

ASBO ACE

**ASBO INTERNATIONAL
ANNUAL CONFERENCE & EXPO**

OCTOBER 25-28, 2019

**GAYLORD
NATIONAL**

NATIONAL HARBOR

MARYLAND

PROGRAM BOOK

asbointl.org/ACE

SCHOOL BUSINESS OFFICIALS, **MEET YOUR BIGGEST FANS**

These companies recognize the incredible work you do, which is why they are committed to supporting ASBO International members with valuable professional development and recognition opportunities, as well as enhancements to the Annual Conference & Expo. They focus on meeting your district's needs—so you can serve students to the best of your ability.

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Welcome to ASBO International's 2019 Annual Conference & Expo!

Dear Fellow Attendee,

If you're reading this, you have the privilege of experiencing an incredible few days at ASBO International's Annual Conference & Expo. Whether this is your first time at the meeting or you have enough ASBO International pins to fill the Exhibits Marketplace, you will leave here with new ideas that can help improve the way your school district serves students.

During your time here, you will find yourself bouncing between inspiring general sessions, invaluable workshops and seminars, a buzzing Exhibits Marketplace, and education sessions loaded with helpful takeaways. However, **don't miss the great people who are sitting beside you at each event.** Go out on a limb and sit next to someone you don't know—and then introduce yourself! Listen to the stories of others who share similar setbacks and can appreciate the small victories no one back home fully understands.

Yes, you'll leave with plenty of helpful ideas to report back to your supervisor and real action items that will make your school system stronger, but you'll also find something only you can hold on to: the knowledge that you are not alone. You are part of an international movement of individuals who are **working together to make a difference** for students. And that's something you won't find anywhere else.

Sincerely,



Tom Wohlleb, CSRM
President, ASBO International
Chief Financial Officer
Casa Grande Elementary School District
Casa Grande, Arizona



David J. Lewis
Executive Director, ASBO International
Ashburn, VA



WORKINGTOGETHER
to make a difference



WHEN WE SAY "A THOUSAND THANKS," WE MEAN IT!

To the Maryland/DC ASBO volunteers who stepped in as local hosts and the Annual Meeting Program Committee volunteers who reviewed hundreds of education sessions: School business officials have a suitcase full of ideas to take back to their districts because you helped make this conference a success.

Are you interested in volunteering? Email education@asbointl.org to learn how you can help!



We didn't think so. By setting up a 403(b) plan today, your educators can get a jump-start on their retirement planning.

How do we continue to be ranked the #1 provider of 403(b) plans for K-12 schools?* Our financial professionals make it effortless for educators to plan for retirement by guiding them through the planning process and remaining dedicated to them, staying by their side every step of the way.



**Ever say,
“I don’t need
to plan for
retirement?”**

AXA Equitable is proud to be the sponsor of the ASBO International Eagle Awards & Eagle Institute. Visit us.axa.com/teachers or contact a financial professional at (855) 205-2494.

* LIMRA, Not-for-Profit Survey, Q4, 2017, based on 403(b) plan assets, participants and contributions.

403(b) retirement plans are funded with an annuity issued by AXA Equitable Life Insurance Company (NY, NY) and co-distributed by affiliates, AXA Advisors, LLC (member FINRA, SIPC) and AXA Distributors, LLC. “AXA” is the brand name of AXA Equitable Financial Services, LLC and its family of companies, including AXA Equitable Life Insurance Company (NY, NY); AXA Advisors, LLC; and AXA Distributors, LLC. GE-134295c (3/18) (Exp. 3/20) | G523126



All events take place at the **Gaylord National Harbor Convention Center** unless otherwise noted.

Registration Hours

Friday..... 7:00 am – 6:00 pm
 Saturday..... 7:30 am – 4:00 pm
 Sunday..... 7:30 am – 4:00 pm
 Monday..... 7:30 am – 10:00 am

Exhibits Marketplace Hours

Saturday..... 11:30 am – 2:30 pm
 Lunch..... 12:30 pm – 1:30 pm
 Sunday..... 12:30 pm – 2:45 pm
 Lunch..... 1:00 pm – 2:00 pm

? Be In the Know

ASBO International staff will be wearing blue shirts and are happy to assist you. You can also visit the registration desk, located in Potomac Foyer A.

📶 Complimentary Wi-Fi

Complimentary Wi-Fi is available in conference meeting spaces. Password is case-sensitive.

Network: asbo international

Password: asbo2019

Sponsored by U.S. Retirement & Benefits Partners

🔋 Charging Stations

Low battery? No problem! Recharge your devices using the secure charging lockers located near education sessions. Choose a unique PIN and let your device charge while you're away.

Sponsored by Aflac

📄 Badges

An official 2019 Annual Conference & Expo badge is required to enter education sessions, general sessions, the Exhibits Marketplace, and all social events.

📍 ASBO Booth and Pin Trading Zone

See pages 90 and 91 for details about these and other Exhibits Marketplace highlights.

📱 2019 Annual Conference & Expo App

Expand your social and networking opportunities during the conference with the ASBO International app! Connect with attendees, create your personal itinerary, and search for sessions and slides. Search ASBO International in the Apple App Store or Google Play to download the app.

Sponsored by BMO Financial Group

+ First Aid

For all medical or security issues dial (301) 965-4500 from an outside line or extension 333 on any hotel phone for assistance.

Education

Session Recordings

Torn between multiple sessions in one time slot? Don't worry, all sessions will be recorded* and made available online for members in the Global School Business Network. After the meeting, you'll be able to access educational sessions and slides whenever you need them, continuing your education even after the conference is over!

Sponsored by Ricoh USA, Inc.

***Please silence cell phones, as all sessions are recorded.**

Earn SFO Contact Hours and CPE Credits

Be sure to scan the barcode on your badge when you enter and exit a session, which will allow you to earn up to 19 SFO contact hours and CPE credits during the conference. See page 17 for more details.

Learning Log

You are 42% more likely to achieve your goals and dreams by simply writing them down on a regular basis. Use the Learning Log to summarize what you learned during each session. Answer the five reflection questions and retain valuable information to increase the likelihood of turning your great ideas into change agents in your school system.

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SCHEDULE AT-A-GLANCE

IO Invitation Only

ALL EVENTS TAKE PLACE IN THE **GAYLORD NATIONAL HARBOR CONVENTION CENTER** UNLESS OTHERWISE NOTED.

THURSDAY, OCTOBER 24

4:00 pm – 7:00 pm Emerging Leaders Scholarship Workshop IO

4:30 pm – 7:00 pm Certification Commission Meeting and Dinner IO

7:00 pm – 8:00 pm Emerging Leaders Scholarship Dinner IO

FRIDAY, OCTOBER 25

7:00 am – 6:00 pm Registration

7:30 am – 8:00 am Coffee Break

8:00 am – 5:45 pm **Workshops and Seminars**

12:30 pm – 1:30 pm **Annual Conference Program Planning Session and Lunch**

5:45 pm – 6:30 pm First Timer Networking Reception

6:30 pm – 7:30 pm Welcome Mixer

SATURDAY, OCTOBER 26

7:00 am – 7:45 am SFO® Breakfast IO

7:30 am – 4:00 pm Registration

8:00 am – 9:00 am **Discussion Groups**

8:45 am – 9:15 am Coffee Break

9:15 am – 11:15 am **First General Session: Ariane de Bonvoisin**

11:30 am – 12:45 pm COE Advisory Committee and Reviewers Meeting and Lunch IO

11:30 am – 2:30 pm **Exhibits Marketplace**

12:30 pm – 1:30 pm **Lunch in the Exhibits Marketplace**

1:00 pm – 1:45 pm COE Reception IO

1:30 pm – 2:30 pm Affiliate Executive Directors Group Meeting IO

1:30 pm – 5:00 pm SFO® Testing (Additional fee; Pre-Registration required)

1:45 pm – 2:30 pm Emerging Leaders Scholarship Reception IO

2:30 pm – 3:00 pm Food-for-Thought Station

2:30 pm – 3:30 pm Guest Program: Book Club with the Author. *The Cutaway: A Thriller*

2:45 pm – 3:45 pm **Discussion Groups**

2:45 pm – 4:45 pm **Deep Dives**

3:00 pm – 3:45 pm Eagle Awards Reception IO

4:00 pm – 4:25 pm **Mini-Modules**

5:00 pm – 6:00 pm Pinnacle Awards Reception *Offsite* IO

6:00 pm – 8:00 pm Eagle Awards Dinner IO

6:00 pm – 8:00 pm Pinnacle Awards Dinner IO

8:00 pm – 10:00 pm Joint Affiliate Reception *Offsite*

SUNDAY, OCTOBER 27

7:30 am – 4:00 pm	Registration
8:00 am – 9:15 am	Clinic Tables
9:00 am – 9:30 am	Coffee Break
9:30 am – 10:30 am	Discussion Groups
10:45 am – 12:15 pm	Second General Session: <i>Mark Eaton</i>
12:30 pm – 1:45 pm	MBA Advisory Committee and Reviewers Meeting and Lunch 10
12:30 pm – 2:45 pm	Exhibits Marketplace
1:00 pm – 2:00 pm	Lunch in the Exhibits Marketplace
1:45 pm – 2:30 pm	MBA Reception 10
2:30 pm – 3:00 pm	Food-for-Thought Station
2:45 pm – 3:45 pm	Discussion Groups
2:45 pm – 4:45 pm	Deep Dives
4:00 pm – 4:25 pm	Mini-Modules
4:00 pm – 5:00 pm	Open Bylaws Meeting
5:00 pm – 6:30 pm	MD/DC ASBO Affiliate Reception “A Taste of the Chesapeake”

MONDAY, OCTOBER 28

7:30 am – 8:00 am	Coffee Break
7:30 am – 10:00 am	Registration
8:00 am – 9:00 am	Discussion Groups
9:15 am – 10:15 am	Discussion Groups
10:30 am – 11:30 am	Discussion Groups
11:45 am – 12:30 pm	Peer-to-Peer Wrap-Up Session





Horace Mann

Crowdfunding best practices for K-12 public schools

Public schools have long used donations to enrich students' academic experience and fund materials that budgets cannot always afford. Crowdfunding is becoming a viable funding source, filling resource gaps and providing strategic acceleration for academic programs. However, because the practice may be misunderstood, it may result in unexpected liabilities without the proper partners and safeguards in place.

Horace Mann is a national sponsor of DonorsChoose.org, an organization that connects teachers in need of classroom resources with donors who want to help. Schools served by Horace Mann representatives have received more than \$486 million in classroom funding through DonorsChoose.org.

Horace Mann can help you learn how to implement crowdfunding best practices like these in your schools.

- Crowdfunding guidance and which sites to trust
- Financial accountability
- Controls over materials and supplies
- Safety and privacy

Horace Mann can host no-cost workshops to help your teachers understand how DonorsChoose.org works, how to set up a project and how to help make it a success. To learn more, contact your local Horace Mann representative.

Jim Yale
VP Industry Relations
Jim.Yale@horacemann.com
217 789 5182

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OFFICIALS INTERNATIONAL

Some see a
classroom.

GERMS SEE A
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Visit [depot.support/healthy-schools](https://www.officedepot.com/support/healthy-schools) or contact your account manager for more details.

*Alliance for Consumer Education, 2019 (www.consumered.org/stopgerms).

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CONVENTION CENTER MAP

National Harbor Conference Rooms

Ballroom Level

- B Maryland Ballroom
- C Chesapeake Conference Rooms
- D Potomac Ballroom
- E Baltimore Rooms
- F Fort Washington Boardroom
- G Annapolis Rooms
- H Woodrow Wilson Ballroom
- I Cherry Blossom Ballroom
- J Magnolia Rooms
- K Camellia Rooms
- L Azalea Rooms
- M Presidential Boardroom

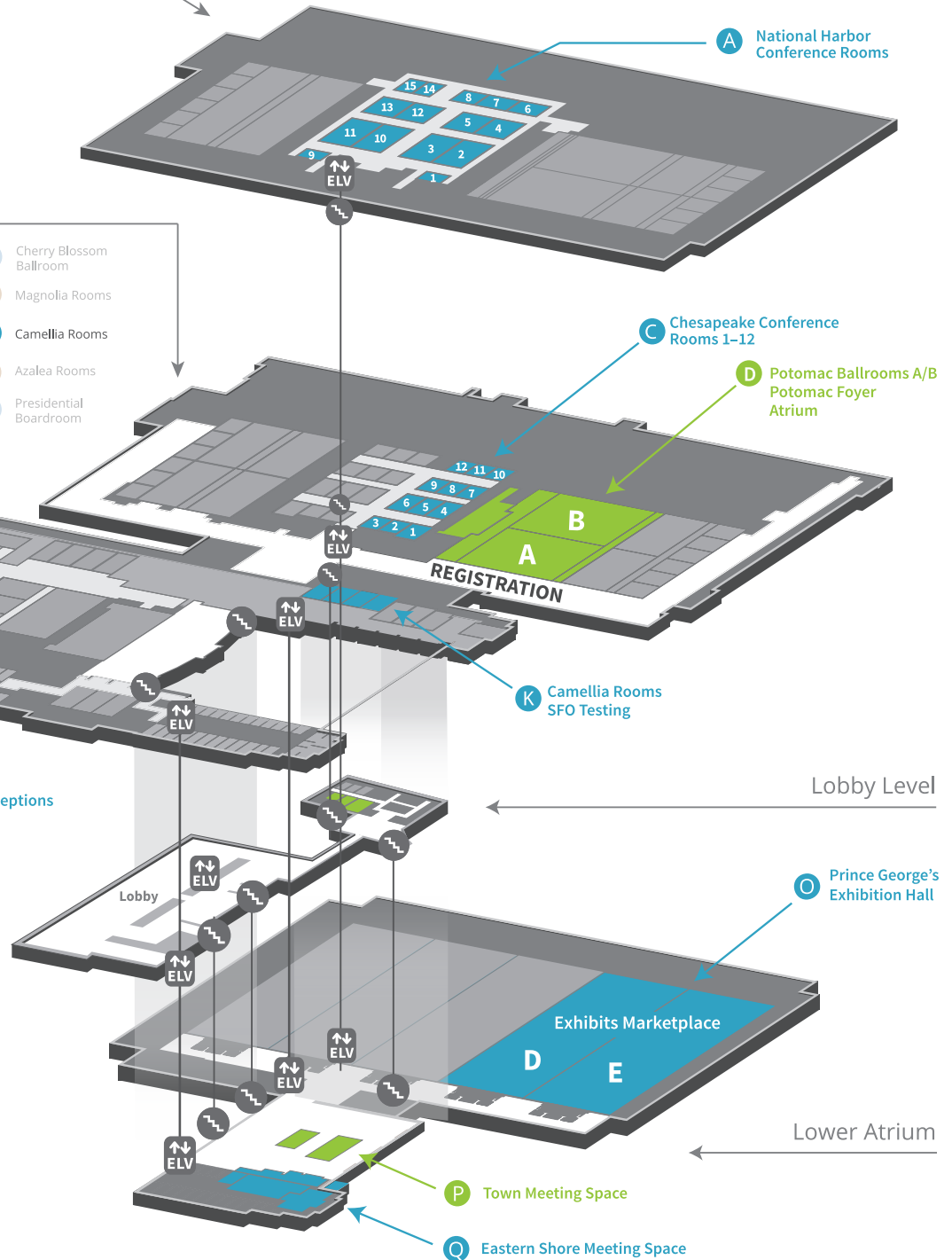
Baltimore Rooms E

Education Sessions, Program Receptions and Committee Meetings

- C Chesapeake
- A National Harbor
- Q Eastern Shore
- E Baltimore

General Sessions, Registration, and Mixers

- D Potomac Ballrooms A/B Potomac Foyer
- P Town Meeting Space





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Gavin Gruenberg, Senior Vice President, Voya Financial | 909-798-3250,
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ASBO *global* SCHOOL BUSINESS NETWORK *LIVE!*

Exchange your thoughts on the *LIVE!* version of ASBO International's online community of school business officials.

Use the cards found at the bottom of the board and **"post"** on the wall.

Located near Registration
on Friday and in ASBO
International booth 132
on Saturday and Sunday!

Keep the conversation going after the conference!

Log into asbointl.org/Network

IDENTIFY YOUR KNOWLEDGE GAPS, CHOOSE YOUR SESSIONS!



Where do you need the most growth? Check the boxes next to the core knowledge domains required for effective performance as a school business official. Choose sessions that focus on selected domains.

% Weight	SFO EXAM DOMAINS*	Need Knowledge
13.33%	Management of Accounting Systems Reconcile General Ledger Accounts • Formulate and Administer the Chart of Accounts • Analyze and Reconcile General Ledger Accounts • Manage Risk of District's Investments	<input type="checkbox"/>
26.67%	Management of Accounting Functions Manage Payroll Functions • Manage Accounts Receivable • Manage Accounts Payable • Manage Purchasing Procedures • Create and Monitor Annual Budgets • Prepare Financial Reports • Manage Cash Flow • Provide Accurate and Transparent Reporting	<input type="checkbox"/>
15.33%	Financial Planning and Analysis Serve as a School Leader • Review Financial Impact of Strategic Planning Goals • Develop Financial Goals • Evaluate Funding Options for Debt Management • Develop Outside Funding Sources • Analyze Economic and Demographic Data • Develop Multi-Year Forecast • Estimate Real Estate Property Tax Revenues	<input type="checkbox"/>
10.67%	Budgeting and Reporting Activities Project Student Enrollment • Evaluate Instructional Program Costs • Develop Annual Budgets • Manage Grant Activities • Prepare for Annual Audit	<input type="checkbox"/>
7.33%	Risk Management Activities Evaluate Existing Risks • Address Results of Risk Audit • Conduct Annual Evaluation of Insurance Plans • Manage Insurance Plans	<input type="checkbox"/>
7.33%	Management of School Facilities Update Facility Master Plan • Oversee the Operation and Maintenance of School Campuses • Oversee New Construction and Renovations	<input type="checkbox"/>
4.00%	Management of Information Systems Assist in Developing a Technology Plan • Maintain Technology Systems • Oversee Telecommunication Systems	<input type="checkbox"/>
10.67%	Management of Human Resource Functions Manage Hiring of New Employees • Develop Compensation Structure • Facilitate Staff Development and Training Programs • Manage Evaluation Process • Manage Personnel Administration • Manage Employee Benefit Programs	<input type="checkbox"/>
4.67%	Management of Ancillary Services Manage Transportation Services • Manage Food Service Programs	<input type="checkbox"/>

*This chart is based on a validated study that measures the frequency and time SBAs spend on work-related responsibilities. The domain weight represents the approximate percentage of SFO exam questions that fall within a domain.

PROUD SPONSOR



Seminars (SM) • FRIDAY ONLY

Develop essential skills and learn about available tools and resources that associate you and your district with integrity, excellence, and distinction within your community during these interactive instructional sessions.

Workshops (WS) • FRIDAY ONLY

Explore crucial issues at the heart of school business management with an interactive approach. These two- or four-hour sessions are designed to deepen knowledge and skills essential to navigating key school business operations.

Discussion Groups (DG) • SATURDAY, SUNDAY, MONDAY

These one-hour education sessions range from discussions and updates on timely topics to panels of your peers and industry experts.

Deep Dives (DD) • SATURDAY, SUNDAY

Take a longer look and dive deeper into current topics and issues in school business management with these two-hour educational offerings.

Mini-Modules (MM) • SATURDAY, SUNDAY

These 25-minute sessions explore topics that can easily be covered in brief while providing attendees with valuable new knowledge they can implement immediately. Presented by school business officials, Mini-Modules provide a great opportunity for colleagues to learn and share with one another in short but significant segments.

No SFO or CPE credits awarded for these sessions.

Clinic Tables (CT) • SUNDAY MORNING

The Clinic Tables session features roundtables, each with a discussion topic presented by an exhibitor and focused on a specific aspect of school business management. Participants change tables every 15 minutes. You can find more details on these sessions on page 76 or in the event app.

No SFO or CPE credits awarded for this session.

Peer-to-Peer Wrap-Up • MONDAY

This session offers an additional learning and networking opportunity to reflect on educational content and have further discussions with your colleagues before you leave the event.

No SFO or CPE credits awarded for this session.

SFO Contact Hours

NEW! Whether you are a current SFO or an SFO candidate, use the SFO domains correlated with each education session to increase your knowledge in specific areas.

SFO EXAM COMPETENCY DOMAINS:

- Management of Accounting Systems
- Management of Accounting Functions
- Financial Planning and Analysis
- Budgeting and Reporting Activities
- Risk Management Activities
- Management of School Facilities
- Management of Information Systems
- Management of Human Resource Functions
- Management of Ancillary Services

Earn up to 19 SFO recertification contact hours Friday through Monday. To receive SFO contact hours, attendees must scan their badge in and out of sessions via self-scanners inside each room to verify attendance. At the conclusion of the meeting, attendees who scan in for sessions will receive an email with instructions to access a certificate for all sessions for which they have earned credit; they must then enter the recertification hours in their online My SFO Manager account.

CPE Credits

Earn up to 19 CPE credits for the entire Annual Conference & Expo across different fields of study. To receive CPE credits, attendees must scan their badge to verify attendance and complete the online session evaluation. Attendees who scan in for a session will receive an email with CPE login and evaluation information. **All sessions are offered at a basic program level, group live, and require no program prerequisites or advance preparation.**

Programming Note: ASBO International's 2019 Annual Conference & 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 (ASBO), any of its respective affiliates, officers, directors, board members, or employees. The published event schedule is subject to change at any time.

THURSDAY, OCTOBER 24

4:00 pm – 7:00 pm **Emerging Leaders Scholarship Workshop** **IO**

Chesapeake 3

4:30 pm – 7:00 pm **Certification Commission Meeting and Dinner** **IO**

Chesapeake 12

7:00 pm – 8:00 pm **Emerging Leaders Scholarship Dinner** **IO**

Chesapeake 4

FRIDAY, OCTOBER 25

7:00 am – 6:00 pm **Registration**

Potomac Foyer A

7:30 am – 8:00 am **Coffee Break**

Potomac Foyer A/B

8:00 am – 5:45 pm **Workshops and Seminars**

8:00 am – 10:00 am **■ SEMINAR**

National Harbor 4

Create an Award-Winning Budget (SM01)

Presenter: Karin Smith, Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ

SFOs: 2 **SFO Domains:** Financial Planning and Analysis, Budgeting and Reporting Activities

CPEs: 2 **Field of Study:** Accounting (Governmental)

Content Area: School Finance

The most scrutinized and utilized financial report in school district financial reporting is the annual budget. Therefore, communicating budget information is critical. This workshop, based on the Meritorious Budget Award (MBA) criteria, will show participants how to develop a budget document that meets today's most rigorous demands using guidelines created specifically for school entities.

Learning Objectives: 1. Discuss how best to communicate to constituents and school board members through the budget document, the budget process, and funding. 2. Identify best budgeting practices and recognize them in the budget document. 3. Describe how to organize budget information to provide in-depth data about education programs and their funding stream.



Welcome to Maryland! We're excited to support you as a Strategic Partner and sponsor of the Certificate of Excellence program. Join us for the Friday workshop, "The Future of Health Care Reform," or visit our Clinic Table Sunday morning for "ACA: What Do I Need to Do Now?" Visit American Fidelity at **Booth 222** to learn how we can help ease your worry and workload.

8:00 am – 10:00 am

■ WORKSHOP

Chesapeake 7/8

Playing It Safe: Establishing Safe and Supportive Schools (WS01)

Presenter: Daniel Romano, Co-Founder, Edventures in Learning, Inc., Toledo, OH

SFOs: 2 **SFO Domain:** Management of School Facilities

CPEs: 2 **Field of Study:** Business Management and Organization

Content Areas: Risk Management, Management Techniques

Ensuring safe and supportive schools is imperative to K–12 education. A key part of this effort is making certain all stakeholders understand the true meaning of safe and supportive schools, what conditions are needed to create them, and each role that is necessary to make them a reality. This interactive learning experience enables participants to learn from and collaborate with their peers as they connect the conditions of safety and security to student learning, understand the importance of safety as a district strategic priority, and learn how each of us contributes to creating a safe and supportive environment.

Learning Objectives: 1. Identify K–12 stakeholders and their roles in establishing safe and supportive school environments. 2. Discuss the key elements of safe and supportive schools established by the U.S. Department of Education. 3. Describe how to measure performance, identify areas of improvement, and act as needed to ensure schools are safe and supportive.

8:00 am – 10:00 am

■ WORKSHOP

National Harbor 6

Changing Lanes: Moving to More Equitable and Sustainable Salary Models (WS02)

Presenters: Krista Kelly, Executive Director of Finance, Manassas Park City Schools, Manassas Park, VA; Bruce McDade, Superintendent, Manassas Park City Schools, Manassas Park, VA

SFOs: 2 **SFO Domains:** Financial Planning and Analysis, Management of Human Resource Functions

CPEs: 2 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations; Accounting, Auditing, and Budgeting

Staff from Manassas Park City Schools will tell the story of how their division moved from multiple traditional step and lane salary scales to a single unified series of pay grades. Details about their three-year journey will include the ups and downs of benchmarking, the quest to gain buy-in for the new midpoint plus loyalty raise methodology, and the intricacies of scale placement. Learn how this pay structure improves starting salary competitiveness and lifetime earnings for employees without increasing the overall cost to the division.

Learning Objectives: 1. Describe how the midpoint methodology works. 2. Discuss the relationship between maximum salary and lifetime earnings. 3. Explain the value of determining the important characteristics of a candidate for hire.

8:00 am – 10:00 am

■ **WORKSHOP**

Chesapeake 4

Grants Management and Compliance (WS03)

Presenter: Sharie Lewis, Director of Business Services and Operations, Parkrose SD, Portland, OR

SFOs: 2 **SFO Domains:** Management of Accounting Systems, Budgeting and Reporting Activities

CPEs: 2 **Field of Study:** Accounting (Governmental)

Content Areas: Accounting, Auditing, and Budgeting; School Finance

We all love grants and the funds that come along with them, but school finance officials are responsible for ensuring their schools are compliant. Expand your knowledge about the information needed to ensure your district is compliant with federal, state, and local governance in relation to grants. Learn about changes to ESSA, 2 CFR 200, and EDGAR in this fun and educational session.

Learning Objectives: 1. Describe the responsibility of school finance officials related to grant management. 2. Explain how ESSA has changed grant management. 3. Outline reporting and documentation requirements for grant management.

8:00 am – 12:00 pm

■ **WORKSHOP**

Eastern Shore 1

Limited to the first 55 attendees.

School Tour: Duke Ellington School of the Arts (WS04)

Presenter: Christoffer Graae, Founding Principal, cox graae + spack architects, Washington, DC

SFOs: 2 **SFO Domain:** Management of School Facilities

CPEs: 2 **Field of Study:** Business Management and Organization

Content Area: School Facilities Management

Founded in 1974, the Duke Ellington School of the Arts is a 9–12 public magnet school located in Washington, DC. Named after legendary composer and Washington, DC, native Duke Ellington and housed in the site of the former Western High School, the school is listed on the National Register of Historic Places. A three-year renovation was completed in 2017. Graduates of this prestigious high school include opera singer Denyce Graves.

Learning Objectives: 1. Describe the purpose and educational goals for creating a specialized school for the arts. 2. Discuss unique construction and design elements of this progressive, program-based school. 3. Outline the benefits of the school, instructional program, and building aspects that can be replicated in other school systems.



Download the ASBO International App to help you make the most of the meeting!

- Create and manage your conference agenda
- Find education session details
- View maps
- Access the attendee list
- Share photos
- Receive updates and notifications



AXA is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and Eagle Institute. We are honored to support ASBO and its members' continued commitment to public school systems and the future of our children. We invite you to visit us at **Booth 400** and join our Clinic Table discussion, "Top 5 Risk Management Trends in 2019: How to Avoid the Fiduciary Trap," on Sunday, 8:00 am – 9:15 am.

8:00 am – 12:00 pm

National Harbor 2

■ WORKSHOP

Internal Controls and Reporting for Student Activity Funds, Booster Clubs, and PTOs (WS05)

Presenters: Karen Smith, Assistant Superintendent of Business and Financial Services, Cypress-Fairbanks ISD, Houston, TX; Karen Wiesman, Associate Superintendent for Business and Finance, Mansfield ISD, Mansfield, TX; Bert Nuehring, Partner, Crowe LLP, Oak Brook, IL; Christine Torres, Partner, Crowe LLP, Oak Brook, IL; Jennifer Shields, Audit Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ; Robert Williams, Manager, Crowe LLP, Washington, DC

SFOs: 4.5 **SFO Domain:** Management of Accounting Systems

CPEs: 4.5 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; School Finance

Athletics, student activity funds, booster clubs, and PTOs are integral to the operations of schools. However, the convenience of these organizations can come with many risks due to decentralized operations, large numbers of transactions, tax reporting issues, and numerous parties handling money. This session presents strategies that school business officials have used to improve accounting practices and reporting, strengthen internal controls, and document procedures. It also will cover audit and control techniques to reduce the risk of fraud.

Learning Objectives: 1. Discuss how to implement stronger controls over internal accounts, document the procedures, and reduce the risk of fraud. 2. Describe best practices to enhance accountability. 3. Outline reporting practices and tax reporting requirements from a school district perspective.

8:00 am – 12:00 pm

National Harbor 3

■ WORKSHOP

The Business Manager as Educational Leader (WS06)

Presenters: Charles Smargiassi, Master Level Department Chair/Assistant Professor, Wilkes University, Bloomsburg, PA

SFOs: 4.5 **SFO Domain:** Management of Human Resource Functions

CPEs: 4.5 **Field of Study:** Personal Development

Content Areas: Leadership Development, Human Resources and Labor Relations

Be inspired to view yourself through the lens of an educational leader. Participants will investigate and define concepts of management versus leadership; complete personal leadership inventories; create a personal leadership statement; and define morals, values, and ethics, and how they apply to the role of an educational leader.

Learning Objectives: 1. Explain the difference between management and leadership. 2. Analyze leadership styles using leadership analysis instruments. 3. Develop a personal leadership statement.

8:00 am – 3:00 pm

National Harbor 7

■ SEMINAR

Need-to-Know Fundamentals for Future SFOs (SM02)

Presenters: David Bein, Assistant Superintendent of Business Services/CSBO, Barrington CUSD 220, Barrington, IL; Marvin Dereef, Chief Financial Officer, Fulton County Schools, Atlanta, GA; Matthew Lentz, Assistant Superintendent for Business and Operations, Upper Moreland SD, Willow Grove, PA; Brian Moore, Manager for School Climate, Delaware DOE, Dover, DE; Jim Westrum, Executive Director of Business and Finance, Wayzata Public Schools, Wayzata, MN

SFOs: 7 **SFO Domain:** Financial Planning and Analysis

CPEs: 7 **Field of Study:** Personal Development

Content Area: Leadership Development

This focused program will provide an extensive overview of the fundamentals for SFO exam success, including eligibility and an assessment to determine readiness to test. Participants will learn how the SFO certification can benefit them and their district.

Learning Objectives: 1. Outline the specifics of exam eligibility, application, maintenance, and the unique benefits of an SFO certification. 2. Discuss important concepts covered in the exam as they relate to implementing recognized industry accounting standards and sound financial management practices. 3. Identify study resources that cover job competencies as defined by the skills, tasks, and knowledge requirements for school finance administrators.

10:15 am – 12:15 pm

National Harbor 4

■ SEMINAR

Preparing Your First Comprehensive Annual Financial Report (CAFR) (SM03)

Presenter: Sara Kirk, Consulting Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ

SFOs: 2 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 2 **Field of Study:** Accounting (Governmental)

Content Area: School Finance

Learn how to create a Comprehensive Annual Financial Report (CAFR) and discover the differences between a regular financial report and one considered "comprehensive." Participants also will learn how to apply for ASBO International's Certificate of Excellence in Financial Reporting (COE) and how receiving the award benefits their district.

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



Attend the Annual Conference Program Planning Session & Lunch

Use your areas of school business expertise to help guide the content for the 2020 Annual Conference & Expo. Enjoy lunch and the opportunity to earn 1 education credit. Find details on page 25.



Horace Mann welcomes you to ASBO International's 2019 Annual Conference & Expo! We are pleased to be a Strategic Partner and proud sponsor of the Certified Administrator of School Finance and Operations® (SFO®) program. Attend our Clinic Table on Sunday morning to learn more about "Attracting and Retaining Employees by Helping Reduce Student Loan Debt." Visit **Booth 300** for a chance to win funding for a DonorsChoose.org project in your district and learn more about our solutions.

10:15 am – 12:15 pm ■ **WORKSHOP**

Chesapeake 5

Update on the Law of Special Education (WS07)

Presenter: Charles Russo, Panzer Chair in Education, Research Professor of Law, University of Dayton, Dayton, OH

SFOs: 2 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 2 **Field of Study:** Business Law

Content Areas: Legal Aspects, Legislative Affairs

This interactive session will provide school business officials with a basic working knowledge of the legal issues associated with providing special education for students with disabilities. More specifically, this session examines the parameters of Section 504 of the Rehabilitation Act of 1973 and the Individuals with Disabilities Education Act (IDEA), paying particular attention to issues involving costs associated with the delivery of special education.

Learning Objectives: 1. Discuss federal disability law generally and its financial impacts on public school systems. 2. Detail impacts of Section 504 of the Rehabilitation Act of 1973 and the Individuals with Disabilities Education Act on school business officials. 3. Explain the relationship between Section 504 and the IDEA.

#ASBOcate for your school district's needs.

Access legislative information and advocacy tools at asbointl.org/Legislative.

Legislative Resources

Advocating for Quality Education

As a school business leader, you advocate for your students to ensure they have a quality education and ample resources to maximize their potential.

As your advocate, and an advocate of the school business profession, ASBO International is here to help you navigate education law compliance and ensure your voice is heard in pressing legislative issues.

INFORMATION AND TOOLS

- **Legislative Advocacy**
- **Public Information & Policy**
- **Legislative Advocacy**
- **Public Information & Policy**
- **Legislative Advocacy**
- **Public Information & Policy**

ASBO USA

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The Association of School Business Officials International

LIVE UPDATES

#ASBOcate

SAVE THE DATE!

Legislative Advocacy Conference

July 7-9, 2020 • Washington, D.C.

10:15 am – 12:15 pm ■ **WORKSHOP**

Chesapeake 6

Leveraging School Financial Data to Improve Outcomes and Create Messaging That Builds Trust (WS09)

Presenters: Shana Wang, Specialist, Budget Strategy, District of Columbia Public Schools, Washington, DC; Marguerite Roza, Director, Edunomics Lab and Research Professor, Georgetown University, Seattle, WA

SFOs: 2 **SFO Domain:** Financial Planning and Analysis

CPEs: 2 **Field of Study:** Accounting (Governmental)

Content Areas: School Finance, Leadership Development

The school finance landscape is on the verge of a radical transformation, moving from being a little-known and even less-talked-about element of the education landscape to front and center with the emergence of new school-by-school spending data under ESSA. With this transformation comes myriad opportunities to leverage the data to improve outcomes and communicate with various stakeholders openly and honestly about school finance, solicit input, and build trust around district budgeting and spending practices. In this interactive and collaborative workshop, participants will learn effective messaging techniques on school spending with practical applications in districts nationwide.

Learning Objectives: 1. Describe how to use new school-level financial data to improve outcomes and develop successful messaging around school finance information to various audiences. 2. Analyze real-world examples of messaging in school finance and the intended and unintended effects of those examples. 3. Develop a plan to incorporate new messaging strategies into existing communication plans within your district.

10:15 am – 12:15 pm ■ **WORKSHOP**

National Harbor 5

Harassment and Other Workplace Investigations (WS10)

Presenter: Bret McKittrick, Attorney, Associated Benefits and Risk Consulting, Milwaukee, WI

SFOs: 2 **SFO Domain:** Management of Human Resource Functions

CPEs: 2 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations, Legal Aspects

When it comes to sexual harassment and other forms of discrimination, the stakes are high. School districts face liability when employees or supervisors engage in unlawful harassment or discrimination if the employer fails to take prompt and appropriate remedial action. With retaliation claims rising more than 30% over the last decade, employers must ensure there is no retribution against the employee who brought forth the complaint. This session will provide a roadmap to conducting internal investigations, from the moment the employer becomes aware of the complaint, to communicating the investigative findings to the appropriate parties and determining the proper course of action.

Learning Objectives: 1. Describe what steps to take to conduct an objective and thorough internal investigation. 2. Discuss best practices for conducting investigatory interviews and communicating with the complainant and the alleged perpetrator. 3. Identify ways to reduce the district's legal exposure, including reducing the risk of retaliation claims.



Welcome to Maryland and the 2019 ASBO International Annual Conference & Expo. At Office Depot, we believe education is the foundation for a bright future. Our full spectrum of services and solutions will help transform your school. We're more than just office supplies. We're people, products, and solutions to help your school succeed. Enjoy the conference and be sure to stop by **Booth 233**—we look forward to seeing you!

12:30 pm – 1:30 pm

Eastern Shore 2

■ WORKSHOP

Annual Conference Program Planning Session and Lunch (WS11)

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Area: Leadership Development

Seize the opportunity to influence your profession by brainstorming with other members in planning the professional development curriculum for ASBO International's 2020 Annual Conference & Expo. All members are encouraged to attend. Lunch will be provided.

Learning Objectives: 1. Assess current knowledge and skill requirements for school business officials in your area of specialization. 2. Recommend and describe specific educational sessions to meet the identified professional development needs of SBOs in your area of specialization. 3. Describe formats and identify potential presenters for each of the recommended educational sessions.

1:45 pm – 3:45 pm

National Harbor 4

■ WORKSHOP

How to Use Excel's Advanced Features to Build and Automate Salaries, Budget Tables, and More (WS12)

Presenter: Aziz Aghayev, Chief Financial Officer, Pioneer Charter School of Science, Everett, MA

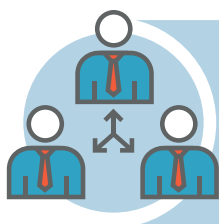
SFOs: 2 **SFO Domains:** Budgeting and Reporting Activities, Management of Information Systems

CPEs: 2 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Information Technology

The budgeting process takes time, and manual data entry is not only inefficient, it also can be prone to errors. Through some basic knowledge of Excel, SBOs can expedite the budgeting process and increase accuracy. Learn a few key formulas that can automate data tables, saving time that can be dedicated to handling other district responsibilities. See how automating one district's salary sheet through Excel formulas saved weeks of manual work and reduced overall errors.

Learning Objectives: 1. Outline how to create automated Excel sheets that increase accuracy and efficiency. 2. Describe how to create simple macros and customized shortcuts within Excel. 3. Demonstrate an increased ability to analyze data using Excel.



Peer-to-Peer Wrap Up

Have a long list of goals inspired by the conference? Ensure your ideas take root when you get back to your district by sharing them with a peer partner at this closing networking opportunity. See page 68 for more details.

1:45 pm – 3:45 pm

National Harbor 5

■ WORKSHOP

The Future of American Health Care Reform (WS13)

Presenters: Jessica Frier, Attorney, Senior Health and Welfare Plan Consultant, American Fidelity Administrative Services, Oklahoma City, OK; Lisa Stevens, Account Development Coordinator, Benefits Specialist, American Fidelity Assurance Company, Ashville, OH

SFOs: 2 **SFO Domain:** Management of Human Resource Functions

CPEs: 2 **Field of Study:** Business Law

Content Areas: Legislative Affairs, Human Resources and Labor Relations

After a frenzy of activity, the dust has begun to settle on legislative efforts to impact the healthcare reform landscape. Participants will learn about the current state of the Patient Protection and Affordable Care Act (ACA). Additional topics covered include the impact of tax reforms and recent federal rulemaking, the outlook for the Cadillac Tax, the future of tax-advantaged medical savings plans, and other plan design considerations employers should be aware of.

Learning Objectives: 1. Describe the current state of healthcare reform legislation. 2. Discuss how to prepare for forthcoming provisions like the Cadillac Tax. 3. Assess possible changes to HSAs/FSAs/HRAs and how to make these programs more valuable to employees.

1:45 pm – 3:45 pm

National Harbor 8

■ WORKSHOP

Construction and Purchasing Problems and Practical Solutions (WS14)

Presenters: Tim Keeley, Assistant Superintendent for Business, Addison SD 4, Addison, IL; Terence Fielden, Director of K-12, International Contractors, Elmhurst, IL; Kenneth Florey, Partner, Robbins Schwartz, Chicago, IL; Carrie Matlock, President, DLA Architects, Ltd., Itasca, IL; Howard Metz, Partner, Robbins Schwartz, Chicago, IL

SFOs: 2 **SFO Domains:** Financial Planning and Analysis, Management of School Facilities

CPEs: 2 **Field of Study:** Business Management and Organization

Content Areas: School Facilities Management, Legal Aspects

Every successful school construction project, large and small, begins with selecting the right construction project team and understanding how to recognize common problems and implement practical solutions. Learn from seasoned construction professionals including a school board member, chief school business official, school attorneys, architect, and construction manager. Gain practical advice and solutions for your construction project problems and engage in an attendee-driven problem-solving activity.

Learning Objectives: 1. Outline the elements of an effective construction project team. 2. Discuss how to determine which professionals should be part of your construction project team. 3. Identify common construction project problems and practical solutions to address them.



The Ricoh Team welcomes you to Maryland! As you build your schedule, we highly recommend you include our presentation, "Content Management Systems for Educational Records Retention and Business Process Automation," on Saturday, October 26 at 2:45 pm. We also look forward to meeting you at the Clinic Table session and in the Exhibits Marketplace at **Booth 601**.

1:45 pm – 5:45 pm

National Harbor 3

■ WORKSHOP

Identify, Analyze, and Deliver. Strategically Leading the District with Data and Analytics (WS16)

Presenters: Michael Jacoby, Executive Director, Illinois ASBO, DeKalb, IL; Jeff Carew, Managing Director, Forecast5 Analytics, Inc., Naperville, IL; David Torres, Senior Product Manager, Forecast5 Analytics, Inc., Naperville, IL

SFOs: 4.5 **SFO Domains:** Financial Planning and Analysis, Budgeting and Reporting Activities

CPEs: 4.5 **Field of Study:** Finance

Content Areas: School Finance; Accounting, Auditing, and Budgeting

The new ESSA environment challenges school finance leaders to connect building performance to financial investments. In this three-part hands-on workshop, participants will use historical, trend, and comparative data to identify key metrics about individual school sites to measure performance; analyze and focus on best practices in resource allocation, budget building, initiative sustainability, and financial forecasting; and focus on ESSA transparency and compliance by developing custom reports, dashboards, and narratives appropriate for internal board and community stakeholders.

Learning Objectives: 1. Identify metrics at school sites that are critical to success. 2. Analyze performance and financial data to support continuous improvement. 3. Outline strategies to deliver custom results and forecasts to each stakeholder group.

5:45 pm – 6:30 pm

Eastern Shore 2

First Timers Networking Reception

Your first meeting deserves a great start! Join fellow first-time school business official attendees over light refreshments, learn how to make the most of the Annual Conference & Expo, and hear from members who are experts at navigating this annual event.

6:30 pm – 7:30 pm

Lower Level Atrium

Welcome Mixer

Enjoy refreshments, heavy hors d'oeuvres, live music, and dancing as you meet up with long-time colleagues and create new connections at this kickoff to the Annual Conference & Expo.

Open to all conference attendees. Badge required.

SATURDAY, OCTOBER 26

7:00 am – 7:45 am

SFO Breakfast **IO**

Eastern Shore 1

Sponsored by The Horace Mann Companies

7:30 am – 4:00 pm

Registration

Potomac Foyer A

8:00 am – 9:00 am

■ DISCUSSION GROUP

National Harbor 4

Understanding the Medicaid Reimbursement Process for Specialized Services (DG01)

Presenters: Sharie Lewis, Director of Business Services and Operations, Parkrose SD, Portland, OR; Sasha Pudelski, Assistant Director, Policy and Advocacy, AASA, Alexandria, VA

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Legislative Affairs

School districts use Medicaid reimbursement funds in a variety of ways to help support the learning and development of their students who have special needs. This includes providing specialized instructional support personnel, health and mental health services, and equipment. Review the federal criteria for receiving Medicaid reimbursement for specialized services delivered to students with disabilities and discuss ways to maximize the capture of data for reimbursement purposes. Also learn how the politics and policy of Medicaid reimbursement may be changing.

Learning Objectives: 1. Outline the current federal guidelines related to Medicaid reimbursement. 2. Identify the various specialized services that may be eligible for reimbursement. 3. Detail examples of how schools are electronically capturing the data necessary for reimbursement.



Exhibits Marketplace “Crabwalk”

Play the Exhibits Marketplace game to connect with vendors and earn tickets for a daily raffle where you could win \$250! (There will be two winners on Saturday and four on Sunday.) Use the gamecard you received in your registration bag to find vendors to visit along your crabwalk.



Security Benefit is proud to be an ASBO Strategic Partner and we applaud your commitment to your district. Attend our Clinic Table to learn about "Matching and Special Pay Plans 403(b)" and our Saturday Discussion Group, "2019 Emerging Issues and Best Practices for Your District's 403(b) Plan." Visit us at **Booth 622** to learn how Security Benefit can help your employees To and Through Retirement.

8:00 am – 9:00 am

National Harbor 2

■ DISCUSSION GROUP

Crowdfunding Best Practices for K-12 School Business Officials (DG03)

Presenters: Susan Harkin, Chief Operating Officer, CUSD 300, Algonquin, IL; David DeSchryver, Senior Vice President and Co-Director of Research, Whiteboard Advisors, Washington, DC; Kirk Smiley, Managing Director, Advocacy and Public Partnerships, DonorsChoose.org, New York, NY; James Yale, Vice President, Industry Relations, The Horace Mann Companies, Springfield, IL

SFOs: 1 **SFO Domain:** Risk Management Activities

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; School Finance

Public schools have long used donations to enrich students' academic experiences and fund materials that budgets cannot always afford. Crowdfunding is becoming a viable funding source, filling resource gaps and providing strategic acceleration for academic programs. However, because the practice may be misunderstood, it may result in unexpected liabilities without the proper partners and safeguards in place. Learn how to implement crowdfunding best practices in your schools, get general crowdfunding guidance, find out which crowdfunding sites to trust, and learn how to uphold financial accountability while maintaining control over materials and supplies as well as safety and security of those in your district.

Learning Objectives: 1. Describe best practices for the development of crowdfunding policies. 2. Identify best practices for controlling crowdfunded materials and supplies. 3. Outline best practices for protecting the safety and privacy of students and teachers.

8:00 am – 9:00 am

National Harbor 6

■ DISCUSSION GROUP

Starter Kit for the New SBO (DG04)

Presenters: Sarah Viera, Executive Director of Business Services, Mequon-Thiensville SD, Mequon, WI; Todd Hajewski, Vice President, School Business Specialist, Baird Public Finance, Milwaukee, WI

SFOs: 1 **SFO Domain:** Management of Accounting Functions

CPEs: 1 **Field of Study:** Personal Development

Content Area: Management Techniques

A school business official's transition to a new district can be challenging regardless the circumstances. Often, the new SBO is focused entirely on mastering the existing job and consequently misses opportunities to improve the position. Both new and experienced business administrators will get insights into opportunities for continuous improvement in their districts as well as proven tools to make positive impacts.

Learning Objectives: 1. Describe tools that new school business officials can use to succeed in their districts. 2. Identify unique programs that new school business officials might implement in their districts. 3. Discuss ways to "see the big picture" while mastering the day-to-day tasks.

8:00 am – 9:00 am

National Harbor 5

■ DISCUSSION GROUP

The Real Root of Education Staffing Failures: How to Uncover Unconscious Bias (DG05)

Presenters: Naticia Montgomery, Director of Organizational Effectiveness, Kelly Services/Kelly Educational Staffing, Troy, MI

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations, Leadership Development

Would your school district's organizational issues improve if you looked at them from a different perspective? Even with limited budgets and low teacher salaries, negative press, and teacher shortages, our own unconscious biases are actually a big part of what's preventing our schools from being successful. Discuss what these biases are and how we can benefit from shifting them. Learn about the underlying root of organizational and staffing issues that you have ownership to change as a leader, and how to begin transforming and influencing your organization and tackling key issues on a fundamental level.

Learning Objectives: 1. Define unconscious bias and its presence within you and your organization. 2. Discuss common forms of bias in schools and in the workplace and their effect on the organization. 3. Identify ways to overcome biases and create the foundation for fundamental change.

8:00 am – 9:00 am

National Harbor 3

■ DISCUSSION GROUP

Solving the School Safety Conundrum (DG06)

Presenters: Milton Nagel, Assistant Superintendent of Administrative Services, Caroline County Public Schools, Denton, MD; Tom Strasburger, Vice President, Strategic Alliances, PublicSchoolWORKS, Cincinnati, OH

SFOs: 1 **SFO Domain:** Risk Management Activities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Area: Risk Management

School districts are asked to provide more students with wraparound services, operate within shrinking budgets, comply with a growing list of mandates, and ensure schools are safe. However, "school safety" has become an enigma, often puzzling educators and policymakers alike. Districts must anticipate and mitigate myriad risks, including minor injuries, inclement weather or natural disasters, and acts of violence with very little guidance on how to do so effectively. This session will unpack how different program components—including risk identification, safety training and reporting mechanisms, data analysis, and more—work together to increase safety awareness, meet districts' individual needs, and save time and money.

Learning Objectives: 1. Define the challenges school districts face when developing, implementing, and sustaining school safety programs. 2. Describe the characteristics and components of a comprehensive school safety program. 3. Discuss important features district leaders should consider when assessing school safety tools.



Welcome to ASBO International's 2019 Annual Conference & 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 **Booth 401** and visit with us during the annual conference. We look forward to seeing you and to serving you whenever you need furniture and equipment for your district.

8:00 am – 9:00 am

National Harbor 12

■ DISCUSSION GROUP

Changing Bell Times—Balancing Efficiency and Educational Outcomes (DG07)

Presenters: Jim Ellis, Assistant Director of Transportation, Loudoun County Public Schools, Ashburn, VA; Derek Graham, Industry Consultant, Education Logistics, Cary, NC

SFOs: 1 **SFO Domains:** Financial Planning and Analysis, Management of Ancillary Services

CPEs: 1 **Field of Study:** Business Management and Organization

Content Area: Pupil Transportation

School start times can be modified for many reasons, including financial reasons. Learn the keys to successfully rolling out new bell times, including recognizing the potential impact on families, using data in the decision-making process, responding to questions from stakeholders, and finding ways to improve student transportation.

Learning Objectives: 1. Cite examples of school board objectives involving changing school bell times. 2. Analyze the costs and benefits of changing bell times. 3. Outline an effective approach to implementing new bell times.

8:00 am – 9:00 am

National Harbor 13

■ DISCUSSION GROUP

Conflict of Interest—Does Your Staff Fully Understand? (DG08)

Presenters: Jill Barragan, Executive Director of Business Services, Avondale Elementary SD 44, Avondale, AZ; Karin Smith, Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ

SFOs: 1 **SFO Domains:** Risk Management Activities, Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations, Management Techniques

Conflict of interest is a growing area of concern for school business officials. Do your employees understand what it is? Do you know how to properly track conflicts of interests? Do you know how to protect your organization? Explore valuable strategies to implement in your school district to protect your organization and employees while maintaining the highest level of integrity with your community.

Learning Objectives: 1. Define conflict of interest. 2. Describe how to train employees to understand conflict of interest. 3. Identify strategies to protect your organization from conflict of interest issues.



Earning SFO Contact Hours and CPE Credits

Scan your badge before and after each session to receive SFO Contact Hours and CPE credits. You will receive an email reminder at the end of each day to log into the Attendee Service Center, where you can evaluate sessions to claim your credits and download a certificate of completion at the end of the conference.

8:00 am – 9:00 am

National Harbor 7

■ DISCUSSION GROUP

Is Your District Ready to Support a 24x7x365 Network? (DG09)

Presenters: Frankie Jackson, Independent K–12 Chief Technology Officer, Houston, TX; Aaron M. Smith, CETL, PMP, CSM, Director of Infrastructure and Engineering, Department of Digital Innovation, Loudoun County Public Schools

SFOs: 1 **SFO Domain:** Management of Information Systems

CPEs: 1 **Field of Study:** Information Technology

Content Area: Information Technology

We are experiencing a monumental shift in how school districts deliver education, and school district networks are one of the most critical infrastructure components. Students, educators, and administrators expect to have network accessibility 24 hours a day, 7 days a week, 365 days a year. Districts must plan for technology infrastructure upgrades and invest in staff and technology systems. They must budget for, implement, and sustain well-designed, high-performing networks that are safe and resilient. This session will provide specific guidelines that can help school administrators lay a foundation for network availability and scalability with a future-ready support system.

Learning Objectives: 1. Explain the technology infrastructures needed to support a 24x7x365 network. 2. Examine budget strategies for procuring, implementing, and sustaining a 24x7x365 network. 3. Recognize the hidden costs associated with supporting a 24x7x365 network.

8:00 am – 9:00 am

National Harbor 7

■ DISCUSSION GROUP

Building a Sustainable Facility Management Program (DG49)

Presenter: Kevin Lewis, Assistant Superintendent for Support Services, Loudoun County Public Schools, Ashburn, VA

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Sustainability, School Facilities Management

Loudoun County Public Schools (LCPS) is the third-largest school system in Virginia and one of the fastest growing districts in the nation. Located close to Washington, DC, in a community that is home to numerous government contractors and technology giants, LCPS must manage the constant rising costs of building and operating new schools along with the pressures and challenges of environmental stewardship. Learn how LCPS developed policies, practices, and goals to keep up with the exponential growth of the system while achieving national recognition for energy savings and environmental stewardship.

Learning Objectives: 1. Define sustainability and the ways it can be measured. 2. Identify potential sustainability goals and evaluate which may apply to a particular organization. 3. Discuss questions to ask when reviewing vendor proposals to ensure achievement of organizational goals.

8:45 am – 9:15 am

Potomac Foyer A/B

Coffee Break



Voya Financial® welcomes you to ASBO International's 2019 Annual Conference & Expo. We are proud to support your profession as a Strategic Partner of ASBO International and the sponsor of the Meritorious Budget Award (MBA). Congratulations to this year's recipients. We encourage you to visit us at **Booth 323** to learn how we can help make retirement planning and administration easier for you and your employees—The Voya Financial® Team.

9:15 am – 11:15 am

Potomac Ballroom A/B

First General Session

Welcome and Acknowledgments

Tom Wohlleber, CSRM
President, ASBO International

Introductions and Member Achievements

Tom Wohlleber, CSRM

David Lewis
Executive Director, ASBO International

ASBO International's 2019 Eagle Awards

Fred Makonnen
Divisional Vice President, AXA

Speaker Introduction

Mark Turner
Senior Vice President, Western United States, Security Benefit

Keynote Address

Sponsored by Security Benefit

The 9 Principles of Change: How to Navigate Change and Transition Successfully



Ariane de Bonvoisin, Founder, CEO, and Chief Change Optimist of The First 30 Days

Most of us hate change, think we are bad at change, and feel overwhelmed at the thought of making a change, especially the older we get. Yet change is always a certainty in life.

Ariane de Bonvoisin will discuss the principles that help people successfully navigate all types of life transitions, from relationship and career changes to financial and health changes. She will share the 9 Principles of Change and how to transition easily and gracefully. Based on thousands of interviews with people going through all types of changes, these are proven ways to make these times easier.

11:30 am – 12:45 pm

Chesapeake 7

COE Advisory Committee and Reviewers Meeting and Lunch 10

11:30 am – 2:30 pm

Prince George's
Exhibit Hall D/E

Exhibits Marketplace

DAILY SCHEDULE

IO Invitation Only

ALL EVENTS TAKE PLACE IN THE **GAYLORD NATIONAL HARBOR CONVENTION CENTER** UNLESS OTHERWISE NOTED.

12:30 pm – 1:30 pm **Lunch in the Exhibits Marketplace**

*Prince George's
Exhibit Hall D/E*

Sponsored by Public Trust Advisors, LLC

1:00 pm – 1:45 pm

Chesapeake 9

COE Reception **IO**

Sponsored by American Fidelity

1:30 pm – 2:30 pm

National Harbor 2

Affiliate Executive Directors Group Meeting **IO**

1:30 pm – 5:00 pm

Camellia 2

SFO Testing

Pre-registration required.

1:45 pm – 2:30 pm

Eastern Shore 3

Emerging Leaders Scholarship Reception **IO**

2:30 pm – 3:30 pm

*Main Chesapeake
Foyer
Main National
Harbor Foyer*

Food-for-Thought Station

Grab a quick, healthy snack to refuel your energy and power up your focus.

Sponsored by Forecast5 Analytics, Inc.

2:30 pm – 3:00 pm

Chesapeake 3

Guest Program

Book Club with the Author. *The Cutaway: A Thriller*

Author Christina Kovac will be present for the group discussion of her gripping book. Described as “*The Newsroom* meets *Gone Girl*,” this stunning psychological thriller features a young television producer investigating the disappearance of a beautiful Georgetown lawyer.



Global School Business Network...LIVE!

The online platform has come alive on a larger-than-life scale and can be found near registration on Friday and in the ASBO Booth (132) on Saturday and Sunday. Use the notecard prompts to post team kudos, the best advice you ever received, and more.

2:45 pm – 3:45 pm

National Harbor 5

■ DISCUSSION GROUP

2019 Emerging Issues and Best Practices for Your District's 403(b) Plan (DG10)

Presenters: Jim Westrum, Executive Director of Business and Finance, Wayzata Public Schools, Wayzata, MN; Paul Arvin, Annuity Product Manager, Strategic Development Division, American Fidelity Assurance Company, Oklahoma City, OK; Thomas J. Granger, Second Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Fred Makonnen, Vice President, Technical Services, AXA, Cleveland, OH; Linda Segal Blinn, Vice President, Voya Financial®, Windsor, CT; James Yale, Vice President, Industry Relations, The Horace Mann Companies, Springfield, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Area: Human Resources and Labor Relations

Learn about emerging issues and best practices to help keep your 403(b) plans up to date. Join this interactive discussion as you consider adopting a restatement of your 403(b) plan document with an IRS pre-approved 403(b) plan document. The IRS deadline of March 31, 2020 means you want to be certain your plan design is strategically aligned to your organization's value and that you give careful consideration to the features you choose to adopt as well as best practices for operating your plan compliantly as you help your employees save for retirement.

Learning Objectives: 1. Identify the benefits of correcting past defects retroactively to 2010 for school districts that originally adopted a 403(b)-plan document by December 31, 2009. 2. Identify plan design features that are strategically and purposefully aligned with the school district's objectives to attract and retain employees and to ultimately prepare them for retirement. 3. Outline best practices for plan administration and strategies for employee education.

2:45 pm – 3:45 pm

Chesapeake 6

■ DISCUSSION GROUP

Critical Clauses in Your Construction and Purchasing Contracts (DG11)

Presenters: Tim Keeley, Assistant Superintendent for Business, Addison SD 4, Addison, IL; Terence Fielden, Director of K-12, International Contractors, Elmhurst, IL; Kenneth Florey, Partner, Robbins Schwartz, Chicago, IL; Howard Metz, Partner, Robbins Schwartz, Chicago, IL

SFOs: 1 **SFO Domains:** Management of School Facilities, Risk Management Activities

CPEs: 1 **Field of Study:** Business Law

Content Areas: Legal Aspects, Purchasing and Supply Management

Every school district contract from software agreements to construction contracts can be filled with landmines and traps that are discovered only when a problem arises. Be proactive with your school contracts by learning about what contract clauses to avoid and what to include. Receive practical advice and strategies from a panel that includes attorneys, school board members, school business officials, and contractors.

Learning Objectives: 1. Identify problem contract clauses to avoid. 2. Outline critical contract clauses that every school contract should include. 3. Describe strategies in negotiating your school purchasing and construction contracts.

2:45 pm – 3:45 pm

National Harbor 8

■ DISCUSSION GROUP

Creative Financing that Increases Your Resources (DG12)

Presenters: Rochel Daniels, Executive Director of Organizational Development, North Kansas City Schools, Kansas City, MO; Matthew Fritz, Chief Financial Officer, North Kansas City Schools, Kansas City, MO; Paul Harrell, Business Development Manager, Navitas, Kansas City, MO

SFOs: 1 **SFO Domains:** Financial Planning and Analysis, Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Sustainability, School Facilities Management

North Kansas City Schools financed \$25 million in capital expenditures and reduced their environmental impact without an increase in the operating budget. Find out how they conducted one of the largest energy-savings projects in the state of Missouri via performance contracting. In addition to these efforts, the district replaced their aging fleet of buses, reduced reliance on foreign oil products, demonstrated a sustainable green impact to students while providing for their safety, and stabilized the district budget with compressed natural gas buses. Learn how to use creative financing to reduce environmental impacts while increasing district resources.

Learning Objectives: 1. Detail ways in which to make your organization more sustainable. 2. Develop a plan regarding next steps to increase sustainability throughout your organization. 3. Outline a network of contacts pertaining to increased sustainability measures.

2:45 pm – 3:45 pm

Chesapeake 4

■ DISCUSSION GROUP

Content Management Systems for Educational Records Retention and Business Process Automation (DG36)

Presenters: Gioconda Padilla, Director, Purchasing and Communication Services, Torrance USD, Torrance, CA; Doug Hansberger, Technical Account Engineer, Enterprise Services Sales, Southern California, Ricoh USA, Inc., Irvine, CA

SFOs: 1 **SFO Domains:** Management of Information Systems, Management Techniques

CPEs: 1 **Field of Study:** Information Technology

Content Areas: Information Technology, School Facilities Management

Ensuring proper records retention and accommodating changing business processes around contracts and special education requires careful planning, budgeting, and a content management system that fits district needs. Learn the regulatory requirements of records retention and implement a document management program to convert thousands of documents and microfiche into digitally searchable and indexed documents. Also, hear a case study about one district that applied a business process and automation to contracts management and special education documentation to ensure proper management for students and purchasing processes.

Learning Objectives: 1. Discuss regulatory requirements of record retention. 2: Identify a document management program to create a library of searchable, digital documents. 3: Outline way to ensure proper management for students and purchasing processes.

2:45 pm – 3:45 pm

National Harbor 7

■ DISCUSSION GROUP

Implementing a Successful Financial Training Program for Non-Financial Employees (DG14)

Presenters: Jeff Crimm, Financial Training Manager, Cobb County SD, Marietta, GA; Nancy Tolbert, Director of Financial Services Special Projects, Cobb County SD, Marietta, GA

SFOs: 1 **SFO Domains:** Management of Accounting Functions, Financial Planning and Analysis

CPEs: 1 **Field of Study:** Accounting

Content Area: School Finance

Ensuring employees understand the complicated financial policies and procedures of one of the country's largest school systems is a critical endeavor with significant consequences if done improperly. Explore the development, implementation, progress, and future of the Cobb County School District's comprehensive, multi-tiered, financial training and support program. Hear how this initiative has helped provide efficient content delivery to employees with various responsibilities and has limited the amount of time and effort needed for user support. Learn how to replicate and scale a similar program from the conceptual development of topics to the implementation and dissemination of training materials on district platforms.

Learning Objectives: 1. Explain the importance and benefits of a quality financial training and support program. 2. Outline the steps needed to develop an organizational system of financial information and training. 3. Evaluate opportunities to implement a scalable program using off-the-shelf products.

2:45 pm – 3:45 pm

Chesapeake 5

■ DISCUSSION GROUP

Tried and True or New and Shiny? Key Business Decision Making in School Facility Design (DG15)

Presenters: Paul Falkenbury, Partner and Principal, Samaha Architects, Fairfax, VA; Michael McBride, Design Director, 21st Century School Buildings Program, Baltimore, MD; Meredith Sullivan, Senior Associate, Design Collective Inc., Baltimore, MD

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: School Facilities Management, School Finance

Pimlico Elementary received funding for renovation or reconstruction as part of the \$1.1 billion 21st Century School Buildings Program. One of the subsequent projects was transformation of an early 20th-century campus inspired by the industrial education model, to a 21st-century learning space celebrating historic architecture, respecting the past, and placing value on community. Using this school as a case study, participants will learn how the project team navigated complexities when reconfiguring space to meet institutional objectives and how school business officials can work with staff, teachers, community, authorities, and consultants to design a 21st-century learning environment.

Learning Objectives: 1. Identify how to differentiate perceived facility needs from actual facility needs and understand the fiscal impact of this differentiation. 2. Discuss how to guide staff at all levels to work in partnership with the community. 3. Describe how to link budget decisions to curriculum objectives and how these two variables impact one another.

2:45 pm – 3:45 pm

Chesapeake 7/8

■ DISCUSSION GROUP

The Four Major Global Problems Keeping School Leaders Awake at Night (DG42)

Presenter: Karen Starr, University Chair, School Development and Leadership, Deakin University, Burwood, VIC, Australia

SFOs: 1 **SFO Domain:** Management of Accounting Systems

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Global Issues, Management Techniques

Research across the developed world reveals four major trends that are cause for concern for school leaders: the increasing influence of politicians in education policy, the directions in which education policy is heading, the rise of anti-educational attitudes, and increasing inequality in education. Explore how these troublesome developments are wreaking havoc in schools and what the enormous repercussions are for school business, education policy and funding, the work of school principals, and the job of school business officials.

Learning Objectives: 1. Discuss the effects of global political, economic, and cultural issues on education worldwide. 2. Evaluate education policy responses to global issues in the western world. 3. Describe how and why global issues impact school business and what this means for the work of school business officials.

2:45 pm – 4:45 pm

Chesapeake 9

■ DEEP DIVE

ASBO International Legislative Update (DD01)

Presenters: Sasha Pudelski, Assistant Director, Policy and Advocacy, AASA, Alexandria, VA; Elleka Yost, Government Affairs and Communications Manager, ASBO International, Ashburn, VA

SFOs: 2 **SFO Domain:** Financial Planning and Analysis

CPEs: 2 **Field of Study:** Business Law

Content Area: Legislative Affairs

Learn about the many federal laws and regulations affecting school districts across the country and ASBO International's legislative resources. This legislative brief will provide school business officials with an overview of major education policy issues, including the federal budget and education funding issues. It will also highlight tools to help you stay informed and advocate on these issues.

Learning Objectives: 1. Explain the state of federal education funding and how federal spending affects state/local education funding. 2. Describe the education-related legislative issues from last Congress and the most relevant policy issues that will be debated this Congress. 3. Outline ASBO International legislative priorities and resources available to help school business officials advocate for their districts.

2:45 pm – 4:45 pm

National Harbor 3

■ DEEP DIVE

Keeping Schools Safe by Reducing Risks: The Law of Negligence and Adequate Supervision (DD02)

Presenter: Charles Russo, Panzer Chair in Education, Research Professor of Law, University of Dayton, Dayton, OH

SFOs: 2 **SFO Domain:** Risk Management Activities

CPEs: 2 **Field of Study:** Business Law

Content Areas: Legal Aspects, Risk Management

Whether students are studying in classrooms, playing in school yards, or participating in extracurricular activities, educators are at risk of liability for injuries the children sustain if school officials fail to meet their duty to protect them from unreasonable risks of harm. Examine the elements of negligence and its defenses to help school business officials, their boards, and other education leaders keep schools safe while avoiding liability for student injuries.

Learning Objectives: 1. Identify the elements of negligence. 2. Describe defenses to negligence. 3. Discuss recommendations education leaders should consider as they devise and implement risk-management policies dealing with student supervision.

2:45 pm – 4:45 pm

National Harbor 4

■ DEEP DIVE

Developing the Mindset to Lead Authentically (DD03)

Presenters: Susan Harkin, Chief Operating Officer, CUSD 300, Algonquin, IL; Ann Williams, Chief Financial Officer, East Aurora SD 131, Aurora, IL; Lori Hanson, Performance Coach and Keynote Speaker, Lori Hanson International, Castle Rock, CO

SFOs: 2 **SFO Domain:** Management of Human Resource Functions

CPEs: 2 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

Do you wish you had the skills to speak more clearly and lead with confidence? In this interactive session, learn coaching techniques that can elevate your effectiveness as a leader, participate in exercises to unblock barriers that limit your ability to speak authentically from the heart, and leave with tools and techniques to up your game to be a more valued leader on your administrative team. Be inspired and motivated to become your dream leader.

Learning Objectives: 1. Identify barriers to being a highly effective and successful leader. 2. Discuss tools and techniques to help leaders become authentic. 3. Describe coaching techniques and exercises that take leadership skills to the next level.

2:45 pm – 4:45 pm

National Harbor 12

■ DEEP DIVE

Navigating the Risks of Procurement Fraud (DD04)

Presenter: Paula McCoy, Executive Director of Business Services, Ridgefield SD, Ridgefield, WA

SFOs: 2 **SFO Domain:** Risk Management Activities

CPEs: 2 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Purchasing and Supply Management

The session will provide an overview of various procurement fraud schemes such as bid rigging, vendor kickbacks, purchasing card fraud, and contract fraud. Case studies will help participants understand the anatomy of fraud schemes, including how the frauds were ultimately identified. Participants will also learn about internal controls their districts can implement to help prevent them from becoming victims of fraud schemes.

Learning Objectives: 1. Identify the common risks and red flags associated with procurement/purchasing fraud. 2. Discuss common obstacles organizations face when trying to implement effective internal controls. 3. Outline fraud prevention methods and internal controls to mitigate the risks associated with procurement fraud.

2:45 pm – 4:45 pm

National Harbor 6

■ DEEP DIVE

School Meals Hot Topics: Millennial Parents, Unpaid Charges, KPIs, and Financing Makeovers (DD05)

Presenters: Jackie Turner, Chief Operations Officer, Saint Paul Public Schools, St. Paul, MN; Jim Westrum, Executive Director of Business and Finance, Wayzata Public Schools, Wayzata, MN; Jean Ronnei, Senior Consultant, ProTeam Foodservice Advisors, Madison, WI; Cynthia Hormel, Director, School Nutrition Services, Alexandria City Public Schools, Alexandria, VA

SFOs: 2 **SFO Domain:** Management of Ancillary Services

CPEs: 2 **Field of Study:** Production

Content Areas: School Food and Nutrition Management, School Finance

What steps can you take if your food service program is losing money? Is your menu satisfying the expectations of millennial parents? How can you update your 1970s (or earlier) cafe using proper procurement rules without breaking the bank? What key performance indicators and strategies are available to manage food service programs? Get answers to these questions and bring your own hot topics for discussion in this interactive and audience-driven session.

Learning Objectives: 1. Outline options for successful school meal programming based on community demographics and politics. 2. Discuss options available for providing meals at no cost for students. 3. Describe how your district's school meals program measures up to national norms.

2:45 pm – 4:45 pm

National Harbor 13

■ DEEP DIVE

The Art of Data-Driven Leadership (DD06)

Presenter: Travis Tracey, CMMS Support and Data Quality Specialist, Frederick County Public Schools, Frederick, MD

SFOs: 2 **SFO Domain:** Management of Information Systems

CPEs: 2 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

Business intelligence, data analysis, and “big data” are all commonplace terms in today’s organizations. Data empowers leaders to effectively lead organizations and accomplish goals not possible in the past. Learn how to transition your organization to begin making informed data-driven leadership decisions while cultivating a data-driven culture.

Learning Objectives: 1. Explain the importance of data in making informed decisions. 2. Detail organizational requirements to transition to a data-driven culture. 3. Analyze current organizational processes and systems for effectiveness in a data-driven environment.

3:00 pm – 3:45 pm

Eastern Shore 2

Eagle Awards Reception IO

Sponsored by AXA

4:00 pm – 4:25 pm

Chesapeake 6

■ MINI-MODULE

Leading Food Service Success by Sharing Services of a Professional Nutrition Director (MM01)

Presenter: Karen Asetta, School Business Manager, East Hampton Board of Education, East Hampton, CT

Content Areas: School Food and Nutrition Management, School Finance

School business officials have a direct and positive impact on student success by leading a high-quality school nutrition program. Since recruiting, hiring, and retaining experienced cafeteria leadership can be too costly for a single school district, creative business officials can reduce administrative overhead by sharing the cost of a skilled nutrition director with one or more neighboring towns. Participants will examine sample contracts, job descriptions, and key statistics, and leave with a tool for evaluating the bottom-line success of each individual school they oversee.

4:00 pm – 4:25 pm

National Harbor 8

■ MINI-MODULE

Making Time for Professional Development (MM02)

Presenters: Brianne King, Executive Director, Washington ASBO, Tumwater, WA; Trisha Schock, Executive Director of Administrative Services, North Central ESD 171, Wenatchee, WA

Content Area: Leadership Development

Do you want to be viewed as a leader in your industry? Making time for your own professional development is imperative to ensure that you continue to be competent. Learn to devise and implement a professional development plan, establish specific goals, and identify and eliminate obstacles in your way to enhance your career and positively impact your employer.

4:00 pm – 4:25 pm

National Harbor 7

■ **MINI-MODULE**

Strategies to Turn Defense into Offense in Budget Discussions (MM03)

Presenter: Bo Yan, Data Strategist, Jefferson County Public Schools, Louisville, KY

Content Areas: Leadership Development, Management Techniques

During the budgeting process, school business officials often find themselves in a defensive position, explaining why a newly proposed initiative cannot be funded or an existing program needs to be discontinued. It can be frustrating and difficult to explain the justification for some of these decisions. Learn how to turn defense into offense by asking four critical data-driven questions of program champions.

4:00 pm – 4:25 pm

Chesapeake 5

■ **MINI-MODULE**

School Funding and Performance: Implications for School Budgeting Under ESSA (MM06)

Presenter: Craig Schilling, Professor, Department of Leadership, Concordia University, Northbrook, IL

Content Areas: School Finance, Global Issues

Most states publish financial data by school district and performance data by school. What happens when the two meet? Illinois recently adopted an evidence-based funding model for determining adequacy targets for every school district, then published individual school designations required by the Every Student Succeeds Act. Learn what district finances reveal about individual school performance and discuss the policy implications for school business officials.

4:00 pm – 4:25 pm

National Harbor 5

■ **MINI-MODULE**

Google Calendar Mobile App: Free and User-Friendly (MM12)

Presenter: Suzanne Jones, MIS Coordinator, Caroline County Public Schools, Denton, MD

Content Area: Information Technology

Spend less time managing your schedule and more time enjoying your life. Your phone is always with you, so why not take advantage of an app on your phone that will help keep you from overscheduling your life? You can customize Google Calendar views with just one click and integrate the Google Calendar mobile app with your Google desktop calendar, Google maps, contacts, and accounts

5:00 pm – 6:00 pm

Lower Atrium Level

Pinnacle Awards Reception **IO**

Sponsored by Virco, Inc.

6:00 pm – 8:00 pm

Eagle Awards Dinner **IO**

Sponsored by AXA

6:00 pm – 8:00 pm

Eastern Shore 1

Pinnacle Awards Dinner **IO**

Sponsored by Virco, Inc.



8:00 pm – 10:00 pm

Joint Affiliate Reception at the Cadillac Ranch

*Cadillac Ranch,
National Harbor*

Join Canada, Colorado, Illinois, Iowa, Kansas, Ohio, Oregon, Pennsylvania, South Africa, Texas, Washington, and Wisconsin ASBO affiliates at the Cadillac Ranch for an extraordinary joint event.

Meet vice president and director candidates for ASBO International's 2020 election and enjoy the music of the John Stone Band.

The Cadillac Ranch, 186 Fleet Street, is a short walk across the street from the Gaylord.

Open to all conference attendees. Badge required.

SUNDAY, OCTOBER 27

7:30 am – 4:00 pm

Registration

Potomac Foyer A

8:00 am – 9:15 am

Clinic Tables

Baltimore 3-5

Participate in roundtable discussions hosted by an exhibitor and focused on a specific aspect of school business management such as healthcare reform, 403(b) retirement plans, budget planning, technology, and more. See page 76 for details.

9:00 am – 9:30 am

Coffee Break

Potomac Foyer A/B

9:30 am – 10:30 am

■ DISCUSSION GROUP

*National Harbor 2***How to Build a Team That Brings an A-Game Performance (DG16)****Presenter:** Arthur D. Jackson, President, Eagles Nest Performance Management, Inc., Woodbridge, VA**SFOs:** 1 **SFO Domain:** Management of HR Functions**CPEs:** 1 **Field of Study:** Business Management and Organization**Content Areas:** Management Techniques, Leadership Development

Greatness in your organization is seldom about the performance of a few superstars; it's about getting an extraordinary performance from every team member. Pareto's Rule indicates that 20% of team members provide 80% the team's effectiveness. Based on this ratio, increasing the first number by just 7.5% yields 110% effectiveness. Learn the secret to tapping into the extra 7.5% by developing and maintaining buy-in to team strategy, tactics, common goals, and believable values. Uncover time-tested team-building processes and methods that allow senior executives, managers, and individuals to rethink their strategies to provide sustainable profitable growth.

Learning Objectives: 1. Describe the value of "greatness" when it comes to inspiring commitment. 2. Outline strategies to increase your team's performance to 110%. 3. Outline how to help team members develop productive relationships.

9:30 am – 10:30 am

■ DISCUSSION GROUP

*National Harbor 6***Cyberattacks—Are You Really Protected? (DG17)****Presenters:** Karen Smith, Assistant Superintendent of Business and Financial Services, Cypress-Fairbanks ISD, Houston, TX; Frankie Jackson, Independent K-12 Chief Technology Officer, Houston, TX; Eugene Kipness, Senior Program Specialist, Center for Internet Security, Albany, NY**SFOs:** 1 **SFO Domain:** Risk Management Activities**CPEs:** 1 **Field of Study:** Information Technology**Content Area:** Information Technology

The U.S. Department of Education, the IRS, and other organizations are constantly warning us about cyberattacks and in fact, cyberattacks within school districts are on the rise. Learn about some of the recent cyberattacks affecting school districts and the internal controls needed to better protect your district against cyber criminals.

Learning Objectives: 1. Detail the state of cybersecurity and data privacy in your organization. 2. Analyze current cybersecurity issues impacting school districts. 3. Explain what districts can do to protect themselves from cybersecurity attacks.

9:30 am – 10:30 am

National Harbor 4

■ DISCUSSION GROUP

Internal Controls: Doing More with Less (DG18)

Presenter: Julie Novak, Chief Financial Officer, Fort Sam Houston ISD, San Antonio, TX

SFOs: 1 **SFO Domain:** Management of Accounting Systems

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Management Techniques

We all know that internal controls are important, but how can we make them work with a restricted budget? In small districts with limited staff, how can internal controls be incorporated without stressing employees with too many “other duties as assigned?” Explore methods to build internal controls into your system without breaking your budget or making too many demands on staff time.

Learning Objectives: 1. Identify critical internal controls within your district’s environment. 2. Outline effective internal controls to safeguard assets. 3. Describe how to operate efficiently with existing staff to ensure reliable financial reporting.

9:30 am – 10:30 am

Chesapeake 6

■ DISCUSSION GROUP

Grounding Your Master Facilities Plan Through Community Engagement (DG19)

Presenters: Andrew Geistfeld, Chief Financial Officer/Treasurer, Upper Arlington City Schools, Upper Arlington, OH; Chris Potts, Chief Operating Officer, Upper Arlington City Schools, Upper Arlington, OH

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: School Facilities Management, Management Techniques

In 2015, the Upper Arlington Schools Board of Education committed to engaging its community in a transparent and highly participatory master facilities planning process. The almost three-year process led to overwhelming support and passage of a \$230 million bond issue that would fund the replacement or renovation of six of the district’s eight core academic buildings. This session will present the rationale for engaging in a master planning process, the various elements of a master facilities plan, and how to authentically engage a diverse array of constituents. It also will cover the current state of the master plan and the steps the board of education is taking to ensure its bold vision is realized.

Learning Objectives: 1. Discuss why the authentic and meaningful engagement of a school district community should be a key aspect of every master facility planning process. 2. Describe why a transparent and open process is important to the success of bond issues and which techniques ensure the process is continuously communicated. 3. Identify the range of components that make up a master facilities plan.

9:30 am – 10:30 am

■ DISCUSSION GROUP

*National Harbor 3***Year 1 ESSA Site-Level Financial Reporting—What Did We Learn? What's Next? (DG20)**

Presenters: Susan Harkin, Chief Operating Officer, CUSD 300, Algonquin, IL; Michael Jacoby, Executive Director/CEO, Illinois ASBO, DeKalb, IL; Sara Shaw, Senior Manager, Fiscal and Academic Solvency, Illinois State Board of Education, Springfield, IL; Carrie Stewart, Co-Founder, Managing Director, Afton Partners, Chicago, IL

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Business Law

Content Areas: Legislative Affairs, School Finance

School business officials, superintendents, state board of education staff, and other key stakeholders throughout Illinois collaborated to establish a value proposition statement and develop guiding principles to facilitate conversations focused on empowering school districts to assess and improve equity, gain a better understanding of the relationship between student outcomes and financial resources, and identify evidence-based best practices and opportunities to foster innovation among peers. Learn what's in store for year two implementation and how this work is fitting into other state goals and initiatives such as ESSA state plan implementation, an evidence-based funding formula, state longitudinal systems and supporting grants, and fiscal and academic solvency efforts.

Learning Objectives: 1. Describe collaborative approaches to complying with new federal regulations. 2. Discuss how federal reporting requirements can be used beyond compliance. 3. Explain how site-level reporting requirements can guide conversations about resources and student outcomes.

9:30 am – 10:30 am

■ DISCUSSION GROUP

*National Harbor 7***Need More Revenue? Understand Markets, Strategies, and Budget Forecasting to Increase Revenue (DG21)**

Presenters: Wendy Flaherty, Director of Operations/Treasurer, Keeneyville SD 20, Hanover Park, IL; Jon Hitcho, Assistant Superintendent for Business/CSBO, Kildeer Countryside District 96, Buffalo Grove, IL; Sheetal Rai, Vice President/Managing Director, Fifth Third Securities, Chicago, IL

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Accounting

Content Areas: School Finance; Accounting, Auditing, and Budgeting

Need more revenue? Interest rate volatility, state funding, and market uncertainty make interest income a vital component to school district budgets. Learn how you can generate more interest income through a well-structured investment strategy, understanding the economic market and evaluating the best investments for your district. Learn to forecast bottom-line revenue from investments to help with future budget planning and funding of projects.

Learning Objectives: 1. Explain how economic factors and market volatility affect your interest income revenue sources. 2. Analyze whether your district is getting the best yields and how to compare market products to maximize interest income. 3. Discuss the importance of interest income in future budget forecasting.

9:30 am – 10:30 am

National Harbor 5

■ DISCUSSION GROUP

Hair-Raising Tales of Booster Club Fiascos and How to Reduce Your Schools' Risks (DG22)

Presenter: Sandra Englund, Founder, Attorney, Author, Parent Booster USA, Winter Garden, FL

SFOs: 1 **SFO Domain:** Risk Management Activities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Risk Management, Legal Aspects

Because of their lack of financial controls, frequent leadership turnover, and limited understanding of school policies, booster clubs often cause problems for school business officials. Learn how booster clubs can increase school liability and how you can utilize tips and tricks presented in this session to reduce your school's liability. Turn your booster clubs into the productive groups they are meant to be.

Learning Objectives: 1. Explain the risks school booster clubs pose for schools and how to reduce the risks. 2. Identify three key components to include in annual booster club training. 3. Outline best practices for school district booster club community fundraising policies and how to evaluate your district's policy.

9:30 am – 10:30 am

National Harbor 12

■ DISCUSSION GROUP

How to Read the Room in 2020: #newleader—Developing Organizational Awareness (DG23)

Presenters: Louis Pepe, Assistant Superintendent for Business/Chief Financial Officer, City of Summit Public Schools, Summit, NJ; Megan Slamb, Business Administrator/Board Secretary, Carlstadt Public Schools, Carlstadt, NJ

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Management Techniques, Human Resources and Labor Relations

Today's emerging leaders must master the discipline of generational awareness to ensure leaders at all levels of experience work together effectively and make better decisions—and that means acknowledging the differences in their organization and working to reconcile them through a shared vision. This session will address the components of change and the importance of character bias and self-awareness. Explore a multitude of core human resources, leadership, and management techniques topics and have your vision tested.

Learning Objectives: 1. Evaluate the impact of different generational perspectives on establishing common organizational goals. 2. Describe management techniques for improving communication and listening skills. 3. Outline methods for improved team building, mission planning, and goal setting.

9:30 am – 10:30 am

National Harbor 13

■ DISCUSSION GROUP

A Pre-65 Retiree Solution to Pre-Tax Funding of Future Healthcare Expenses (DG24)

Presenters: Mathew Knott, Director of Business Services, Mead SD, Mead, WA; Rich Puryear, Executive Director of Financial Services, Richland SD 400, Richland, WA; Trisha Schock, Executive Director of Administrative Services, North Central ESD 171, Wenatchee, WA; Scott Baldwin, Managing Director of Public Sector Practice, Arthur J. Gallagher & Co., Rolling Meadows, IL; Rich Dickman, Senior Client Consultant, Arthur J. Gallagher & Co., Spokane, WA; Dutch Ross, Senior Client Consultant, Arthur J. Gallagher & Co., Rolling Meadows, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Risk Management

Monthly insurance premiums of \$1,000 or more for pre-65 retirees and spouses is one of the biggest road blocks for most public sector employees wanting to retire on time. More than 30 years ago, school business officials in Washington helped pioneer the use of funded health reimbursement arrangements (HRAs) to address this problem. Learn about the development of this program, insights and lessons learned, and how the program ultimately helped employees save tax-free money for future healthcare expenses.

Learning Objectives: 1. Demonstrate an understanding of the looming cost of retiree healthcare. 2. Describe what other school districts are doing to help employees prepare for retirement healthcare costs. 3. Discuss how school business officials can influence other decision makers within their organizations to help employees better prepare for their futures.

9:30 am – 10:30 am

Chesapeake 4

■ DISCUSSION GROUP

Is Absenteeism Straining Your Budget? (DG46)

Presenters: Keven Cotton, Business Manager, Friendship Public Charter School, Chamberlain Campus, Washington, D.C.; Sandra Arteaga, Vertical Marketing Manager, Office Depot, Springfield, VA

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations, School Facilities Management

Human capital is the primary resource constraint on a district's budget. Health and cleanliness research shows that students miss an average of 4.5 days of school per year due to illness, and teachers miss 5.3 days per year. Annually, \$14.6B is spent on substitute teachers. While the costs associated with absenteeism are alarming enough, the impact on instruction and retention cannot be overlooked. Learn how schools can breed a culture of healthy hands, hearts, habits, and minds to cultivate learning, community involvement, and student success.

Learning Objectives: 1. Describe characteristics of a healthy school and its impact on student achievement. 2. Identify germ-generating hot spots within a school building that can be managed. 3. Discuss best practices for resource reallocation by addressing school environment.

10:45 am – 12:15 pm

Potomac Ballroom A/B

Second General Session

Welcome and Acknowledgments

Claire Hertz, CSBA, SFO
Vice President, ASBO International

Recognition of Past Presidents

Claire Hertz, CSBA, SFO

Installation of Officers

Charles E. Peterson Jr., MBA, PRSBA, SFO
Immediate Past President, ASBO International

ASBO International's 2019 Pinnacle Awards

Brian True
Vice President of Sales, Virco, Inc.

Speaker Introduction

Claire Hertz, CSBA, SFO

Keynote Address



The Four Commitments of a Winning Team

Mark Eaton, NBA All-Star and Team-Building Expert

The Four Commitments of a Winning Team enables industry leaders, teams, and individuals to outsmart, outlast, and outperform their competition and achieve record-breaking success. In this high-energy, insightful presentation, 7' 4" Mark Eaton shares how he rose from auto mechanic to NBA All-Star and, after 12 amazing years with the Utah Jazz, reinvented himself and became a successful business leader, entrepreneur, award-winning speaker, and best-selling author.

12:30 pm – 1:45 pm

Chesapeake 8

MBA Advisory Committee and Reviewers Meeting and Lunch IO

12:30 pm – 2:45 pm

*Prince George's
Exhibit Hall D/E*

Exhibits Marketplace

1:00 pm – 2:00 pm

*Prince George's
Exhibit Hall D/E*

Lunch in the Exhibits Marketplace

1:45 pm – 2:30 pm

Chesapeake 9

Meritorious Budget Award Reception IO

Sponsored by Voya Financial®

2:30 pm – 3:00 pm

*Main Chesapeake
Foyer
Main National
Harbor Foyer*

Food-for-Thought Station

Grab a quick, healthy snack to refuel your energy and power up your focus.

Sponsored by Forecast5 Analytics, Inc.

2:45 pm – 3:45 pm

National Harbor 4

■ DISCUSSION GROUP

How to Effectively Manage Student Activity Accounts (DG25)

Presenter: Bill Parkinson, Treasurer/Chief Financial Officer, Willoughby-Eastlake City SD, Eastlake, OH

SFOs: 1 **SFO Domain:** Management of Accounting Functions

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; School Finance

Student activity accounts enable schools to offer a wide range of extracurricular opportunities. Because of this variety, strong internal controls and budgetary processes must be in place to ensure statutory compliance regardless of the activity. Learn how Willoughby-Eastlake City SD uses its procedures to ensure accounting practices, internal controls, and audit procedures are adhered to throughout the district.

Learning Objectives: 1. Detail how to effectively manage and monitor budgetary controls to help reduce fraud. 2. Describe how to effectively manage and monitor fundraising. 3. Outline how to effectively manage and monitor ticket sales.

2:45 pm – 3:45 pm

National Harbor 8

■ DISCUSSION GROUP

What's Your Emotional IQ? How to Better Lead Through Making Tough Decisions (DG26)

Presenter: Matthew Lentz, Assistant Superintendent for Business and Operations, Upper Moreland SD, Willow Grove, PA

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Areas: Human Resources and Labor Relations, Leadership Development

Emotions play an important part in not only our work environments, but in daily decision making for school business officials. Explore best practices for presenting difficult decisions to your teams in a positive and supportive manner.

Learning Objectives: 1. Discuss the importance of emotional intelligence. 2. Analyze difficult situations and review approaches to yield a positive outcome. 3. Outline an effective structure to support decision making and ensure you are considering the real issues at stake.



2:45 pm – 3:45 pm

Chesapeake 6

■ DISCUSSION GROUP

The Conversation Makes the Difference (DG27)

Presenters: Robert Saul, PCSBA, SFO, Business Administrator, East Penn SD, Emmaus, PA; Stan Wisler, Strategic Account Advisor, Forecast5 Analytics, Naperville, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Management Techniques, Leadership Development

Words matter. The quality of conversations dictates relationships and relationships are critical to effectively manage and lead people. Explore the critical aspects of true communication and the art of productive conversations. Learn the principles of effective and meaningful face-to-face conversations and the most valuable strategies to use when dealing with challenging situations that require crucial conversations.

Learning Objectives: 1. Outline the key components of an effective conversation. 2. Describe specific practical standards and concepts to employ when entering a difficult conversation. 3. Discuss the impact our words have on others and the power of conversations.

2:45 pm – 3:45 pm

National Harbor 7

■ DISCUSSION GROUP

Collaborative Leadership: Finance and Curriculum Working Together to Allocate Resources (DG28)

Presenters: Karen Wiesman, Associate Superintendent for Business and Finance, Mansfield ISD, Mansfield, TX; Lisa Morstad, Senior Analytics Advisor, Forecast5 Analytics Inc., Naperville, IL

SFOs: 1 **SFO Domains:** Financial Planning and Analysis, Budgeting and Reporting Activities

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Leadership Development; Accounting, Auditing, and Budgeting

Fostering a strong relationship between school finance and curriculum departments can lead to great synergy. Learn how Mansfield ISD's CFO and curriculum director were able to fund new programs by strategic abandonment and redirection of resources for more effective spending. Gain insights on how this relationship can help meet new mandated ESSA compliance and reporting requirements for both finance and curriculum.

Learning Objectives: 1. Describe specific strategies used for collaboration between curriculum and finance at Mansfield ISD. 2. Define how this relationship is key in strategic planning and optimizing district resource allocation. 3. Explain new ESSA requirements and how the relationship between curriculum and finance can improve reporting requirements.

2:45 pm – 3:45 pm

National Harbor 5

■ DISCUSSION GROUP

Focusing the Budget Process Through Planning, Implementing, and Measuring Programs (DG29)

Presenters: Bill Sutter, Chief Financial Officer, Boulder Valley SD, Boulder, CO; Sam Ribnick, Senior Director, District Management Group, Boston, MA

SFOs: 1 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Management Techniques

The Boulder Valley School District embarked on a project to capture information on all the district's programs and initiatives to better inform district leadership, improve the budgeting process, and focus efforts and dollars toward the activities most important to improving student achievement. This session will explore the process, results, and future plans related to BVSD's program inventory project and provide participants with the tools to begin the process in their district.

Learning Objectives: 1. Define and identify the components of Academic Return on Investment (A-ROI). 2. Describe how to apply the A-ROI framework to assess district programs. 3. Discuss how to apply rigor and specificity to the budget development process to focus resources toward the greatest outcomes for students.

2:45 pm – 3:45 pm

Chesapeake 4

■ DISCUSSION GROUP

Where the Rubber Meets the Road: Designing a Sustainable Bus Replacement Strategy (DG30)

Presenter: Tim Ammon, Chief Business Development Officer, TransPar Group of Companies, Daniel Island, SC

SFOs: 1 **SFO Domain:** Business Management and Organizations

CPEs: 1 **Field of Study:** Accounting

Content Area: Pupil Transportation

As budgets shrink, ensuring efficient use of cash throughout the district is critical. No one wants to spend more on transportation than they have to. One way to ensure you do not divert any more money than necessary from the classroom is to confirm you are managing your bus fleet in way that ensures lowest total cost of ownership. This session will identify key elements of designing, implementing, and monitoring a sustainable fleet replacement strategy.

Learning Objectives: 1. Identify opportunities to minimize total cost of ownership for school buses. 2. Assess the viability of alternative fleet financing strategies. 3. Evaluate the operational impact of inadequate planning practices on successfully transporting students.

2:45 pm – 3:45 pm

Chesapeake 5

■ DISCUSSION GROUP

Growing Young Bodies and Minds: Transitioning to Scratch Cooking and Nutrition Education (DG31)

Presenter: Ann Cooper, Director of Food Services, Boulder Valley SD, Boulder, CO

SFOs: 1 **SFO Domain:** Management of Ancillary Services

CPEs: 1 **Field of Study:** Production

Content Areas: School Food and Nutrition Management, Management Techniques

Until 2009, Boulder Valley School District served its students a menu that relied largely on reheated processed foods and packaged goods. That year, a group of parents and district staff initiated a comprehensive overhaul of the food service, targeting nutrition as one of the best ways to positively impact the success of BVSD's 31,000 students. The district now serves nearly 14,000 fresh, well-balanced, scratch-cooked meals each day, appealing to the majority of students. Food services and operations administrators will learn how BVSD transformed their food program to support a Whole School, Whole Community, Whole Child model.

Learning Objectives: 1. Outline the steps BVSD took to ensure success in their transition from prepackaged and processed foods to scratch cooking. 2. Analyze your existing school food program to determine strengths and weaknesses. 3. Evaluate to what extent your district's school food program is supporting student health and wellness as it relates to a Whole School, Whole Community, Whole Child model.

2:45 pm – 4:45 pm

National Harbor 2

■ DEEP DIVE

GASB Update: How Does It Impact My School District? (DD07)

Presenters: Sharie Lewis, Director of Business Services and Operations, Park Rose SD, Portland, OR; David Bean, Director of Research and Technical Activities, GASB, Norwalk, CT

SFOs: 2 **SFO Domain:** Management of Accounting Functions

CPEs: 2 **Field of Study:** Accounting (Governmental)

Content Areas: Accounting, Auditing, and Budgeting; School Finance

The Governmental Accounting Standards Board 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. This session will provide participants with the latest information about GASB's activities and standards. This session also will cover the requirements of GASB Statement No. 84, Fiduciary Funds, Statement No. 87, Leases, and the new financial reporting model.

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

2:45 pm – 4:45 pm

National Harbor 3

■ DEEP DIVE

Understanding the Emerging Issues and the Impact of Risk Management in Your Schools (DD08)

Presenters: Stephen Anderson, Business Manager, ISD 704–Proctor Public Schools, Proctor, MN; Jim Westrum, Executive Director of Business and Finance, Wayzata Public Schools, Wayzata, MN; Amy Diedrich, Employee Benefits Consultant, Marsh & McLennan Agency, Minneapolis, MN; Tom Strasburger, Vice President, Strategic Alliances, PublicSchoolWORKS, Cincinnati, OH; Brad Nigh, Director of Professional Services & Innovation, FRSecure, Minnetonka, MN

SFOs: 2 **SFO Domain:** Risk Management Activities

CPEs: 2 **Field of Study:** Business Management and Organization

Content Area: Risk Management

The dynamic nature of risks means managing them in schools is no easy task and extends beyond simply having insurance. Schools have a plethora of risks ranging from everyday occurrences such as slips, trips and falls, to bus accidents and even to the rarer occurrences of tornados or floods. Emerging issues like drones, international field trips, and cybersecurity pose new challenges to a district's risk management plans. The majority of the time will be spent on the ever-changing and increasing threat cyberattacks pose to school districts. Discuss how your school district identifies and mitigates these risks and controls losses while learning proactive school risk management measures from expert risk managers.

Learning Objectives: 1. Define risk management and discuss various elements of the process. 2. Identify and discuss the impact risk management has on various departments within schools. 3. Describe how to educate and train staff to raise risk management awareness.

2:45 pm – 4:45 pm

National Harbor 12

■ DEEP DIVE

Navigating Through the Complicated Intersection of ADA, FMLA, and Workers' Compensation (DD09)

Presenters: Lynn Knight, Business Manager, Nekoosa SD, Nekoosa, WI; Julie Lewis, Attorney/Principal, Lewis Law Office, Madison, WI; Linda Mont, Managing Member, Key Benefit Concepts, LLC, Wales, WI

SFOs: 2 **SFO Domain:** Management of Human Resource Functions

CPEs: 2 **Field of Study:** Personnel/Human Resources

Content Area: Human Resources and Labor Relations

This session provides a short legal overview and checklist every district office should have. Through real-live stories, participants will better understand the triggers that indicate their district may be entering an FMLA, ADA, or workers compensation situation. This interactive session will include audience participation and role-playing exercises and allow attendees to network with others and share insights and experiences.

Learning Objectives: 1. Discuss how to determine if FMLA, ADA, or workers compensation applies to a situation. 2. Describe how state laws impact these situations. 3. Outline how to navigate between the requirements of interacting regulations.

2:45 pm – 4:45 pm

National Harbor 6

■ DEEP DIVE

Shaping Culture: Why Do It and Where to Start? (DD10)

Presenter: Robert Wilkinson, Director, Maintenance/Operations, Frederick County Public Schools, Frederick, MD

SFOs: 2 **SFO Domain:** Management of Human Resource Functions

CPEs: 2 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

All organizations have a culture, but compelling and respectful cultures rarely evolve naturally; rather, they are shaped and cultivated by strong leaders. Shaping a positive culture leads to overall improvement; the pursuit of excellence without focus on culture is futile. In this session we will define culture, explore common cultural foibles, and explore effective approaches to cultural shaping. Learn about Frederick County Public Schools' successes and failures, exchange supportive ideas, and emerge better positioned to shape culture in your organization.

Learning Objectives: 1. Discuss the role of organizational culture in fostering positive change. 2. Evaluate methods and tactics to prompt cultural change. 3. Describe the incentives and basic methodology to start changing culture.

2:45 pm – 4:45 pm

Chesapeake 7/8

■ DEEP DIVE

Making the Grade: Assessing IEQ's Impact on Student Performance to Support Modernization (DD11)

Presenters: Patrick Davis, Deputy Chief, Facilities, District of Columbia Public Schools, Washington, DC; Heather Jauregui, Sustainability Specialist, Perkins Eastman, Washington, DC; Sean O'Donnell, Principal, Perkins Eastman, Washington, DC

SFOs: 2 **SFO Domain:** Management of School Facilities

CPEs: 2 **Field of Study:** Business Management and Organization

Content Areas: School Facilities Management, Sustainability

When renovating or building a new school, impacts to student achievement are what school districts should care about most. Using the findings of a study involving nine District of Columbia Public Schools, this session will explore how high-performance design strategies can have a direct positive impact on student performance, and consequently how this information can be used to justify the value of high-performance design when developing school capital budget requests.

Learning Objectives: 1. Explain how indoor environmental quality can affect student and teacher performance. 2. Analyze how modernized and non-modernized schools can impact indoor environmental quality and student performance. 3. Outline how to measure and improve the IEQ in your educational projects moving forward.

2:45 pm – 4:45 pm

National Harbor 13

■ DEEP DIVE

Best Budgeting Practices: Connecting Academic Outcomes to Resource Allocation (DD12)

Presenters: Marvin Dereef, Chief Financial Officer, Fulton County Schools, Atlanta, GA; Michele Trongaard, Assistant Superintendent for Finance and Operations, Wylie ISD, Wylie, TX; Scott Gooding, Executive Director, Columbus City Schools, Columbus, OH; Matt Bubness, Senior Manager, Government Finance Officers Association, Chicago, IL

SFOs: 2 **SFO Domain:** Budget and Reporting Activities

CPEs: 2 **Fields of Study:** Business Management and Organization, Finance

Content Area: Finance

Finance leaders from districts of various demographics will share their experiences with developing a budget and planning process that leverages stronger academic and finance collaboration to effectively allocate scarce resources toward areas of greatest need to promote student achievement. The budget and planning process improvements follow a framework that offers recommendations and guidance for all stages of the processes, including better stakeholder engagement, development of robust goals, prioritizing strategies to enhanced cost-effectiveness measurements, implementation plans, and improved budget presentations. This session will include key points and potential benefits of the five major areas of best practices in school budgeting, examples of efforts to improve the budget process, and opportunities for discussion and self-assessment of your district's budget process.

Learning Objectives: 1. Outline the key points and potential benefits of the five major areas of the best practices in school budgeting framework. 2. Discuss district examples and work to date on efforts to improve the budget process. 3. Identify opportunities for discussion and self-assessment for your district's budget process.

4:00 pm – 4:25 pm

Chesapeake 6

■ MINI-MODULE

Outlook Tips and Tricks for Increasing Productivity and Staying Organized (MM07)

Presenter: Brianne King, Executive Director, Washington ASBO, Tumwater, WA

Content Areas: Leadership Development, Management Techniques

Are you feeling overwhelmed by the number of emails you receive daily? Do you need help meeting deadlines? Learn quick tips and tricks to make Outlook work for you. Outlook is more than email. It's a personal information manager to streamline workloads and boost productivity. Create and delegate tasks and share calendars and contacts with co-workers. Use mail merge to send personalized emails automatically to an entire list and set up email signatures and templates to gain efficiencies.

4:00 pm – 4:25 pm

National Harbor 5

■ MINI-MODULE

Addressing Sustainability Issues: Educating and Empowering Water Warriors (MM05)

Presenter: Sara Paul, Assistant Superintendent, White Bear Lake Area Schools, White Bear Lake, MN

Content Areas: Global Issues, Sustainability

School business officials have a responsibility to make sustainability a top priority, reduce our impact on the environment, and educate students and the community at large. Learn how White Bear Lake Area School District aligned standards-based instruction with community engagement opportunities to prompt youth to become water stewards to protect and advocate for our precious water resources for future generations.

4:00 pm – 4:25 pm

National Harbor 7

■ MINI-MODULE

Hire and Inspire with Confidence—Predicting the Right Fit (MM08)

Presenter: Aubrey Kirkpatrick, Director of Finance and Administration, Anglophone East SD, Moncton, NB, Canada

Content Areas: Human Resources and Labor Relations, Management Techniques

Learn more about human behavior, how it drives our influence and workplace behavior, and how we can become more self-aware. Hear how one district uses the PI Behavioural Assessment to predict aspects of job performance independent from knowledge and skills and shows us how we can make the most of our strengths, differences, and abilities and understand how someone responds to their environment and team members. Learn how to use the assessment tool in your hiring process to help you select the right candidates and as a way of inspiring greater communication and collaboration among team members.

4:00 pm – 4:25 pm

National Harbor 8

■ MINI-MODULE

Cross-Training and Transition Planning in the Business Office (MM09)

Presenters: Melissa Fekkether, Business Manager/School Business Official, Postville CSD, Postville, IA; Angie Morrison, Chief Financial Officer/Board Secretary/Treasurer, College Community School District, Cedar Rapids, IA

Content Areas: Human Resources and Labor Relations, Leadership Development

This session will provide a review of processes and procedures that can ensure seamless transitions and smooth operations related to staffing changes or emergency staff absences. Review a comprehensive manual currently being used in a school district to prevent problems related to staff transitions and learn how to create or refine your current transition processes and increase awareness around staff roles and responsibilities.

4:00 pm – 4:25 pm

Chesapeake 4

■ MINI-MODULE

Breakfast Beyond the Cafeteria (MM10)

Presenter: Melissa Harding, Coordinator of School Nutrition Services, North Penn SD, Lansdale, PA

Content Area: School Food and Nutrition Management

Roughly 90% of schools that operate the School Lunch Program offer breakfast as well, but overall participation is much lower. When breakfast moves away from the traditional cafeteria-based model to a “grab and go” or alternate delivery model, participation is shown to increase. More students eating breakfast translates into better behavior and concentration in the classroom and can lead to a healthier bottom line for nutrition services. Explore alternative breakfast delivery models and how to implement them in your district while confronting common challenges such as labor, equipment, storage, food safety, and acceptance.

4:00 pm – 5:00 pm

Chesapeake 3

Open Bylaws Meeting

Open to all members of the association, this forum will allow members to voice opinions and concerns to the board of directors and other association leaders. Please join us to learn more about and to influence the future direction of the association.

5:00 pm – 6:30 pm

Potomac Foyer A-C

MD/DC ASBO Affiliate Reception: A Taste of the Chesapeake

Every region has its own culinary claim to fame, and Maryland has quite a few to brag about. Join other conference attendees at A Taste of the Chesapeake, where you'll enjoy food and beverages inspired by the local faire.

Hosted by ASBO: Maryland/DC

Co-Hosted by Virginia ASBO

Open to all conference attendees. Badge required.



MONDAY, OCTOBER 28

7:30 am – 8:00 am **Coffee Break**

Potomac Foyer A/B

7:30 am – 10:00 am **Registration**

Potomac Foyer A

8:00 am – 9:00 am

■ DISCUSSION GROUP

Chesapeake 6

What Questions Should Finance Be Asking of Facilities Maintenance? (DG32)

Presenters: Heather Clabaugh, Budget Officer, Frederick County Public Schools, Frederick, MD; Curtis Orndorff, Manager, Building Maintenance, Frederick County Public Schools, Frederick, MD

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: School Facilities Management; Accounting, Auditing, and Budgeting

While their worth is immeasurable, the cost to operate and maintain school facilities can be formidable. Without an effective information exchange between facility maintenance and finance, a school system cannot claim to have a strategic business plan. Explore the methodology and metrics facility management professionals use to identify and prioritize needs, learn how financial experts can interpret this data for strategic planning, and identify straightforward methods to generate or improve facility-related data. Share successes and failures, exchange ideas, and emerge better positioned to perform strategic planning.

Learning Objectives: 1. Explain common facility management metrics and how to use them for strategic planning. 2. Detail how to overcome the hurdles that prevent organizations from generating these metrics. 3. Discuss incentives and basic methodology to start or improve strategic facilities planning.

8:00 am – 9:00 am

National Harbor 4■ **DISCUSSION GROUP****GASB Statement 87 Implementing the New Standard for Leases (DG33)**

Presenters: Marvin Dereef, Chief Financial Officer, Fulton County Schools, Atlanta, GA; Corey Arvizu, Managing Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ; Jeff Jensen, Partner, Crowe LLP, Sacramento, CA; Bert Nuehring, Partner, Crowe LLP, Oak Brook, IL

SFOs: 1 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Accounting, Auditing, and Budgeting; School Facilities Management

GASB Statement 87, Leases, requires lessor and lessee districts to analyze existing lease agreements to properly measure and report assets, liabilities, revenues, expenditures, and deferred items associated with the new standard. This statement is effective for reporting periods beginning after December 15, 2019, so you should be planning implementation steps within your district now. The standard will have significant ramifications by increasing the level of long-term debt reported by districts that use leased facilities and equipment in their operations. Practical implementation tips will be provided, including the steps required for analyzing and recording lease transactions.

Learning Objectives: 1. Identify the key provisions for the new Lease Accounting Standard for your school district. 2. Evaluate the impact of the new standard on your school district's debt reporting and debt limits. 3. Outline the efforts necessary to comply with the new standard.

8:00 am – 9:00 am

Chesapeake 4■ **DISCUSSION GROUP****How Making Sustainability Part of Your Culture Has Positive Impact on Your Students (DG34)**

Presenter: Patty Bedborough, Chief Financial Officer, Parkway SD, Chesterfield, MO

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Sustainability, School Facilities Management

Learn how one school district with a long history of recycling deepened its commitment to environmental sustainability by adding programs such as building envelope and energy savings, alternate fuel for buses, composting programs, and more. The district blended these goals into their strategic plan while enhancing learning opportunities for students. Find out what obstacles the district encountered during the process as well as positive outcomes such as operational savings and improved learning environments.

Learning Objectives: 1. Outline steps and strategies to bring a sustainability focus to your district. 2. Discuss common challenges associated with prioritizing sustainability and strategies to overcome obstacles to changing mindsets. 3. Evaluate the lifecycle return on investment and operational savings that can be obtained with improved energy-efficient HVAC, roofs, and building envelope improvements.

8:00 am – 9:00 am

National Harbor 6

■ DISCUSSION GROUP

Business Office Succession Planning—Who's on Deck? (DG35)

Presenters: Tamara Mitchell, Assistant Superintendent for Business and Financial Services/CSBO, Joliet Public Schools District 86, Joliet, IL; Dr. Ann Williams, Chief Financial Officer/CSBO, East Aurora District 131, Aurora, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

Retirements, resignations, and an unfortunate employee termination can wreak havoc in a school business office. Having a succession plan is a great safeguard where retirement is concerned, but what about planning ahead for other staffing changes? Cross-training and professional development are of paramount importance. Participants will discuss effective ways to plan for both expected and unexpected personnel changes within the school business office.

Learning Objectives: 1. Discuss best practices for professional development of business office staff. 2. Outline best practices for cross-training business office staff as well as other administrative staff. 3. Describe specific topics and level of detail to include in a business office procedures manual.

8:00 am – 9:00 am

National Harbor 7

■ DISCUSSION GROUP

Staff Wellness Programs That Pay Dividends (DG37)

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

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personnel/Human Resources

Content Area: Human Resources and Labor Relations

When done right, employee wellness programs can make a difference in their employees' health and happiness while promoting a positive relationship between management and labor. Learn how workplace wellness can offer financial gains beyond reduced claim expenses, including reduced absenteeism, greater employee engagement and productivity, less unscheduled paid time off, fewer workers' comp claims, greater employee retention, and increased employee satisfaction and morale.

Learning Objectives: 1. Cite research on workplace wellness programs. 2. Identify best practices in implementing your own staff wellness program. 3. Discuss short-term and long-term impacts of effective programs on labor relations.

9:15 am – 10:15 am

■ DISCUSSION GROUP

*National Harbor 6***Overcoming Adversity—The Power of a Positive Mindset (DG39)****Presenter:** Stephen Morales, Chief Executive, Institute of School Business Leadership, Coventry, United Kingdom**SFOs:** 1 **SFO Domain:** Financial Planning and Analysis**CPEs:** 1 **Field of Study:** Personal Development**Content Area:** Leadership Development

The concept of post-traumatic growth can be a positive transformational experience and lead to greater clarity of purpose, which is particularly powerful in a leadership context. Learn how one school business official overcame two traumatic events in the space of 12 months, the tools he used to return to the demanding job of a chief executive, and the lessons he learned about himself and others on the pathway to recovery.

Learning Objectives: 1. Explain the importance of authenticity and self-realization. 2. Discuss steps toward developing a positive mindset. 3. Describe how to use incremental steps to realize significant goals.

9:15 am – 10:15 am

■ DISCUSSION GROUP

*Chesapeake 6***Turning an Education System Upside Down (DG02)****Presenter:** Peter Thompson, President, New Zealand School Business Managers Association, Palmerston North, New Zealand**SFOs:** 1 **SFO Domain:** Financial Planning and Analysis**CPEs:** 1 **Field of Study:** Personal Development**Content Area:** Global Issues

In March 2018, the New Zealand Minister of Education appointed an independent task force to review the country's school education system and recommend a completely new model to be implemented in 2020. Learn how an education system was turned upside down and how the school business managers association took the opportunity to embrace the situation, evolve, and contribute to the process.

Learning Objectives: 1. Discuss the role school business official organizations can play in significant education reform. 2. Outline lessons learned from the New Zealand case study that can be applied to your school district. 3. Describe how individual school business officials can implement significant change.

9:15 am – 10:15 am

National Harbor 5

■ DISCUSSION GROUP

Creating Work-Life Harmony: Finding a Balance That Works for You (DG40)

Presenters: David Bein, Assistant Superintendent of Business Services/CSBO, Barrington CUSD 220, Barrington, IL; Jeff Feyerer, Chief School Business Official, Fairview SD 72, Skokie, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

In a world where individuals are pulled in many different directions, both personally and professionally, the importance of work-life balance has never been greater. Learn the benefits of striking a balance between optimal work performance and time spent away from the office, methods to achieving work-life harmony (including time management and prioritization techniques), and how successfully doing so can create an even more positive work environment for you and others.

Learning Objectives: 1. Discuss the importance of finding a harmony between work life and personal life. 2. Identify road blocks that make achieving a work-life balance increasingly difficult. 3. Outline strategies and techniques to create personalized work-life goals.

9:15 am – 10:15 am

Chesapeake 4

■ DISCUSSION GROUP

Micro-Credentials for School Business Officials (DG41)

Presenters: Sue Bertrand, Deputy Executive Director/COO, Illinois ASBO, DeKalb, IL; Barry Bolek, Retired Assistant Superintendent for Finance, Highwood, IL

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Leadership Development, Global Issues

Learn about cutting-edge professional development through micro-credentials and digital badging. This self-guided professional development puts you in control of your learning anytime, anywhere. Similar to badges earned in scouting, micro-credentialing allows you to demonstrate competency in school finance by earning digital badges. Once earned, your digital badge on your resume, email signature, and LinkedIn profile demonstrate your mastery to your professional network.

Learning Objectives: 1. Define what a micro-credential and digital badge are and why they demonstrate mastery of specific functions in school finance. 2. Describe the benefits of micro-credentials in professional learning goals. 3. Describe how to employ micro-credentials as part of a strategy toward professional growth and development.

9:15 am – 10:15 am

■ DISCUSSION GROUP

National Harbor 8

Effective Advocacy: Identifying Your Goals, Targets, and Messaging (DG43)

Presenters: Karen Smith, Assistant Superintendent of Business and Financial Services, Cypress-Fairbanks ISD, Houston, TX; Hannah Barrick, Director of Advocacy, Pennsylvania ASBO, Harrisburg, PA

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Business Law

Content Area: Legislative Affairs

In an environment where legislators are less supportive of public education and federal and state policy changes continue to create challenges for school districts, it is essential for school business officials to get involved in advocacy to share their expertise and shape the future of education. Learn the basics of creating advocacy goals, developing effective strategies, identifying your target audiences, why advocacy matters, and how to craft persuasive messaging at both the state and federal levels to get your advocacy goals across the finish line.

Learning Objectives: 1. Outline how to create advocacy goals. 2. Describe how advocacy messages should be adjusted for different target audiences. 3. Discuss how to create persuasive messaging.

9:15 am – 10:15 am

■ DISCUSSION GROUP

Chesapeake 5

New Market Tax Credits: An Innovative Solution for Funding School Projects (DG44)

Presenters: Shaquita Burke, Director of Financial Operations, Vicksburg Warren SD, Vicksburg, MS; Anna Watson, Attorney, Butler Snow LLP, Ridgeland, MS

SFOs: 1 **SFO Domain:** Financial Planning and Analysis

CPEs: 1 **Field of Study:** Accounting

Content Areas: School Finance, School Facilities Management

New Market Tax Credits (NMTCS) are a new option for schools seeking funding for innovative projects. The NMTC program incentivizes community development and economic growth through the use of tax credits that attract private investors who assist schools in low-income areas fund projects to help reinvigorate struggling local economies. Learn more about NMTCS and how school districts can reduce their debt obligation and generate automatic equity in a project that can be used elsewhere.

Learning Objectives: 1. Define the New Market Tax Credits program. 2. Describe potential funding options or benefits that can be gained from NMTC. 3. Outline program requirements and how to apply for NMTC.

9:15 am – 10:15 am

National Harbor 4

■ DISCUSSION GROUP

Implementing a Balanced Budget That Ensures Academic Success (DG45)

Presenters: Thomas Wall, Executive Director of Business Services and Operations, Dearborn Public Schools, Dearborn, MI; Jill Chochol, Executive Director of Student Achievement, Dearborn Public Schools, Dearborn, MI

SFOs: 1 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Management Techniques

One of the challenges of budget development is explaining your decisions to your board. In response to significant financial changes in Michigan impacting budgets, district leadership collaborated with board members and school stakeholders to devise a transparent budgeting process that ensures decisions are aligned with the strategic plan. Learn how Dearborn Public Schools implemented a thorough budgetary process aligned with the strategic plan and gain insights on how to explain complex accounting information and decisions to stakeholders.

Learning Objectives: 1. Describe the interactive development of a K-12 budget. 2. Outline strategies for conducting effective board of education discussions with administration on budgets. 3. Discuss how to develop a budget with teaching and learning in mind.

10:30 am – 11:30 am

National Harbor 5

■ DISCUSSION GROUP

Using Key Performance Indicators for a Successful School Nutrition Program (DG47)

Presenters: Becky Domokos-Bays, School Nutrition Services Director, School Nutrition Association, Arlington, VA; Patricia Montague, Chief Financial Officer, School Nutrition Association, Arlington, VA

SFOs: 1 **SFO Domain:** Management of Ancillary Services

CPEs: 1 **Field of Study:** Production

Content Areas: School Food and Nutrition Management, Management Techniques

Key performance indicators are essentials tools for any business, especially the complex, multibillion-dollar business of school nutrition programs. Successful use of KPIs requires rigorous and meaningful application of operational data so that business officials can identify problem areas, determine resource allocation, and demonstrate improvement. Learn how KPI use can help establish a robust school nutrition program that ensures well-nourished children and serves as a foundation for student and school-wide success.

Learning Objectives: 1. Describe how to identify and establish a common set of key performance indicators. 2. Discuss how KPIs can enable districts to develop achievable action plans and benchmark results. 3. Outline tools and resources to identify and use KPIs effectively

This session has been rescheduled:

Saturday, September 26

8:00 am - 9:00 am

Chesapeake 6

■ DISCUSSION GROUP

Conducting School Safety Site Assessments (DG48)

Presenter: Victor Hayek, Deputy Superintendent, Conejo Valley USD, Thousand Oaks, CA

SFOs: 1 **SFO Domains:** Risk Management Activities, Management of School Facilities

CPEs: 1 **Field of Study:** Business Management and Organization

Content Areas: Risk Management, School Facilities Management

A comprehensive assessment of the safety of students and staff and the security of the campus is critical to providing a safe and effective school. A former police officer turned school superintendent will present guidance on how to conduct a safety and security assessment on a school campus. He will review findings from the Conejo Valley Unified School District site assessments of 26 schools and discuss strategies for improving safety and security on school campuses.

Learning Objectives: 1. Describe what a safety and security assessment entails. 2. Outline best practices related to safety and security on a school campus. 3. Discuss how to identify and manage safety and security risks.

10:30 am – 11:30 am

National Harbor 6

■ DISCUSSION GROUP

Visualizing the Numbers: Creating Customizable Dashboards in Microsoft Power BI (DG50)

Presenter: Andrew Feuling, Director of Fiscal Services, Carson City SD, Carson City, NV

SFOs: 1 **SFO Domain:** Management of Accounting Systems

CPEs: 1 **Field of Study:** Information Technology

Content Areas: Information Technology, School Finance

Using data analytics to create visuals for communication is nothing new, but creating quick, customizable dashboards of these visuals that are interactive and shareable in real time may be. If you are looking to communicate financial, academic, or other data to a variety of audiences, learn how Microsoft Power BI (Business Intelligence) will allow you to deliver a more powerful message.

Learning Objectives: 1. Explain how to create a PowerBI Dashboard. 2. Discuss and evaluate the potential for using this program to meet a variety of needs. 3. Detail how to customize and share the dashboard in real time.

10:30 am – 11:30 am ■ **DISCUSSION GROUP**

National Harbor 7

Managing the School District Budget from a Program Perspective and Measuring Academic ROI (DG51)

Presenters: Joseph Greco, Director of Budget and Program Integration, Saratoga Springs City SD, Saratoga Springs, NY; Tim Hilker, Assistant Superintendent for Business, Saratoga Springs City SD, Saratoga Springs, NY

SFOs: 1 **SFO Domain:** Budgeting and Reporting Activities

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; Management Techniques

Based on current best practices, this session will provide innovative strategies to facilitate program-driven budget-planning discussions with instructional leaders. The focus will be on strategies to help school business officials navigate some of the cultural obstacles they may encounter throughout the process and how to anchor resource allocations to academic return on investment. The importance of long-range planning for recruitment and retention of staff, building infrastructure, and programmatic needs will be covered. Successes and challenges related to legacy planning will be shared, along with unique strategies to connect instructional vision with budget development.

Learning Objectives: 1. Identify best practices for building a collaborative, program-driven budget. 2. Discuss techniques for measuring academic return on investment. 3. Describe the importance of integrating long-term strategic planning into the budget development process.

10:30 am – 11:30 am ■ **DISCUSSION GROUP**

National Harbor 8

Starting on the Inside: Implementing an Internal Audit Function in Your District (DG52)

Presenters: Shakeel Yusuf, Comptroller, Fairfax County Public Schools, Falls Church, VA; Jeff Jensen, Partner, Crowe LLP, Sacramento, CA; Bert Nuehring, Partner, Crowe LLP, Oak Brook, IL

SFOs: 1 **SFO Domain:** Management of Accounting Functions

CPEs: 1 **Field of Study:** Accounting

Content Areas: Accounting, Auditing, and Budgeting; School Finance

Having an internal audit function allows school district officials to monitor internal control activities, improve operational efficiencies, and reduce the risk of fraud. Learn about strategies to develop and implement an internal audit function within your district. Learn the pros and cons of various forms of internal audit functions, including informal, formal, co-sourced, and outsourced internal audit functions.

Learning Objectives: 1. Explain how an internal audit function can improve your district's operations. 2. Discuss the options for implementing an internal audit function. 3. Evaluate other districts' approaches for developing internal auditing.

10:30 am – 11:30 am ■ **DISCUSSION GROUP**

National Harbor 4

Connecting with the Operations Side: Leading by Building Relationships (DG53)

Presenters: Brianne King, Executive Director, Washington ASBO, Tumwater, WA; Mathew Knott, Director of Business Services, Mead SD, Mead, WA

SFOs: 1 **SFO Domain:** Management of School Facilities

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Leadership Development, Management Techniques

As a school business official do you really know what goes on in the school buildings? Consider supporting learning by taking the time to connect with the operational side of the school house. Learn how building relationships and learning current processes allows you to help create efficiencies and shows staff you care. By being approachable and accessible, you can save the district money by listening to new ideas. By tapping into new ideas, you create buy-in from staff on key projects and support collaboration to resolve issues and identify opportunities for organizational improvements.

Learning Objectives: 1. Discuss how communication helps achieve goals and create efficiencies. 2. Discuss best practices in confronting new challenges to the operational side of schools. 3. Describe how engaging with staff and embracing transparency can save the district money.

10:30 am – 11:30 am ■ **DISCUSSION GROUP**

Chesapeake 6

Hiring the Right People—Another Perspective (DG54)

Presenters: Matthew Lentz, Assistant Superintendent for Business and Operations, Upper Moreland SD, Willow Grove, PA; Stan Wisler, Strategic Account Advisor, Forecast5 Analytics, Naperville, IL

SFOs: 1 **SFO Domain:** Management of Human Resource Functions

CPEs: 1 **Field of Study:** Personal Development

Content Areas: Management Techniques, Leadership Development

Hiring the right individuals is critical to the success of any organization, but doing so can be challenging. Research shows that job success is 15% related to technical skills and 85% related to emotional intelligence (EI). Review the importance of EI and the hiring practices that help you determine whether the applicant has the right EI for the job. Explore nontraditional methods to screen and interview candidates that can help determine fit and discuss new practices that can minimize the risk of hiring the wrong person.

Learning Objectives: 1. Describe the importance of emotional intelligence (EI). 2. Discuss interview techniques to determine an applicant's EI. 3. Outline practices to identify the right person for the job.

11:45 am – 12:30 pm **Peer to Peer Wrap-Up Session (DG55)***National Harbor 3*

Use this additional learning and networking opportunity to reflect on educational content, have further discussions with your colleagues, and connect with a peer accountability partner to ensure follow-through on your top two action items for when you return. Bring your Learning Log filled with notes and ideas from the conference and discuss lessons learned, challenges you face in your district, and/or plans for new programs or changes you intend to make in your district based on knowledge gained during the conference. Session presenters are encouraged to attend to discuss aspects of their session in more depth with attendees and provide further insights.

HELP GUIDE THE FUTURE OF THE ASSOCIATION:

Board Elections

The ASBO International Board of Directors represent not only ASBO International members as they make decisions for the future of the association—they also represent school business officials around the world and the profession as a whole through their guidance on strategies surrounding legislative issues, school business certification, professional development, and more. Your involvement is crucial.

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How to Play:

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- 3** Winners will be announced at the ASBO International Booth on Saturday at 2:20 pm and Sunday at 2:30 pm.

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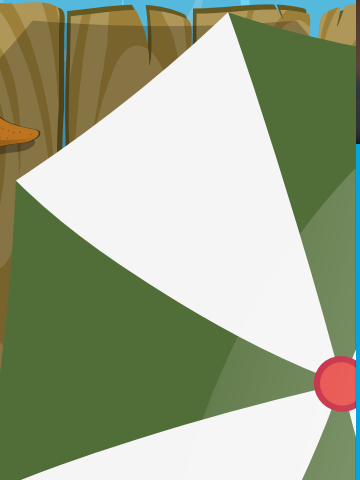


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SUNDAY, OCTOBER 27

■ TABLE 1 – VOYA FINANCIAL®

Take Care of Those Who Matter Most:
Help Your Employees Navigate Special
Needs Planning

Presenter: Doug Peters, Regional Vice President,
Voya Financial®, Woodbridge, NJ

■ TABLE 2 – SECURITY BENEFIT

Matching and Special Pay Plans 403(b)

Presenter: Thomas J. Granger, Second Vice
President/Sales Director, Qualified Plans, Security
Benefit, Topeka, KS

■ TABLE 3 – RICOH USA, INC.

5 Ways K-12 School Districts Can
Improve Their Cybersecurity in 2019

Presenter: John Stewart, Partner Executive – K12
Education and SLG, mindSHIFT, a Ricoh Company,
New York, NY

■ TABLE 4 – OFFICE DEPOT, INC.

Healthy Schools: Is Absenteeism
Straining Your Budget?

Presenter: Sandra Arteaga, Vertical Marketing
Manager, Office Depot, Inc., Springfield, VA

■ TABLE 5 – THE HORACE MANN COMPANIES

Attracting and Retaining Employees by
Helping Reduce Student Loan Debt

Presenters: David Allen, Zone Marketing Officer,
The Horace Mann Companies, Springfield, IL; Jim Yale,
Vice President – Industry Relations, The Horace Mann
Companies, Springfield, IL

■ TABLE 6 – AXA

Top 5 Risk Management Trends in 2019:
How to Avoid the Fiduciary Trap

Presenters: Fred Makonnen, Divisional Vice
President, AXA, Cleveland, OH

■ TABLE 7 – AMERICAN FIDELITY ASSURANCE COMPANY

ACA: What Do I Need to Do Now?

Presenter: Jessica Frier, Attorney, Senior Health
& Welfare Plan Consultant, American Fidelity
Administrative Services, Long Beach, CA

■ TABLE 8 – U.S. RETIREMENT & BENEFITS PARTNERS

Benefits Dashboard: All of Your Benefit
Services in One Place

Presenter: Paul Miller, Managing Partner, U.S.
Employee Benefits Services Group/USRBP, Wayne, PA

■ TABLE 9 – TYLER TECHNOLOGIES, INC.

Is Your District Prepared for the
Cybersecurity Threats Facing Schools
Today?

Presenter: Karen Grosset, Sales Manager, Tyler
Technologies, Inc., Yarmouth, ME

■ TABLE 10 – PUBLIC TRUST ADVISORS, LLC.

The Benefits of Utilizing Local
Government Investment Pools

Presenters: Rich Garay, Regional Director, Public
Trust Advisors, LLC, Hopewell Junction, NY; Danny
King, Sales Manager, Public Trust Advisors, LLC,
Hopewell Junction, NY

■ TABLE 11 – FORECAST5 ANALYTICS, INC.

Automating Monthly Reporting to Gain
Efficiency and Inform Decision Making

Presenter: Allen Albus, Senior Analytics Advisor,
Forecast5 Analytics, Inc., Naperville, IL



■ TABLE 12 – BMO FINANCIAL GROUP

Protect Yourself From Fraud: Helping You Win the Battle

Presenter: Mark Bockelmann, Sales Manager, Treasure & Payment Solutions, BMO Harris Bank, Chicago, IL

■ TABLE 13 – AFLAC

Enhance Your Benefit Offering Through Education, Technology and Tax-advantaged Plans

Presenters: Anthony Cavallaro, Public Sector Sales Manager, Aflac, New York, NY; Kai Hand, Public Sector Sales Manager, Aflac, Dallas, TX

■ TABLE 14 – ARAMARK

Consumer Expectations in K-12: Taking a Proactive Approach to Maintain and Grow Your Food Program

Presenters: Ryan Collings, National Marketing Director K-12, Aramark, Philadelphia, PA; Eddie Noriega, Director of Business Development, Aramark, Philadelphia, PA

■ TABLE 15 – KEENAN & ASSOCIATES

Pharmacy Benefits Savings: An Innovative Physician Centric Solution

Presenters: Gerry Blaum, Senior Account Executive, Keenan Pharmacy, Torrance, CA; Jeffrey Hall, Senior Vice President, Keenan Pharmacy, Torrance, CA

■ TABLE 16 –TREMCO

Save Millions by Never Replacing Another Roof

Presenter: Regina Martino, National Director of Education Market Development & Cooperative Solutions, Tremco Roofing & Building Maintenance, Afton, MN

■ TABLE 17 – KEV GROUP, INC.

The Problem with Cash in Schools

Presenter: Kim Vivian-Downs, Founder, KEV Group, Fort Worth, TX

■ TABLE 18 – RYCOR

Smart Fees and Forms: The Building Blocks to Simplify Your Daily Work

Presenter: Patricia Parsley, Manager, RYCOR, Fredericksburg, VA

■ TABLE 19 – HP, INC.

What Hidden Security Risks Are Impacting Your Copiers and PCs Now

Presenter: Elliot Levine, Director of Education and Distinguished Technologist, HP, Inc., Long Island, NY

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School Business Leader

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Wylie, Texas



John C. Wilson, CPA

Chief School Financial Officer
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FOOD & BEVERAGE OFFERINGS

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BELVEDERE LOBBY BAR

Open Daily

4:00 pm - 12:00 am

Location: Lobby Level

COCOA BEAN

Open Daily

5:00 am - 2:00 pm

Location: Atrium Lower Level

HARBOR MARKETPLACE

Open Daily

6:00 am - 2:00 am

Sunday – Thursday Delivery

6:00 am - 12:00 am

Friday and Saturday Delivery

6:00 am - 2:00am

Location: Atrium Lower Level

NATIONAL PASTIME SPORTS BAR & GRILL

Open Daily

11:00 am - 12:00 am

Location: Atrium Lower Level

OLD HICKORY STEAKHOUSE

Open Daily

5:00 pm - 10:00 pm

Location: Lobby Level

PIENZA

Open Daily

Breakfast 6:30 am - 10:30 am

Location: Atrium Lower Level

POSE ROOFTOP LOUNGE

Open Daily

9:00 pm - 2:00 am

Entrance: Lobby Level

RESTAURANT SPECIALS



Location: Atrium Lower Level

Harbor Full Breakfast Buffet \$21++

Harbor Continental \$15++

Full Lunch Buffet \$21++

Bistro Lunch (Soup, Salad, Sandwich) \$17++

Friday, October 25, 2019

Breakfast: 6:30 am - 10:30 am

Lunch: 11:30 am - 2:00 pm

Saturday, October 26, 2019

Breakfast: 6:30 am - 10:30 am

Lunch: 11:30 am - 2:00 pm

Sunday, October 27, 2019

Breakfast: 6:30 am - 10:30 am

Lunch: 11:30 am - 2:00 pm

2019 EMERGING LEADERS SCHOLARSHIP



Supporting school business officials with five or fewer years of experience, the Emerging Leaders Scholarship recognizes the commitment and involvement of these new professionals and helps them develop into tomorrow's leaders.

Congratulations to the 2019 recipients and thank you to the 2019 mentors.



Jessica Beemer, CPA
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Roanoke County Public
Schools
Roanoke, Virginia



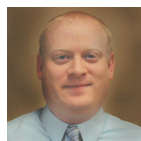
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Director of Finance and
Human Resources
Animas High School
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Bryan (B.J.) Ryan, MBA
Chief Financial Officer
Moore Public Schools
Moore, Oklahoma



Lisa K. Bjorklund, CSBO
Assistant Director of
Business Services
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Jeff Johanning
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Jennifer Snyderman, CFE, PCSBA
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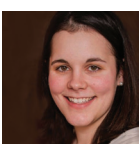
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Thomas Tallis School
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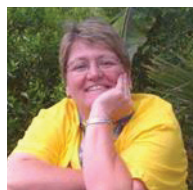
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Director of Business Services and
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LEGAL ASPECTS

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Panzer Chair in Education
University of Dayton
Dayton, Ohio



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Chief Financial and Operations
Officer
Worcester Public Schools
Worcester, Massachusetts



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Director of Financial Services
Loudoun County Public Schools
Ashburn, Virginia



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Transportation/Child Accounting/
Residency Supervisor
Great Valley SD
Malvern, Pennsylvania



PURCHASING AND SUPPLY MANAGEMENT

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Director of Cooperative Purchasing
Services
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RSBA, SFO**
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Program Manager for School Climate
and Discipline
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Dover, Delaware



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Community CSD 181
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SCHOOL FOOD AND NUTRITION MANAGEMENT

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Food Service Supervisor
Great Valley SD
Malvern, Pennsylvania



SUSTAINABILITY

Sara Paul, SFO
Assistant Superintendent
White Bear Area Schools
White Bear Lake, Minnesota

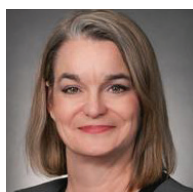
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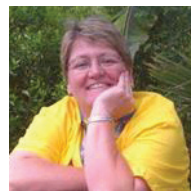
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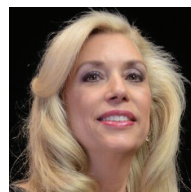


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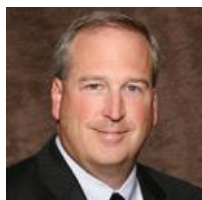
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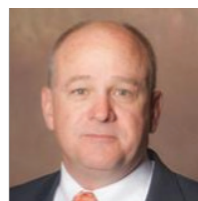
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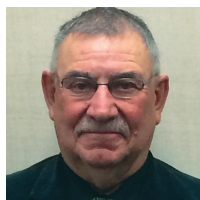
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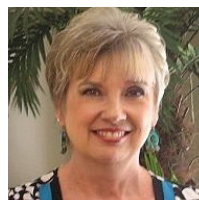
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U.S. Retirement & Benefits Partners (USRBP) is the nation's largest independent Employee Benefits and Retirement Planning firm serving K-12 public schools. From the very beginning, USRBP has taken a strategic approach in providing a comprehensive suite of employee benefits plan consulting, compliance, administration, communication and technology services, as well as customized retirement plan counseling.

Visit us at Booth 521.



www.usrbpartners.com

EXHIBITS MARKETPLACE HIGHLIGHTS

Hours

Saturday:

11:30 am – 2:30 pm

12:30 pm – 1:30 pm • **EXHIBITS MARKETPLACE LUNCH**

Lunch sponsored by Public Trust Advisors, LLC

Sunday:

12:30 pm – 2:45 pm

1:00 pm – 2:00 pm • **EXHIBITS MARKETPLACE LUNCH**

ASBO International Booth

BOOTH 132

Stop by to learn how ASBO International can help you and your district meet your next big goal. You'll also have a chance to catch up on the latest publications, ask us questions, share your story, and learn about upcoming events. Visit daily to turn in your Exhibits Marketplace game raffle tickets for a chance to win prizes! Two \$250 prizes will be given away on Saturday and four \$250 prizes will be given away on Sunday!

2019 Collector's Edition Pins and Pin Trading Zone

BOOTH 132

Join in on the longstanding ASBO tradition of pin trading. Check out a treasure trove of pins to collect and share, including the commemorative edition set found in your registration bag.

2019 Collector's Edition pins are sponsored by AIG Retirement Services.

Exhibits Marketplace Game – Crabwalk

Find your game card in your registration bag and "crabwalk" to participating exhibitor booths to learn about the products and services these valued companies provide. During your one-on-one conversations with exhibitors, collect as many raffle tickets as you can for more chances to win a prize! Exhibitors decide how many raffle tickets you receive, so have your questions about their products and services ready! Prizes will be announced 15 minutes before the hall closes (2:20 pm on Saturday and 2:30 pm on Sunday). You must be present in the Exhibits Marketplace to win a prize.

ASBO Bookstore

BOOTH 132

Explore all the print resources ASBO International has to offer and take advantage of the conference discount.

Professional Headshots

BOOTH 501

Refresh your online image with a complimentary professional headshot on Saturday and receive your photos via email after the conference.

Sponsored by Virco, Inc.

Relaxation Station

BOOTH 623

Regroup and refocus with a complimentary professional massage at the Relaxation Station. Visit Booth 508 to pick up your ticket.

Sponsored by Aramark K-12 Education



EXHIBITS MARKETPLACE MAP

EXHIBITS MARKETPLACE MAP

ASBO International 132		239 338 237 336 Office Depot 233 334 332	339 438 337 436 335 432 333	439 538 437 536 433 532	539 638 537 636 535 634 533 632	639 738 637 736 635 734 633 732	739 838 737 836 735 834 733 832	839 837
126 124 122 120	125 226 123 222 121 220	Lounge 223	327 426 Voya Financial 323 422 321 420	427 526 425 524 423 522 421 520	527 626 525 622 523 622 USRBP 521 620	Relaxation Station 623	727 826 725 824 723 822 721 820	827 825
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104 102 100	105 204 103 200 101	205 304 203 300 201	305 404 303 400 301	VIRCO INC 401	Headshots 501	605 704 Ricoch USA, Inc. 601 702 700	705 804 703 802 Aflac 701 800	805 803 801



EXHIBITOR DIRECTORY

ABMM Financial

BOOTH: 615

ABMM is an independent financial services organization built upon a foundation of more than 90 years of experience. We specialize in working with public schools, nonprofits, and governmental entities to provide their employees with a variety of flexible, forward-thinking retirement strategies that fit each individual's need.

www.abmmfinancial.com

Advancement Courses, a Wiley brand

BOOTH: 311

Since 1988, Advancement Courses has been a leader in professional development, providing customized solutions to schools and expertly crafted, classroom-applicable courses to thousands of teachers across the country.

www.advancementcourses.com

Aflac

BOOTH: 701

Aflac can help solve workforce challenges faced by today's public sector with underwriting offers, benefits education/enrollment subsidies, tax-advantaged plans, and a robust roster of supplemental policies. We adapt to your technological needs by leveraging our proprietary platform or implemented partner integrations to help ease administration.

www.aflac.com/publicsector



AIG Retirement Services

BOOTH: 509

AIG Retirement Services provides customized retirement plan solutions that are tailored to your school district's needs. We offer your employees a personalized approach to retirement planning, providing solutions with a flexible mix of services, technology, and support.

www.aig.com/RetirementServices



AkitaBox

BOOTH: 333

Data is a powerful tool. At AkitaBox, we want to simplify the way you manage your facility's data by offering data collection services, location-based asset mapping, and work order management. Learn more about simplified facility management.

home.akitabox.com

Allovue

BOOTH: 525

Allovue is a K-12 education finance technology company that empowers educators to strategically and equitably allocate resources to best support the needs of students. Our signature software platform, Balance, helps educators budget, manage, and evaluate spending. Allovue also supports district financial strategy through research, training, and equity analysis.

<https://allovue.com>

Amazon Business

BOOTH: 532

Amazon Business combines the selection, convenience, and value customers have come to know and love from Amazon, with new features and unique benefits tailored to the needs of businesses. Amazon Business provides easy access to hundreds of millions of products and a variety of benefits, including Business Prime.

www.amazonbusiness.com/education

American College of Education

BOOTH: 313

American College of Education is a 100% online institution, offering advanced degrees at an affordable cost. Accredited by the HLC, ACE is committed to providing rigorous programs for educators to elevate professional practices and be a change agent in the educational community.

www.ace.edu

American Fidelity Assurance Company

BOOTH: 222

American Fidelity provides employer cost-savings solutions and supplemental insurance benefits to the education industry. We educate, enroll, and support the development of robust, competitive insurance packages while ensuring seamless administration and employee satisfaction. Our professional account managers deliver year-round support and help employers overcome benefit administrative challenges.

americanfidelity.com/asbo



AMETEK Electronic Systems Protection

BOOTH: 332

We share important industry information and best value strategies that will help you strengthen specification language in your copier, mailing, and AV technology solicitations. This helps optimize equipment performance so that end-users are more productive and less frustrated, while buyers save time, control costs, and have greater peace of mind.

ametekesp.com

ARAMARK K-12 Education

BOOTH: 508

Our team of chefs, dietitians, and culinary professionals develop innovative recipes that enable districts to meet USDA requirements and energize students to increase their participation in K-12 dining programs. Our suite of solutions is flexible to fit any budget and is customized to meet the unique needs of your district.

www.aramark.com/schools



Armstrong Flooring

BOOTH: 820

As North America's largest producer of resilient flooring products, our mission is to build a trusted foundation and inspire beauty wherever your life happens. With eight manufacturing facilities in the U.S., China, and Australia, we are dedicated to providing the highest levels of innovation, design, quality, and service.

www.armstrongflooring.com/commercial/en-us

Association of School Business Officials International

BOOTH: 132

Founded in 1910, ASBO International is an education association that supports school business professionals who are passionate about quality education. We are committed to providing programs and services that promote the highest standards of school business management, professional growth, and the effective use of educational resources.

asbointl.org

Asset Services, Inc.

BOOTH: 721

"On-site" Physical Fixed Asset Inventory. Asset Services is a leading provider of fixed asset inventory solutions for school districts nationwide. Services include wall-to-wall physical inventories of fixed assets, physical audits of existing assets, and assigning replacement costs for each item inventoried.

www.assetservices.com

Association of Educational Purchasing Agencies (AEPA)

BOOTH: 404

AEPA is a 28-state national cooperative of education purchasing professionals representing lead agencies in their respective states. Each contract is available statewide and is facilitated by one cooperative member agency. With shrinking budgets, school districts and public agencies are looking to AEPA more than ever to meet their purchasing requirements.

www.aepa.org

Avigilon USA Corporation

BOOTH: 803

Avigilon, a Motorola Solutions company, designs, develops, and manufactures solutions in video analytics, cloud, security cameras, video management software and hardware, and access control. Avigilon is an industry leader and, together with Motorola Solutions, provides integrated solutions for video security, access control, and critical communications.

www.avigilon.com

AXA

BOOTH: 400

At AXA, we know educators are driven by passion and have unique financial needs. That's why we created a strategy tailor-made for education professionals. As the #1 provider of 403(b) plans in K-12 schools, we can help teachers supplement their pension by turning their salary into a more comfortable retirement.

axa.com



Axis Communications

BOOTH: 103

Axis enables a smarter and safer world by creating network solutions that provide insights for improving security and new ways of doing business. As the industry leader in network video, Axis offers products and services for video surveillance and analytics, access control, and audio systems.

www.axis.com

BMO

BOOTH: 409

BMO is a full-service bank offering a full suite of financial products tailored to local governments and public school districts. Whether it's treasury management solutions to make your payments more efficient, maximizing your resources, or our corporate card programs, we're focused on one thing: our clients' financial success.

bmoharris.com/governments



BoardDocs

BOOTH: 632

BoardDocs is a part of Diligent, the pioneer in modern governance. We empower leaders to turn governance into an advantage through unparalleled insights and highly secure, collaborative paperless meeting software. Our technology streamlines the day-to-day work of board management and supports collaboration and information sharing throughout the district and larger community.

www.BoardDocs.com

BuyBoard Purchasing Cooperative

BOOTH: 704

The BuyBoard provides schools with an opportunity to save time and money while purchasing the products, equipment, and services they use every day. Schools and other governmental entities can take advantage of the volume discounts and pricing achieved through the cooperative's competitive procurement process.

www.buyboard.com

Bytecurve LLC

BOOTH: 437

Bytecurve offers a fully integrated transportation operating platform that allows scheduling, dispatch, and payroll modules with robust routing and GPS integration. The platform allows you to manage daily operations, improve route efficiency and on-time performance, and reduce costs.

www.bytecurve.com

Chartwells K12

BOOTH: 426

At Chartwells K12, feeding children is a privilege and a responsibility. As an organization built on decades of food and education experience, we pride ourselves on cooking and serving every student great-tasting, nutritious meals and create custom dining programs in each of our 4,000 schools (large public, small charter, private).

chartwellsK12.com

Chetu Inc.

BOOTH: 539

Chetu is a U.S.-based custom software solutions provider for the eLearning and digital education industries, including the development of digital education applications, course creation systems, student enrollment/sign-up platforms, LMS development with real-time data analysis, plus mLearning, cloud-based, on-premises platforms, and more.

www.chetu.com/e-learning.php

ClassWallet

BOOTH: 204

Eliminate teacher receipts, paperwork, and audit and accounting challenges related to the smaller budget item purchases. Free up administrators' time to focus on the most important fiduciary responsibilities. ClassWallet offers an end-to-end solution for allocating, tracking, and reconciling funding and expenses in a cashless and paperless environment.

www.classwallet.com

CliftonLarsonAllen

BOOTH: 211

CLA is a professional services firm providing audit, accounting, tax, consulting, and outsourcing services to more than 2,200 governments and governmental entities nationwide. As dedicated industry professionals, we provide solutions to your compliance, regulatory, and operational needs whether it includes audits, information technology security assessments, investment management, or outsourced operations.

CLAconnect.com

CommunityPass

BOOTH: 810

CommunityPass Software: Your Complete Online Recreation Management Solution. CommunityPass is a leading provider of affordable recreation software for managing online registration, payment, memberships, and facilities. Our easy-to-use, cloud-based software simplifies registration for the public, streamlines administrative tasks and operations, and helps drive revenue for parks and recreation organizations.

www.communitypass.net

Crowe LLP

BOOTH: 613

Crowe is a public accounting, consulting, and technology firm with offices around the world. Connecting deep industry and specialized knowledge with innovative technology, our dedicated professionals create value for our clients with integrity and objectivity.

www.crowe.com

Davis Demographics

BOOTH: 415

Davis Demographics is the nation's premier K-12 demographer, having served hundreds of school districts across the U.S. over the past 25 years with comprehensive student forecasts, redistricting tools and services, and detailed demographic studies. Our SchoolSite GIS planning software is currently licensed by school districts in 33 states. Plan With Confidence!

www.DavisDemographics.com

Diamond Assets

BOOTH: 315

Diamond Assets is a trusted Apple hardware trade-up company that pays organizations for used devices, providing funds to improve the sustainability of technology investments. We provide fast pick-up; detailed inventory and evaluation of devices; certified, secure data erasure; a thorough reconciliation review; and prompt payment.

www.diamond-assets.com

Digital Designs, Inc.

BOOTH: 303

With more than 30 years of expertise, Digital Designs is a leader in document management, accounts payable automation, and virtual payments to vendors. We offer payments to vendors with virtual cards that generate revenue back to your school district at no cost! Create an ongoing revenue stream in your district.

www.ddilink.com

District Administration Media**BOOTH: 201**

District Administration provides K-12 leaders with critical news and information for school district management through its monthly magazine, website, e-newsletters, and the District Administration Leadership Institute Superintendent Summits.

www.districtadministration.com

Dude Solutions**BOOTH: 535**

Dude Solutions combines innovative, user-friendly technology with the world's smartest operations engine, empowering education operations leaders to transform the most important places in our lives. Today, more than 7,000 educational institutions use our award-winning software to manage maintenance, assets, energy, safety, IT, events, and more.

www.dudesolutions.com

Durham School Services**BOOTH: 200**

Durham School Services, Petermann Ltd., and Stock Transportation are premiere providers of school transportation services. Combined, we operate more than 19,500 school buses, employ over 25,000 people, and serve over 450 school districts in 33 states and 3 provinces. Getting students to school safely, on time, and ready to learn®.

www.durhamschoolservices.com

E&I Cooperative Services**BOOTH: 126**

With nearly 5,000 institutional members, E&I Cooperative Services is the member-owned nonprofit sourcing cooperative focused on education. Established in 1934, E&I provides members with access to a diverse portfolio of competitively solicited contracts and electronic procurement solutions to help reduce costs, save time, and optimize supply chain efficiencies.

www.eandi.org/k-12

Education Logistics, Inc.**BOOTH: 304**

Education Logistics (Edulog) is the largest and most innovative supplier of software and services for K-12 transportation and GIS management. We provide affordable and effective solutions for GPS, bus routing, driver/passenger management, parent notification, and boundary planning.

www.edulog.com

EDUStaff, LLC**BOOTH: 432**

EDUStaff is an educational staffing entity specializing in creating HR efficiencies for our partnering school districts.

www.edustaff.org

EduTrak Software**BOOTH: 732**

EduTrak offers payment solutions for schools including nutrition management with F/R application and management, athletics registration with payment and eligibility tracking, fee generation module, tuition management, ticketing, and more. We give your parents one place to pay for everything, with best-in-class apps for everything they pay for!

www.edutrak.com

Elior North America**BOOTH: 308**

With a focus on culinary innovation and exemplary service, Elior North America is committed to making a positive difference in peoples' lives every day. Through our family of companies, we offer food service management and catering to five industry segments: healthcare (including senior nutrition), B&I, education, corrections, and cultural institutions,

www.elior-na.com

Energy Products Distribution**BOOTH: 209**

Energy Products Distribution (EPD) is the exclusive 3M-authorized distributor of 3M window film products for the following states: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Maryland, the District of Columbia, Virginia, West Virginia, Ohio, Indiana, Kentucky, North Carolina, and South Carolina.

www.epdwindowfilm.com

Envision Payment Solutions, Inc.**BOOTH: 638**

More than 6,000 ASBO members know Envision for innovative processes that remove returned payments from their schools and guarantee the funds. It is just one of our solutions; we also allow parents to make payments any time, any where, and on any device (smartphones, text messages, Facebook Messenger & Amazon Alexa).

www.envisionpayments.com

EXHIBITOR DIRECTORY

EqualLevel, Inc.

BOOTH: 526

EqualLevel provides a modular Procurement Marketplace solution to the public sector. The marketplace delivers a Travelocity-like shopping experience, to compare prices across your approved cooperative and direct bid contracts. Users can convert carts to requisitions for approval, and checkout in the marketplace, or pass carts directly to the ERP.

www.equallevel.com

E-RATE ONLINE, LLC

BOOTH: 512

E-RATE ONLINE specializes in all aspects of the E-Rate program. Our goal is to give clients peace of mind that they are meeting deadlines, maintaining program compliance, and maximizing their E-Rate dollars. Let us take the burden off your hands!

www.erateportal.com

ESS

BOOTH: 522

ESS is a leading educational management firm specializing in full-service, cost-effective management of substitute teachers, paraprofessionals, and support personnel for school districts.

ESS.com

F. H. Black & Company Incorporated

BOOTH: 110

For 25 years, F. H. Black & Company Inc., has worked with finance departments in government, education, and corporations across North America to crush waste and eliminate inefficiency. Our finance departments do more with less, do it better than it was done before, and do it in less time.

www.fhblackinc.com

FACILITY ENGINEERING ASSOCIATES, PC

BOOTH: 527

FEA supports business officers by delivering consulting services on school operations. We specialize in the built environment by delivering physical security consulting services, school facility management technology planning and implementation, operations and maintenance planning, capital and operational budgeting and forecasting, and facility condition assessments.

www.feapc.com

Fairway Disclosure (a Phoenix Advisors, LLC affiliate)

BOOTH: 414

Fairway Disclosure powers continuing disclosure for nearly 700 issuers through its affiliate Phoenix Advisors, who has provided the service since 2011. Compliance is of paramount importance for market access. Fairway Disclosure eases the burden, simplifies the process, and improves issuers' presentation of their compliance.

www.fairwaydisclosure.com

First Student

BOOTH: 801

At First Student, our mission is to become the partner of choice for transportation and logistics in the K-12 industry. We leverage our scale to provide the safest, most cost effective, and most reliable way to get to and from school, giving our customers peace of mind.

Firststudentinc.com

Forecast5 Analytics, Inc.

BOOTH: 515

Forecast5™ Analytics provides decision support systems for school leaders. Our analytics technology helps identify strategic and financial opportunities with visual output in the areas of financial performance, compensation, enrollment, student performance, and ESSA reporting solutions. Over 1,800 school districts across the country are using Forecast5 tools to maximize data insights.

www.forecast5analytics.com



Frontline Education

BOOTH: 614

Frontline Education is an integrated insights partner serving more than 12,000 educational organizations and millions of educators in their efforts to develop the next generation of learners.

www.frontlineeducation.com

Gallagher

BOOTH: 312

Gallagher's National Public Sector Practice focuses exclusively on municipalities and school districts. Our client-centered CORE360™ and Better WorksSM approaches provide powerful insights and tools that evaluate risk. By looking at your organization in a holistic way, we can deliver data-driven solutions that will minimize your total cost of risk.

www.ajg.com

The Garland Company, Inc.

BOOTH: 626

The Garland Co., Inc., is a leader of quality, high-performance roofing and building maintenance systems for the commercial, industrial, and institutional markets.

www.garlandco.com

Gordian

BOOTH: 520

Gordian is North America's leading provider of construction cost data, software, and services for all phases of the construction lifecycle. From planning to design, procurement, construction, and operations, Gordian delivers groundbreaking solutions to contractors, architects, engineers, educational institution stakeholders, facility owners, and managers in nearly every industry.

www.gordian.com

Government Finance Officers Association

BOOTH: 220

GFOA is a nonprofit organization dedicated to improving financial management in governments, including school districts. GFOA provides guidance on accounting, budgeting, debt, pensions, and investments. The Alliance for Excellence in School Budgeting and Smarter School Spending were created by GFOA to promote the use of best practices in school budgeting.

www.gfoa.org

Harris School Solutions

BOOTH: 725

Harris School Solutions has been working with business officials and other K-12 financial decision makers for the past 20+ years to provide the cutting-edge financial management software (payroll, finance, automated time entry, HR) in combination with training and proactive support to more than 4,000 schools and districts nationwide.

www.harrisschoolsolutions.com

Heinfeld, Meech & Co., P.C.

BOOTH: 703

As specialists in the school district industry, HeinfeldMeech can develop or review your CAFR or Meritorious Budget Award and can provide innovative solutions for almost any school finance issue. We are the technical advisors and reviewers for ASBO's Certificate of Excellence in Financial Reporting and the Meritorious Budget Award.

heinfeldmeech.com

The Horace Mann Companies

BOOTH: 300

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

www.horacemann.com



Horizon Software International

BOOTH: 310

MyPaymentsPlus, by Horizon Software, allows parents to pay for school fees, activities, and exams online. Parents have the convenience of knowing what's available, while districts have an easy way to manage and reconcile all school payments, leading to less cash handling, reduced labor costs, and more revenue for the district.

www.horizonsoftware.com

HP Inc.

BOOTH: 813

HP, Inc., creates new possibilities for technology to have a meaningful impact on people, businesses, governments, and society. With the broadest technology portfolio spanning printing, personal systems, software, services, and IT infrastructure, HP delivers solutions for customers' most complex challenges in every region of the world.

www.hp.com

ICMA-RC

BOOTH: 713

Founded as a nonprofit independent financial services organization in 1972 dedicated to helping public sector employees reach their retirement security goals, we provide products and services to more than 9,000 plans and over 1.4 million participant accounts.

www.icmarc.org

InTouch Receipting

BOOTH: 433

InTouch Receipting has been helping districts to streamline, cut costs, and save time in cash receipting and fee management operations since 2003 by building point of sale fully integrated to online payments. The system is complete with student activity accounting, gates, concessions, forms, with GL integration and student, asset management, and library integration. Greatly increase internal financial controls!

www.intouchreceipting.com

EXHIBITOR DIRECTORY

IPX Platform

BOOTH: 215

IPX is helping plan sponsors and administrators take control of their 403(b) plan. Bringing multiple providers to one platform, IPX gives your employees access to best-in-class products and services, while ensuring quality, compliance, and transparency. IPX provides a platform where all administrative tasks are accomplished in a centralized, secure environment.

www.ipxplatform.com

Johnson Controls

BOOTH: 422

Johnson Controls Building Technologies & Solutions is making schools safer, smarter, and more sustainable—one building at a time. Our technology portfolio integrates every aspect of a building—whether security systems, energy management, fire protection, or HVACR—to ensure that students have the optimal environment in which to achieve.

www.johnsoncontrols.com

Keenan & Associates

BOOTH: 122

Keenan Pharmacy Services has been providing innovative solutions to help school districts save money on their prescription drug employee benefit programs since 2008. Our pharmacy program coalition pricing, rebates, and clinical management has proven to save schools 20% or more on their prescription drug costs.

www.keenan.com

Kelly Educational Staffing

BOOTH: 213

When it comes to solving our nation's teacher shortage crisis, Kelly Educational Staffing® goes to work, every day, for school districts who trust us to provide continuity of instruction when teachers are needed. Our substitutes educate students in 3 million classrooms across the country each year.

www.kellyeducationalstaffing.com

KEV Group, Inc.

BOOTH: 714

KEV Group is the industry leader of school cash management software in North America. Ours is the only solution that fully integrates school-level accounting, online payments, fee management, and digital forms. KEV solutions provide transparency, accountability, internal controls, and reporting capabilities district business officials require.

www.kevgroup.com

Key Benefit Concepts, LLC

BOOTH: 305

Key Benefit Concepts, LLC (KBC) is an actuarial and employee benefits consulting firm. Since 1992, our mission statement is grounded in delivery of unbiased counsel to employers in the evaluation, design, and implementation of employee benefit programs. We specialize in actuarial services for active and post-employment benefit plans.

www.keybenefits.com

Keystone Purchasing Network

BOOTH: 413

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

www.theKPN.org

KI

BOOTH: 533

KI manufactures innovative furniture solutions for today's educational environments. Get cutting-edge innovation, great design, and the most comprehensive furniture offering from KI. Smart—that's why more people imitate us. Proven—that's why more schools choose KI than any other. KI—your one source for educational solutions.

www.ki.com

KMC Controls

BOOTH: 538

KMC Controls is an American manufacturer of Internet of Things (IoT) and building automation solutions. From secure hardware to smart software, KMC is committed to providing innovative and intuitive solutions from responsive and supportive people. KMC's solutions help increase operating efficiency, optimize energy usage, maximize comfort, and improve safety.

www.kmccontrols.com

Kronos

BOOTH: 814

Every K-12 employee plays an important role in student achievement. Our innovative Kronos for K-12 Education solutions are designed to create time and attendance efficiencies that let you spend less time on administrative processes and more time on academics and programs.

www.kronos.com/industry-solutions/k-12

Lincoln Investment

BOOTH: 537

Lincoln Investment is a full-service broker/dealer. We have been in business since 1968 and work with over 364,000 investors with more than \$36 billion in assets. We are a leading provider of employee retirement plans for over 4,000 employers nationwide.

www.lincolninvestment.com

LINQ**BOOTH: 100**

LINQ is home to the first-ever Education Resource Management Platform (ERM). ERM starts by connecting all our products into one portal with a single sign-on solution. This portal then connects all your staff and departments and finishes by connecting your school to your students, parents, and community.

www.linq.com

MidAmerica Administrative & Retirement Solutions**BOOTH: 102**

MidAmerica makes benefits funding simple for the public sector. Since 1995, we have administered retirement and healthcare plans for public sector employers across the nation. Our products and services include HRAs, FSAs, FICA Alternative Plans, Special Pay Plans, and Trusts.

www.myMidAmerica.com

Municibid**BOOTH: 123**

Online auctions for government and school surplus.

Municibid.com

MyBudgetFile, Inc.**BOOTH: 609**

MyBudgetFile offers cloud software that connects the hundreds of individual department and school budgets into a single district budget. From school principals up to district superintendents, MyBudgetFile makes it easy for everyone to contribute their expertise to the school district budget.

www.mybudgetfile.com

MySchoolBucks—Heartland School Solutions**BOOTH: 700**

MySchoolBucks provides districts and parents a single, secure place to organize and manage all school-related fees and purchases. MySchoolBucks is brought to you by Heartland, the leading provider of secure online and on-campus payment solutions. Our products and services ease administrative responsibilities, increase revenue, minimize risk, and improve accountability.

www.heartlandpaymentsystems.com/school-solutions

National Insurance Services**BOOTH: 205**

National Insurance Services provides employee benefits solutions specifically for governmental organizations. Our solutions help maintain a healthy/productive work environment, give employees peace of mind, make good use of taxpayer funds, and attract/retain a quality workforce.

www.NISBenefits.com

National School Boards Association (NSBA)**BOOTH: 237**

NSBA advocates for equity and excellence in public education through school board leadership, working with and through our state associations. We offer services and information to school leaders to support optimization of educational resources, with the goal of all children having equal access to an education that maximizes their potential.

www.nsba.org

National Tax-Deferred Savings Association (NTSA)**BOOTH: 723**

The National Tax-Deferred Savings Association (NTSA) is the nation's only independent, nonprofit association dedicated to the 403(b) and 457(b) marketplace. NTSA's mission is to provide high-quality professional education, technical support, and networking forums for all professionals in the 403(b) and 457(b) marketplace. NTSA is part of the American Retirement Association.

ntsa-net.org

NOVAtime Technology, Inc.**BOOTH: 605**

With over 18,000 customers, NOVAtime is the leading workforce management/time and attendance solution provider selected by many of the best-managed companies in the world. Founded in 1999, NOVAtime is known for its leading-edge software and hardware technology and integrating workforce management solutions with human resources and payroll systems.

www.novatime.com

The Nutrition Group**BOOTH: 612**

Providing fresh, nutritious, and innovative food service management solutions for public schools.

www.thenutritiongroup.biz

Office Depot, Inc.**BOOTH: 233**

Office Depot, Inc., is a leading global provider of business services, supplies, and technology solutions for every institution, facility, or organization through its fully integrated omni-channel platform of 1,300+ stores, world-class ecommerce sites, mobile app, dedicated sales professionals, and technicians.

www.officedepot.com



EXHIBITOR DIRECTORY

OfficeScope

BOOTH: 711

The paperless central office! Is your central office still dealing with paper records? Does it take too much time to find archived documents? Are you running out of space to store paper? For 20 years we've helped offices increase efficiency and reduce office expenses with automated filing and retrieval.

www.OfficeScopeK12.com

OMNIA Partners

BOOTH: 620

National IPA is redefining the future of cooperative purchasing. The cooperative purchasing organization is dedicated to serving public agencies and educational institutions nationwide. All cooperative agreements have been competitively solicited and publicly awarded by a public agency/governmental entity.

www.omniapartners.com

Online School Management Systems, Inc.

BOOTH: 705

Online School Management Systems (OSMS) is a fully integrated, modular cloud software suite for K-12 student receiving online and in-person. Accept cash, check and credit card payments from students, parents and community members anywhere, anytime such as: school activities, cafeteria funds, student debts, before and after care, fundraisers, tickets, etc.

osmsinc.com

Parchment

BOOTH: 802

Manage all of your incoming record requests like transcripts, letters of recommendation, immunization reports, etc., with Parchment's complete record management system. Students, alumni, parents, administrators, and third parties can order and track any record request from beginning to end. Simple tools for K-12 make managing records a cinch.

www.parchment.com

PaySchools

BOOTH: 710

PaySchools is a software company exclusively serving the K-12 market. We enhance school districts' ability to collect, track, and manage payments. We offer a secure, web-based solution that allows schools and school districts to easily manage funds and fee collection online for food services, activities, fundraisers, etc.

www.payschools.com

PenServ Plan Services, Inc.

BOOTH: 514

PenServ Plan Services, Inc., is a full-service independent and certified women-owned retirement and benefits third-party administrator and consultant. PenServ has been providing compliance, record keeping, technical training, and administration services to employers nationally for over 25 years.

www.penserv.com

PEPPM

BOOTH: 411

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

www.PEPPM.org

PMA Financial Network

BOOTH: 513

The PMA companies work to provide integrated financial solutions to public entities and other institutional investors, including competitive investment options, cash flow analysis, bond proceeds management, debt issuance, financial advisory, and investment advisory services.

www.pmanetwork.com

Pro Team Foodservice Advisors / Visualz

BOOTH: 412

Consulting services offer "fresh eye" reviews, menu and cafeteria makeovers, and KPI evaluations to school districts. Our distinctive partners include transformation specialists Visualz, a division of Vomela. Stop to see samples of cafeteria makeovers designed to increase meal participation and learn how we customize our services to your unique needs.

www.proteamadvisors.com

PSST

BOOTH: 226

Empowering K-12 systems and businesses by seamlessly connecting data sources and software.

www.psst.com

The Public Group LLC

BOOTH: 436

We are a software company that helps school districts across the country sell their surplus equipment on our website, Public Surplus. We also do e-procurement for bid management for school districts with our Public Purchase system.

www.publicsurplus.com

Public Trust Advisors, LLC

BOOTH: 608

Public Trust Advisors, LLC (Public Trust) provides investment management services for the public sector including the management of local government investment pools and separately managed accounts. Public Trust offers public sector clients high-quality, cost-efficient investment management services that rely on market experience and proven processes.

www.publictrustadvisors.com



PublicSchoolWORKS**BOOTH: 715**

PublicSchoolWORKS safety compliance management solutions help schools meet ever-changing compliance requirements, improve staff and student safety, and cut costs associated with risk. PublicSchoolWORKS is the only complete K-12 safety compliance management program created by and for schools and is proud to provide districts with award-winning technology and customer support.

www.publicschoolworks.com

Questica Budget**BOOTH: 420**

Questica's end-to-end cloud-based multi-user school budgeting and performance management software simplifies assembling, tracking, analyzing, and reporting of operating, salary, and capital budgets. Questica integrates with financial/HR/SIS systems. Perform fund gap analysis, FTE, budget vs. actual reports, build revenue/activity-based models, and what-if scenarios. Questica is a GTY Technology company (NASDAQ: GTYH).

www.questica.com

ReadySub**BOOTH: 812**

ReadySub is a state-of-the-art employee absence management and substitute placement system. Employees can post absences, administrators can approve them, and substitutes can accept jobs via text message, email, phone call, and mobile app. ReadySub also offers detailed reporting and integrations with many other systems.

www.readysub.com

Records Consultants Inc.**BOOTH: 727**

Records Consultants, Inc., are experts in turnkey services for records retention programs, document imaging solutions, and fixed asset inventory management. We have been in business for over a quarter of a century and serve a wide range of clients.

www.rcitech.com

RevTrak, a Vanco company**BOOTH: 105**

RevTrak, a Vanco company, helps schools reduce administrative burdens by using electronic payments to minimize the amount of cash and checks they handle. All student payments can be collected online with RevTrak's Web Store built to fit your needs. With RevTrak, staff can reconcile payments in 10 minutes or less.

revtrak.com

Ricoh USA, Inc.**BOOTH: 601**

Ricoh helps improve school districts by providing innovative technologies and services, enabling educators, administrators, and students to work smarter.

www.ricoh-usa.com

**RISO, Inc.****BOOTH: 101**

RISO manufactures high-speed digital duplicators and full-color cut-sheet inkjet printers. The company creates unique new technologies through an approach that emphasizes productivity, cost containment, and versatility, delivering compact, reliable, high-volume duplicating and printing machines and accessories.

us.riso.com

RYCOR**BOOTH: 203**

RYCOR delivers smart business administration solutions for K-12 districts. Our suite of award-winning components includes school payments, fee management, and advanced forms. Drop by our booth to speak with one of our experts and learn how we can help your school district increase productivity, and security, and collection revenues.

www.rycor.net

SAP Concur**BOOTH: 121**

SAP Concur is the world's leading provider of integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. With SAP Concur, a top-rated app guides employees through every trip, charges are populated into expense reports, and invoice approvals are automated.

concur.com

School Health Corporation**BOOTH: 335**

We are a national, full-service provider of health supplies and services. We support health professionals in educational settings from pre-school to college. Our offering includes health supplies, sports medicine equipment, physical education, special needs aids, and early childhood products.

www.schoolhealth.com

Script**BOOTH: 524**

Script digitizes and automates processes, forms, approvals, and payments for school districts. Script works specifically with departments, central offices, and even the schools within districts. Visit our booth or visit our website to find out how your schools can teach more and manage less today!

www.scriptapp.com

EXHIBITOR DIRECTORY

Security Benefit

BOOTH: 622



Security Benefit is a 126-year-old financial services company with headquarters in Topeka, Kansas. We provide retirement planning services for educational employees "To and Through Retirement."

www.securitybenefit.com

Seon

BOOTH: 321

Safe Fleet is a group of leading safety and security brands including Seon, Transpec, Pretoria, and Specialty Manufacturing, trusted to keep students safe inside and outside the bus. Tomorrow, we're driving safety forward with innovations to predict and prevent accidents, creating better drivers, smarter vehicles, and safer fleets.

www.seon.com

Sharp Electronics Corporation

BOOTH: 708

Sharp MFPs, AQUOS BOARD® interactive and professional displays are available on the Sourcewell contract. These innovative products offer workflow solutions for cities, counties, educational institutions, and nonprofits. Sharp can help you streamline document processing and enhance collaboration while helping you avoid the bidding process and take advantage of contract savings.

www.sharppusa.com/documents

SIEMENS

BOOTH: 327

Siemens Guaranteed Performance-Based Solutions allow facility and capital improvements to be made and funded through the energy savings of your facilities. Our professionals formulate, design, and implement solutions that can reduce your operating expenses while providing new, energy-efficient equipment.

www.siemens.com

Skyward, Inc.

BOOTH: 511

Skyward's SIS and ERP solutions are used by more than 2,000 public sector organizations worldwide, from small entities to statewide implementations supporting millions of stakeholders. Skyward has been helping school districts and municipalities work smarter, engage more, and empower everyone since 1980.

www.skyward.com

Sodexo

BOOTH: 301

Sodexo, leader of quality of daily life solutions, helps schools improve the learning environment by focusing on student well-being and achievement. From nutritious school meals to clean classrooms to safe playgrounds and more, Sodexo enhances every student's ability to learn and grow.

www.sodexoUSA.com

Sourcewell, formerly NJPA

BOOTH: 423

Sourcewell is a self-supporting government organization, partnering with education, government, and nonprofits to boost student and community success. We offer training and shared services to our central Minnesota members and cooperative purchasing solutions throughout North America. We are driven by service and the ability to strategically reinvest in member communities.

www.sourcewell-mn.gov

Special-Lite

BOOTH: 124

Special-Lite produces complete entrance systems and interior architectural products for high-cycle usage and lasting value. A made-to-order approach and excellent customer service have been our legacy. We have a highly engineered approach to delivering safe and secure entrance systems and strive to innovate beyond convention.

special-lite.com

SSC Services for Education

BOOTH: 427

With decades of industry experience, SSC partners with educational institutions nationwide to provide quality integrated facilities programs including custodial, maintenance, and grounds services. As a trusted partner, we are committed to our customers' goals, our employees' well-being, and helping you focus on your core objective: educating our future.

sscserv.com

Staples

BOOTH: 125

A well-rounded education isn't just about homework and exams, and a comprehensive supply solution is about more than just paper and pencils. At Staples Business Advantage®, you'll find thousands of products that make it easy to stock your entire school as well as meeting your STEAM objectives.

www.staples.com

Steelcase Inc.

BOOTH: 421

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

www.steelcase.com

Tarkett

BOOTH: 633

Tarkett provides innovative flooring and surface solutions that don't just perform, they inspire. Our Tarkett Solution SPECtrum™ offers the most extensive inventory of Cradle to Cradle® certified products, from resilient to soft surface, and from products to adhesives to maintenance. Great spaces. One surface at a time.

www.tarkettna.com

TimeClock Plus

BOOTH: 111

Celebrating more than 30 years, TimeClock Plus provides premier K-12 solutions helping over 3,000 school districts integrate an automated workforce management strategy. With our scalable software solution, v7, TimeClock Plus is designed to help educators and teachers ensure compliance, mitigate audit risks, and create a streamlined tracking system in real-time.

www.timeclockplus.com

TIPS—The Interlocal Purchasing System

BOOTH: 309

TIPS is a leading national purchasing cooperative offering members access to competitively priced purchasing contracts that save time and money by streamlining the process and leveraging the purchasing power of our 4,600 member agencies. "Purchasing Made Personal"

www.tips-usa.com

TITAN School Solutions, Inc.

BOOTH: 634

TITAN School Solutions is making schools stronger by bringing state-of-the-art efficiencies and real-time transparency to school foodservice. TITAN offers an entirely Software as a Service (SaaS) cloud-based platform, from general ledger to point of service. There is no software to install, maintain, or upgrade—ever.

www.titank12.com

Transpar Group of Companies

BOOTH: 702

The TransPar Group of Companies supports school districts in their efforts to make student transportation more efficient and effective. We focus on asset management, operating efficiency, and management practices. We provide a comprehensive array of services that allow districts to minimize transportation costs while maximizing the services offered.

www.transpargroup.com

Tremco Incorporated

BOOTH: 712

Tremco Roofing and Building Maintenance have been delivering roofing and weatherproofing solutions since 1928. Innovative restoration options offer long-term warranties and can save over half the cost of a traditional replacement. Visit us to learn more about our compliantly bid procurement options for all our solutions.

www.tremcoinc.com

Triple S

BOOTH: 334

Triple S is a member-owned national distribution services and logistics company that provides facility maintenance solutions to the healthcare, education, commercial, retail, government, and building services contractor markets. We offer a broad range of SSS brand products: cleaners, tools, equipment, and supplies for every cleaning task, every day.

www.triple-s.com

TSA Consulting Group, Inc.

BOOTH: 104

TSA Consulting Group is the nation's largest provider of third-party administration and compliance services to public education employer-sponsored 403(b)/457 retirement plans.

www.tsacg.com

Tyler Technologies, Inc.

BOOTH: 408

Now, more than ever, schools need to function as a cohesive system—from the classroom and business office to the transportation department and superintendent's office. With integrated solutions for financials/HR, student information, transportation, and data analytics, Tyler Technologies empowers schools to bridge silos, share information, and build a connected district.

www.tylertech.com



U.S. Retirement & Benefits Partners

BOOTH: 521

U.S. Retirement & Benefits Partners (USRBP) is the nation's largest independent employee benefits and retirement planning firm serving K-12 public schools. We are a single-source provider offering a comprehensive suite of employee benefits plan consulting, compliance, administration, communication, and technology services, as well as customized retirement plan counseling.

www.usrbpartners.com



UHY LLP

BOOTH: 733

UHY LLP, a national CPA firm, provides state and local government services, including financial statements and grant audits, internal control and process improvements, cybersecurity assessments, forensic accounting, and enterprise risk management. Our public sector team members are well-recognized professionals with vast experience in servicing the unique requirements of governmental clients.

www.uhy-us.com

EXHIBITOR DIRECTORY

US OMNI

BOOTH: 523

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

www.omni403b.com

Utica National Insurance Group

BOOTH: 611

Utica National, a nationally recognized insurer, provides personal and commercial insurance. For 45 years we have worked to keep kids and school staff safe through our customized coverages. We work with you to manage risk and preserve your resources so you can do what you do so well: educate children.

www.uticanational.com

ViewSonic Corporation

BOOTH: 804

As leaders in interactive display technology, ViewSonic transforms classrooms into immersive learning environments. Our education solutions drive engagement, energize and motivate students, and make teaching more fun. From ViewBoard interactive displays and myViewBoard collaborative software, to projector solutions for aging whiteboards, our award-winning solutions help you connect and collaborate.

www.viewsonic.com/us

VIRCO INC

BOOTH: 401

Since 1950, Virco has proudly manufactured industry-leading furniture and equipment for K-12 schools in the U.S. Collections include seating for healthy movement, technology-ready tables, and a range of collaborative tables and desks for flexible classrooms. For large-scale FF&E purchases, Virco's complimentary, hassle-free PlanSCAPE services deliver on-time, on-budget solutions.

www.virco.com



Voya Financial

BOOTH: 323

Voya is a leading provider of retirement products and services in the U.S., serving more than 47,000 institutional clients and nearly 4.5 million individual retirement plan investors.

www.voya.com



Weidenhammer

BOOTH: 425

Weidenhammer is an established education management software leader serving the information technology needs of school districts since 1978. The Alio suite of financial management and human resources solutions provides our clients with robust applications for managing the complexities of today's dynamic school administration needs.

www.myalio.com

Wilkes University

BOOTH: 610

Wilkes University offers several degree options designed for school business officials. Options include a bachelor's degree in business administration with a concentration in school business, a master's degree in school business leadership, an Ed.D. in educational leadership, and other innovative, practical degree programs to improve your career and transform schools.

www.wilkes.edu/sbl

WINFertility

BOOTH: 800

For over 20 years, WINFertility has been managing inclusive family-building benefit solutions for organizations, health plans, and individuals. From integrated fertility management, including medical treatment, pharmacy and reproductive genetics, to surrogacy and adoption, WIN helps build families through access to the best doctors, technology, and support at the lowest cost.

www.winfertility.com

Worth Ave Group

BOOTH: 709

For over 46 years, Worth Ave Group has provided a sense of security for individuals nationwide. We specialize in providing electronic device insurance for educational institutions, businesses, and individuals. Our low deductibles and affordable premiums make our insurance beneficial to anyone who owns a portable electronic device.

www.worthavegroup.com

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Nina Boyd

Associate Superintendent,
Orange County Dept. of Education

See more of this story:
americanfidelity.com/asbo

