients Reception (IO)

Monday, October 26

7:00 a.m. – 10:00 a.m.	Registration Open
8:00 a.m. – 9:00 a.m.	Discussion Groups
9:15 a.m. – 10:15 a.m.	Discussion Groups
9:30 a.m. – 10:15 a.m.	Guest Program: Art of Reflexology
10:30 a.m. – 11:30 a.m.	Discussion Groups



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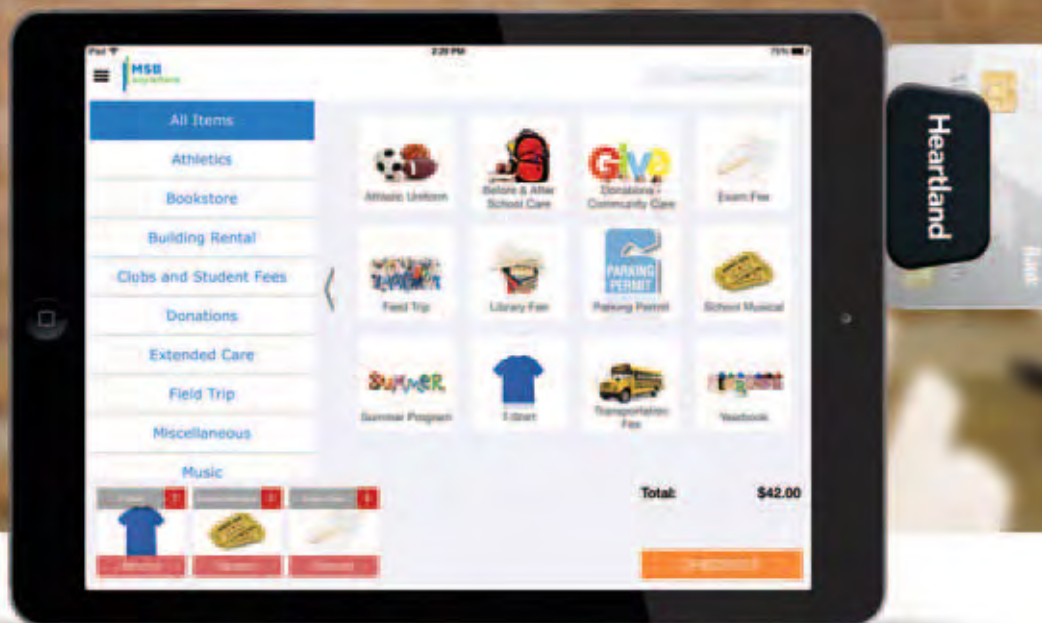
Visit us at booth 809 and get your questions answered!
EXHIBIT HALL GAME PARTICIPANT - SATURDAY ONLY!

Mike Barnhill
Business Development Director
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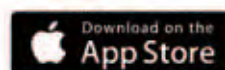


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WORKSHOPS AND SEMINARS

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

Remember, your badge is your ticket to earn CPE credits, so please scan your badge as you enter and exit each session room. To earn SFO recertification hours, remember to have your SFO Contact Hours Record initialed by the presenter or ASBO staff.

Friday, October 23

WORKSHOPS

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

Full-Day Workshop

8:00 a.m. – 5:00 p.m.

Workshop 1: Engaging Education's Stakeholders in Financing Our Future
Room: Dallas 6 SFOs: 8 CPEs: 8

Two-Hour Workshops

8:00 a.m. – 10:00 a.m.

Workshop 2: Alliance for Excellence in School Budgeting
Room: Texas 1-3 SFOs: 2 CPEs: 2

Workshop 3: How Your District's Dining and Nutrition Program Can Impact Student Well-Being, Your Community, and School Climate
Room: Texas 4 SFOs: 2

10:15 a.m. – 12:15 p.m.

Workshop 4: How to Create and Deliver Dynamic Presentations
Room: Texas C SFOs: 2 CPEs: 2

Workshop 5: Mentoring Magic: How Professional Mentoring Can Produce Exceptional School Business Officials
Room: Texas 5-6 SFOs: 2 CPEs: 2

1:00 p.m. – 3:00 p.m.

Workshop 6: Cool Tools for Managing Data
Room: Texas 1-3 SFOs: 2 CPEs: 2

Workshop 7: Design Scalable Staffing and Budgeting Models to Support Academic Goals
Room: Texas 5-6 SFOs: 2 CPEs: 2

Workshop 8: Technology, the Law, and Schools: Emerging Issues
Room: San Antonio 4-5 SFOs: 2

Four-Hour Workshops

8:00 a.m. – 12:00 p.m.

Workshop 9: ACA Strategy and Compliance Tactics for 2016 and Beyond
Room: San Antonio 4-5 SFOs: 4 CPEs: 4

Workshop 10: School Tour: Richard J. Lee Elementary School and Lady Bird Johnson Middle School
Room: San Antonio 6 SFOs: 4

Workshop 11: The Sustainable Management of Risk
Room: Dallas 5 SFOs: 4

1:00 p.m. – 5:00 p.m.

Workshop 12: Internal Controls and Reporting for Athletics, Student Activity Funds, Booster Clubs, and PTOs
Room: Texas C SFOs: 4 CPEs: 4

Workshop 13: Lessons from Corporate America: How Professional Development Builds Leadership
Room: Texas 4 SFOs: 4 CPEs: 4

SEMINARS

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

Full-Day Seminar

8:00 a.m. – 5:00 p.m.

Seminar 14: Skills Refresher for ASBO's SFO® Certification Exam
Room: San Antonio 1-2 SFOs: 8 CPEs: 8

Four-Hour Seminars

8:00 a.m. – 12:00 p.m.

Seminar 15: How to Create an Award-Winning Budget
Room: Dallas 7 SFOs: 4 CPEs: 4

1:00 p.m. – 5:00 p.m.

Seminar 16: How to Prepare a Comprehensive Annual Financial Report
Room: Dallas 5 SFOs: 4 CPEs: 4

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By sponsoring the Certificate of Excellence in Financial Reporting (COE), VALIC enables ASBO to recognize education's financial managers for communicating school district expenditures with utmost clarity and integrity.

At VALIC, we commit ourselves to upholding the "four Ps" — Partnership, People, Process and Promise. It is this commitment to our clients and our industry that has helped us become a leading retirement plan provider, serving nearly 24,000 plan sponsors and more than 2 million participants.



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Focuses on global school business management issues.



FACILITY MANAGEMENT

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



LEADERSHIP DEVELOPMENT

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

EARNING CPE CREDITS AND SFO CONTACT HOURS

Earn up to 16 CPE credits for the entire Annual Meeting & Expo in Personal Development, Finance, Auditing, Specialized Knowledge and Applications, Computer Science, Accounting (Governmental), Administrative Practice, Management Advisory Services, Personnel/HR, Business Law, Regulatory Ethics, and Accounting fields of study.

To receive CPE credit for designated sessions, you must scan your badge to verify attendance and complete the online session evaluation.



Earn up to 16 SFO recertification contact hours Friday through Monday. Use the Contact Hours Record in your registration packet to document

your attendance. Remember to have the presenter or ASBO staff initial next to each session you attend. All Workshops, Seminars, Discussion Groups, and Deep Dig sessions award SFO contact hours.



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 the 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.

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 International will also offer CPE credits for select Discussion Groups and Deep Dig sessions at the Annual Meeting & Expo using the group live instructional delivery method.

COMPLAINT RESOLUTION AND REFUND POLICY

For more information regarding administrative policies, such as complaints and refunds, contact ASBO International offices by phone, 866.682.2729 x7080, or by mail, 11401 North Shore Drive, Reston, Virginia, 20190.

ASBO International reserves the right to cancel a Workshop or Seminar due to low enrollment.

DAILY SCHEDULE: Friday & Saturday

Friday, October 23

7:00 a.m. – 6:00 p.m.

Registration

Center Pre-function, Ballroom Level

8:00 a.m. – 5:00 p.m.

Workshops and Seminars

(See page 12 for complete listing.)

9:00 a.m. – 12:00 p.m.

Dallas Cowboys Stadium Tour

Additional Fee and Advance Registration Required

Buses depart from the Tour Bus Lobby at 9:15 a.m.

9:30 a.m. – 3:00 p.m.

Certification Commission Meeting and Lunch

By Invitation Only

Room: Appaloosa 1

6:00 p.m. – 7:30 p.m.

Welcome Mixer*

Glass Cactus

Continuous shuttle service will be available from the Gaylord Texan Tour Bus Lobby to the Glass Cactus from 5:45 p.m. to 8:45 p.m. Prefer to walk? The Glass Cactus is a short 10–15 minute walk from the Gaylord Texan along a paved sidewalk.

Attendees are welcome to stay at the Glass Cactus until closing. After 7:30 p.m., food and beverage purchases will be the responsibility of each individual.

**Must be 21+ to attend. Badge required.*

Saturday, October 24

7:00 a.m. – 4:00 p.m.

Registration

Center Pre-function, Ballroom Level

7:30 a.m. – 8:30 a.m.

SFO® Recipient Breakfast

By Invitation Only

Room: Austin 1-3

Sponsored by The Horace Mann Companies

8:00 a.m. – 8:45 a.m.

General Session Coffee Break

Texas Ballroom Foyer

Sponsored by Tyler Technologies

FIRST GENERAL SESSION

8:45 a.m. – 10:45 a.m.

First General Session

Room: Texas Ballroom A

Welcome to Grapevine

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

Business Meeting

Mark C. Pepera, MBA, RSBO, SFO

Presentation of the 2015 Eagle Awards

Matthew R. Foxhall, CFP®
Regional Senior Vice President, AXA

Introduction of Speaker

Mark Turner
Senior Vice President, Security Benefit

DAILY SCHEDULE: Saturday

Annual Meeting & Expo

2015

October 23-26
Grapevine, Texas

FIRST GENERAL SESSION SPEAKER

"Catalyzing Success: Training Your Brain to Seize Opportunities"



MICHELLE GIELAN

Ready to get happy? Founder of the Institute for Applied Positive Research and executive producer of "The Happiness Advantage" on PBS, Michelle Gielan has identified the hallmarks of an optimistic mindset and how we can train our brains to process the world for greater happiness and success.

In this inspiring and interactive session, Michelle reveals strategies that can rewire your brain to see more potential, increase your chances of being in the "right place at the right time," and turn chance encounters and connections into professional success in your school district.

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Our Family, Dedicated To Yours.®

Welcome to ASBO International's 2015 Annual Meeting & Expo!

From administrative services to Affordable Care Act guidance, our specialized approach was designed to support the education community and educate you on matters that affect your school. Please join us for our highly interactive ACA Strategy and Compliance Tactics for 2016 and Beyond session on Friday at 8:00 a.m.; visit our Clinic Table, ACA Reporting Requirements, Sunday at 8:30 a.m.; or join us for the Deep Dig, Understanding the Compliance, Financial, and Administrative Requirements of the Affordable Care Act, Sunday at 2:30 p.m. We also invite you to visit us in the Exhibit Hall at Booth 421. American Fidelity is proud to be a partner on your side.

11:00 a.m. – 12:00 p.m.

Annual Meeting Program Committee Meeting

All Encouraged to Attend

Room: Texas C

11:00 a.m. – 12:00 p.m.

Guest Program

Book Club: *Mrs. Kennedy and Me*

Room: Austin 3

Join us for an engaging discussion of Clint Hill's intimate memoir, *Mrs. Kennedy and Me*. The author, a former Secret Service agent, details his relationship with First Lady Jackie Kennedy in the years surrounding President Kennedy's assassination.

11:00 a.m. – 1:30 p.m.

Affiliate Executive Directors Meeting and Luncheon

By Invitation Only

Room: Fort Worth 5-6

DISCUSSION GROUPS

11:00 a.m. – 12:00 p.m.

Workers Compensation Jeopardy (DG228)



Room: Dallas 5

SFOs: 1

Participants in this interactive session will learn best practices for controlling workers' compensation costs, including the importance of safety committees, claims reviews, training, loss control, managed care, and modified duty. Participants will learn from one another's experiences, develop an understanding of workers' compensation law, and understand why past medical history and investigation are so crucial.

Speakers: Bernardo Giuliana, School Business Administrator, East Brunswick Board of Education, East Brunswick, NJ; Latonya Jackson, Vice President—Public Entity, Arthur J. Gallagher & Company, Princeton, NJ; Derek J. Jess, School Business Administrator,

Leadership Development & Events

Daily Schedule: Saturday

DAILY SCHEDULE: Saturday

Perth Amboy Board of Education, Perth Amboy, NJ;
John H. Geaney, Attorney at Law, Capehart Scatchard,
Mount Laurel, NJ

11:00 a.m. – 12:00 p.m.

**How to Prepare and Submit a Comprehensive
Annual Financial Report (CAFR) for ASBO's
Certificate of Excellence (COE) Award (DG167)**



CPE

Room: San Antonio 6

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Learn about the requirements for developing an effective CAFR. Review guidelines and processes to receive the COE award.

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

Speakers: Sara Kirk, Audit Manager, Heinfeld, Meech, & Co., P.C., Phoenix, AZ; Members of the COE Advisory Committee

11:00 a.m. – 12:00 p.m.

**Projecting Educational and Financial Solvency
for Your District (DG160)**



CPE

Room: Texas 4

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

How many times have you been asked to predict the future? School board members, superintendents, faculty members, and community stakeholders often call upon

the school business official (SBO) to forecast the financial stability and resulting educational opportunities for their organizations. Learn how SBOs can use data elements such as expenses, revenues, fund balance, enrollment, class sizes, and staffing demographics to help leaders understand their district's current reality, use historical financial data to analyze trends, and forecast the district's long-term financial and educational solvency.

Learning Objectives: 1. Demonstrate how to use historical data to evaluate current trends in expenses, revenues, and the resulting fund balance. 2. Discuss how to use data along with your knowledge of future trends to analyze the long-term financial health of your district. 3. Identify which future trends in your district's financial data would indicate educational solvency.

Speakers: Scott Smith, Senior Vice President, Forecast5 Analytics, Inc., Naperville, IL; Jennifer Bolton Carls, Deputy Superintendent, ONC BOCES, Grand Gorge, NY; Greg Carlson, Assistant Superintendent for Business and Management Services, Bryam Hills SD, Armonk, NY

11:00 a.m. – 12:00 p.m.

**Widigital to Digital: Procurement in the Age of Content
(DG224)**



Room: Dallas 6

SFOs: 1

Almost overnight, decisions about everything from desks to devices are driven by learning outcomes. How does the procurement specialist understand, protect, and drive learning outcomes alongside financial efficiency? Learn best practices for device procurement and implementation. Explore scenarios in which the use of tablets goes badly, and examine how learning may decline in a 1:1 school. Learn how to transform technology into content and review new research on the classroom ecosystem that must balance purchasing decisions with learning outcomes.

Speaker: Kevin E. Baird, Chairman and National Supervising Faculty, Center for College and Career Readiness, Orlando, FL

11:00 a.m. – 12:00 p.m.**Developing and Implementing Internal Controls for Accounts Payable (DG122)****CPE****Room:** Dallas 7**SFOs:** 1 **CPEs:** 1 **Program Level:** Basic**Field of Study:** Auditing**Program Prerequisites:** None**Advance Preparation:** None

Learn practical tips to develop and implement internal controls for accounts payable processing in your school district. This session will also provide a great opportunity to share your own best practices in managing this repetitive task in the most accurate, efficient, and effective manner. Leave with valuable resources such as procedures and checklists.

Learning Objectives: 1. Discuss the need for internal controls in the accounts payable department. 2. Describe how to utilize the resources provided during the session to create and/or update your district's procedures. 3. Outline your district's own best practices and challenges in managing accounts payable payments.

Speaker: Rebecca Estrada, Executive Director of Finance, Lackland ISD, San Antonio, TX

11:00 a.m. – 12:00 p.m.**Why Food Allergies Matter to Your Staff, Students, and Community (DG201)****Room:** San Antonio 3**SFOs:** 1

Food allergy is a serious medical condition affecting up to 15 million people in the United States, including 1 in 13 children. Allergic reactions can be life-threatening and have far-reaching effects on children and their families, as well as on the schools they attend. Meeting the needs of this growing population must be addressed in all school foodservice venues. Staff in schools should develop plans for preventing an allergic reaction and responding to a food allergy emergency. Participants will

AXA

AXA continues to be a proud Strategic Partner of ASBO International and the sponsor of the Eagle Award and the Eagle Institute. We applaud your commitment to professional development and the business solutions that ASBO embodies. In support of your efforts, we offer a broad selection of retirement solutions to help you and your employees save for retirement income in the future. With several opportunities during the conference to learn more about what AXA offers, please visit our Booth 432 and join us for our Clinic Table discussion on Sunday, 8:30 a.m. – 9:45 a.m.

have the opportunity to receive food allergy and gluten-free foodservice training.

Speaker: Stacy Lofton, MS, RD, SNS, Director, Premier Inc., and Master Trainer, MenuTrinfo, LLC

11:00 a.m. – 12:00 p.m.**What I Didn't Learn in Business Official School (DG149)****CPE****Room:** Texas 5-6**SFOs:** 1 **CPEs:** 1 **Program Level:** Basic**Field of Study:** Personal Development**Program Prerequisites:** None**Advance Preparation:** None

As school business officials, we often have great plans for what we will get done each day. Then the day starts and the plans promptly get derailed. Sometimes the questions we are asked or tasks we need to accomplish seem easy and straightforward, but because they may be related to an obscure aspect of state or federal law, they consume much more time than we expected. Learn about some of these unusual, time-consuming aspects of school business management,

DAILY SCHEDULE: Saturday

key approaches for managing time, and strategies for building a network to help get things done quickly. Audience participation is encouraged.

Learning Objectives: 1. Describe how to address typical time-consuming activities in school business. 2. Formulate time-management approaches to make efficient use of time. 3. Outline strategies for developing a resource network to assist in completing school business tasks.

Speaker: David Bein, Assistant Superintendent of Business Services and Chief School Business Official, East Maine SD 63, Des Plaines, IL

11:00 a.m. – 12:00 p.m.

**Community Use of Schools Program—
Ontario, Canada (DG100)**



Room: San Antonio 4-5

SFOs: 1

Examine the benefits of the multi-faceted Community Use of Schools Program now in place for over 10 years at all 72 school boards in the province of Ontario. Discover how the program has positively impacted the community, especially the youth, by allowing programs to be held in school facilities after hours at little or no cost. Issues and best practices will be discussed as well as risk management, balancing the budget, and the program's impact on other departments.

Speakers: Kelly O'Boyle, Community Use of Schools Outreach Coordinator, Peterborough Victoria Northumberland and Clarington Catholic District School Board, Peterborough, ON; Debbie Dover, Community Use of Schools Officer, Waterloo Catholic District School Board, Kitchener, ON

11:00 a.m. – 12:00 p.m.

**Technology Costs Associated with 1:1 Initiatives
(DG176)**



CPE

Room: San Antonio 1-2

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Are you interested in leveraging technology to redesign an innovative and rigorous curriculum? Do you want your faculty to become master learners who can expertly guide their students through complex tasks? Have you thought about an educational design where the technology infrastructure supports innovative teaching and learning? If so, then join us as we discuss how to implement a 1:1 device scenario in your district.

Learning Objectives: 1. Demonstrate how to improve the educational environment into one that fosters student ownership of learning. 2. Describe how flexible learning environments promote a personal educational experience for every student. 3. Explain how formative assessment is transformed with the 1:1 device.

Speakers: Lisa Calligy Technology Facilitator, Union City Board of Education, Union City, NJ; Karl Pittenger, District Technology Liaison, Promedia Technologies, Little Falls, NJ; Anthony Dragona, School Business Official, Union City Board of Education, Union City, NJ

12:00 p.m. – 1:30 p.m.

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

By Invitation Only

Room: Austin 4

DEEP DIG SESSIONS

12:30 p.m. – 2:30 p.m.

**Developing, Implementing, and Sustaining a Multi-Year
Strategic Finance Plan (DD183)**



CPE

Room: San Antonio 4-5

SFOs: 2 **CPEs:** 2 **Program Level:** Basic

Field of Study: Accounting Governmental

Program Prerequisites: None

Advance Preparation: None

Lake County, Florida, Wylie, Texas, and Beaverton, Oregon, school districts are members of a 30-school district Alliance for Excellence in School Budgeting. Using resources from Smarter School Spending and a process created by school business officials, researchers, and education finance experts, districts use the budget process to create a multiyear financial plan to align resources to student outcomes. Learn how these three districts have brought teaching and learning, communication, and finance leaders together to implement the process, and how they are embedding the practice into the culture of their district.

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

Speakers: Claire Hertz, Chief Financial Officer, Beaverton SD, Beaverton, OR; Carol MacLeod, CPA, Chief Financial Officer, Lake County Schools, Lake County, FL; Michele Trongaard, Chief Financial Officer, Wylie ISD, Wylie, TX

12:30 p.m. – 2:30 p.m.

A Safer, Healthier School Through Green Cleaning (DD154)



Room: San Antonio 3

SFOs: 2

Seeking healthier, safer indoor environments, many school districts have developed environmentally preferable purchasing policies, which is an excellent first step. The next vital step for our K–12 schools is green cleaning. Become familiar with the components of a green cleaning program and discover numerous benefits, including reduced absenteeism and rates of asthma attacks. Learn how green cleaning procedures can help your district save money. The executive directors of two national nonprofits will describe their experiences working with school administrators, facilities teams, unions, purchasers, parents, communities, and trainers to help schools implement green cleaning.

THE HORACE MANN COMPANIES



Horace Mann

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

Speakers: Claire Barnett, Executive Director, Healthy Schools Network, Albany, NY; Arthur Weissman, President and CEO, Green Seal, Washington, DC

12:30 p.m. – 2:30 p.m.

Creative Disruption: Using the Student's Viewpoint to Transform Education (DD212)



Room: San Antonio 1-2

SFOs: 2

Creative disruption refers to overturning the norms that result in mediocrity in order to institute innovative and positive change. The unremarkable student outcomes most of us observe suggest that we can discover more about our roles as progressive financial and operations chiefs by seeing the world as our students do. How might we improve educational results by applying our mission-focused wisdom to better provide what students really want: a great teacher, a school experience that aligns with their world, and effective preparation for their future? Explore opportunities for shifting our thinking and resource deployment to re-energize our students' enthusiasm for learning.

Speaker: Carl Harrison Gruenler, Deputy Superintendent for Business Operations, Santa Fe Public Schools, Santa Fe, NM

DAILY SCHEDULE: Saturday

12:30 p.m. – 2:30 p.m.

Behavioral Finance: How Understanding the Psychology of Investing Can Guide School Employees Toward a More Secure Retirement (DD184)



CPE

Room: Texas 1-2

SFOs: 2 **CPEs:** 2 **Program Level:** Basic

Field of Study: Personnel/HR

Program Prerequisites: None

Advance Preparation: None

Join a panel of industry experts for a lively and participatory exploration of behavioral finance, a field that combines behavioral psychology and conventional finance to explain why people make irrational financial decisions. Unravel generational differences in attitudes toward retirement saving and gain actionable insights into diffusing negative implications of irrational financial decision making. Examine plan design elements that help employees save more for a secure retirement and address recent legislative updates regarding 403(b)/457 plans.

Learning Objectives: 1. Describe the current landscape of retirement security among school employees. 2. Define behavioral finance and discuss research and implications of employees' irrational retirement planning behaviors. 3. Discuss generational differences in attitudes toward retirement planning. 4. Explain the role of employee engagement and education in mitigating negative implications of irrational retirement decisions. 5. Outline educational and retirement plan designs that can help mitigate those negative implications. 6. Identify recent IRS legislative updates regarding 403(b) and 457 plans.

Speakers: John Kevin, Vice President K-12 Market, VALIC, Linthicum, MD; Ketul Thaker, Vice President, Consultant and Industry Relations, Voya Financial®, Windsor, CT; Tom Granger, Assistant Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Nick Taylor, Vice President, Marketing Strategies, Horace Mann Companies, Springfield IL; Curtis May, Executive Vice President, AXA Advisors, Milwaukee, WI; Linda Segal Blinn, Vice President, Technical Services, Voya Financial®, Windsor, CT

DISCUSSION GROUPS

1:15 p.m. – 2:15 p.m.

What Every School Administrator Should Know about K-12 Security (DG250)



Room: Texas 3

SFOs: 1

Everyone knows that the key to successful K-12 security is preparation. But in today's school environments, the security needs and challenges are rapidly becoming more complex and require greater collaboration across multiple agencies. Every school employee has a role to play in K-12 security and it starts with understanding what adequate school security and emergency planning look like. Learn about recent recommendations from key federal and state agencies for crisis management in our K-12 districts.

Speakers: Shamus P. O'Meara, Partner, O'Meara, Leer, Wagner & Kohl, P.A., Minneapolis, MN; Gwenn McDaniel, K-12 Vertical Market Director, Johnson Controls, North Myrtle Beach, SC

1:15 p.m. – 2:15 p.m.

Meritorious Budget Award Discussion Group (DG187)



CPE

Room: San Antonio 6

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

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

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

Speakers: Karin Smith, Partner, Heinfeld, Meech, & Co. P.C., Phoenix, AZ; Members of the MBA Advisory Committee

1:15 p.m. – 2:15 p.m.

Solutions to Top Bidding and Construction Problems (DG925)



Room: Dallas 5

SFOs: 1

Public bidding and construction can create nightmares for school business officials. This program, presented by two school law attorneys and an assistant superintendent for business, will help you recognize common problems and provide you with practical advice on how to solve these problems. Topics will include critical construction contract issues, pre-qualifying bidders, pre-bid meetings, project labor agreements, liquidated damages, rejecting unqualified bidders, certificates of insurance, payment and performance bonds, and project close-out challenges.

Speakers: Howard Metz, Attorney, Robbins Schwartz, Chicago, IL; Nelson Gray, Assistant Superintendent for Business Services, Des Plaines SD 62, Des Plaines, IL; Ken Florey, Attorney, Robbins Schwartz, Chicago, IL; Terry Fielden, School Board, Naperville High SD 203, Director of K–12 Education, ICI, Elmhurst, IL

1:15 p.m. – 2:15 p.m.

Making School Finance Understandable—Again (DG203)



CPE

Room: Texas 5-6

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Are you having difficulty getting teachers, staff, the public, and even your board of education to understand the basics of school finance, much less more complicated issues? Explore how to avoid finance jargon and explain school finance in terms anyone can understand. Clear examples and references will

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Office DEPOT Office Depot® delivers cost-saving solutions that provide real value to K–12 and help budgets go further. The conversation starts with instructional goals and technology vision and ends with customized solutions that drive student achievement. From school supplies and technology to professional development and parent engagement offerings, Office Depot provides a one-stop solutions resource for schools.

be presented that will engage your district's staff and community in meaningful dialogue about school finance. Saw this presentation last year? You will find expanded information in this new and improved version.

Learning Objectives: 1. Demonstrate how to translate school finance into layman's terms. 2. Discuss how to be creative as a school business manager. 3. Explain why effective communication is a necessity to successful financial management.

Speaker: John W. Hutchison, Chief Financial and Operations Officer, Olathe Public Schools, Olathe, KS

1:15 p.m. – 2:15 p.m.

E-Rate Update (DG175)



CPE

Room: Texas 4

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Business Management and Organization

Program Prerequisites: None

Advance Preparation: None

Since the inception of the E-Rate program in 1998, schools and libraries have become increasingly dependent on this program to provide support for the essential Internet and telecommunications services required by 21st-century learning environments. Coupled with the summer 2014 modernization of E-Rate rules, increased funding will give many more

DAILY SCHEDULE: Saturday

ed-tech leaders the resources they need to launch their schools and districts into the 21st century. The unprecedented increase, raising the funding cap by over 60%, will radically re-shape the way the program works going forward.

Learning Objectives: 1. Outline the new E-Rate rules and regulations. 2. Explain the changes in three major areas: closing the Wi-Fi gap, maximizing E-Rate spending, and making the E-Rate administration and application processes more efficient. 3. Describe the most effective ways to start leveraging the new regulations to get the most out of the E-Rate program.

Speaker: Keith R. Krueger, CEO, Consortium for School Networking (CoSN), Washington, DC

1:15 p.m. – 2:15 p.m.

Why Are School Business Managers Critical in an Increasingly Uncertain Educational Environment? (DG271)



Room: Dallas 6

SFOs: 1

Around the world, the delivery of educational programs has been bedeviled by an increasingly uncertain environment characterized by radical changes in financing, structure, content, and systems of inspection and impact measurement. Explore the reasons for these changes and why the role of the school business manager, as both a skilled member of a team and a leader, is of critical importance in this changing environment. The session will draw on evidence and data from the U.S., Canada, Australia, South Africa, and Europe.

Speaker: Trevor Summerson, Retired Director, National College for School Leadership, Sheffield, United Kingdom

1:15 p.m. – 2:15 p.m.

Past, Present, and Future of Shared Services for School Entities (DG984)



Room: Dallas 7

SFOs: 1

Get an overview of best practices for shared services utilized by districts for areas that include personnel, transportation, foodservices, custodial, and curriculum and instruction. Learn about the future need for shared services as well as innovative ways school districts and other agencies are utilizing shared services to address current personnel shortages and budgetary setbacks, while continuing to provide varied learning opportunities for all students.

Speakers: Stan H. Wisler, Chief Financial Officer/Director of Business Services, Montgomery County Intermediate Unit, Norristown, PA; Matthew J. Malinowski, Business Manager/Board Secretary, Upper Moreland Township SD, Willow Grove, PA

2:30 p.m. – 5:30 p.m.

Exhibit Hall Opening Reception

Exhibit Hall F

Sponsored by Horizon Software

7:00 p.m. – 10:00 p.m.

Affiliate Reception and Candidate Meet-and-Greet*

The Ranch of Lonesome Dove

2299 Lonesome Dove Road

Hosted by ASBO affiliate organizations in Alabama, Arizona, California, Colorado, Iowa, New Jersey, New York, Oregon, Pennsylvania, Washington, and Wisconsin.

Join us at Lonesome Dove for a reception and candidate meet-and-greet. Get to know current and future ASBO International board candidates and network with friends and colleagues while you enjoy line dancing instruction, mechanical bull riding, and quick-draw contests. Texas-style appetizers and beverages will be provided.

Continuous shuttle service to Lonesome Dove will be available from the Gaylord Texan Tour Bus Lobby beginning at 6:30 p.m.

**Open to all conference attendees. Badge required.*

Sunday, October 25

7:00 a.m. – 4:00 p.m.

Registration

Center Pre-function, Ballroom Level

8:30 a.m. – 9:45 a.m.

Clinic Tables

Room: Texas C

(See page 48 for complete listing.)

8:45 a.m. – 9:45 a.m.

Open Bylaws Meeting

Room: Texas 5-6

9:15 a.m. – 10:00 a.m.

General Session Coffee Break

Texas Ballroom Foyer

Sponsored by Tyler Technologies

SECOND GENERAL SESSION

10:00 a.m. – 11:30 a.m.

Second General Session

Room: Texas Ballroom A

Business Meeting

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

Installation of Officers

Terrie S. Simmons, RSBA, CSBO
Immediate Past President, ASBO International

Presentation of the 2015 Pinnacle Awards

Brian True, Corporate Director,
National Sales Group, Virco Mfg. Corporation

Introduction of Speaker

Brenda R. Burkett, CPA, CSBA, SFO

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

SECURITY BENEFIT



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Security Benefit is proud to be an ASBO International Strategic Partner and we applaud your commitment to your district. Join us during the Clinic Tables to learn about special options that can help increase participation in your district's 403(b) retirement plan and potentially solve some budget issues with those early retirements. At the 403(b) panel session, learn about behavioral finance and generational differences and what these may mean to your school district's 403(b) plan. Visit our booth to explore other ways Security Benefit can help your employees To and Through Retirement.

SECOND GENERAL SESSION SPEAKER

"Reaching the North Pole: Insights on Leading Teams Through Challenge and Change"



MATT MCFADYEN

A brush with death in the icy waters of the Great Southern Ocean ignited a passion in Matt McFadyen to lead others in reaching their peak potential. From surviving 45 degrees below zero to battling powerful ice drifts, Matt knows a thing or two about perseverance, leadership, and teamwork. Taking insights from his incredible expedition to the North Pole, Matt brilliantly illustrates what's needed when you're called to lead your team through challenge, change, and ambiguity. Get ready to leave inspired to tackle your personal mountaintop goal!

DAILY SCHEDULE: Sunday

11:00 a.m. – 11:45 a.m.

Guest Program

Dallas History

Room: Austin 3

Discover the rich and colorful history of Dallas in this educational and entertaining presentation. Author and speaker Rose-Mary Rumbley will guide you through the region's historical milestones and delight you with stories of the city's past.

11:30 a.m. – 1:00 p.m.

Certificate of Excellence Advisory Committee and Reviewers Meeting and Lunch

By Invitation Only

Room: Austin 4

11:30 a.m. – 2:15 p.m.

Exhibit Hall Open

Exhibit Hall F

12:30 p.m. – 1:30 p.m.

Lunch in the Exhibit Hall

Exhibit Hall F

Sponsored by BMO Financial Group

1:00 p.m. – 3:30 p.m.

Professional Development Networking Group

By Invitation Only

Room: Fort Worth 5-6

1:15 p.m. – 2:00 p.m.

Certificate of Excellence Award Recipients Reception

By Invitation Only

Mission Plaza

Sponsored by VALIC

2:15 p.m. – 3:00 p.m.

Eagle Award Recipients Reception

By Invitation Only

Yellow Rose Pavilion

Sponsored by AXA

DISCUSSION GROUPS

2:30 p.m. – 3:30 p.m.

Entrepreneurial Transportation Services (DG216)



Room: San Antonio 3

SFOs: 1

Hemet USD developed an award-winning and income-producing transportation service that serves students in multiple school districts across California. This program has enabled the district, despite fiscal challenges and cutbacks in transportation services, to provide an excellent transportation program plus increased revenue. Explore how the district created joint partnerships and affiliations with other public agencies to meet student needs and decrease costs, and learn about the program's impact on vendors and for-profit providers.

Speakers: Vince Christakos, Assistant Superintendent, Hemet USD, Hemet, CA; Michael Fogerty, Director of Internal & External Transportation, Hemet USD, Hemet, CA

2:30 p.m. – 3:30 p.m.

Purchasing Fundamentals (DG123)



Room: San Antonio 6

SFOs: 1

This interactive presentation offers a narrative coupled with audience participation through scenarios and group discussion. While the presentation focuses mainly on the area of how to purchase and offers information for those who are new to purchasing, it also provides insight and tips for those whose job requires purchasing only on an occasional basis.

Speaker: Kimberly Bauer, Purchasing Director, Norman Public Schools, Norman, OK

2:30 p.m. – 3:30 p.m.

Overcoming the Rising Costs of School Meal Regulations (DG028)



Room: Dallas 5

SFOs: 1

The Healthy, Hunger-Free Kids Act brought healthier foods to more than 31 million school children; however many school districts are facing rising costs as a result of the new requirements. Gain a bird's eye view of the issue with comprehensive data on trends across America's schools, then hear first-hand how a Texas school district is successfully meeting challenges head-on through a combination of savvy procurement, serving line creativity, and advocacy efforts for regulatory flexibility.

Speaker: Chris Kamradt, Director of Child Nutrition Services, Spring Branch ISD, Spring Branch, TX

2:30 p.m. – 3:30 p.m.

Legislative Issues That Could Affect Your State (DG205)



Room: Dallas 7

SFOs: 1

Explore legislative issues that affect school business management and the education of your district's students.

Speakers: Jay Himes, Executive Director, Pennsylvania ASBO, Harrisburg, PA; Tracy Ginsburg, Executive Director, Texas ASBO, Austin, TX; Michael Borges, Executive Director, New York ASBO, Albany, NY; David Lenihan, Legislative Liaison, Connecticut ASBO, West Hartford, CT

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GOVERNMENT PURCHASING ALLIANCE

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

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

2:30 p.m. – 3:30 p.m.

Leadership Lessons Learned from the Life and Presidency of FDR (DG147)



Room: Texas 5-6

SFOs: 1

Set politics aside and look at the life and presidency of Franklin Delano Roosevelt. What lessons in leadership can we learn from America's only four-term president? This presentation will examine 10 events in FDR's life that offer the opportunity to learn—what he did, what he didn't do, and what he could have done differently—from his example and his mistakes. How can we then apply these lessons to the challenges that we face as leaders?

Speaker: Bob Avery, Director of Business Services, Beaver Dam USD, Beaver Dam, WI

DAILY SCHEDULE: Sunday

2:30 p.m. – 3:30 p.m.

Invest for Student Success Strategic Planner Tool for Educational Planning, Budgeting, and Resource Allocation (DG211)



CPE

Room: San Antonio 4-5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

The Strategic Planner is a tool designed to facilitate planning and budgeting processes that explicitly align resources to programmatic goals. Users perform a needs assessment and establish goals. A series of strategies necessary to achieve the goals is then defined, under which staffing and materials resources are specified and automatically costed out, allowing the user to simulate different programmatic designs and their corresponding costs. The result is a transparent program design that details not only staffing and materials resources and their costs, but also documents how the resources are to be used to achieve the goals. Learn more about the tool and see a live demonstration.

Learning Objectives: 1. Describe the state-of-the art Strategic Planner planning/budgeting system that can be used to align resource allocation to educational objectives. 2. Explain how planning/budgeting systems can be used to develop and monitor school- and district-level programs that promote innovation and efficiency in achieving educational goals. 3. Outline effective resource allocation practices that can enhance professional learning and continuous improvement.

Speaker: Jesse Levin, Principal Research Economist, American Institutes for Research, San Mateo, CA

2:30 p.m. – 3:30 p.m.

How One District's Printing Program Transformation Is Saving Money, Securing Documents, and Improving Sustainability (DG155)



Room: Texas 3

SFOs: 1

Shawnee Mission, Kansas, leveraged Ricoh's U.S. Communities contract to create a complete document management plan. The plan transformed the way district employees interact with technology and relieved teachers of administrative time that they are now able to spend on student interactions. Explore how the plan enabled the district to eliminate 4,000 printers; reduce print volume by 43%; transform and outsource print shop management; reduce FTEs; shorten the submittal process from four steps to one; and increase the number of print jobs from 2,000 per year to 15,000 in nine months. Card authentication is used to securely access multifunction device functions and protect printed documents. Live analytics and monthly reporting are generated for bill back purposes and ongoing change management.

Speaker: Drew Lane, Executive Director of Information Services, Shawnee Mission SD, Shawnee Mission, KS

DEEP DIG SESSIONS

2:30 p.m. – 4:30 p.m.

Understanding the Compliance, Financial, and Administrative Requirements of the Affordable Care Act (DD198)



CPE

Room: Texas 1-2

SFOs: 2 **CPEs:** 2 **Program Level:** Basic

Field of Study: Specialized Knowledge and Applications

Program Prerequisites: None

Advance Preparation: None

The Affordable Care Act (ACA) came at a time of budget constraints and limited resources for many employers. However, not being compliant or cognizant of future

obligations can be costly and time-consuming for your school district. Review the Patient Protection and ACA requirements imposed today and expected to take effect in the future, understand your responsibilities, and identify your level of preparedness using a checklist approach you can take back to your district.

Learning Objectives: 1. Identify reporting requirements, such as the new IRS 1094/1095 forms required in early 2016. 2. Discuss the upcoming ACA requirements, such as the Excise Tax on High Cost Plans ("Cadillac Tax") and how your district can prepare now. 3. Detail how to prepare a compliance action plan for steps your district needs to take or needs to confirm are being handled by a third party.

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

2:30 p.m. – 4:30 p.m.

**Time to Implement Uniform Grant Guidance:
The OMB Omni Circular (DD133)**



CPE

Room: Texas 4

SFOs: 2 **CPEs:** 2 **Program Level:** Basic

Field of Study: Accounting Governmental

Program Prerequisites: None

Advance Preparation: None

The Office of Management and Budget (OMB) issued its long-awaited grant reform rules, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. OMB is streamlining the federal government's guidance on administrative requirements as a key component to more effectively focus federal resources on improving performance and outcomes while ensuring financial integrity of taxpayer dollars. This guidance provides a government-wide framework for grants management that will be complemented by additional efforts to strengthen program outcomes through innovative and effective use of grant-making models, performance metrics, and evaluation. Learn the latest information about the OMB requirements.

VALIC

VALIC VALIC welcomes you to Grapevine and the 2015 Annual Meeting & Expo. VALIC, as a leading provider of retirement plans to public K-12 school districts, has proudly sponsored ASBO International for over 20 years. Please visit us in the Exhibit Hall at Booth 726. VALIC 403(b) experts will join the Behavioral Finance and 403(b) panel discussion on Saturday, 12:30 p.m. – 2:30 p.m. in Room Texas 1-2.

Learning Objectives: 1. Outline the requirements of the new OMB guidelines. 2. Define the new terminology related to the guidelines. 3. Describe the potential impact of the standard on your school district's grant programs. 4. Explain the new audit and oversight requirements for federal grants.

Speakers: Bert Neuhring, Partner, Crowe, Horwath LLP, Oak Brook, IL; Corey Arvizu, Partner, Heinfeld, Meech & Co, Tucson, AZ; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL; Phillip W. Saurman, Shareholder, Hungerford Nichols, Grand Rapids, MI; Laura Cowburn, Assistant to the Superintendent for Business Services, Columbia SD, Columbia, PA

2:30 p.m. – 4:30 p.m.

FMLA and ADA Compliance and Administration—The Confessions of a Lawyer (DD092)



Room: Dallas 6

SFOs: 2

Get up to date on the latest interpretations, compliance obligations, and offering strategies for employers. Explore state and federal compliance issues and compliance strategies to minimize record keeping responsibilities and maximize employee satisfaction.

Speaker: Robert J. Simandl, Attorney, Simandl Law Group, S.C., Waukesha, WI

DAILY SCHEDULE: Sunday

DISCUSSION GROUPS

3:45 p.m. – 4:45 p.m.

Multi-Year Budget Planning for Education: Informed Look Ahead (DG166)



CPE

Room: San Antonio 4-5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This three-part session focuses on forecasting fiscal futures: a state summary; a district-level budget planning model; and multiyear data and planning with the school board. Participants will learn how a forecast of major local and state revenues and key expenditure items indicated severe financial stress for about half the districts in Pennsylvania, how districts responded with a five-year budget planning model that permits school officials to examine alternative fiscal strategies, and the details of a more informal structure in which the business official works closely with the school board on an ongoing basis.

Learning Objectives: 1. Describe a reliable methodology for projecting multiple revenue and expenditure assumptions over five years and demonstrate the results regarding fiscal stability or shortfalls in school districts and subsequent state funding requirements. 2. Demonstrate an interactive district-level budget planning model to allow districts to try alternative taxation strategies, vary expenditure estimates and state revenue possibilities, and illustrate its use in “what if” analyses to manage the district’s fiscal condition. 3. Identify and utilize budget planning tools to assist the school board in reaching the best short- and long-run fiscal decisions regarding attaining and maintaining a district’s strong fiscal position. 4. Discuss the critical fiscal areas facing school districts and how they can and will disrupt instructional programs.

Speakers: Timothy Shrom, Business Manager, Solanco SD, Quarryville, PA; William Hartman, Professor, Pennsylvania State University, State College, PA

3:45 p.m. – 4:45 p.m.

Stay in the Black by Going Green: Realizing Benefits by Greening Your Schools (DG139)



Room: San Antonio 3

SFOs: 1

With operating costs and expenses continuing to rise, school business officials are often tasked with trying to maintain or improve existing facilities and build new ones with limited resources in support of the educational mission of the district. Green features in schools such as proper daylighting, ventilation, or sustainable materials can reduce operation and maintenance costs, but also have been shown to dramatically improve student learning and performance. Explore the benefits of developing and implementing a green school master plan in your district, including its alignment with your current long-range facility plans as well as the economic, environmental, and educational challenges and opportunities. Also look at how such measures align with national recognition programs such as Green Ribbon Schools, LEED, and Eco-Schools.

Speakers: Greg Somjen, Principal, Parette Somjen Architects, Rockaway, NJ; Jason Kliwinski, Director of Sustainable Design, Parette Somjen Architects, Rockaway, NJ; Derek Jess, Business Administrator, Perth Amboy SD, Perth Amboy, NJ

3:45 p.m. – 4:45 p.m.

Understanding the Impact of Risk Management in Your Schools (DG142)



Room: Texas 3

SFOs: 1

Risk management—two words that are rarely fully understood. Simply having insurance is not enough. It is critical to understand the dynamic nature of risks in schools and how to manage them. Schools have a plethora of risks that range from everyday occurrences such as slips and falls to bus accidents, and even the more rare occurrences such as

earthquakes. How does your school district identify and mitigate risks and control losses? Learn about proactive school risk management measures from expert risk managers.

Speakers: Tom Wohlleber, Chief Financial Officer, Gilbert Public Schools, Gilbert, AZ; Jim Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN; Amy Kohl, CSRM, Director of Business Services, School District of Greenfield, Greenfield, WI; Judyann Robinson, Risk Manager, Irving ISD, Irving, TX; Christina Ford, Risk Management/Operations Manager, Mesquite ISD, Mesquite, TX

3:45 p.m. – 4:45 p.m.

Capital Forecasting and Planning (DG207)



Room: Dallas 5

SFOs: 1

Every part of your school building and its equipment will need repair or replacement, whether in the near or distant future. These projects can range from small work orders to multimillion-dollar contracts. Putting off repairs can result in bigger, more costly problems down the line. But business and facility professionals face constant pressures such as fluctuating budgets, unexpected repairs and improvements, as well as the need to prioritize what to do and when to do it in light of capital project priorities and associated costs. Seeing the big picture is essential to optimizing building maintenance by not only tending to current projects, but also forecasting and planning for future ones.

Speaker: Chris DeJuneas, Applications Engineer, SchoolDude, Cary, NC

3:45 p.m. – 4:45 p.m.

The Value of the SFO® Certification (DG146)



Room: San Antonio 6

SFOs: 1

VIRCO



Equipment for Educators

Welcome to ASBO International's 2015 Annual Meeting & Expo.

Virco's long-standing support for school business officials includes serving as an ASBO International Strategic Partner, as well as sponsoring the Pinnacle Awards for over 20 years. We invite you to stop by Virco's Booth 311 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.

Join a panel of current SFO certificants to examine the benefits of pursuing the SFO credential. Topics include the value to the individual, the value to the districts served by the certificant, and the value to the school business profession overall. Join a discussion exploring two questions: How do I get started? Why become an SFO?

Speakers: Cindy Reilly, SFO, Chief Financial Officer, Wautoma Area SD, Wautoma, WI; Lynn Buch, SFO, Chief Financial Officer, Homewood City Board of Education, Homewood, AL

3:45 p.m. – 4:45 p.m.

Building Community and School Board Trust: Creating a Transparent, Collaborative, Data-Driven Community Process for Long-Range Financial Planning (DG238)



Room: Texas 5-6

SFOs: 1

Building trust is an important part of our role as school business officials as we create budgets, complete audits, and oversee internal controls. Come along on one district's journey toward the creation of a transparent, collaborative, data-driven process for long-range financial planning (LRFP). Learn how this staff, board, and community came together to develop a LRFP framework that aligns the district's mission and

DAILY SCHEDULE: Sunday

strategies with available resources. Learn about tools for using data in a way that leads to improved financial decision making while building trust and transparency with your community, school board, and staff.

Speakers: Patricia Magnuson, Executive Director of Finance and Operations, Osseo Area Schools–ISD 279, Maple Grove, MN; Kelly Benusa, Director of Business Services, Osseo Area Schools–ISD 279, Maple Grove, MN; Cindy Brown, Coordinator of Accounting and Payroll, Osseo Area Schools–ISD 279, Maple Grove, MN; Michael Hueller, Coordinator of Accounting and Payroll, Osseo Area Schools–ISD 279, Maple Grove, MN

3:45 p.m. – 4:45 p.m.

Consolidation of Services Between Districts—Experiences and Lessons Learned (DG108)



Room: Dallas 7

SFOs: 1

Managing two separate budgets comprising over \$55 million and two bond construction projects can be a challenge, to say the least. Learn how one school district finance director did just that for two districts that had wide-scale consolidated efforts and ultimately decided to go their separate ways. What worked well and what were the missteps? What challenges to consolidation can be overcome and what roadblocks are more difficult to navigate? Hear more about this director's experience, what he learned, and why the consolidation project was permanently put on hold. Would he do it again and would he recommend that you try it?

Speaker: Jason Helsen, Director of Finance, Reeths-Puffer Schools, Muskegon, MI

3:45 p.m. – 4:45 p.m.

We Can Review Your Budget to Help You Make It an MBA Award-Winner (DG926)



Room: Texas C

SFOs: 1

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

Speakers: MBA Advisory Committee Members and MBA Reviewers

5:00 p.m. – 6:00 p.m.

Emerging School Business Leaders Scholarship Recipients Reception

By Invitation Only

Texan Station

Sponsored by U.S. Communities

5:15 p.m. – 6:00 p.m.

Meritorious Budget Award Recipients Reception

By Invitation Only

Mission Plaza

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

Monday, October 26

7:00 a.m. – 10:00 a.m.

Registration

Center Pre-function, Ballroom Level

7:30 a.m. – 8:15 a.m.

Coffee Break

Dallas Foyer, Ballroom Level

Sponsored by Tyler Technologies

DISCUSSION GROUPS

8:00 a.m. – 9:00 a.m.

The Design-Build Delivery Process for School Construction Projects (DG061)



CPE

Room: Dallas 5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

The design-build delivery method for construction projects is a system of contracting under which one entity performs both architecture/engineering design and construction under a single contract with the owner. Learn about the design-build process, explore examples of real/completed design-build projects, and decide if this delivery system for contracting and completing a construction project is best for your school district.

Learning Objectives: 1. Describe the design-build delivery system for construction projects. 2. Compare the design-build system with the traditional competitive bidding system. 3. Outline potential pros and cons of the design-build system. 4. Discuss potential financial benefits of design-build projects.

Speaker: William Roberson, School Board President, Mooresville Consolidated School Corporation, Mooresville, IN

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Voya Financial® welcomes you to ASBO International's 2015 Annual Meeting & Expo! We are proud to support your profession as a Strategic Partner of ASBO and the exclusive sponsor of the Meritorious Budget Award (MBA). We encourage you to visit us at Booth 208 to learn how we can help make retirement planning and administration easier for you and your employees. To this year's MBA recipients: Congratulations on your achievement! Respectfully, The Voya Financial® Team.

8:00 a.m. – 9:00 a.m.

Financial Software Implementation: What Did I Get Myself Into? (DG152)



CPE

Room: Texas 3

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

Implementing a new software system is no easy task! The work (and fun) begins once you have selected the product that is best for your district. This interactive session will focus on implementation strategies and best practices, along with the successes and challenges of software implementation. Come prepared to share your experiences and learn from two districts that have implemented new software systems.

Learning Objectives: 1. Outline strategies to ensure a successful software implementation. 2. Discuss ways to effectively manage time and resources during implementation. 3. Describe process changes needed for successful software implementation. 4. Detail the challenges that can occur during software implementation.

DAILY SCHEDULE: Monday

Speakers: Brian Marcel, Assistant Superintendent, Administrative and Support Services, Washtenaw ISD, Ann Arbor, MI ; Stephanie Weese, Director of Finance, Kent ISD, Grand Rapids, MI

8:00 a.m. – 9:00 a.m.

Communicating Financial Information to Stakeholders—The Use of Infographics to Spice Up Your Presentation (DG022)



CPE

Room: San Antonio 4-5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This interactive session is designed to identify important information that can be illustrated in an infographic, that can then be used to communicate necessary financial information to stakeholders.

Learning Objectives: 1. Identify important financial information that needs to be communicated to district stakeholders. 2. Summarize information so that it can be placed in an infographic. 3. Outline the steps to follow in preparing an infographic.

Speaker: Sheri Senger, Associate Superintendent, Business, Wetaskiwin Regional Public Schools, Wetaskiwin, Alberta, Canada

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

Reducing the Cost of Early Retiree Health Insurance Using the Affordable Care Act (DG113)



CPE

Room: San Antonio 1-2

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Specialized Knowledge and Applications

Program Prerequisites: None

Advance Preparation: None

Many school districts allow early retirees to continue on the group health plan at the same premium as active employees. However, the true age-related cost of coverage for an average 60-year-old retiree is twice that of the average active employee. This cost is often overlooked as a way to reduce premiums while increasing retiree flexibility. Prior to the Affordable Care Act there were no viable alternatives for retirees. Now private and public marketplaces offer plan designs that are more affordable, with no prohibition for pre-existing conditions. Learn how one school district provides increased flexibility to retirees at reduced cost.

Learning Objectives: 1. Identify options other than cost shifting that may yield insurance savings. 2. Describe the often-overlooked driver of health insurance costs. 3. Outline insurance solutions that foster cost-saving relationships. 4. Discuss how to increase the value of retiree benefits at reduced net cost.

Speakers: Ken Zastrow, Market Development, National Insurance Services, Brookfield, WI; David Branback, Director of Market Development, National Insurance Services, Brookfield, WI; Erik Kass, Assistant Superintendent for Finance, Operations, and Human Resources, School District of Elmbrook, Brookfield, WI

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8:00 a.m. – 9:00 a.m.

Crisis Management and Planning for the Mobile Age (DG208)


Room: Texas 4

SFOs: 1

As professionals in education, our top priority is the safety of our students, faculty, and staff. We may feel that our current crisis plans are adequate, but it's important to be aware of the restrictions and problems that may arise from reliance on purely analog communication systems. Binder-based plan documents can be useful for training purposes, but in the event of an actual emergency, when time is the most precious resource you have, do all staff and faculty have access to the binder, poster, or emergency flipchart? Learn what you can do to keep your crisis management plan relevant.

Speaker: Chris DeJuneas, Applications Engineer, SchoolDude, Cary, NC

8:00 a.m. – 9:00 a.m.

Internal Controls in the Small Office (DG141)


Room: San Antonio 6

SFOs: 1

Year after year, does your auditor cite your district as being significantly or materially deficient due to lack of segregation of duties? Discuss why internal control is so important and the three A's of segregation of duties. Then go through a booklet of best practice segregation of duties models, recently developed jointly by Iowa ASBO and the Iowa Association of School Boards, that can be used to achieve appropriate segregation of duties even in a small school business office.

Speakers: Patti Schroeder, Co-Director of Finance and Support, Iowa Association of School Boards, Des Moines, IA; James R. Scharff, Executive Director, Iowa ASBO, Ankeny, IA

8:00 a.m. – 9:00 a.m.

Energy Inefficiency: Low-Hanging Fruit Behind Closed Doors (DG137)


Room: San Antonio 3

SFOs: 1

School boards have looked at the operations and maintenance budget to help fill part of budget shortfalls, including upgrading energy systems and equipment to reduce energy inefficiency. Most energy fixes are directed at low-hanging fruit—simple, common, energy-efficiency measures. One overlooked system lies behind locked doors: low-voltage distribution transformers (LVDT). Learn about the evolution of LVDT in simple, understandable terms, how the U.S. Department of Energy has studied and recommended improvements in the design of LVDTs, and the final ruling on future energy efficiency of buildings and the future requirement to obtain net-zero energy buildings.

Speaker: Lorenz Vernon Schoff, Energy Efficiency Consultant, Energy Efficient Solutions, Blacksburg, VA

8:00 a.m. – 9:00 a.m.

Purchasing Cards 101 (DG091)


Room: Texas 1-2

SFOs: 1

Learn, step by step, how to start a purchasing card program from the ground up. Explore risk migration/controls, how cards are being used, strategies for rebates, and why district card programs are increasingly popular.

Speakers: Karen Smith, Assistant Superintendent, Business and Finance, Cypress-Fairbanks ISD, Houston, TX; Karen Wiesman, Associate Superintendent, Business and Finance, Mansfield ISD, Mansfield, TX

DAILY SCHEDULE: Monday

8:00 a.m. – 9:00 a.m.

The Successful Charter School Business Official (DG117)



Room: Dallas 6

SFOs: 1

What happens during a typical day in the life of a charter school business official? There are approximately 6,000 public charter schools operating in nearly every state, all requiring seasoned business professionals to manage their affairs. Unfortunately, charters close every year due to mismanagement and financial deficiencies. Participants will learn about the three commonly accepted tenets of successful charter schools, the duties and responsibilities of charter school business officials, and in-house vs. outsourced charter school business operations. They will leave with information about the resources available from ASBO and ASBO affiliates to help SBOs and their charters succeed.

Speaker: Richard Weeks, Retired School Business Official, Wakefield, MA

DISCUSSION GROUPS

9:15 a.m. – 10:15 a.m.

Internal Auditing Functions Without the Internal Auditor (DG124)



CPE

Room: Dallas 5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Auditing

Program Prerequisites: None

Advance Preparation: None

School business officials are responsible for ensuring their districts meet an ever-increasing number of compliance requirements dictated by state, local, and federal laws, yet they often find themselves without sufficient staff to ensure all requirements are being met.

Internal auditors often fill the role of compliance officers as well as proactive protectors of district resources, but not all districts have the luxury of this position. Internal auditing functions are crucial to the prevention and detection of fraud and noncompliance. Learn how to implement procedures traditionally performed by internal auditors without increasing staff size.

Learning Objectives: 1. Discuss internal audit functions and define their benefits. 2. Examine internal controls and describe what can go wrong. 3. Recommend changes that can be made to strengthen already existing internal controls through additional procedures.

Speaker: Sara Kirk, Audit Manager, Heinfeld, Meech & Co., P.C., Phoenix, AZ

9:15 a.m. – 10:15 a.m.

Mobilizing Alumni to Create a Sustainable Revenue Stream (DG111)



Room: San Antonio 6

SFOs: 1

Learn about the steps you can take to engage your alumni in generating a revenue stream that supports instructional programs, arts, athletics, and clubs. Explore the merits of a capital campaign, including the sale of naming rights and other nontraditional methods to generate revenue. Take home a framework to maximize social media to provide a strong alumni database for long-term advocacy, engagement, talent, and revenue generation.

Speakers: Dave Van Spankeren, Executive Director of Business Services, CESA #6, Oshkosh, WI; Jim Burgraff, Managing Partner, Alumni Nations, Oshkosh, WI; Alex Burgraff, CEO and Managing Partner, Alumni Nations, Oshkosh, WI

DAILY SCHEDULE: **Monday****9:15 a.m. – 10:15 a.m.****Common Deficiencies in Financial Statements and Single Audits (DG129)****CPE****Room:** San Antonio 3**SFOs:** 1 **CPEs:** 1 **Program Level:** Basic**Field of Study:** Accounting**Program Prerequisites:** None**Advance Preparation:** None

Examine the most common audit deficiencies for both auditors and auditees in the financial and single audit environments. Learn about audit areas that will receive more attention and ways you can have a quality audit and avoid audit findings. Both auditors and auditees will benefit from knowing these common deficiency areas.

Learning Objectives: 1. Identify common audit deficiencies. 2. Describe ways to guard against audit findings. 3. Discuss areas of increased audit focus.

Speaker: Phillip W. Saurman, Shareholder Government Services, Hungerford Nichols, Grand Rapids, MI; Laura Cowburn, RSBA, Assistant to the Superintendent for Business Services (Retired), Columbia Borough School District, Columbia, PA

9:15 a.m. - 10:15 a.m.**GASB Update (DG265)****CPE****Room:** Texas 4**SFOs:** 1 **CPEs:** 1 **Program Level:** Basic**Field of Study:** Accounting Governmental**Program Prerequisites:** None**Advance Preparation:** None

The Governmental Accounting Standards Board (GASB) is the official source of generally accepted accounting principles for school districts. GASB provides accounting guidance through the issuance of standards and other communications to provide information to preparers and users of school district financial statements. Participants will get the latest information about GASB's activities and standards.

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

Speaker: Wesley Galloway, GASB Project Manager, Governmental Accounting Standards Board, Norwalk, CT

9:15 a.m. – 10:15 a.m.**A Win-Win Approach to Energy Efficiency Retrofits, Health, and Safety: The Energy Savings Plus Health Guide (DG114)****Room:** Texas 3**SFOs:** 1

Energy efficiency projects and occupant health protection sometimes seem at odds with each other. However, when energy efficiency and indoor air quality (IAQ) projects are well-coordinated, schools can save money and improve occupant health. U.S. EPA's new Energy Savings Plus Health: Indoor Air Quality Guidelines for School Building Upgrades helps managers understand the relationship between energy and IAQ and identify key steps to realizing substantial improvements. Explore how managers can use the guide to create healthy schools with cost savings and sustainability in mind. Take advantage of a demonstration of management tools like the Energy Savings Plus Health Checklist Generator and the ENERGY STAR® Cash Flow Opportunity Calculator. Learn about the experience of the Carrollton-Farmers Branch Independent School District, which illustrates how integrating IAQ and energy management can improve school environments, reduce energy use, and yield cost savings.

DAILY SCHEDULE: Monday

Speakers: Kudret Utebay, Senior Associate, The Cadmus Group, Inc., Arlington, VA; Victor Melton, Environmental and Energy Specialist, Carrollton-Farmers Branch ISD, Carrollton, TX; Michele Curreri, Environmental Protection Specialist, U.S. EPA, Indoor Environments Division, Washington, D.C.

9:15 a.m. – 10:15 a.m.

Data-Driven Fiscal Sustainability (DG164)



CPE

Room: San Antonio 1-2

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

New technologies in the area of business intelligence and analytics enable school business officials to gain immediate insight into their districts' operations. This insight provides guidance to gain efficiencies, improve effectiveness, and reduce risks to schools. Applications of this technology include conducting performance reviews, identification of best practices across peers, and data discovery to reveal new inroads to improvements. East Liverpool Schools utilized analytic techniques to make substantial improvements and reduce costs. Learn how to replicate these efforts within your own district.

Learning Objectives: 1. Describe the new business intelligence and analytics technologies available for school districts. 2. Discuss how your district might utilize these tools to lower costs, improve performance, and reduce risks. 3. Outline the benefits of using business analytics and intelligence tools in your district.

Speakers: Todd Puster, Treasurer/Chief Financial Officer, Orange City School District, Pepper Pike, OH; Dan Romano, Senior Vice President, Forecast5 Analytics, Inc., Toledo, OH

9:15 a.m. – 10:15 a.m.

Relating Education Resources to Student Outcomes (DG221)



Room: San Antonio 4-5

SFOs: 1

Is there a positive correspondence between the availability of education resources and student achievement? If so, might effective business practices that optimize the provision of education resources for instruction improve learning outcomes? And, ultimately, how might the impact of business decisions on learning be measured? Explore the foundational assumptions behind Australia's first university course in education business leadership. Learn about the current context of school business and how education business is integrally connected to students' experiences, school improvement, and educational outcomes. The Australian experience is relevant in all contexts and every school business official should know how their role has direct impact on successful schools, school systems, and educational practices.

Speakers: Craig A. Schilling, Associate Professor, Concordia University Chicago, River Forest, IL; Mark Donehue, Course Presenter, Deakin University, Burwood, Victoria, Australia; Matthew McDonough, Finance Manager, Deakin University, Burwood, Victoria, Australia; Karen Elizabeth Starr, Professor, Deakin University, Burwood, Victoria, Australia

9:15 a.m. – 10:15 a.m.

Today's Multi-Generational Workplace (DG127)



Room: Texas 1-2

SFOs: 1

Four generations in one office or on one campus? That is the reality in many work environments today. Each generation—Traditionalists, Baby Boomers, Generation X, and Millennials—has its own perspectives regarding management styles, preferred communication methods, and work values. How can we learn to co-exist as we

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strive to achieve success for our students and staff? Learn what has shaped and influenced each generation, their traits, and how best to lead and motivate across the generations.

Speakers: Julie P. Novak, Chief Financial Officer, Fort Sam Houston ISD, San Antonio, TX

9:15 a.m. – 10:15 a.m.

OPEB Solutions Using Retiree-Only Health Reimbursement Arrangements (HRAs) (DG116)



CPE

Room: Texas 5-6

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Personnel/HR

Program Prerequisites: None

Advance Preparation: None

Gain a working knowledge of retiree-only health reimbursement arrangements (HRAs) and how districts can use them to help restructure, reduce, and even eliminate OPEB liability. Using retiree HRAs to establish defined contribution plans as opposed to defined benefit plans can help provide a comparable benefit value at lower net cost to the employer. Retiree-only HRAs also offer increased flexibility for retirees, allowing them to purchase insurance outside of the district plan. Case studies will provide examples of how school districts have implemented these solutions and the impact they have had.

Learning Objectives: 1. Define retiree-only HRAs and explain how they can be used. 2. Describe how retiree-only HRAs can increase the value of post-employment benefits at reduced employer cost to increase funds available for the classroom. 3. Explain how retiree-only HRAs can result in reduced costs to the employer coupled with increased flexibility for retirees. 4. Outline practical examples based on district case studies.

Speakers: Erik Kass, Assistant Superintendent for Finance, Operations, and Human Resources, School District of Elmbrook, Brookfield, WI; David Branback, Director of Market Development, National Insurance Services, Brookfield, WI

9:15 a.m. – 10:15 a.m.

Creating a Can-Do Culture in Procurement and School Business (DG217)



Room: Dallas 6

SFOs: 1

Clovis USD is a large suburban school district in central California with a reputation for exceptional facilities, a history of fiscal stability, and high student achievement. The district is committed to working cooperatively and collaboratively with vendors and schools to provide exceptional learning environments and to meet staff and student needs. Learn about the impact that leadership, culture, and the development of best practices in business and procurement can have on a school district. Explore the dynamics of purchasing and procurement in education and methods to improve customer service and provide exceptional service to our schools and students.

Speakers: Leeann Errotabere, Director, Purchasing, Clovis USD, Clovis, CA; Michael Johnston, Assistant Superintendent, Clovis USD, Clovis, CA

9:30 a.m. – 10:15 a.m.

Guest Program

Art of Reflexology

Room: Austin 5

In this enlightening workshop, participants will discover how reflex points on the hands and feet are believed to treat the entire body. In addition to a reflexology demonstration, participants will also learn how to properly administer hand and foot massages.

DAILY SCHEDULE: Monday

DISCUSSION GROUPS

10:30 a.m. – 11:30 a.m.

If You Build It, They Will Come! Building Market-Driven Compensation Plans for High Performance (DG021)



Room: Dallas 5

SFOs: 1

Competition between school districts is not limited to the football field. In this era of high-stakes accountability and limited financial capacity, districts must compete for the best and brightest teachers and administrators. Districts must develop and implement creative compensation plans to ensure that “they will come.” Clear Creek ISD, a 41,000-student district outside Houston, developed creative solutions and practical tools to move district salaries to market-competitive rates in challenging financial times.

Speaker: Paul McLarty, Deputy Superintendent of Business and Support Services, Clear Creek ISD, League City, TX

10:30 a.m. – 11:30 a.m.

Learning Management Systems 101 (DG177)



Room: Dallas 7

SFOs: 1

Most SBOs today are familiar with 1:1 initiatives, Race-to-the-Top mandates, and even student information systems (SIS). The new kid on the block in K–12 educational technology is the learning management system (LMS). Develop your understanding of what an LMS is, discuss the difference between an LMS and an SIS, and consider the benefits and costs associated with selecting and implementing an LMS.

Speaker: Susan Givens, Chief Financial Officer, Masconomet RSD, Topsfield, MA

10:30 a.m. – 11:30 a.m.

Responsible Contract Management: What Needs to Be Managed? (DG102)



CPE

Room: Texas 5-6

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

You’ve successfully completed the procurement process and you think your work is done. Not so fast. After the contract is awarded, the fun begins. Contract management is a vital element in ensuring district resources are used effectively and appropriately. Procurement professionals must ensure proper monitoring takes place from utilization of the contract, to invoice payments, staffing, renewals, and most important, the quality of services provided by the vendor. Ensure your district and your vendor are held contractually accountable for the terms and conditions outlined in the procurement. Participants will receive practical monitoring approaches to take back to their district.

Learning Objectives: 1. Outline the important elements of contract management. 2. Identify common pitfalls of contract management. 3. Describe current contract monitoring applications.

Speaker: Karin Smith, Partner, Heinfeld, Meech & Co., P.C., Phoenix, AZ

10:30 a.m. – 11:30 a.m.

Outsourcing Classified Services to Reduce Your Budget Without Reducing Services (DG159)



CPE

Room: San Antonio 4-5

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

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Are you looking for a way to reduce your budget without reducing services? Outsourcing your classified services could be the answer. Xenia Community Schools in Ohio was facing a major budget deficit and had no hope of passing a levy in the near future. The district had cut roughly \$10 million over two years and had to think creatively to come up with a way to cut expenses without being forced to cut any additional services or people. Xenia Schools outsourced transportation, custodial, grounds, maintenance services, and IT staffing, and anticipates saving approximately \$7 million over the next five years. Learn how Xenia's experience may work for your district.

Learning Objectives: 1. Enumerate key requirements for successful outsourcing. 2. Explain how to productively negotiate when outsourcing. 3. Discuss how to compare expected savings to actual savings. 4. Explain how outsourcing can help a district reduce costs without reducing services.

Speakers: Christy Fielding, Director of Business and Technology, Xenia Community Schools, Xenia, OH; Tracy Jarvis, Treasurer, Xenia Community Schools, Xenia, OH

including alternative transportation fuels, geothermal HVAC systems, and solar electric generation systems. Also explore energy efficiency and related programs/techniques to reduce telecommunications and energy procurement costs and some of the many educational opportunities that emerged as a result of implementing sustainable strategies.

Learning Objectives: 1. Explain how effective leadership is necessary for creating opportunities to improve resource efficiency. 2. Describe strategies for evaluating existing conditions as a basis for crafting fiscal and educational improvement programs. 3. Discuss positive outcomes that may be derived from leveraging public/private partnerships. 4. Describe methods for creating educational opportunities by using school buildings and systems as learning labs. 5. Identify successful energy monitoring and procurement services to reduce energy expenses.

Speakers: Chad Fires, Business Administrator, Medford Township, Medford, NJ; Joe Biluck, Director of Operations and Technology, Medford Township, Medford, NJ

10:30 a.m. – 11:30 a.m.

Uncovering Funds to Support Sustainable Education Through Successful Collaborations (DG156)



CPE

Room: San Antonio 1-2

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

A sustainable approach to district operational and capital expenses has significantly reduced Medford Township's operating costs and environmental impact. For example, the district's solar electric generation provides 70% of the district's electric needs while reducing electric expenses by \$300,000 per year. These funds are then released from operating expenses and reallocated to support educational goals. Learn about the path that led to the use of sustainable technologies,

10:30 a.m. – 11:30 a.m.

Measuring the Success of Your Medicaid Program (DG119)



CPE

Room: Texas 1-2

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

You can monitor how much money your Medicaid program is bringing into your school district, but how do you know if you're recovering all the money you should? What data should you be reviewing to identify issues that might be making revenue recovery suboptimal? Learn about best practices for analyzing your Medicaid program performance, including questions to ask and data to review. This session is designed for school administrators, finance administrators, and Medicaid

DAILY SCHEDULE: Monday

coordinators to help familiarize them with the best ways to measure the ongoing success of their Medicaid program.

Learning Objectives: 1. Outline best practices for analyzing your district's Medicaid program performance. 2. Identify sources of recovery opportunity in Medicaid spending categories. 3. Discuss and analyze the impact of non-recovery performance on revenues. 4. Describe how to measure and sustain the ongoing success of and participation in a district's Medicaid program.

Speakers: Cody Way, Chief Financial Officer, Jenks Public Schools, Jenks, OK; Jann Arnold, Account Executive, SEAS Education, Mountain Home, AR

10:30 a.m. – 11:30 a.m.

Managing the Millennials: A Comprehensive Look at Employing a New Generation of Teachers (DG173)



Room: San Antonio 6

SFOs: 1

As Baby Boomers begin retiring in large numbers, the disparity in size between the exiting generation and Generation X has led economists to predict a 40% shortfall in available workers. This means that the populous Generation Y (Millennials) are being asked to fill the employment hole. The large gap has magnified the cultural and motivational differences that naturally exist between two or more generations. Focus on understanding the mindset and motivations of the Millennial generation and discuss how these differences affect recruiting practices and compensation packages.

Speaker: Bret McKittrick, Attorney, Associated Financial Group, Waukesha, WI

10:30 a.m. – 11:30 a.m.

To Outsource or Not to Outsource Transportation: That Is the Question (DG130)



Room: San Antonio 3

SFOs: 1

Deciding to outsource transportation services can be a traumatic decision for school districts. Developing a methodology that best assesses the potential costs and benefits of an outsourced model or of changing a current contractor can be a complex and confusing effort. Learn how to structure both the cost and operational analyses to maximize the efficiency and effectiveness of your school transportation operation.

Speaker: Tim Ammon, Vice President, School Bus Consultants, Lee's Summit, MO

10:30 a.m. – 11:30 a.m.

Becoming a Charter District: A Reluctant CFO's Perspective (DG200)



CPE

Room: Texas 4

SFOs: 1 **CPEs:** 1 **Program Level:** Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

As school districts in Georgia consider becoming "charter districts," many wonder how this decision will affect financial and human resource management. After all, doesn't becoming a charter mean that schools within the district can customize their programs to meet the needs of their unique students? Can't schools decide between increased professional development, lower/increased class size, or greater options around foreign language and/or music? How does school empowerment affect instruction, compliance requirements (state/federal), operational efficiency, and fiscal responsibility? Explore how Fulton County Schools manages these issues as a charter system.

Learning Objectives: 1. Discuss the characteristics of a charter district and the impact of conversion to a charter on a district's financial management and human resources operations. 2. Outline the stages of preparation, managing expectations, building anticipation, and implementation involved in becoming a charter district. 3. Discuss reasons a CFO may be reluctant to transition to a charter district and identify factors that might encourage acceptance of the conversion.

Speakers: Marvin Dereef, Deputy Chief Financial Officer, Fulton County Schools, Atlanta, GA; Lisa Bracken, Director of Budget Services, Fulton County Schools, Atlanta, GA; Robert Morales, Chief Financial Officer, Atlanta Public Schools, Atlanta, GA

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CLINIC TABLES

Sunday, October 25

8:30 a.m. – 9:45 a.m.

Room: Texas C

A Clinic Table session features roundtables, each with a discussion topic presented by exhibitors and focused on a specific aspect of school district management. Session participants change tables every 15 minutes. Presenters direct the discussion and serve as a source of information on topics such as healthcare reform, 403(b) retirement plans, budget planning, energy efficiency, communications in school districts, and more.

TABLE 1

Run Your Retirement Numbers with Our Informative Tools

Speaker: Ketul Thaker, Vice President of Industry Relations, Voya Financial®, Windsor, CT

TABLE 2

Critical Questions to Ask Before Using a Cooperative Contract

Speaker: Jennifer Sulentic, Program Manager, U.S. Communities, Chicago, IL

TABLE 3

Employer Contributory Plans (Match, Elective, Special Pay)

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

TABLE 4

Understanding Print Procurement in the K–12 Environment

Speaker: Freddie Rogers, National Account Manager, Office Depot, Carol Stream, IL

TABLE 5

How Erasing Student Loan Debt Can Improve Teacher Retention

Speakers: Kelly Ruwe, Regional Marketing Officer, The Horace Mann Companies, Springfield, IL; Steven Delisle, Regional Marketing Officer, The Horace Mann Companies, Quakertown, PA

TABLE 6

Pension Tsunami: What Must be Done to Fix It?

Speakers: Fred Makonnen, Regional Vice President, AXA, New York, NY; Clare Ronaghan, Director, Strategic Relations, AXA, Jersey City, NJ

TABLE 7

Affordable Care Act Reporting for K–12 Districts

Speakers: Jillian Pulsifer, Product Manager, Tyler Technologies, Yarmouth, ME; Crystal Alcott, Software Development Analyst, Tyler Technologies, Yarmouth, ME

TABLE 8

Improving Facilities, Technology, and the Educational Experience Through Partnerships

Speakers: Charley Cohen, Sustainability Education Director, Siemens Industry Inc., Building Technologies Division, Buffalo Grove, IL; Jamie Sitter, K12 Marketing Manager, Siemens Industry Inc., Building Technologies Division, Buffalo Grove, IL

TABLE 9

Going Paperless Means Power and Security in the FERPA, HIPAA Records World

Speakers: Tim Beauchamp, National Director of Legal Solutions, Ricoh Americas Corporation, Dallas, TX; Stu Parker, National Program Manager, Ricoh Americas Corporation, Highlands Ranch, CO

TABLE 10**Critical Communications: Education and Public Safety Together**

Speaker: Connie Allen, Vertical Marketing Manager, Motorola, Schaumburg, IL

TABLE 11**Energy Efficiency: Tips from a Grandmother to Save Energy and Money at Home and School**

Speaker: Gwenn McDaniel, North America K–12 Vertical Market Director, Johnson Controls, Myrtle Beach, SC

TABLE 12**Protecting Parent Payments: Helpful Tips When Choosing an Online Payment Solution**

Speaker: Christina L. Carroll, Account Manager, Horizon Software, Atlanta, GA

TABLE 13**Simple Solutions for Employee Benefit Challenges**

Speaker: Carey Adamson, Vice President—Public Sector, Colonial Life, Columbia, SC

TABLE 14**School Credit Card Program Fraud Protection and Management Best Practices**

Speaker: David Wintczak, Vice President, Treasury & Payment Solutions, BMO Financial Group, Chicago, IL

TABLE 15**What's New, What's NOT in K–12 Nutrition? The Potential Impact of the Professional Standards Rule and Other USDA Regulatory Changes**

Speaker: Linda Scurman, MS, RDN, LDN, Director of Nutrition and Operations Support, Aramark K–12 Education, Philadelphia, PA

TABLE 16**Budget Planning Improvement Through the Use of Technology**

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

TABLE 17**Don't Just Collect Your School Fees Online, Manage Them!**

Speaker: Helene McMurphy Business Development, Rycor Software, Chandler, AZ

TABLE 18**Making the Most of Dollars and Accelerating Student Achievement Through "Owning Standards" with Lincoln Learning Solutions**

Speaker: Debi Crimmins, Chief Marketing Officer, Lincoln Learning Solutions, Rochester, PA

TABLES 19 & 20**ACA Reporting Requirements**

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

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Each recipient earned a \$2,000 scholarship to attend the Annual Meeting & Expo
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GUEST ACTIVITIES



Friday, October 23

9:00 a.m. – 12:00 p.m.

Dallas Cowboys Stadium Tour

Advance Registration Required (\$)
Buses depart from the Tour
Bus Lobby at 9:15 a.m.

6:00 p.m. – 7:30 p.m.

Welcome Mixer*

Glass Cactus
(See page 16 for complete listing)
*Must be 21+ to attend. Badge required.

Saturday, October 24

8:00 a.m. – 8:45 a.m.

General Session Coffee Break

Texas Ballroom Foyer
Sponsored by Tyler Technologies

8:45 a.m. – 10:45 a.m.

First General Session

Room: Texas Ballroom A

11:00 a.m. – 12:00 p.m.

Guest Program

Book Club: *Mrs. Kennedy and Me*
Room: Austin 3
(See page 17 for complete listing)

2:30 p.m. – 5:30 p.m.

Exhibit Hall Opening Reception

Exhibit Hall F
Sponsored by Horizon Software

7:00 p.m. – 10:00 p.m.

Affiliate Reception and Candidate Meet-and-Greet

The Ranch of Lonesome Dove
(See page 24 for complete listing)

Registered guests are welcome to attend the **General Sessions**, enjoy the **Welcome Mixer**, and visit the **Exhibit Hall**. Guests may not attend educational sessions.

Sunday, October 25

9:15 a.m. – 10:00 a.m.

General Session Coffee Break

Texas Ballroom Foyer

Sponsored by Tyler Technologies

10:00 a.m. – 11:30 a.m.

Second General Session

Room: Texas Ballroom A

11:00 a.m. – 11:45 a.m.

Guest Program

Dallas History

Room: Austin 3

(See page 26 for complete listing)

11:30 a.m. – 2:15 p.m.

Exhibit Hall Open

Exhibit Hall F

12:30 p.m. – 1:30 p.m.

Lunch in the Exhibit Hall

Exhibit Hall F

Sponsored by BMO Financial Group

Monday, October 26

7:30 a.m. – 8:15 a.m.

Coffee Break

Dallas Foyer, Ballroom Level

Sponsored by Tyler Technologies

9:30 a.m. – 10:15 a.m.

Guest Program

Art of Reflexology

Room: Austin 5

(See page 39 for complete listing)

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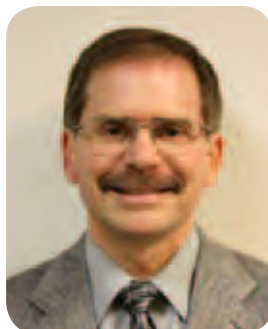
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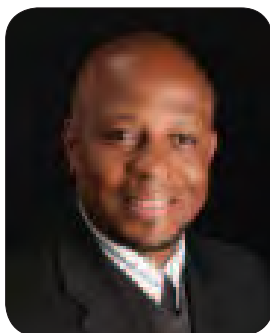
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Room: San Antonio 1-2

Sunday, 3:45 p.m. – 4:45 p.m.
Room: San Antonio 6



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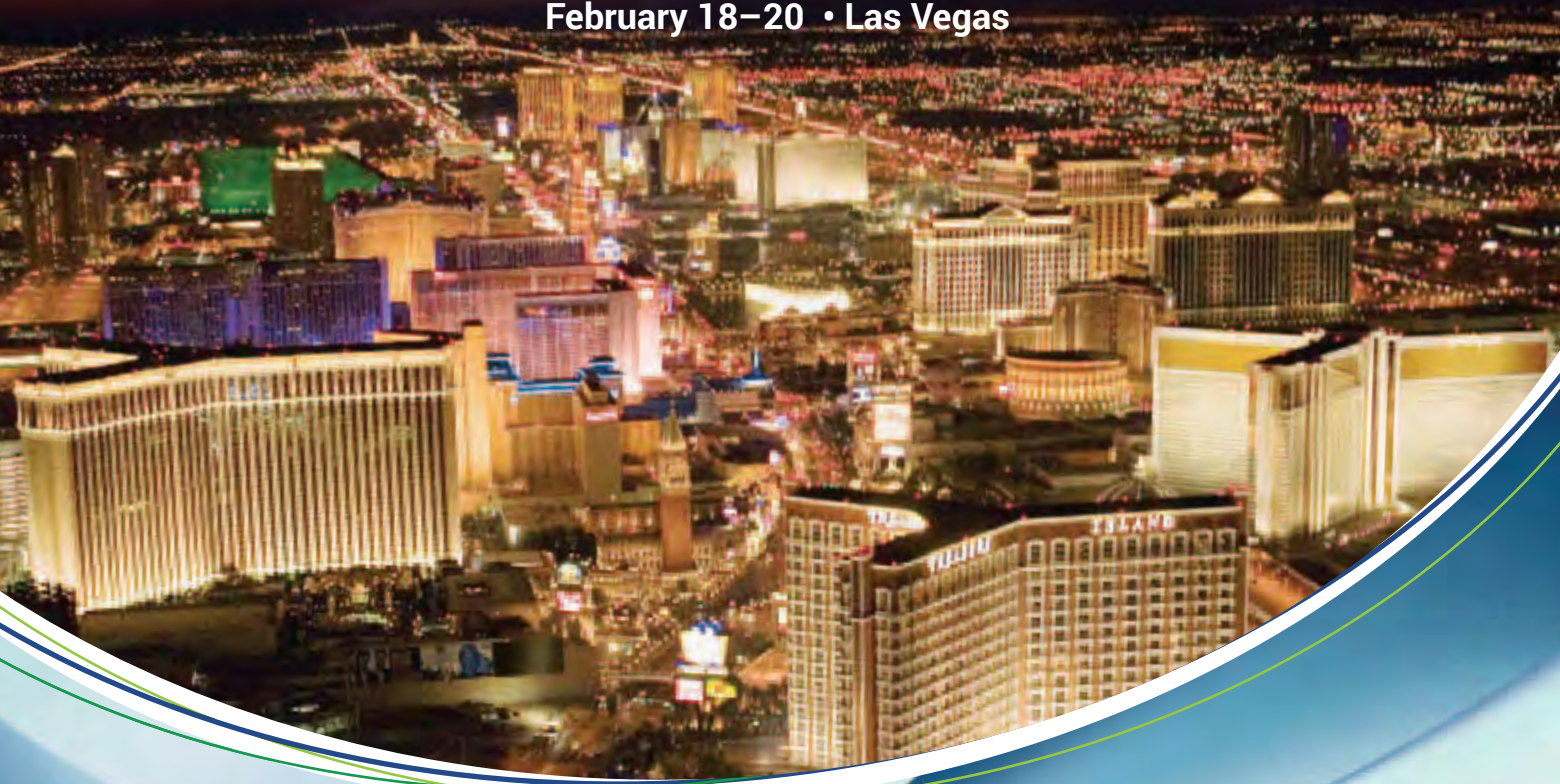
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Pupil Transportation



**Michael F. Detwiler, Sr.,
PSRBS**
Transportation Supervisor
Great Valley SD
Malvern, Pennsylvania

Sustainability



Amador Garza
Retired School
Business Official
San Antonio, Texas

Information Technology



Yasmine Dada
Assistant Superintendent-
Business Community
HSD 128
Vernon Hills, Illinois

Purchasing and Supply Management



Jeffrey L. Kimball
Director of Cooperative
Purchasing Services
Central Susquehanna IU 16
Lewisburg, Pennsylvania

Legal Aspects



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Panzer Chair in Education
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Wayzata Public Schools
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OPEB Solutions Using Retiree-Only Health Reimbursement Arrangements (HRA)

Monday, October 26, 2015, 9:15am - 10:15am



Presented by:

Ken Zastrow, Market Development, National Insurance Services and **Erik Kass**, Assistant Superintendent of Finance, Operations and Human Resources, Elmbrook Schools

Reducing the Cost of Early Retiree Health Insurance Using the Affordable Care Act

Monday, October 26, 2015, 8:00am - 9:00am



Presented by:

David Branback, Director of Market Development, National Insurance Services and **Erik Kass**, Assistant Superintendent of Finance, Operations and Human Resources, Elmbrook Schools

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SATURDAY: 2:30 p.m. – 5:30 p.m.

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(Lunch: 12:30 p.m. – 1:30 p.m.)

Saturday, October 24

2:30 p.m. – 5:30 p.m.

Exhibit Hall Opening Reception

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Sunday, October 25

12:30 p.m. – 1:30 p.m.

Lunch in the Exhibit Hall

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Our Cowboy Magician will dazzle you with his sleight of hand and comedic interactive entertainment performed as he strolls around the Exhibit Hall!

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Booth 731

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You must be present in the Exhibit Hall to win a prize. Prizes will be announced 15 minutes before the hall closes.

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ABMM Financial Booth 514

517 Route 1 South
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ABMM is an independent financial services organization founded on 90 years of experience. We specialize in working with public school, non-profit, and governmental employers and their employees, providing them with a variety of flexible, forward-thinking retirement strategies that fit each individual's needs. www.abmmfinancial.com

Acorn by Rycor Booth 620

4960 S. Gilbert Rd., Ste. 1-267
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ActPoint KPI Booth 527

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American Fidelity Assurance Co. Booth 421

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Arizona ASBO Booth 727

2100 N. Central Ave., Ste. 202
Phoenix, AZ 85004

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Association of Educational Purchasing Agencies Booth 211

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Association of School Business Officials International Booth 731

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BerryDunn Booth 120

100 Middle St., 4th Floor, East Tower
Portland, ME 04101

BerryDunn is an independent management and IT consulting firm with extensive IT strategic planning, systems consulting, process improvement, and change management expertise. We have partnered with more than 200 public sector clients nationwide, helping to guide their most complex enterprise IT projects. Our K-12 consulting practice is committed to understanding the systems and processes that support K-12 schools. We proudly participate in ASBO to stay abreast of the challenges and opportunities impacting our clients.



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Officers Association
Booth 826

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8080 Tristar Dr.
Irving, TX 75063

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

Keystone Purchasing Network Booth 626

90 Lawton Lane
Milton, PA 17847

The Keystone Purchasing Network (KPN) is a cooperative purchasing program operated by the CSIU, serving schools, government, and other nonprofit agencies through free membership. KPN establishes contracts through sealed public bid processes and awards contracts to the most responsive, responsible vendors. Contracts include FieldTurf, Musco, GT Grandstands, Hertz Furniture, Promethean Whiteboards, Playground Equipment, Modular Classrooms, Library Supplies and more. Visit us at www.theKPN.org to apply for free membership.

KI Booth 420

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

KI provides the entire furniture package for schools and has been ranked as the number one furniture supplier for educational solutions for 11 years. (Source: Contract Magazine Brand Report)

Lincoln Learning Solutions Booth 127

294 Massachusetts Ave.
Rochester, PA 15074

Lincoln Learning Solutions (formerly NNDS) is a nonprofit educational solutions organization redefining the PreK–12 learning experience through a continuum of personalized learning. By providing differentiated, customizable digital learning curriculum tools coupled with powerful teacher instruction, we maximize virtual and blended learning so students can “own” national and state content standards.



Motorola/SchoolSAFE Booth 805

1303 E. Algonquin Rd.
Schaumburg, IL 60196

Motorola (www.motorolasolutions.com) provides products and services to schools and their surrounding police, fire, and EMS agencies. With our partner SchoolSAFE (www.SchoolSafecom.org), we offer web-enabled, two-way radio-based solutions that allow for communications interoperability between school radio systems and public safety radio systems.



MyBudgetFile.com Booth 427

1805 Third Ave. South
No. 302
Minneapolis, MN 55404

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

2015 EXHIBITORS*

NASPO ValuePoint (formerly WSCA-NASPO)

Booth 926

201 E. Main, #1405
Lexington, KY 40507

NASPO ValuePoint (formerly WSCA-NASPO) provides the highest standard of excellence in public cooperative contracting. Since 1993, we have been the cooperative purchasing arm of NASPO (National Association of State Procurement Officials), guiding the nation's most significant public contract cooperative. NASPO ValuePoint is a nationally focused cooperative aggregating the demand of all 50 states, the District of Columbia, and the U.S. territories and their political subdivisions, spurring best value, innovation, competition in the marketplace.

National Alliance for Insurance Education & Research

Booth 808

3630 N. Hills Dr.
Austin, TX 78731

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

National Insurance Services of WI, Inc.

Booth 429

250 S. Executive Dr.
Brookfield, WI 53005

National Insurance Services (NIS) has been a specialist in employee benefits for schools, cities, and counties 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. NIS is a full-benefits consultant providing health, dental, life, disability and vision insurance. Our financial solution products include HRAs, OPEB Trusts, Special Pay Plan, and Flexible Spending Accounts.

National IPA/TCPN

Booth 712

11280 West Rd.
Houston, TX 77065

TCPN is a national governmental purchasing cooperative able to leverage the purchasing power of governmental entities in all 50 states. All TCPN contracts are competitively bid, evaluated, and awarded by a government entity serving in the lead agency role and in accordance with purchasing procedures mandated by state procurement laws.

National Joint Powers Alliance

Booth 520

PO Box 219
202 12th 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 nonpublic educational systems, governmental agencies,

and nonprofits. 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 Life Group®/LSW®

Booth 815

15455 Dallas Pkwy., Ste. 800
Addison, TX 75001

We are National Life Group®. We serve nearly a million customers with revenues of over a billion dollars annually. The group includes National Life Insurance Company®, founded in Vermont in 1848, and Life Insurance Company of the Southwest® (LSW) in Texas. We're leaders in the 403(b)/457(b) market and have delivered innovative solutions to meet our clients' needs. We've been delivering on our promises for nearly 170 years and will do so for years to come.

Noodle Markets

Booth 629

59 Chelsea Piers, Ste. 201
New York, NY 10011

Noodle Markets is an education technology company that is revolutionizing K-12 purchasing. Our mission is to dramatically transform the way K-12 school districts and education agencies buy products and services; level the playing field for vendors and spur innovation; and improve procurement processes and promote best practices. Our marketplace will help K-12 buyers and vendors reduce costs, increase efficiency through standardization and digitization, and enhance communication.

*As of August 31, 2015


Office Depot, Inc.
Booth 409

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

We're more than just office supplies. We're people, products, and solutions to help your school succeed. From technology to professional development, Office Depot provides a one-stop resource for schools.

The OMNI Group, Inc.
Booth 508

Watertown Office Park
 1099 Jay St., Bldg. F
 Rochester, NY 14611

OMNI is a national, independent 403b/457b third-party administrator providing compliance, remittance, and customer support services, including in-house legal counsel and IRS audit support. Please inquire about OMNI's P3 program.

OSC WORLD
Booth 813

170 Earle Ave.
 Wantagh, NY 11563

OSC WORLD has developed software programs to assist teachers and administrators reduce the time it takes to address bureaucratic requirements and ensure the safety of students from cyber-bullying and other threats. Digital Writing expedites much of the paperwork teachers and administrators are required to complete, using tablet devices. Gradelt takes over the burdensome task of scoring exams. Digital Fly monitors social media, analyzing harmful content and protecting students and faculty.

PEPPM
Booth 627

90 Lawton Lane
 Milton, PA 17847

PEPPM is a national technology bidding and purchasing cooperative administered by the Central Susquehanna Intermediate Unit (CSIU), a political subdivision of the Commonwealth of Pennsylvania. PEPPM aggregates buyers and demand across the country to get the lowest prices while saving time and money on the bidding process. PEPPM can maximize technology budgets and minimize administrative time. Go to www.peppm.org to start saving time and money now.

PMA Financial Network, Inc.
Booth 812

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

PMA Financial Network, Inc., has been a leading provider of financial services since 1984 and currently provides a diverse lineup of customized financial solutions to over 2,000 school districts and other public entities in 11 states. With services ranging from investment advisory work through Prudent Man Advisors, Inc., to public finance work with PMA Securities, Inc., among others, the PMA companies are focused on achieving long-term financial success for their clients.

Premier
Booth 322

1349 Tilton D
 Franklin, TN 37067

The Public Group
Booth 209

PO Box 50676
 Provo, UT 84605

PublicSchoolWORKS
Booth 413

2010 Madison Rd.
 Cincinnati, OH 45208

Save money. Save time. Complete, automated safety compliance for staff. Safety and behavior management for students. 350+ Ohio districts depend on PublicSchoolWORKS. So should yours!

Questica Budget
Booth 110

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

The recognized leader in budget preparation and budget management software, Questica products include Questica Budget Operating, Capital, Position Planning, Questica Performance, and Statistical Ledger. With customers of all sizes, and budgets ranging from \$20 million into the billions, Questica has the experience to create a solution tailor-made for your specific needs.

RevTrak
Booth 728

9201 E. Bloomington Frwy., Ste. RR
 Bloomington, MN 55420

Stop by to learn how your district can accept online payments for any school-related fee using RevTrak, the leader in processing K-12 online payments. Take online payments without creating more work for your staff, and without changing your internal processes and controls. From your idea to public view, RevTrak does the work for you to make sure you have a secure, reliable, and orderly process for accepting and reconciling online payments.

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Ricoh Americas Corporation **Booth 320**

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

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

SchoolDude **Booth 221**

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

SchoolDude provides cloud-based operations and facilities management software to over 6,000 schools, colleges, and universities. As the market leader, we help both small and large institutions save time and money by managing facility services. Our solutions help you manage maintenance, track inventory usage, respond to critical alarms, and plan future capital needs. With SchoolDude, you're equipped with the data, tools, and resources needed to run facilities that promote student health, learning, and safety.

SchoolMessenger **Booth 422**

100 Enterprise Way, Ste. A-300
Scotts Valley, CA 95066

SchoolMessenger is the trusted provider of communications solutions for education. Thousands of school districts, charter schools, private

schools, and other educational institutions in all 50 states depend on the company's products and services to engage with their communities in multiple languages and on any device, from notifications and websites to custom mobile apps and social media. Founded in 1999, the company has offices in the United States and Canada.



Security Benefit **Booth 605**

555 Jackson St.
Denver, CO 80206

Security Benefit is proud to be an ASBO Strategic Partner. Join our breakout to learn what Gen X and Gen Y employees think about saving for retirement and ways you can help increase their participation in your district's 403 (b) retirement plan. Visit us at Booth 605 to explore how your 403 (b) plan can provide possible budget solutions and ways Security Benefit can help your employees To and Through Retirement.

Sharp Electronics Corporation **Booth 522**

1 Sharp Plaza
Mahwah, NJ 07495

Budget constraints and mandates for advanced technology are a couple of the challenges faced by schools and government agencies. Our exclusive partnership with National Joint Powers Alliance (NJPA) provides government, education, and nonprofit agencies the ability to acquire advanced technology at a competitive price without going through the full bid process. NJPA's contract and Sharp's state-of-the-art technology enable your organization to streamline processes and improve efficiencies. Stop by ASBO Booth 522 to learn more!



Siemens Industry, Inc. **Booth 509**

1000 Deerfield Pkwy.
Buffalo Grove, IL 60089

Siemens is the world market leader for safe, reliable, and energy-efficient (green) buildings and infrastructures. Our totally integrated portfolio of solutions and services allows us to help manage building automation, fire safety and security systems, HVAC, air quality, power distribution and management, and energy efficiency for all educational facilities.

Skyward, Inc. **Booth 321**

5233 Coxe 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 1,800 school districts throughout the world.

Sodexo **Booth 613**

283 Cranes Roost Blvd., Ste. 260
Altamonte Springs, FL 32201

Sodexo supports student engagement and improves the quality of life for the entire school's community. By focusing on quality of life services, we reinforce the overall experience of a student's educational journey. From nutritious school meals to clean classrooms to safe playgrounds and more, Sodexo enhances every student's ability to learn and grow. For more information, please visit www.sodexoUSA.com.

*As of August 31, 2015

**SSC
Booth 232**

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

With decades of industry experience, SSC partners with educational institutions to further the success and well-being of students, staff, and faculty by delivering quality integrated facilities programs including custodial, maintenance, and grounds services.

As a trusted and specialized provider, we are committed to enhancing educational settings and creating financial guarantees that can be reallocated into key areas of your academic mission. With SSC, you can focus on your core objective: educating our future.

**Staples Advantage
Booth 521**

500 Staples Dr.
Framingham, MA 01702

A well-rounded education is about more than just homework and exams, and a comprehensive supply solution is about more than just paper and pencils. At Staples Advantage, you'll find thousands of products that make it easy to stock your entire school, from the classroom to the lunchroom to the main office.

**Steelcase
Booth 526**

901 44th St. SE
Grand Rapids, MI 49508

Steelcase is focused on helping schools, colleges, and universities create the most effective, rewarding, and inspiring active learning and work environments to meet the evolving needs of students and educators. Using an insight-led approach, we design solutions for the many spaces learning happens, from

classrooms and libraries to in-between spaces and cafes. We have a passion for understanding how learning best takes place and how smarter, active learning spaces can help. See www.steelcase.com.

**SUBWAY
Booth 214**

325 Sub Way
Milford, CT 06461

The SUBWAY School Lunch Program can help you give the children in your care a product that they will like, while offering menu options with nutritional content superior to other name-brand products. Our flexible programs, whether an on-site location run by our franchisee, or your own staff or food service contractor, can supplement your existing menu offerings and help boost overall participation levels in your food service operations.

**SunGard K-12 Education
Booth 215**

3 W. Broad St.
Bethlehem, PA 18018

SunGard K-12 Education software solutions serve one out of six students nationally. Offering student information, curriculum and assessment, special education, and financial and human resource management, our software products can be deployed to work together or implemented as powerful stand-alone systems. Experience the benefits of working with a single vendor and a fully integrated solution. Call 866.905.8989 for a demonstration, or visit www.sungardk12.com today!

**TekVisions, Inc.
Booth 810**

40970 Anza Rd.
Temecula, CA 92592

TekVisions has been around since 1991 and provides hardware and accessories for school technology needs. Our four offices nationwide provide Chromebooks, tablets, charging carts, and iPads for the common core, as well as manufacture POS touchscreens for cafeterias. National and state piggyback-able contracts are available to purchase all of our products.

**TIAA-CREF
Booth 612**

6400 Fannin St., Ste. 2450
Houston, TX 77030 US

TIAA-CREF is a full-service financial services company with \$869 billion in total assets under management (as of 8/30/2015), serving the needs of those working in the academic, research, medical, cultural, religious, and governmental fields. We provide advice and guidance, and offer products that provide lifetime income options, retirement plans, mutual funds, IRAs, and life insurance. We are mission-driven and committed to helping our more than five million participants plan for their financial well-being.

**TimeClock Plus
Booth 121**

1 TimeClock Dr.
San Angelo, TX 76904

TimeClock Plus records employee hours for payroll while providing labor reporting functions to thousands of school districts nationwide. As a recipient of numerous awards that include Deloitte Technology Fast 500 and Texas Small Business

2015 EXHIBITORS*

of the Year, TimeClock Plus is an industry leader. Go to www.timeclockplus.com or call 800.749.8463.

TIPS

Booth 614

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

The Interlocal Purchasing System (TIPS) is a purchasing cooperative serving public and private school districts, colleges, universities, state, county, and city municipalities.

Transfinder

Booth 713

440 State St.
Schenectady, NY 12305

Transfinder is a national leader in intelligent transportation systems, providing transportation management systems and services to K-12 school districts. Founded in 1988 and headquartered in Schenectady, New York, Transfinder is one of the easiest to use and most intuitive and versatile methodologies for transportation routing, scheduling, planning and communications. Transfinder, an *Inc.* magazine fastest-growing company for the past nine consecutive years, offers routing and scheduling solutions for optimal transportation logistics. www.transfinder.com

Tremco

Booth 504

3735 Green Rd.
Beachwood, OH 44122

Tremco Roofing and Building Maintenance has been delivering roofing and weatherproofing solutions on time and on budget since 1928. Innovations include restoration options that can save over half the cost of

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a traditional replacement. Visit us at Booth 504 or contact Regina Martino at 651.323.7431 before your next roofing or building envelope project to learn how we can help save you time and money, and improve your facilities.



Tyler Technologies

Booth 621

5101 Tennyson Pkwy.
Plano, TX 75024

School districts of all sizes can focus more on students and less on data when they implement Tyler Technologies' integrated school solutions. From the classroom to the business office, from the transportation depot to the superintendent's desk, Tyler's enterprise solutions help districts reduce costs and streamline operations. Our clients are empowered with seamless, dynamic data transfer between departments, allowing them to better respond to the needs of students, parents, teachers and administrators.



U.S. Communities

Booth 304

9711 Washingtonian Blvd.,
Ste. 100
Gaithersburg, MD 20878

Co-founded by ASBO International, U.S. Communities is the leading government purchasing cooperative that provides school districts with cost savings for products and services that address the unique needs of schools. From science and athletic supplies, building maintenance, technology, food services, and more, schools can access suppliers' best overall government pricing while reducing the costs of competitive bids. Registration is free and there are no commitments or minimum orders. Visit www.uscommunities.org to get started!

U.S. Employee Benefits Services Group

Booth 632

4550 State Hwy. 360, Ste. 190
Grapevine, TX 76051



VALIC

Booth 726

2929 Allen Pkwy.
Houston, TX 77019

VALIC is an industry leader and currently manages long-term investment programs for more than 24,000 K-12 schools and districts, as well as higher education, healthcare, government, and other not-for-profit institutions serving nearly 2 million plan participants. VALIC markets these plans and services through a national team of financial advisors dedicated to providing unparalleled personal, face-to-face service.



Virco Mfg. Corporation

Booth 311

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 workstation for teachers and administrators. Hundreds of Virco items are GRENNGUARD-certified. For large-scale furniture purchases, Virco's complimentary, hassle-free PlanSCAPE service delivers on-time, on-budget solutions.


**Voya Financial®
Booth 208**

One Orange Way, B3N
Windsor, CT 06095-4774

Voya Financial, Inc. helps Americans plan, invest, and protect their savings to get ready to retire better. Serving the financial needs of approximately 13 million individual and institutional customers in the United States, Voya is a Fortune 500 company. The company is equally committed to conducting business in a way that is socially, environmentally, economically and ethically responsible. Voya has been recognized as one of the World's Most Ethical Companies by the Ethisphere Institute.

**Wave Resource Strategies
Booth 920**

200 Cahaba Park Circle
Birmingham, AL 35242

Wave Resource Strategies is an enterprise class IT power management solution. Wave uses a unique profile management technology to reduce electricity consumption by up to 60%. This sustainable approach provides a dashboard to centrally manage fleets of computers across multiple locations.

**Weidenhammer
Booth 708**

935 Berkshire Blvd.
Wyomissing, PA 19610

Weidenhammer is an established education management software leader serving the information technology needs of more than 1,500 school districts in 40 states since 1978. With nearly 200 IT professionals in seven locations throughout the United States, Weidenhammer is structured to align the requirements of any

school district with the best-suited information technology applications including the alio financial management and human resources system.

**Wilkes University
Booth 124**

84 West South St.
Wilkes Barre, PA 18766

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

**WillSub/PCMI Staffing Services
Booth 106**

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Portland, MI 48875

Get out of the substitute teacher business with willSub/PCMI! WillSub, software-as-a-service, saves countless hours of manual sub-calling, employee work data tracking, and absence management. Eliminating paper processes, willSub creates efficiencies by integrating with your other software applications, allowing automation of your manual data entry. Save your district time and/or money! Contact us at 877.855.7264.

**YellowFolder, LLC
Booth 333**

1125 Longpoint Ave.
Dallas, TX 75247

We offer the only paperless document management service specifically designed for school districts. YellowFolder securely manages the entire lifecycle of a district's records, saving time and money, and eliminating stored boxes.

EXHIBIT HALL MAP*

Strategic Partners		Event Partners		Affinity Partner		U.S. Communities Street			
<div>929</div> <div>927</div> <div>925</div> <div>923</div> <div>921</div>	<div>926</div> <div>827</div>	<div>727</div> <div>826</div> <div>725</div>	<div>633</div>	<div>638</div> <div>539</div>	<div>538</div> <div>439</div>	<div>438</div> <div>339</div>	<div>338</div> <div>239</div>		
				<div>636</div> <div>537</div>	<div>536</div> <div>437</div>	<div>436</div> <div>337</div>	<div>336</div> <div>237</div>		
				<div>634</div> <div>535</div>	<div>534</div> <div>435</div>	<div>AXA</div> <div>335</div>	<div>332</div> <div>235</div>		
				<div>632</div> <div>533</div>	<div>532</div> <div>433</div>	<div>333</div>	<div>233</div>		
				ASBO Booth				232	
<div>915</div> <div>913</div> <div>911</div> <div>909</div> <div>907</div> <div>905</div>	<div>914</div> <div>912</div> <div>910</div> <div>908</div> <div>906</div> <div>904</div>	<div>814</div> <div>812</div> <div>810</div> <div>808</div>	<div>713</div> <div>711</div> <div>Colonial Life</div>	<div>615</div> <div>712</div> <div>710</div> <div>708</div> <div>Johnson Controls</div> <div>Security Benefit</div>	<div>614</div> <div>515</div>	<div>Professional Headshots</div> <div>Virco Mfg. Corporation</div>	<div>314</div> <div>215</div>	<div>214</div> <div>115</div>	<div>114</div>
				<div>613</div>	<div>510</div>	<div>312</div> <div>213</div>	<div>212</div> <div>113</div>	<div>112</div>	
				<div>611</div>	<div>511</div> <div>Siemens Industry, Inc.</div>	<div>310</div> <div>211</div>	<div>Voya Financial</div> <div>111</div>	<div>110</div>	
				<div>609</div>	<div>508</div>	<div>308</div> <div>209</div>	<div>109</div>	<div>108</div>	
				<div>Motorola / SchoolSAFE</div> <div>906</div> <div>904</div>	<div>908</div> <div>809</div>	<div>809</div>	<div>U.S. Communities</div> <div>Aramark K-12 Education</div>	<div>106</div>	<div>104</div>

ENTRANCE TO HALL

*As of August 31, 2015

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125 plan document



communicate employee
benefit plan changes



check 403(b) universal
availability requirements



develop affordable care
act strategy

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Please visit us in the
Exhibit Hall, Booth #421



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