

ANNUAL MEETING



& EXPO



September 22-25

PROGRAM BOOK

DENVER

2017

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ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL

11401 North Shore Drive
Reston, VA 20190-4232

P 866.682.2729 | F 703.708.7060

INFORMATION

REGISTRATION HOURS

Friday: 7:00 am – 6:00 pm

Saturday: 7:00 am – 4:00 pm

Sunday: 7:30 am – 4:00 pm

Monday: 7:30 am – 10:00 am

EXHIBIT HALL HOURS

Saturday: 11:45 am – 2:30 pm

Lunch: 11:45 am – 12:45 pm

Sunday: 10:00 am – 12:15 pm

Brunch: 10:00 am – 11:00 am

BE IN THE KNOW

For the latest on daily Annual Meeting & Expo activities, visit Registration, located in the Plaza Foyer, Concourse Level.

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

COMPLIMENTARY WIRELESS

Wi-Fi is available in conference meeting space.

Network: **ASBO International**
Password: **ASBO2017**

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CHARGING STATIONS

Need a battery boost? Stop by a charging station located near Registration in the Plaza Foyer, Concourse Level, and outside the Grand Ballroom in the South Convention Lobby. Secure lockers are available so you can charge your device while you're attending a session!

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BADGES

An official 2017 Annual Meeting & Expo badge is required to enter the Workshops and Seminars, educational sessions, General Sessions, Exhibit Hall, and all social events.

ASBO BOOTH AND PIN TRADING ZONE

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

ANNUAL MEETING & EXPO 2017 APP

Download the free Whova app. Once you sign in and register with Whova, the ASBO International 2017 Annual Meeting & Expo will show up under your events to connect you with other attendees and allow you to create your personal conference itinerary. Stop by registration with any questions.

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WRITE IT DOWN

Use the learning notebook found in your registration bag to keep your notes and insights all in one place. Reflect on what sessions resonated with you and why, make note of top takeaways, and start developing a plan of action.

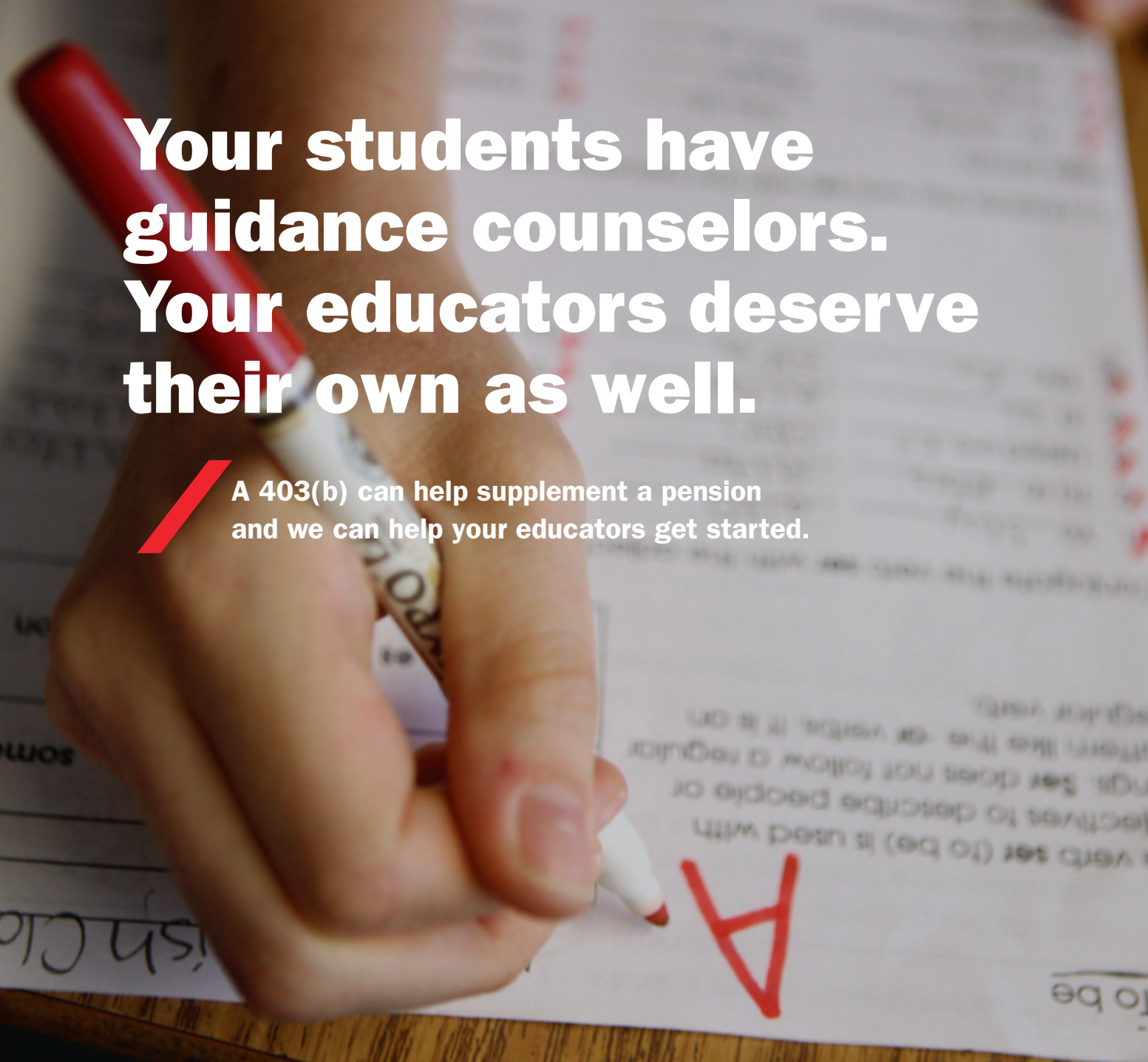
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FIRST AID

In the event of a medical emergency, please dial "0" from any house phone or please locate an ASBO staff member.

Programming Note :

ASBO International's 2017 Annual Meeting & Expo, its programs and materials, including the views and opinions expressed therein, are those of the individual speakers, presenters, and authors, and do not necessarily represent the views and opinions of the Association of School Business Officials International, any of its respective affiliates, officers, directors, board members, or employees. As a courtesy to your colleagues, please silence cell phones while in the sessions.



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conference. Can't stop by? Call us to schedule an appointment at 866-401-3030, option 3.

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*LIMRA, Not-for-Profit Survey, based on total participants for four consecutive years (2012-2015) and contributions for three consecutive years (2013-2015).

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AGENDA

IO = Invitation Only; \$ = Additional Fee

THURSDAY, SEPTEMBER 21

4:00 pm – 7:00 pm	Emerging School Business Leaders Scholarship Workshop (IO)
5:00 pm – 8:00 pm	Certification Commission Meeting and Dinner (IO)
7:00 pm – 8:00 pm	Emerging School Business Leaders Scholarship Dinner (IO)

FRIDAY, SEPTEMBER 22

7:00 am – 6:00 pm	Registration
7:15 am – 2:30 pm	Golf Tournament (\$)
7:30 am – 8:00 am	Coffee Break
8:00 am – 5:00 pm	Workshops and Seminars
5:30 pm – 6:00 pm	First-Timer Networking Social (IO)
6:00 pm – 7:30 pm	Welcome Mixer

SATURDAY, SEPTEMBER 23

7:00 am – 4:00 pm	Registration
8:00 am – 9:00 am	Discussion Groups
8:15 am – 9:15 am	SFO® Recipient Breakfast (IO)
9:00 am – 9:30 am	Coffee Break
9:30 am – 11:30 am	First General Session: Presentation by Pamela Meyer
11:45 am – 2:30 pm	Exhibit Hall Open
11:45 am – 12:45 pm	New! Exhibit Hall Lunch
12:00 pm – 1:30 pm	COE Advisory Committee Meeting and Lunch (IO)
2:00 pm – 2:45 pm	COE Reception (IO)
2:30 pm – 3:30 pm	Guest Program: Book Club— <i>Orphan Train</i> by Christina Baker Kline
2:45 pm – 4:00 pm	AEDG Meeting (IO)
2:45 pm – 4:45 pm	SFO® Testing, Exam 1: Accounting
2:45 pm – 3:45 pm	Discussion Groups
2:45 pm – 4:45 pm	Deep Digs
5:00 pm – 6:00 pm	Emerging School Business Leaders Scholarship Reception (IO)

SATURDAY, SEPTEMBER 23 continued.

5:45 pm – 7:45 pm	Eagle Awards Dinner (IO)
6:00 pm – 8:00 pm	Pinnacle Awards Dinner (IO)
8:00 pm – 11:00 pm	Affiliate Reception: Rocky Mountain Spectacular
8:00 pm – 11:00 pm	Affiliate Reception at Ace's Ping Pong

SUNDAY, SEPTEMBER 24

7:30 am – 4:00 pm	Registration
8:00 am – 9:30 am	MBA Committee Meeting and Breakfast (IO)
8:00 am – 9:15 am	Clinic Tables
9:00 am – 10:00 am	Discussion Groups
10:00 am – 11:00 am	Eagle Awards Reception (IO)
10:00 am – 12:15 pm	Exhibit Hall Open
10:00 am – 11:00 am	New! Exhibit Hall Brunch
12:15 pm – 12:45 pm	Refreshment Break
12:45 pm – 2:15 pm	Second General Session: Presentation by Aron Ralston
2:30 pm – 3:30 pm	Guest Program: A Taste of Colorado
2:30 pm – 5:00 pm	SFO® Testing, Exam 2: School Business Management
2:30 pm – 3:30 pm	Annual Meeting Program Planning Session—All encouraged to attend!
2:30 pm – 3:30 pm	Discussion Groups
2:30 pm – 4:30 pm	Deep Digs
5:00 pm – 5:45 pm	MBA Reception (IO)
9:00 pm – 11:00 pm	President Dragona and NJ ASBO's Dessert Reception

MONDAY, SEPTEMBER 25

7:30 am – 10:00 am	Registration
7:30 am – 8:00 am	Coffee Break
8:00 am – 9:00 am	Discussion Groups
9:15 am – 10:15 am	Discussion Groups
10:30 am – 11:30 am	Discussion Groups

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EDUCATION OVERVIEW

Workshops (WS)

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.

Seminars (SM)

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 four- or eight-hour interactive sessions.

Discussion Groups (DG)

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

Deep Digs (DD)

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

Clinic Tables

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. Presenters direct the discussion and serve as a source of information on topics such as healthcare reform, 403(b) retirement plans, budget planning, energy efficiency, communications in school districts, and more.

CPE Credits and SFO Contact Hours

Earn up to 17 CPE credits for the entire Annual Meeting & 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.

Earn up to 17 SFO recertification contact hours Friday through Monday. To receive SFO contact hours, attendees must complete the Contact Hours Record and Sign Off Sheet that is provided in all registration bags as well as session rooms, and enter the hours in their online account. Scanning of badges is not required for contact hours.

For more details about earning credit hours, please visit asbointl.org/EducationHours.

WORKSHOPS AND SEMINARS

FRIDAY, SEPTEMBER 22

WORKSHOPS

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TWO-HOUR WORKSHOPS

8:00 am – 10:00 am

WORKSHOP 1: HIPAA PRIVACY AND SECURITY—STEPS TO COMPLIANCE

Field of Study: Personnel/Human Resources
Content Area: Human Resources and Labor Relations
Governor's Square 12, Concourse Level | CPEs: 2 SFOs: 2

WORKSHOP 2: WHY SCHOOL REFERENDA FAIL: RESEARCH AND BEST PRACTICES FOR SUCCESS

Content Area: School Finance
Governor's Square 14, Concourse Level | SFOs: 2

WORKSHOP 11: SCHOOL TOUR: EMILY GRIFFITH CAMPUS

Content Area: School Facilities Management
Plaza Court 7 | SFOs: 2

10:15 am – 12:15 pm

WORKSHOP 3: UPDATE ON THE LAW OF SPECIAL EDUCATION

Content Area: Legal Aspects
Governor's Square 12, Concourse Level | SFOs: 2

WORKSHOP 4: SEVEN TIPS FOR EFFECTIVE NEXT-GENERATION FISCAL LEADERSHIP

Field of Study: Business Management and Organization
Content Area: Management Techniques
Governor's Square 14, Concourse Level | CPEs: 2 SFOs: 2

WORKSHOP 5: STRATEGIC COMMUNICATIONS: HOW TO BETTER PROTECT YOURSELF FROM TODAY'S MEDIA

Field of Study: Communications and Marketing
Content Area: Leadership Development
Governor's Square 15, Concourse Level | CPEs: 2 SFOs: 2

1:00 pm – 3:00 pm

WORKSHOP 6: SCHOOL CONSTRUCTION FROM START TO FINISH: PRACTICAL ADVICE FOR COMMON ISSUES

Content Area: School Facilities Management
Governor's Square 14, Concourse Level | SFOs: 2

WORKSHOP 7: UNDERSTANDING THE MEDICAID REIMBURSEMENT PROCESS FOR SPECIALIZED SERVICES

Field of Study: Finance
Content Area: School Finance
Governor's Square 15, Concourse Level | CPEs: 2 SFOs: 2

WORKSHOP 8: EFFECTIVE EMERGENCY PREPAREDNESS

Content Area: Risk Management
Governor's Square 12, Concourse Level | SFOs: 2

FOUR-HOUR WORKSHOPS

8:00 am – 12:00 pm

WORKSHOP 9: WHAT'S NEXT FOR AMERICAN HEALTHCARE REFORM LEGISLATION?

Field of Study: Personnel/Human Resources
Content Area: Legislative Affairs
Governor's Square 16, Concourse Level | CPEs: 4 SFOs: 4

WORKSHOP 10: CROWDSOURCING TECHNOLOGIES—OPTIMIZING DECISIONS WITH THE "WISDOM OF CROWDS"

Content Area: Management Techniques
Majestic Ballroom | SFOs: 4

1:00 pm – 5:00 pm

WORKSHOP 12: MAKING SCHOOL FINANCE FUN

Field of Study: Personal Development
Content Area: Leadership Development
Majestic Ballroom | CPEs: 4 SFOs: 4

WORKSHOP 13: INTERNAL CONTROLS AND REPORTING FOR ATHLETICS, STUDENT ACTIVITY FUNDS, BOOSTER CLUBS, AND PTOS

Field of Study: Accounting
Content Area: Accounting, Auditing, and Budgeting
Governor's Square 16, Concourse Level | CPEs: 4 SFOs: 4

SEMINARS

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FULL-DAY PROGRAM SEMINAR

8:00 am – 5:00 pm

SEMINAR 14: NEED-TO-KNOW FUNDAMENTALS FOR FUTURE SFOS

Field of Study: Personal Development
Content Area: Leadership Development
Governor's Square 11, Concourse Level | CPEs: 8 SFOs: 8

FOUR-HOUR PROGRAM SEMINARS

8:00 am – 12:00 pm

SEMINAR 15: CREATE AN AWARD-WINNING BUDGET

Field of Study: Accounting (Governmental)
Content Area: Accounting, Auditing, and Budgeting
Director's Row H, Lobby Level | CPEs: 4 SFOs: 4

1:00 pm – 5:00 pm

SEMINAR 16: EARN A REPUTATION OF EXCELLENCE THROUGH YOUR COMPREHENSIVE ANNUAL FINANCIAL REPORT

Field of Study: Auditing (Governmental)
Content Area: School Finance
Room: Director's Row H, Lobby Level | CPEs: 4 SFOs: 4



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THURSDAY, SEPTEMBER 21

4:00 pm – 7:00 pm

EMERGING SCHOOL BUSINESS LEADERS SCHOLARSHIP WORKSHOP

Invitation only.

Silver, Mezzanine Level

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5:00 pm – 8:00 pm

CERTIFICATION COMMISSION MEETING AND DINNER

Invitation only.

Plaza Court 3, Concourse Level

7:00 pm – 8:00 pm

EMERGING SCHOOL BUSINESS LEADERS SCHOLARSHIP DINNER

Invitation only.

Windows, Second Level

Sponsored by U.S. Communities

FRIDAY, SEPTEMBER 22

7:00 am – 6:00 pm

REGISTRATION

Plaza Foyer, Concourse Level

7:15 am – 2:30 pm

GOLF TOURNAMENT (\$)

Additional fee and advance registration required.

Buses depart promptly at 7:30 am from the Main Entrance of the hotel.

7:30 am – 8:00 am

COFFEE BREAK

Governor's Square Foyer, Concourse Level

8:00 am – 5:00 pm

WORKSHOPS AND SEMINARS

See page 8 for complete listing.

5:30 pm – 6:00 pm

FIRST-TIMER NETWORKING SOCIAL

Invitation only.

South Convention Lobby, Second Level

Connect with other first-time attendees to learn more about the ASBO International Annual Meeting & Expo and how to get the most out of your experience in Denver. Find out which sessions and events you don't want to miss and hear from members who are experts at navigating this annual event.

6:00 pm – 7:30 pm

WELCOME MIXER

Badge required.

Plaza Foyer, Concourse Level

Enjoy refreshments and heavy hors d'oeuvres as you meet up with long-time colleagues and create new connections at this kickoff to the annual meeting.

SATURDAY, SEPTEMBER 23

7:00 am – 4:00 pm

REGISTRATION

Plaza Foyer, Concourse Level

7:30 am – 9:30 am

IOWA ASBO BREAKFAST

Invitation only.

Tower Court C, Second Level

DISCUSSION GROUPS

8:00 am – 9:00 am

CONDUCTING A FRAUD RISK ASSESSMENT (DG01)

Governor's Square 14, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting

Content Area: Accounting, Auditing, and Budgeting

Fraud happens! Once it happens, the detection and investigation can be time consuming. Conducting a fraud risk assessment will help your organization identify the specific controls that need strengthening. The fraud risk assessment tool is an invaluable resource for school business professionals to use in identifying and addressing their school districts' vulnerabilities to internal fraud and developing a fraud risk response.

Learning Objectives: 1. Outline the elements of fraud.
2. Discuss the aspects of a fraud risk assessment.
3. Explain how to implement a fraud risk assessment.

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

EXPLORING WIN-WIN STRATEGIES FOR LABOR NEGOTIATIONS (DG02)

Governor's Square 12, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personnel/Human Resources

Content Area: Human Resources and Labor Relations

No single cost driver impacts school budgets as much as labor contracts. The negotiation process can often

be arduous and difficult, but recent developments in compensation trends that have employees paying for an increasing share of health benefits costs create an opportunity to achieve win-win scenarios at the negotiations table. Explore the challenges and strategies involved in leveraging trends in health benefits to shift the dynamic of the compensation negotiations toward a mutually beneficial outcome for all.

Learning Objectives: 1. Analyze trends in health benefits and their impact on both operating budget and individual compensation. 2. Identify underlying challenges in current labor negotiations that are distinct and nuanced from the usual challenges derived from a traditional win-lose negotiation. 3. Discuss proposals that expand cost sharing and facilitate win-win environments.

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

LEVERAGING SUPPLIER-PARTNER KNOWLEDGE AND EXPERIENCE DURING STAFF TRANSITION (DG03)

Governor's Square 16, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization

Content Area: Purchasing and Supply Management

Shrinking budgets, the loss of infrastructure, and a demographic shift caused by increasing retirements leading to a loss of organizational history are changing the relationships between districts and their suppliers. Learn how to leverage your suppliers' knowledge and experience and discuss the benefit of using widely accepted contract options. The evolution of the district-supplier relationship must create a partnership of trust and sharing in order to serve the needs of students.

Learning Objectives: 1. Identify challenges resulting from loss of experience and knowledge due to retirements. 2. Compare procurement challenges and solutions with peers from other states. 3. Describe strategies for engaging with suppliers and leveraging their insight and knowledge to facilitate the procurement process.

Presenters: Mike Belcher, Education Innovation Officer, HP, Austin, TX; Mark Dahl, Regional Sales Manager, Pacon, Phoenix, AZ; George Kelley, Director, Procurement and Printing, Cherry Creek School District, Greenwood Village, CO; Chuck Luchen, Sr. Manager, Vertical Markets K-12, Staples Business Advantage, Framingham, MA; Lori Tudor, Director of Purchasing, Keller ISD, Keller, TX



As educators and school officials, you face unique challenges, and the changing benefits landscape serves only to make those challenges more complex. That's why you need timely, clear information to make the best possible decisions for your schools. We're here to help. Join us for the Friday workshop, "What's Next for American Healthcare Reform Legislation?", visit our Clinic Table Sunday morning for "Compliance and Market Trend Q&A on FSAs, HRAs, HSAs," or sit in on our Sunday afternoon Deep Dig, "Best Practices in Health and Welfare Benefit Plan Management." Please stop by **Booth 415** in the Exhibit Hall. See you there!

CREATING A WINNING GAME PLAN FOR SCHOOL BOUNDARY REALIGNMENT (DG04)

Governor's Square 15, Concourse Level

SFOs: 1

Content Area: Leadership Development

Before embarking on a boundary change, it is critical to have a game plan that ensures success. When Wayzata Public Schools needed to create new boundaries to account for growth and a new elementary school, they took a new approach. They began by identifying the information they would need, determining the appropriate players, establishing consistent data points, and implementing a system to integrate and manipulate all the information. This session will outline guiding principles a district needs to ensure a transparent and supported approach.

Presenters: Julie Fitzgerald, Vice President of Marketing, GuideK12, Eden Prairie, MN; Kristin Tollison, Director of Administrative Services, Wayzata Public Schools, Plymouth, MN; Jim Westrum, Executive Director, Finance and Business Services, Wayzata Public Schools, Wayzata, MN



Saturday

DAILY SCHEDULE

FROM DATA PRIVACY TO TRUST: BUILDING YOUR SCHOOL COMPLIANCE PROGRAM (DG05)

Governor's Square 10, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Information Technology
Content Area: Information Technology

As schools leverage technology for learning, they must also ensure that they have safeguards in place to protect the privacy and security of student data. Learn the fundamentals of student data privacy compliance, how to reframe the privacy conversation in your community to one of trust and transparency, and how the Trusted Learning Environment program can help your school system ensure the privacy and security of student data.

Learning Objectives: 1. Outline the hazards that may threaten the privacy and security of student data. 2. Describe the fundamental principles of student data privacy compliance. 3. Discuss how to reframe the data privacy conversation in your community to engender transparency and trust. 4. Describe the potential benefits of the Trusted Learning Environment program for your school system.

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

CERTIFICATE OF EXCELLENCE AWARD DISCUSSION GROUP (DG06)

Governor's Square 11, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Auditing (Governmental)
Content Area: School Finance

Hear from school business officials about the benefits of preparing a Comprehensive Annual Financial Report (CAFR) and participating in ASBO International's Certificate of Excellence in Financial Reporting (COE) program. Discuss the elements of an award-winning CAFR and review the guidelines for the COE award program.

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

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

UNIVERSAL DESIGN FOR LEARNING (UDL) AND FINANCIAL CONSIDERATIONS (DG07)

Governor's Square 17, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Finance
Content Area: School Finance

School district finance and operations departments are vital to ensuring effective instruction and student growth and achievement. What is their relationship to teaching and learning and how does meeting the learning needs of each student affect their activities? Learn about the concept of Universal Design for Learning and how school business officials can play a role in promoting student achievement.

Learning Objectives: 1. Discuss the impact of finance and operations on student growth and achievement. 2. Describe the concept of Universal Design for Learning and its impact on student and teacher growth. 3. Explain how UDL affects the finance and operations departments and how these departments strengthen the impact of UDL.

Presenters: Kevin Baird, Chairman and National Supervising Faculty, Center for College and Career Readiness, Office Depot, Inc., Boca Raton, FL; Kenneth Bowen, National Lead K-12 Education Consultant for Finance, Office Depot, Inc., Laurinburg, NC

THE PATH TO PURCHASING NEW SCHOOL BUSES IN TIMES OF AUSTERITY (DG08)

Governor's Square 9, Concourse Level

SFOs: 1

Content Area: Pupil Transportation

Despite the imperative for safe and reliable school buses, finding the funds to purchase new buses has been increasingly difficult in times of lagging capital funding. Business managers and transportation directors who are consistently challenged to provide increased services with limited resources understand this better than anyone. This session will focus on three key components of successful asset replacement planning in transportation: developing the long-term projections of need, assessing the impact of replacement on total cost of ownership, and evaluating alternative funding options to best meet budgetary capacity.

Presenter: Timothy Ammon, Vice President, School Bus Consultants, Lees Summit, MO

8:15 am – 9:15 am

SFO® RECIPIENT BREAKFAST

Invitation only.

Windows, Second Level

Sponsored by The Horace Mann Companies

9:00 am – 9:30 am

COFFEE BREAK

South Convention Lobby, Second Level

FIRST GENERAL SESSION

9:30 am – 11:30 am

Grand Ballroom, Second Level

WELCOME TO DENVER

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

INTRODUCTIONS AND ACKNOWLEDGMENTS

Anthony N. Dragona, Ed.D., RSBA
President, ASBO International

- ASBO International Strategic and Event Partners
- 2017 ASBO International Board of Directors

STATE OF THE ASSOCIATION DISCUSSION

Anthony N. Dragona, Ed.D., RSBA
Charles E. Petersen, MBA, PRSBA, SFO
Vice President, ASBO International

ASBO INTERNATIONAL'S 2017 EAGLE AWARDS

Ted Beal, Jr.
Executive Vice President and Retirement Benefits
Group Managing Partner
AXA

INTRODUCTION OF SPEAKER

Mark Turner
Senior Vice President
Security Benefit

.....

KEYNOTE

Proudly sponsored by Security Benefit

"Liespotting: Finding the Truth, Building Trust That Lasts"



Pamela Meyer

Author, TED Speaker, and
Certified Fraud Examiner

Pamela Meyer, whose TED talk, "How to Spot a Liar," is among the top 15 of all time, will kick off the meeting with scientific findings and practical tips for lie spotting.

Her session will equip attendees with tools that ultimately promote truth-seeking and trust-building habits, creating stronger atmospheres of honesty and trust within school districts.

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



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AXA is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and the Eagle Institute. We are proud to support ASBO International and its members' continued commitment to protect public school systems and the future of our children. We invite you to visit our **Booth 409** and join us for our Clinic Table discussion, "Addressing Physical, Mental, and Financial Wealth of Your Employees," on Sunday, 8:00 am – 9:15 am.

11:45 am – 2:30 pm

EXHIBIT HALL OPEN

Badge required.

Plaza Ballroom, Concourse Level

11:45 pm – 12:45 pm

NEW! LUNCH IN THE EXHIBIT HALL

Plaza Ballroom, Concourse Level

Sponsored by Public Trust Advisors, LLC

12:00 pm – 1:30 pm

COE ADVISORY COMMITTEE MEETING AND LUNCH

Invitation only.

Tower Court C, Second Level

2:00 pm – 2:45 pm

COE RECEPTION

Invitation only.

Windows, Second Level

Sponsored by VALIC

2:30 pm – 3:30 pm

GUEST PROGRAM: BOOK CLUB—ORPHAN TRAIN BY CHRISTINA BAKER KLINE

Tower Court D, Second Level

Join us for an engaging discussion of Christina Baker Kline's *Orphan Train*, a moving story that unburies a pivotal period in America's past. Before she "ages out" of the foster care system, Penobscot Indian Molly Ayer is bound for juvie or worse until her community service project helping an elderly woman redirects her path.

2:45 pm – 4:00 pm

AFFILIATE EXECUTIVE DIRECTORS GROUP MEETING

Invitation only.

Vail, Majestic Level

2:45 pm – 4:45 pm

SFO® Testing, Exam 1: Accounting

Pre-registration required.

Columbine, Terrace Level

Saturday

DAILY SCHEDULE

DISCUSSION GROUPS

2:45 pm – 3:45 pm

MAKING SCHOOL FINANCE UNDERSTANDABLE (DG09)

Governor's Square 14, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Finance

Content Area: School Finance

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

Learning Objectives: 1. Demonstrate how to translate school finance into layman's terms. 2. Discuss how to be a creative communicator of school finance issues. 3. Explain why effective communication is critical for successful financial management. 4. Demonstrate basic presentation design techniques.

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

STARTER KIT FOR THE NEW SBO (DG10)

Director's Row E, Lobby Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development

Content Area: Management Techniques

The transition to a new district as a school business official can be a difficult endeavor, whether you go to work for a small or large district. Often, a new school business official is focused entirely on mastering the existing job and consequently misses opportunities to improve the position. This session will give both new and experienced business administrators 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 survive and flourish in their districts. 2. Discuss ways to "see the big picture" while mastering the day-to-day tasks. 3. Identify unique programs that new school business officials might implement in their districts.

Presenters: Todd Hajewski, Director of Business Services, Greendale SD, Greendale, WI; Sarah Viera, Executive Director of Business Services, Mequon-Thiensville SD, Mequon, WI

TAKING INSPIRATION FROM THE DEEPEST THINKERS IN BUSINESS AND EDUCATION (DG11)

Director's Row I, Lobby Level

SFOs: 1

Content Area: Leadership Development

The daily work of a school business official or district leader is defined through role descriptions and statements. Underpinning these is a set of specific skills and attitudes that enable them to manage and lead each day. By exploring the research and literature from within the educational and business environments, this session will look at how school business officials can gain insight and perspective into their roles. Participants will investigate the key quotes, phrases, and lessons that will enable them to think smart and run hard as a servant or host leader and manager.

Presenters: Mark Donehue, Lecturer in Education, Deakin University, Waurin Ponds, Victoria, Australia; Karen Starr, Professor, Deakin University, Burwood, Victoria, Australia

MAPPING YOUR FACILITIES TO MEET YOUR FUTURE GOALS (DG12)

Director's Row J, Lobby Level

SFOs: 1

Content Area: School Facilities Management

Meet your future facility and infrastructure needs with precise data and streamlined processes. This discussion will cover best practices and practical strategies for creating and maintaining space to meet your needs now and well into the future. Learn how to optimize capital improvement and master plans through enhanced agendas and prioritize aspects of a project. The presenters will delve into the planning and procurement stages of the project lifecycle and share ways to streamline the construction procurement process once projects are prioritized.

Presenters: Richard Gay, Procurement Officer, Houston ISD, Houston, TX; Joie Serra, Account Executive, Gordian, Greenville, SC

TOOLS TO MAXIMIZE YOUR LEADERSHIP SKILLS (DG13)

Governor's Square 12, Concourse Level

SFOs: 1

Content Area: Leadership Development

With the ever-increasing demands of the workplace, developing yourself as a leader will empower you to move your organization forward more successfully. This includes learning to develop others and alleviate stress through better relationship management. Explore leadership through the development of others and leave with tools to help you and your team reach their full potential.

Presenters: Susan Harkin, Chief Operating Officer, CUSD 300, Algonquin, IL; Jennifer Hermes, Assistant Superintendent of Business Services, Lake Forest SD 67, Lake Forest, IL; Carrie Matlock, President, DLA Architects, Ltd., Itasca, IL

ACING THE TEST TO HELP SCHOOL DISTRICT EMPLOYEES SAVE FOR RETIREMENT (DG53)

Director's Row H, Lobby Level

CPEs: 1 | SFOs: 1

Field of Study: Personnel/Human Resources

Content Area: Human Resources and Labor Relations

Is your retirement readiness theme song "I Walk the Line" or "Got Me Under Pressure"? Join us for an interactive discussion about how to help your school district employees, regardless of their age or career stage, take steps now to prepare to be retirement ready. We will use case studies to help employees understand whether their retirement savings strategy is on track and discuss supplemental contributions that the school district may want to consider or that may need to be adjusted.

Learning Objectives: 1. Discuss how employees' age and career stage affect their retirement savings strategy. 2. Identify approaches school districts may use to educate employees about leveraging the district's various retirement plans to prepare for retirement. 3. Identify best practices to educate employees throughout their careers to develop and adjust their retirement readiness strategy.

Presenters: Thomas J. Granger, Second Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Mark Jackowitz, Divisional Vice President, Head of Retail 403(b) Sales and Strategic Partnerships, Voya Financial®, Windsor, CT; Fred Makonnen, Regional Vice President, AXA, Jersey City, NJ; Linda Segal Blinn, Vice President, Voya Financial®, Windsor, CT

DEEP DIGS

2:45 pm – 4:45 pm

SCHOOL MEALS HOT TOPICS: NEW REGULATIONS, GOING OFF THE PROGRAM, CNR UPDATES, AND MORE! (DD01)

Governor's Square 16, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Management Services

Content Area: School Food and Nutrition Management

Thinking about walking away from the National School Meals Programs? Want to learn the fiscal side of what it takes to provide meals to students at no cost? Wondering what districts are doing to address new



Horace Mann® welcomes you to ASBO International's 2017 Annual Meeting & Expo! We are pleased to be a Strategic Partner and proud sponsor of the Certified Administrator of School Finance and Operations® (SFO®) program. Please join us at our Clinic Table to learn about Key Steps to Educator Financial Success, and learn about Attracting and Retaining Employees by Helping Reduce Student Loan Debt at our panel session on Sunday at 8:45 am. Plus, visit us at **Booth 303** for a chance to win funding for a DonorsChoose.org project in your district and learn more about our solutions.

regulations on chargebacks to school meal programs and unpaid meal balance policies? Have questions about what's happening with Child Nutrition Reauthorization (CNR) and block grants? What are the ins and outs of the Community Eligibility Program and Provision II? This interactive session will provide you with the opportunity to engage with your colleagues and gain insights from subject matter expert panelists around these topics and more.

Learning Objectives: 1. Analyze options for successful school meal programming for your school based on your community demographics and politics. 2. Discuss options available for providing meals at no cost to students. 3. Calculate the financial impact of taking a school or district off the National School Meals Programs. 4. Outline new school meal policies required by the USDA.

Presenters: Mary Anderson, Culinary Express Supervisor, Wayzata Public Schools, Plymouth, MN; Anthony Dragona, School Business Administrator, Union City Board of Education, Union City, NJ; Jill Kidd, Director of Nutrition Services, Pueblo City Schools, Pueblo, CO; Jean Ronnei, SNS, Pro-Team Foodservice Advisors, Richmond, KY; Jim Westrum, Executive Director, Finance and Business Services, Wayzata Public Schools, Wayzata, MN



Saturday

DAILY SCHEDULE

TECHNOLOGY, THE LAW, AND SCHOOLS: EMERGING ISSUES (DD02)

Governor's Square 10, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Business Law

Content Area: Legal Aspects

This interactive session will provide school business officials with a basic working knowledge of emerging issues involving technology, the law, and education. More specifically, participants will examine emerging controversies involving both students and school staff over issues relative to social networking sites such as Facebook or personal blogs, sexting, and acceptable use policies for district owned and operated computer systems. The session includes a review of relevant litigation along with practical considerations for developing sound policies that ensure the appropriate use of technology, while assisting school business officials in working with other educational leaders to avoid being sued over misuse of technology in educational settings.

Learning Objectives: 1. Discuss the rights of students with regard to the use of technology. 2. Discuss the rights of school staff with regard to the use of technology. 3. Describe how to develop policies that can help to avoid legal controversies over student and staff use of technology. 4. Review case law and evolving legal trends with regard to the rights of technology users in schools.

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

UNDERSTANDING THE IMPACT OF THE EVERY STUDENT SUCCEEDS ACT (ESSA) ON SCHOOL DISTRICTS (DD03)

Governor's Square 15, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Business Law

Content Area: Legislative Affairs

The Every Student Succeeds Act (ESSA) is the newest regulation to replace the No Child Left Behind (NCLB) legislation. If your district receives any federal funds, you need to understand how ESSA might affect you. Learn the latest on all the aspects of ESSA, including history, changes to date, rationale behind the changes, and how it will affect your district financially and operationally.

Learning Objectives: 1. Explain the history and purpose of ESSA. 2. Detail the fiscal implications and operational effects of ESSA to school districts. 3. Identify the costs to the district of implementing ESSA and describe how to determine them.

Presenters: Chris Borreca, Partner, Thompson & Horton, LLP, Houston, TX; Sharie Lewis, Director of Business Services and Operations, Parkrose SD, Portland, OR; Karen Smith, Assistant Superintendent of Business and Financial Services, Cypress-Fairbanks ISD, Houston, TX

HOW TO HELP IMPROVE THE EFFECTIVENESS AND COST-EFFECTIVENESS OF SPECIAL EDUCATION (DD05)

Governor's Square 17, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Finance

Content Area: School Finance

Beaverton School District in Oregon and Lake County Schools in Florida have implemented a series of steps to help improve the effectiveness, cost-effectiveness, and equity of serving struggling students with (and without) special needs. In both cases, the business office played a key role in initiating and supporting the efforts. Learn about a wide range of best practices that are effective and cost-effective for serving struggling students, providing more data-driven staffing, and increasing services to students without adding staff.

Learning Objectives: 1. Describe how the business office can help improve the effectiveness and cost-effectiveness of special education services. 2. Explain how to expand intervention staff without increasing the budget. 3. Describe how to cost-effectively expand social, emotional, and behavioral supports. 4. Outline a plan for increasing literacy without added costs.

Presenters: Claire Hertz, Chief Financial Officer, Beaverton SD, Beaverton, OR; Nathan Levenson, President, District Management Group, Boston, MA

PASSING BOND ISSUES AND FINANCING PROJECTS (DD06)

Governor's Square 11, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Finance

Content Area: School Finance

Learn how Ohio's Willoughby-Eastlake City Schools successfully went from the drawing board to financing district-wide facilities improvements in different ways, including partnering with governmental and nonprofit entities. Explore the different ways districts can finance projects, including the pros and cons of various bond levy campaign approaches.

Learning Objectives: 1. Describe what worked and did not work with the bond levy campaign discussed. 2. Identify and discuss the use of various financing options outside of bond levies. 3. Explain how partnerships improve community support.

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

CREATING AN AWARD-WINNING BUDGET (DD07)

Governor's Square 9, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting (Governmental)

Content Area: Accounting, Auditing, and Budgeting

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

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

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

5:00 pm – 6:00 pm

EMERGING SCHOOL BUSINESS LEADERS SCHOLARSHIP RECEPTION

Invitation only.

Tower Court D, Second Level

Sponsored by U.S. Communities

5:45 pm – 7:45 pm

EAGLE AWARDS DINNER

Invitation only.

Sponsored by AXA

6:00 pm – 8:00 pm

PINNACLE AWARDS DINNER

Invitation only.

Windows, Second Level

Sponsored by Virco, Inc.

8:00 pm – 11:00 pm

AFFILIATE RECEPTION: ROCKY MOUNTAIN SPECTACULAR

Badge required.

Seawell Grand Ballroom, Denver Center for the Performing Arts, 14th and Curtis Streets

Meet ASBO leadership candidates, take in the sweeping panoramic view of the Rocky Mountains, and enjoy the music of Rock Slide! The Denver Center for the Performing Arts is just a few blocks from the Sheraton Denver Downtown.

Hosted by ASBO affiliate organizations in Alabama, Illinois, Ohio, Oregon, Washington, and Wisconsin. All conference attendees are welcome.

8:00 pm – 11:00 pm

AFFILIATE RECEPTION AT ACE'S PING PONG

Badge required.

Ace's Ping Pong, 501 17th Avenue

Join us for an evening of games, dancing, beverages, and fun! Enjoy ping pong tables, beanbags, and live music for your entertainment. Ace's is just a short six-block walk from the Sheraton Denver Downtown. Buses will be available for those who need a ride.

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

Office DEPOT®

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One Student at a Time

Welcome to Denver and the 2017 ASBO Annual Meeting & Expo. At Office Depot®, we believe education is the foundation for a bright future, and we're here to help you in every way we can. Our full spectrum of services and solutions, from school supplies and technology to professional development and parent engagement offerings, will help you transform your school. We're more than just office supplies. We're people, products, and solutions to help your school succeed. Enjoy the conference and be sure to stop by **Booth 203**—we look forward to seeing you!

SUNDAY, SEPTEMBER 24

7:30 am – 4:00 pm

REGISTRATION

Plaza Foyer, Concourse Level

8:00 am – 9:30 am

MBA ADVISORY COMMITTEE MEETING AND BREAKFAST

Invitation only.

Tower Court D, Second Level

8:00 am – 9:15 am

CLINIC TABLES

Majestic Ballroom, Majestic Level

See page 36 for detailed listing.

DISCUSSION GROUPS

9:00 am – 10:00 am

BECOME AN EXCEPTIONAL BUSINESS COMMUNICATOR (DG15)

Governor's Square 14, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development
Content Area: Leadership Development

Perhaps you tried pitching a groundbreaking project, or you were assigned to run a departmental meeting, or you needed to deliver a compelling presentation. You gave it your best shot, but you were met with blank looks and awkward silences. Chances are, there wasn't much wrong with what you were trying to say; perhaps you needed to work on how you said it. This session focuses on removing obstacles to understanding while motivating and inspiring people to take effective action.

Learning Objectives: 1. Describe the process of planning and structuring communications with a focus on a desired outcome. 2. Outline effective approaches to communicating powerfully in writing. 3. Discuss strategies for improving face-to-face interactions. 4. Identify methods for handling difficult communication situations effectively.

Presenter: Nan Wodarz, Head of School, Valwood School, Valdosta, GA

THE FUTURE OF ELECTRONIC PAYMENTS FOR SCHOOL DISTRICT PROCUREMENT (DG16)

Governor's Square 17, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization

Content Area: Purchasing and Supply Management

Traditional procurement card use is moving in the direction of e-payables and virtual cards—the next generation in payment technology. Learn how to utilize this technology in your district to make your payment process more secure and efficient. If you currently receive a rebate from your program, using e-payables can help you increase your incentive.

Learning Objectives: 1. Describe the new e-payable and virtual card technologies and how they are supplanting traditional procurement cards. 2. Outline learning techniques to facilitate implementation of these new technologies in the school district. 3. Provide examples of the use of e-payables and virtual cards

Presenters: Kevin Noren, Vice President, Senior Relationship Manager, BMO Harris Financial Group, Chicago, IL; Holly Wallace, Sponsored Programs Coordinator, Illinois ASBO, DeKalb, IL

THE DIGITAL JOURNEY IN K-12—ONE DISTRICT'S STORY OF BUILDING COMMUNITY ADVOCACY UNDER TODAY'S PUBLIC SCRUTINY (DG17)

Governor's Square 10, Concourse Level

SFOs: 1

Content Area: Information Technology

Implementing technology is a daunting task. Districts must decide what new technology they want to install, determine if the network can handle the increased load, and identify what devices and software will be implemented. Then they need to know how much everything will cost, how to obtain the approval for funding, and more importantly, how teachers and students will be affected and, hopefully, strengthened, by the new initiative. And don't forget the most critical component: teacher training. Now take all that complexity and boil it down to a simple concept that can be presented to an audience of taxpayers who have little trust in governments. Learn how one district met this complex challenge to move 20 years forward in 5 years in their digital journey.

Presenter: Bobette Sylvester-McCarroll, Assistant Superintendent for Business Support Services, Queen Creek USD, Queen Creek, AZ

CASH MANAGEMENT AND INVESTMENTS: WHAT EVERY SCHOOL BUSINESS OFFICIAL SHOULD KNOW (DG19)

Governor's Square 16, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting

Content Area: Accounting, Auditing, and Budgeting

Learn about current market conditions and trends for cash management, along with the current investment climate for school funds and best practices for cash management and investment. Case studies will be presented.

Learning Objectives: 1. Outline current economic trends in cash management and investments. 2. Discuss current practices for treasury management. 3. Describe best practices in cash flow management techniques.

Presenter: Matthew Malinowski, Business Manager/ Board Secretary, Upper Moreland Township SD, Willow Grove, PA

AFTER-HOURS USE OF FACILITIES: COST AWARENESS AND COST RECOVERY (DG20)

Governor's Square 15, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization

Content Area: School Facilities Management

The after-hours use of school facilities costs dollars and time across multiple departments. Learn how to determine the cost of your after-hours events, improve customer service without cutting services, build a strong cost-recovery program, and motivate multiple departments to join. The session will also address critical issues to consider when creating facility-use contracts, plans, and rental prices, and strategies to build a business case for recovering more costs and incorporating tiered fee structures.

Learning Objectives: 1. Describe how to determine the costs associated with after-hours events. 2. Discuss steps involved in building a strong cost-recovery program and motivating multiple departments to join. 3. Develop a business case for recovering more costs, setting facility rental prices, and incorporating tiered fee structures.

Presenter: Josh Peach, Strategic Accounts Executive, SchoolDude, Cary, NC

ATTRACTING AND RETAINING EMPLOYEES BY HELPING REDUCE STUDENT LOAN DEBT (DG21)

Governor's Square 12, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personnel/Human Resources

Content Area: Human Resources and Labor Relations



Security Benefit is proud to be an ASBO Strategic Partner and we applaud your commitment to your district. Join us during the Clinic Tables to learn about special options that can help increase participation in your district's retirement plan and potentially solve some budget issues with those early retirements. At the panel session on Saturday at 2:45 pm join an interactive, case study-based discussion to learn how to help your school district employees, regardless of their age or career stage, take steps now to prepare to be retirement ready, and visit us at **Booth 202** to explore other ways Security Benefit can help your employees To and Through Retirement.

SETTING UP A SMOOTH TRANSITION PLAN FROM RETIREE TO THE NEW CHIEF SBO (DG50)

Governor's Square 11, Concourse Level

SFOs: 1

Content Area: Management Techniques

When a school business official retires, a successor might have the mechanics dialed in, but may not know about the historical context and operational highlights of the previous SBO's tenure, such as the history of negotiations with labor groups, debt structure, and investment policies. Taking over a new job at a district can be complicated. This session will provide a transition checklist that includes what issues you should have on your radar screen and what questions to ask the departing SBO or others in the district.

Presenters: Barry Bolek, Assistant Superintendent for Finance, Township HSD No. 113, Highland Park, IL; Ali Mehanti, Assistant Superintendent for Business Services and Operations, CUSD 308, Oswego, IL

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9:00 am – 11:00 am

PROFESSIONAL DEVELOPMENT NETWORKING GROUP

Invitation only.

Silver, Mezzanine Level

10:00 am – 11:00 am

EAGLE AWARDS RECEPTION

Invitation only.

Tower Court D, Second Level

Sponsored by AXA

10:00 am – 12:15 pm

EXHIBIT HALL OPEN

Plaza Ballroom, Concourse Level

10:00 am – 11:00 am

NEW! BRUNCH IN THE EXHIBIT HALL

Plaza Ballroom, Concourse Level

Sponsored by BMO Financial Group

Exceptional educators are critical to the success of any school district. You can attract and retain more of them through educational programs designed to help them make smart financial decisions and feel more comfortable about the future. The average college graduate has more than \$35,000 in student loan debt, which affects daily life decisions and causes some educators to reconsider their career choice. This session shares recent survey data and discusses best practices to educate employees on how to eliminate or reduce monthly student loan payments—and how these practices can help attract and retain employees.

Learning Objectives: 1. Outline the available student loan forgiveness and loan repayment options and how they can be leveraged to recruit teachers into the profession. 2. Explain how to utilize education about loan forgiveness programs to retain employees. 3. Discuss how education about available loan repayment options can improve employee morale and focus at the worksite.

Presenter: James Yale, Vice President, Association Relations, The Horace Mann Companies, Springfield, IL

EDUCATION LEADERSHIP FOR SCHOOL BUSINESS OFFICIALS (DG38)

Governor's Square 9, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development

Content Area: Leadership Development

Education leadership is a hot topic across the developed world. This session examines the various definitions of leadership commonly found in education policies, leadership standards, job descriptions, and professional learning, accountability and performance appraisal programs. The discussion will focus on how dominant leadership understandings and assumptions work against the interests of school business officials and weaken education leadership in schools and districts. Participants will explore the benefits of leadership conceptions based on teamwork, collegiality, and mutual responsibility, while best utilizing the strengths and interests of individuals for the benefit of schools and students. The discussion is based on the latest findings from Australian research on effective education business leadership.

Learning Objectives: 1. Provide definitions of leadership commonly found in education literature. 2. Identify contradictions and paradoxes prevalent in education leadership documents. 3. Discuss recent research on alternative ways of defining and enacting effective leadership in districts and schools.

Presenter: Karen Starr, Professor, Deakin University, Burwood, Victoria, Australia

Sunday

DAILY SCHEDULE

SECOND GENERAL SESSION

12:45 pm – 2:15 pm

Grand Ballroom, Second Level

WELCOME

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

INSTALLATION OF OFFICERS

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

PRESENTATION OF ASBO INTERNATIONAL'S 2017 PINNACLE AWARDS

Brian True
Vice President Sales
Virco, Inc.

INTRODUCTION OF SPEAKER

Charles E. Peterson, Jr., MBA, PRSBA, SFO

KEYNOTE

"127 Hours: Between a Rock and a Hard Place"



Aron Ralston
Fearless Adventurer
and Subject of the Film,
127 Hours

Aron Ralston's extraordinary human drama is captured in the movie, *127 Hours*, and the New York Times bestseller, *127 Hours: Between a Rock and a Hard Place*.

An expert outdoorsman and solo climber, Ralston was descending Blue John Canyon in remote Utah when an 800-pound boulder broke loose, crushing his arm and pinning him to the canyon wall. Ralston's story is about a true test of the human spirit and will remind school business officials that sacrifice in pursuit of the greater good often leads to extraordinary outcomes.

12:15 pm – 12:45 pm

REFRESHMENT BREAK

South Convention Lobby, Second Level

2:30 pm – 3:30 pm

GUEST PROGRAM: A TASTE OF COLORADO

Tower Court D, Second Level

Considering that Colorado is ranked first in the country for craft breweries per capita, a chance to taste some local masterpieces is an opportunity not to be missed! A professional beer expert will sample local Colorado brews and guests will learn about the overall beer-making process.

2:30 pm – 5:00 pm

SFO® TESTING, EXAM 2: SCHOOL BUSINESS MANAGEMENT

Pre-registration required.

Columbine, Terrace Level

2:30 pm – 3:30 pm

ANNUAL MEETING PROGRAM PLANNING SESSION Influence Your Profession by Planning ASBO International's 2018 Annual Meeting & Expo

Majestic Ballroom, Majestic Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development
Content Area: Leadership Development

All encouraged to attend!

Seize the opportunity to influence your profession by collaborating with other content area experts in planning the professional development curriculum for ASBO International's 2018 Annual Meeting & Expo.

Learning Objectives: 1. Assess current knowledge and skill requirements for school business officials (SBOs) 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.

DISCUSSION GROUPS

2:30 pm – 3:30 pm

LEVERAGING PERFORMANCE DATA AND TRANSPARENCY TO CREATE HEALTHIER, MORE SUSTAINABLE SCHOOLS (DG22)

Director's Row J, Lobby Level

SFOs: 1

Content Area: Sustainability

You can't manage what you don't measure, and for school systems with sustainability and environmental health goals, it can be hard to get a handle on actual

building performance. The U.S. Green Building Council recently helped launch a new performance tracking tool called Arc. The Arc platform allows all building owners, including school systems, to track and benchmark energy, water, waste, transportation, and human experience indicators in individual buildings so that improvements can be made over time. And if the building's score within the platform reaches a high enough level, Arc provides a direct pathway to LEED Operations + Maintenance certification. Learn what the Arc platform is, how it is being used in school systems, and how it is helping to revolutionize student engagement in building operations and sustainability benchmarking.

Presenter: Patti Mason, Regional Director, Mountain West, U.S. Green Building Council, Denver, CO

THE VALUE OF THE SFO CERTIFICATION (DG23)

Governor's Square 9, Concourse Level

SFOs: 1

Content Area: Leadership Development

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

Presenters: Evelyn Buch, Chief School Finance Officer, Homewood City Schools, Homewood, AL; Jason Helsen, Director of Finance, Reeths-Puffer Schools, Muskegon, MI; Roxie Taft, Business Manager, Sheridan County SD 2, Sheridan, WY

21ST-CENTURY SAFETY AND SECURITY IN SCHOOLS (DG24)

Governor's Square 11, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization

Content Area: Risk Management

Keeping school campuses safe requires adapting to evolving threats while maintaining an environment that is conducive to learning. In many school systems, increased enrollments means coordinating security across multiple facilities. Learn how Fairfax County Schools, a large suburban school district in Virginia, integrated school security. Participants will hear about risks addressed, lessons learned, and outcomes.

Learning Objectives: 1. Describe challenges involved in identifying risks and coordinating enterprise-level security for multiple facilities. 2. Discuss specific safety risks that most districts must address. 3. Explain lessons learned and outcomes experienced during the evolution and integration of security in the large school district featured.



Welcome to Denver and the 2017 ASBO International Annual Meeting & Expo. U.S. Communities would like to extend a special welcome to the Emerging School Business Leaders Scholarship recipients! Visit us at **Booth 503** to learn more about the leading national purchasing cooperative program of which ASBO International is a proud co-founder.

Presenters: Matt Deloge, Vice President, Business Development and Technology, JCI Lighting Solutions, Milwaukee, WI; Jack Guglielmo, Security Technology Manager, Fairfax County Public Schools, Falls Church, VA; Chris Lehmann, Director, K-12 Vertical Market, North America, Johnson Controls, Leesburg, MD; Glenn Lemke, General Manager, JCI Integrated Security, New Castle, DE; Jamie Owen, Security System Technical Specialist, Fairfax County Public Schools, Falls Church, VA

THE POTENTIAL IMPACT OF MARIJUANA LEGALIZATION LAWS ON SCHOOLS (DG25)

Governor's Square 16, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Law

Content Area: Legal Aspects

About half of the states permit the use of medical marijuana; another eight states, plus the District of Columbia, have legalized recreational marijuana. Yet, it remains to be seen how legalizing marijuana, especially for recreational purposes, will affect public schools. This session focuses on issues surrounding marijuana use by school personnel, such as bus drivers and teachers, and student-athletes in states relying on drug testing to maintain eligibility. The session also examines the potential consequences for students and teachers who drive to or are present in schools while impaired due to marijuana use and reviews legislation and litigation on drug testing and privacy to help education leaders devise policies to ensure safety in response to the use, and misuse, of marijuana in schools.

Learning Objectives: 1. Outline the rights of school employees who use marijuana. 2. Identify the rights of students who use marijuana. 3. Describe how to develop policies to help avoid legal controversies over the use of marijuana by school employees and students. 4. Discuss case law and evolving legal trends with regard to how drug testing might impact the use of marijuana in school settings.

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

IDENTIFYING USEFUL DATA WITHIN YOUR FINANCIAL STATEMENTS FOR MANAGEMENT ANALYSIS (DG26)

Governor's Square 15, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Finance

Content Area: School Finance

Is your district utilizing the data reported within the Comprehensive Annual Financial Report (CAFR) or audited financial statements to its fullest potential? This discussion will highlight key financial information within the report that can be analyzed through the use of ratios, and other information that may provide insight to the CAFR readers. Leave with a list of 20 useful ideas for data identification and analysis that will help your district distinguish itself through the innovative use of information contained in the financial statements.

Learning Objectives: 1. Identify and discuss useful information within the CAFR or audited financial statements. 2. Identify key ratios that can be used to analyze reported information. 3. Describe how the results of the analyses of financial statements can be used to evaluate performance in key areas.

Presenters: Corey Arvizu, Managing Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ; Sara Kirk, Manager, Heinfeld, Meech & Co., P.C., Phoenix, AZ

BENEFITS OF COOPERATIVE PURCHASING: RESOURCES THAT CAN SAVE TIME AND MONEY (DG27)

Governor's Square 10, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization

Content Area: Purchasing and Supply Management

Many schools are challenged with spending less, while also ensuring they meet procurement guidelines. This session will highlight some cost-saving solutions through cooperative purchasing that can help your district spend less. Consider examples of how schools are leveraging competitively solicited contracts to create a better learning environment and bring value to their schools. Learn how Great Valley School District in Pennsylvania has used cooperative purchasing programs to benefit the district's fiscal objectives and how your district can utilize these cooperative solutions.

Learning Objectives: 1. Describe how cooperative purchasing works to achieve cost savings for a school district. 2. Identify specific cost-saving solutions that might benefit your school district. 3. Discuss examples of how schools have leveraged competitively solicited contracts to create better learning environments for students.

Presenter: Michelle Phelps, Program Manager, U.S. Communities, Denver, CO

THE ART OF CAPITAL IMPROVEMENT PLANNING (DG32)

Governor's Square 14, Concourse Level

SFOs: 1

Content Area: School Facilities Management

Schools around the world are in need of capital improvements. In 2013, Olathe Public Schools in Kansas passed its largest bond issue referendum in district history by the largest approval rate ever by utilizing a new capital improvement planning process. The process was developed and implemented using a combination of collaborative building walkthroughs, data-based committee work, and stakeholder feedback to ensure support for the prioritized plan. Learn more about the innovative process that was awarded ASBO International's Pinnacle of Excellence Award in 2016.

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

DEEP DIGS

2:30 pm – 4:30 pm

UNDERSTANDING THE IMPACT OF RISK MANAGEMENT IN YOUR SCHOOLS (DD08)

Director's Row E, Lobby Level

CPEs: 2 | SFOs: 2

Field of Study: Business Management and Organization

Content Area: Risk Management

Understanding the dynamic nature of risks and managing them in schools is no easy task. Having insurance is just the first step. Schools are exposed to a plethora of risks that range from everyday occurrences such as slips, trips, and falls, to bus accidents and even uncommon natural disasters like tornados and floods. How does your school district identify and mitigate these risks and control losses? Learn about 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 the various departments within schools. 3. Describe how to educate and train staff to raise risk management awareness. 4. Discuss the value of a school risk manager and a comprehensive risk management program. 5. Identify various resources and strategies for executing a proper risk management program. 6. Explain how to determine the Total Cost of Risk.

Presenters: Amy Diedrich, Public Sector Specialist, Marsh & McLennan Agency, LLC, Minneapolis, MN; Kerry Leider, Property and Risk Manager, Retired, Duluth, MN; Sara Naus, Academic Director, The National Alliance for Insurance Education and Research, Austin, TX; Tom Strasburger, Vice President, Sales and Marketing, PublicSchoolWORKS, Cincinnati, OH; Jim Westrum, Executive Director, Finance and Business Services, Wayzata Public Schools, Wayzata, MN

IMPROVING GRANTS MANAGEMENT: COMPLIANCE WITH THE UNIFORM GUIDANCE (DD09)

Director's Row H, Lobby Level

CPEs: 2 | SFOs: 2

Field of Study: Accounting

Content Area: Accounting, Auditing, and Budgeting

The Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards has been in effect for several years and schools are still challenged by their implementation. The federal government's guidance on administrative requirements is a key component to more effectively focusing federal resources on improving performance and outcomes while ensuring financial integrity of taxpayer dollars. This session will address key implementation issues, including focus on performance over compliance; strengthened requirements of internal controls and accounting for salaries and wages; capitalization thresholds clarification; purchasing; indirect cost rates; allowable costs; encouraging family friendly policies; sub-recipient and contractor oversight requirements; and person-identifiable information responsibilities. This session will also provide participants with the latest information about the OMB requirements.

Learning Objectives: 1. Outline ways to improve compliance with the OMB Uniform Grant Guidance. 2. Describe how to address some of the more prevalent issues noted as deficiencies by auditors and oversight agencies. 3. Identify key aspects of the standard on your school district's grant programs. 4. Discuss updates of the new audit and oversight requirements for federal grants.

Presenters: Corey Arvizu, Managing Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ; Charlotte Gates, Director of Business Services, Sahuarita USD, Sahuarita, AZ; Bert Nuehring, Partner, Crowe Horwath LLP, Chicago, IL; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL

BEST PRACTICES IN HEALTH AND WELFARE BENEFIT PLAN MANAGEMENT (DD11)

Governor's Square 12, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Personnel/Human Resources

Content Area: Human Resources and Labor Relations

Health and welfare benefit plans are an important employee retention tool yet a drain on already strained budgets. As districts seek to attract and retain qualified and skilled employees, pressure to rein in future spending will only increase. Effective managers of health and welfare benefit plans can achieve balance between these competing demands using strategies that are both competitive and cost-effective. Participants will leave with 10 cutting-edge best practices and the knowledge they need to implement them. Strategies include: consumer-



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driven health plans, dependent verification reviews, employee wellness plans, and more.

Learning Objectives: 1. Explain how a district can save money while still offering competitive benefits. 2. Outline current health and welfare benefits trends across the industry. 3. Discuss steps a district should take toward improving practices in health and benefit plan management.

Presenters: Susan Relland, Chief Marketing Officer, American Fidelity Assurance Co., Oklahoma City, OK; Che Yi, Senior Health and Wellness Plan Consultant, American Fidelity Assurance Co., Oklahoma City, OK

HOW TO CALCULATE THE SAVINGS FOR SCHOOL CONSOLIDATION (DD12)

Governor's Square 17, Concourse Level

CPEs: 2 | SFOs: 2

Field of Study: Finance

Content Area: School Finance

When is school consolidation the smart financial choice? Learn the mathematical formulas used to calculate potential savings gained through school consolidation. Savings in the areas of personnel and non-personnel will be addressed through analyses of multiple scenarios. Participants will also learn basic tips for navigating the political aspects of a consolidation program.

Learning Objectives: 1. Outline the process of calculating consolidation savings. 2. Provide examples of ways to encourage community buy-in for school consolidation. 3. Describe the steps of the consolidation of process from beginning to end.

Presenter: Jay Toland, Chief Financial Officer, Scotland County Schools, Laurinburg, NC

Sunday

DAILY SCHEDULE

SECRETS TO A SUCCESSFUL SOFTWARE IMPLEMENTATION—RFP TO “GO LIVE” (DD13)

Director's Row I, Lobby Level

CPEs: 2 | SFOs: 2

Field of Study: Information Technology
Content Area: Information Technology

Is your district considering a finance/HR software change? If so, this session will provide insight into the entire process, from the RFP process, through selection, through the implementation process, to going live. Hear from two business officials who have implemented software systems and survived!

Learning Objectives: 1. Describe the components of the RFP process. 2. Explain project management options and the role of the project manager. 3. Identify areas of focus for a successful software implementation

Presenters: Brian Marcel, Assistant Superintendent, Administrative and Support Services, Washtenaw ISD, Ann Arbor, MI; Stephanie Weese, Associate Superintendent of Finance, Montcalm Area ISD, Stanton, MI

5:00 pm – 5:45 pm

MBA AND PATHWAY TO THE MBA RECEPTION

Invitation only.

Windows, Second Level

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9:00 pm – 11:00 pm

PRESIDENT DRAGONA AND NJ ASBO'S DESSERT RECEPTION

Badge required.

Grand Ballroom, Second Level

In celebration of a successful year, President Dragona and NJ ASBO invite you to join them for dessert, coffee, and comradery. All conference attendees are welcome.

MONDAY, SEPTEMBER 25

7:30 am – 10:00 am

REGISTRATION

Plaza Foyer, Concourse Level

7:30 am – 8:00 am

COFFEE BREAK

Governor's Square Foyer, Concourse Level

DISCUSSION GROUPS

8:00 am – 9:00 am

ENGAGING SCHOOL LEADERS TO BE ROCK STAR ADVOCATES FOR EDUCATION (DG28)

Governor's Square 17, Concourse Level

SFOs: 1

Content Area: Legislative Affairs

Learn about Pennsylvania's Circuit Rider program, which helped educate and improve the advocacy efforts of school business officials and other school leaders across the state. The session will describe the development, implementation, and impact of the program, which used Circuit Riders (retired school leaders) to identify, educate, and engage stand-out school leader advocates (Rock Stars) in a coordinated effort to obtain a positive change in state education policy. Circuit Riders provided school leaders with the tools and support to improve their advocacy efforts, ultimately shifting the thinking of their communities and their legislators.

Presenter: Hannah Barrick, Director of Advocacy, PASBO, Harrisburg, PA

REAL-WORLD FRAUD AND INTERNAL CONTROLS (DG29)

Governor's Square 16, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting

Content Area: Accounting, Auditing, and Budgeting

When news of the latest major fraud hits the headlines, other school districts sit back and watch, telling themselves that “it couldn't happen here.” But the reality is that fraud can happen anywhere. Huge sums are lost in school districts every day as a result of minor frauds that never make the headlines. Despite the serious risk that fraud presents, many school districts still do not have formal systems and procedures in place to prevent, detect, and respond to fraud. Get a real-world perspective on fraud through reported news stories about the victims and perpetrators. The what, why, and how of each fraud case will be discussed to illuminate focus areas that attendees can review in their own districts.

Learning Objectives: 1. Define fraud and discuss fraud statistics. 2. Explain why people commit fraud. 3. Cite real-world examples of fraud. 4. Identify the importance of and elements of good internal controls.

Presenter: Earl Burke, Assistant Superintendent/Chief Financial Officer, Hinds County SD, Raymond, MS

POSITIONS CHANGE—DO YOUR JOB DESCRIPTIONS? (DG30)

Governor's Square 15, Concourse Level

SFOs: 1

Content Area: Human Resources and Labor Relations

As a result of improved technology, alignment to the district strategic plan, and changes to the organizational structure, job duties, responsibilities, and expectations change as a natural course of business. Maintaining accurate job descriptions that support appropriate compensation provides districts the ability to attract, retain, and motivate a highly qualified and competent work force. Examine a reclassification process implemented in response to recommendations from a recent salary study.

Presenters: Jennifer Lang, Director, Compensation and Leave HR Services, Atlanta Public Schools, Atlanta, GA; Holly Morales, Executive Director of HR Services, Atlanta Public Schools, Atlanta, GA

CREATING A STRATEGIC FINANCIAL PLAN THAT SUPPORTS YOUR DISTRICT GOALS (DG33)

Governor's Square 12, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Finance Content Area: School Finance

Best practices for school business officials in the strategic planning process include developing a strategic financial plan that corresponds with the identified goals of the district. A five-year projected budget sets out how financial and human resources will be used and re-purposed as necessary to meet the district's top goals both short and long term. Advantages to this process include proactive planning, resource management, early identification of challenges and opportunities, stakeholder buy-in, and collaborative management. Participants will learn about successful models across the country and practical steps to get started, and will leave with tools to guide and accelerate the process.

Learning Objectives: 1. Demonstrate the value of tying strategic goals to budgets. 2. Provide examples of strategic financial plans. 3. Outline steps to develop a strategic financial plan. 4. Identify resources and tools available for strategic financial planning.

Presenters: Lisa Morstad, Regional Advisor, Forecast5 Analytics, Naperville, IL; Michele Trongaard, Assistant Superintendent for Finance and Operations, Wylie ISD, Wylie, TX



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USING TIME EFFECTIVELY? THE VALUE OF TRUSTING RELATIONSHIPS (DG34)

Governor's Square 11, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development Content Area: Leadership Development

We all complain about spending time doing things that take us away from more important tasks and do not provide any benefit to our end goal. Developing relationships that are built on trust can speed the processes that move your organization forward with minimal "busy work." Learn the characteristics and benefits of a trusting relationship, discover successful strategies to build those relationships, and find out how to maintain and grow trust in your organization. The discussion will focus on relationships at all levels, including with the board, supervisors, colleagues, and more.

Learning Objectives: 1. Identify the characteristics of a trusting relationship. 2. Discuss successful strategies to build trusting relationships. 3. Describe how to maintain and grow trusting relationships.

Presenter: Wayne McCullough, Director of Leadership and Development, PASBO, Harrisburg, PA



Monday

DAILY SCHEDULE

MOTIVATING THE MILLENNIALS: RECRUITING AND RETAINING A NEW GENERATION OF TEACHERS (DG35)

Governor's Square 10, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personnel/Human Resources
Content Area: Human Resources and Labor Relations

As Baby Boomers begin retiring in large numbers, the disparity in size between the exiting workforce and Generation X has led economists to predict a 40% shortfall in available workers. This means that the populous Millennial generation is being asked to fill the employment hole in record numbers. The large gap has magnified the cultural and motivational differences that naturally exist between two or more generations. Learn how districts can recruit and retain this new generation of teachers.

Learning Objectives: 1. Describe the mindset and motivations of the Millennial generation. 2. Discuss specific compensation package ideas to recruit and retain younger teachers while still being able to attract experienced, hard-to-find specialist educators. 3. Characterize the current paradigm shift in management, evaluation, and benefits provision for a new generation of teachers.

Presenter: Bret McKittrick, Attorney, Associated Benefits and Risk Consultants, Waukesha, WI

INTERNATIONAL PERSPECTIVES ON PROFESSIONALIZING SCHOOL BUSINESS MANAGEMENT (DG36)

Governor's Square 9, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Personal Development
Content Area: Global Issues

The UK's National Association of School Business Management will transition to institute status in the autumn, taking the next significant step in its workforce professionalization initiative. Learn how this move will help to both promote and demonstrate the high levels of knowledge and competency now required of school business leaders.

Learning Objectives: 1. Define "institute status" as it relates to the National Association of School Business Management. 2. Discuss the competency-based approach to school business management and its global transferability. 3. Describe the impact of increasing school autonomy on the school business management profession.

Presenter: Trevor Summerson, School Business Director, National College for School Leadership, Sheffield, United Kingdom

THE VALUE OF A PRINT AND DIGITAL STRATEGY: ORGANIZATIONAL IMPACT AND SUPPORT OF STUDENT ACHIEVEMENT (DG52)

Governor's Square 14, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Management and Organization
Content Area: Management Techniques

Discover how to raise the bar for student achievement, save money, and increase user satisfaction with a print vision. Be inspired by a district that has been nationally recognized for making positive organizational impacts via these efforts. Blue Valley Schools will share its vision, implementation, and current solutions, including: how digital curriculum is integrated, statistics, validation, and teacher testimonials. This session will also discuss the future of print strategy, offering scalable and sustainable ideas.

Learning Objectives: 1. Define the term "print vision" and explain how it aligns, supports, and helps achieve organizational priorities in a school district. 2. Describe how a digital curriculum can be integrated into a print vision and how to implement scalable and flexible solutions in doing so. 3. Discuss future options for print visions designed to benefit educational organizations.

Presenter: Jason Gillam, Director of Business Operations, Blue Valley SD No. 229, Overland Park, KS

DISCUSSION GROUPS

9:15 am – 10:15 am

MANAGING ON-DEMAND "GIG" WORKERS IN SCHOOLS (DG18)

Governor's Square 15, Concourse Level

SFOs: 1

Content Area: Management Techniques

Seemingly overnight, independent and often part-time contract workers are replacing employees in our schools. Working independently or for outsourcing companies, these "gig" workers include long-term substitute teachers, speech pathologists, teacher assistants, school bus drivers, and others. Hiring gig workers can help districts balance budgets, but not without controversy. Learn about best practices for managing contract workers in the new gig economy. This presentation is based in part on Richard Weeks's article, "The Rise of On-Demand 'Gig' Workers in Schools," published in the November 2016 issue of *School Business Affairs*.

Presenters: Mary Ellen Dunn, Deputy Superintendent for Administration and Finance, Public Schools of Brookline, Brookline, MA; Richard Weeks, Emeritus, Part-time Business Manager, Hill View Montessori Charter Public School, Wakefield, MA

GASB UPDATE (DG37)

Governor's Square 12, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting (Governmental)

Content Area: Accounting, Auditing, and Budgeting

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

Learning Objectives: 1. Identify new reporting requirements from GASB. 2. Discuss 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.

Presenters: David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT; Bert Nuehring, Partner, Crowe Horwath LLP, Chicago, IL

USING DATA ANALYTICS TO IMPROVE STUDENT ACHIEVEMENT (DG39)

Governor's Square 11, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Information Technology

Content Area: Information Technology

As school districts continue to operate with limited resources, it becomes increasingly important to efficiently use and measure current and potential uses of funds. Having complete data points from one's own district and gathering comparative data from like districts allows school business officials to locate and communicate with their financial and academic peers using thousands of data points, thus enhancing internal measurement and strategic planning for the future. This session will present detailed examples of these data analytics.

Learning Objectives: 1. Explain the value of "big data" in school district financial planning. 2. Discuss the value of peer group analysis scenarios. 3. Illustrate how financial and student performance data can be correlated.

Presenter: Phillip Saurman, Education Finance Consultant, Eidex Insights, LLC, Caledonia, MI



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ENSURING EQUITY IN STUDENT-BASED BUDGETING (DG40)

Governor's Square 9, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Accounting

Content Area: Accounting, Auditing, and Budgeting

Student-based budgeting (SBB) is an innovation that's taking hold across the country; but how do we ensure equity within the parameters of an SBB model? Find out how School District 49 in Colorado Springs, Colorado, uses a district-wide normalization process to ensure equity in student funding.

Learning Objectives: 1. Outline the process of budget development appropriate for SBB. 2. Explain the steps required for ensuring budget precision relative to SBB. 3. Describe effective strategies for budget presentation and reporting specific to SBB. 4. Discuss the ways in which SBB represents a school finance innovation.

Presenter: Brett Ridgway, Chief Business Officer, El Paso County SD No. 49, Colorado Springs, CO

TAKE OWNERSHIP OF YOUR RETIREMENT PLAN OFFERINGS (DG41)

Governor's Square 10, Concourse Level

SFOs: 1

Content Area: Human Resources and Labor Relations

All too often, school districts across the country take a "hands-off" approach with regard to optional retirement plans (403b, 457), relinquishing their retirement plan offerings to third-party providers and third-party administrators. However, the ultimate fiduciary responsibility rests with the district. Learn how you can take a more active role in what you offer your employees for their retirement options. Hear how St. Vrain Valley Schools in Longmont, Colorado, took the initiative to re-evaluate their paradigm in order to provide the best benefits for their employees' future.

Presenter: Tony Whiteley, Executive Director of Budgets, St. Vrain Valley Schools, Longmont, CO

Monday

DAILY SCHEDULE

GOTEAM! NAVIGATING OUR FIRST BUDGET CYCLE AS A CHARTER SYSTEM (DG42)*Governor's Square 14, Concourse Level***CPEs: 1 | SFOs: 1****Field of Study: Finance****Content Area: School Finance**

Atlanta Public Schools has undergone a significant transition in moving toward a charter system operating model. Learn how the district is navigating this transition. Topics will include the creation and introduction of individual school-based governance teams (GoTeams), the redistribution of central office budgets to school allocations, and the additional flexibility and autonomy principals now have and the corresponding required oversight from the finance office.

Learning Objectives: 1. Identify ways to introduce additional flexibility and autonomy at school sites. 2. Discuss the distribution of governing authority with the creation of local governing teams (GoTeams). 3. Identify additional oversight and management requirements as schools move away from a one-size-fits-all approach. 4. Discuss the challenge of funding transformation in the face of ever-growing mandatory expenditures. 5. Discuss the redistribution of central office budgets to school allocations.

Presenters: Lisa Bracken, Chief Financial Officer, Atlanta Public Schools, Atlanta, GA; Robert Morales, Chief Financial Officer, Fulton County Schools, Atlanta, GA

THE BENEFITS OF BEING PROACTIVE IN IMPLEMENTING INTERNAL CONTROLS (DG44)*Governor's Square 17, Concourse Level***CPEs: 1 | SFOs: 1****Field of Study: Business Management and Organization****Content Area: Management Techniques**

In today's increasingly complex and fast-paced operational environment, being proactive is critical because things can spiral out of adjustment at a faster pace than ever before. Being proactive in implementing internal controls can help minimize the number of "brush fires" that school officials have to deal with in the workweek. Increase your awareness about why it's better to be proactive than reactive with internal controls.

Learning Objectives: 1. Identify recommended controls over payroll and accounts payable. 2. Discuss recommended controls over contract management, segregation of duties, and collaboration practices. 3. Describe recommended data analytic procedures.

Presenters: Thomas Canby, Associate Executive Director, TASBO, Austin, TX; Tracy Ginsburg, Executive Director, TASBO, Austin, TX; Scott Smith, Senior Vice President, Sales and Engagement, Forecast5 Analytics, Inc., Naperville, IL

DISCUSSION GROUPS**10:30 am – 11:30 am****THE CHARACTER OF ETHICAL LEADERSHIP (DG43)***Governor's Square 16, Concourse Level***CPEs: 1 | SFOs: 1****Field of Study: Personal Development****Content Area: Leadership Development**

Are you an ethical leader? At a time when it seems so many well-known leaders exhibit seemingly questionable ethics, it is important to understand the problem and the cure. Together, participants will explore various "virtues" that can build or diminish their professional and personal character and their ability to lead effectively. The take-aways will include a personal ethics audit as well as an opportunity to let those results guide them in fine tuning their perspectives on what is ethical and what is not and how it impacts their ability to lead.

Learning Objectives: 1. Provide examples of the ethical failures of well-known leaders and their cause and cure. 2. Explain how ethical leadership is critical to the influence of leaders. 3. Outline the virtues of ethical leadership and evaluate your own ethics. 4. Articulate goals that might help you improve as a leader.

Presenter: Michael Jacoby, Executive Director, Illinois ASBO, De Kalb, IL

PRESENT WITH CONFIDENCE (DG45)*Governor's Square 12, Concourse Level***CPEs: 1 | SFOs: 1****Field of Study: Personal Development****Content Area: Leadership Development**

You know your numbers, you know the valuable services you provide, and you know the accomplishments of your department. You need to tell people! But presenting to the public isn't always easy—it takes preparation and practice. Learn how to tell your story effectively and with confidence.

Learning Objectives: 1. Describe how to develop a foundation of presentation skills. 2. Explain strategies for avoiding common public speaking pitfalls. 3. Identify presentation resources for continuous improvement.

Presenter: Scott Little, Associate Executive Director, Michigan School Business Officials, Lansing, MI

THE EVOLVING GOVERNMENTAL AUDIT ENVIRONMENT (DG46)

Governor's Square 16, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Auditing

Content Area: Accounting, Auditing, and Budgeting

Those who set standards for governmental audits continue to issue new financial reporting and auditing guidance that affects school organizations. Get insight into the project agendas of the various standard-setting organizations, how current and proposed changes may affect school finance officials, and the future of governmental auditing.

Learning Objectives: 1. Identify the additional audit requirements applicable to school organizations. 2. Describe how a governmental audit is different from an audit in the private sector. 3. Discuss how changes in the government audit sector may affect school organizations.

Presenters: Corey Arvizu, Managing Partner, Heinfeld, Meech & Co., P.C., Tucson, AZ; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL

ENGAGING STAKEHOLDERS IN SCHOOL FINANCE (DG47)

Governor's Square 17, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Finance

Content Area: School Finance

For almost 20 years, Jenks Public Schools in Oklahoma has invited stakeholders to serve as members of the Jenks Select Committee for the Study of School Finance. The committee creates a group of informed citizens/staff members who will have detailed knowledge about school funding in Oklahoma and how it affects their own school district; encourages these newly informed stakeholders to share accurate information within the community; and provides opinions and suggestions on financial matters to legislators. More than 500 people have participated on this committee. Learn how you can create this type of committee in your own community.

Learning Objectives: 1. Describe how a select committee for the study of school finance can increase community engagement. 2. Discuss how the activities of the committee can create a stronger political voice. 3. Outline how to provide a clear understanding of the benefits of the committee for all stakeholders. 4. Describe how the activities of the committee help build relationships with parents and staff.

Presenters: Channa Byerly, Chief Financial Officer, Duncan Public Schools, Duncan, OK; Cody Way, Chief Financial Officer, Jenks Public Schools, Jenks, OK

FINE TUNING THE SCHOOL-VOLUNTEER FUNDRAISING RELATIONSHIPS (DG48)

Governor's Square 10, Concourse Level

CPEs: 1 | SFOs: 1

Field of Study: Business Law

Content Area: Legal Aspects

As school budgets are squeezed, volunteer-led fundraising groups provide much-needed support for important activities. Yet, many school administrators—and many volunteers—do not understand their proper roles when it comes to fundraising activities such as raising money legally, operating concession stands, and sponsoring band trips. Learn the do's and don'ts of school fundraising during this panel discussion and leave with a well-crafted road map on how to set up the school-volunteer relationship for more success and less risk.

Learning Objectives: 1. Describe the complexities of school fundraising and how best to divide roles between the school and volunteer fundraising group to avoid liability. 2. Identify the three biggest reasons schools are sued over fundraising activities. 3. Outline a road map to implement a strong school-volunteer fundraising program. 4. Discuss best practices for managing nonprofit fundraising groups effectively.

Presenter: Sandra Pfau Englund, Chief Executive Officer, RENOSI, Inc., Winter Garden, FL



Monday

DAILY SCHEDULE

ASBO THANKS

Thank you to our local host, **Colorado Association of School Business Officials**, and the **ASBO International Committees** for their help in making this year's meeting one to remember!



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Our corporate values have been sustainable for more than 65 years, even as globalization changes the face of American manufacturing. We are indebted to you, our partners in education, for supporting our way of doing business and contributing to the prosperity of Virco's domestic workforce and suppliers.

So for us, Made in the USA isn't a theme at all. It's how we do business.



Robert Virtue, Virco Chairman of the Board and CEO



SUNDAY, SEPTEMBER 24

CLINIC TABLES

TABLE 1

When I'm 64: Web-based Tools Demo

Presenters: Mark Jackowitz, Senior Vice President, Voya Financial®, Windsor, CT; Jonathan Reilly, Head of Core Sales & Distribution, Voya Financial®, Irvine, CA

TABLE 2

Retirement Pathfinder: The Latest Interactive Retirement Income Planning Tool

Presenter: John Kevin, Vice President, K-12 Market, VALIC, Houston, TX

TABLE 3

Easy, Cost-Effective Solution for Saving Your District Money: The Answers to Cooperative Purchasing

Presenter: Michelle Phelps, Program Manager, U.S. Communities, Denver, CO

TABLE 4

Employer Contributory Plans (Match, Elective, Special Pay)

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

TABLE 5

Open Educational Resources—How They Affect Budgets and Staff Resources

Presenter: Freddie Rogers, K-12 Instructional Consultant, Office Depot, Carol Stream, IL

TABLE 6

Key Steps to Educator Financial Wellness: Small Behavioral Changes That Can Help You and Your Employees Save More for Retirement

Presenter: Steve Delisle, Regional Marketing Officer, Horace Mann, Quakertown, PA

TABLE 7

The Evolution of Employee Wellness Programs: Addressing Physical, Mental, and Financial Wealth of Your Employees

Presenter: Fred Makonnen, Divisional Vice President, Head of Retail 403(b) Sales and Strategic Partnerships, AXA, Jersey City, NJ

TABLE 8

Leveraging Smart Software in the ERP World

Presenters: Kathy Jorgensen, Director of Product Development, Implementation, Tyler Technologies, Sioux Falls, SD; Dana Roberson, Lead Product Market Manager, Tyler Technologies, Lubbock, TX; Anthony Whiteley, Executive Director of Finance, St. Vrain Valley School District, Longmont, CO; Kirk Youngman, Manager of Enterprise Systems, St. Vrain Valley School District, Longmont, CO

TABLE 9

A Roadmap for Successful Technology Implementation in New and Growing Schools

Presenter: John Stewart, Vice President of Sales for K-12, SLG, Higher Ed, mindSHIFT, a Ricoh Company, New York, NY

TABLE 10

Bond Proceeds in Today's Interest Rate Environment

Presenters: Todd Alton, CFA, Vice President, Investment Advisory Services, Public Trust Advisors, LLC, Denver, CO; Joe Carroll, CTP, CGIP, Vice President, Investment Advisory Services, Public Trust Advisors, LLC, Denver, CO

TABLE 11

Building Efficiencies Value in STEAM and Student Achievement

Presenter: Judith Mouton, Program Director of Education, NA Solutions, Johnson Controls, Milwaukee, WI

TABLE 12

Winning the War for Talent: Strategies for Helping to Stay Ahead of the Competition for Talent

Presenter: Carey Adamson, National Public Sector Practice Leader, Colonial Life, Columbia, SC

TABLE 13

How to Grow Your School District P-Card Program

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

TABLE 14

The Benefits of Public-Private Partnerships for Dining Services

Presenters: Merrie Bernstein, Director of Business Development, Aramark K-12, Bridgewater, NJ; Yvette Turner, Director of Business Development, Aramark K-12, Brookfield, IL

TABLE 15

Budget Planning Improvement Through the Use of Technology

Presenter: Tony Olson, Vice President of Marketing, MyBudgetFile, Alberta, Canada

TABLE 16

How Data Analytics Can Improve Student Achievement

Presenter: Phil Saurman, Education Finance Consultant, Grand Rapids, MI

TABLE 17

Stop Missing Out. Learn About the Benefits of an Intelligent School Fee Management System

Presenter: Anna Gradie, Chief Operating Officer, Rycor Software, Chandler, AZ

TABLE 18

Better Workforce Management with TimeClock Plus

Presenter: Trey Watts, Assistant Vice President of Sales, TimeClock Plus, San Angelo, TX

TABLE 19

Siemens SustainU STEAM Academy: Connecting the Dots Between the Classroom and the Job Market

Presenters: Kim Crawford, K12 Business Manager, Siemens, Los Angeles, CA; Darlene Petersen, K12 Program Manager, Siemens, Buffalo Grove, IL; Jamie Sitter, K12 Marketing Manager, Siemens, Los Angeles, CA

TABLE 20

Ensure Clean Audits with Simple Cash Management Strategies

Presenters: Alicia Campbell, Business Development Executive, KEV Group, Palmer, AK; Evelyn Eagle, Co-Founder, KEV Group, Cambridge, ON, Canada; Dava Watson, Business Development Executive, KEV Group, Austin, TX

TABLE 21

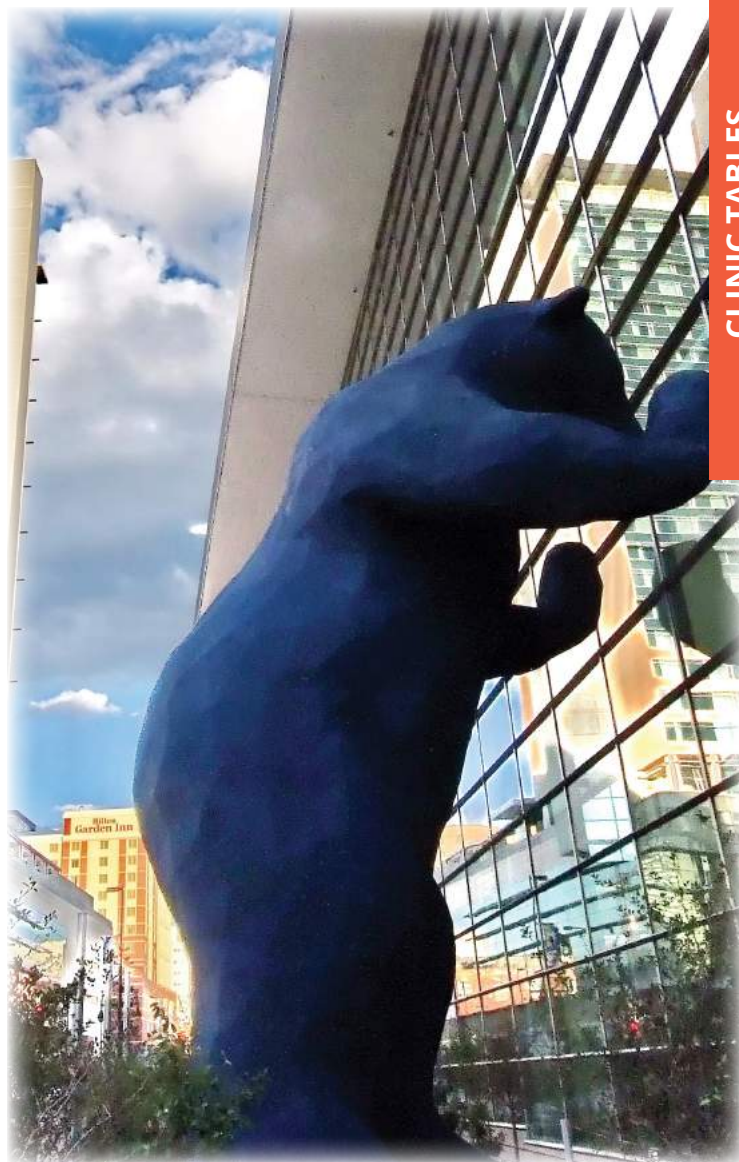
Charting the Course to an Automated Time and Attendance System

Presenter: Rob Tibbs, Subject Matter Expert, K12, Kronos, Birmingham, AL

TABLE 22

Compliance and Market Trend Q&A on FSAs, HRAs, HSAs

Presenter: Jessica Frier, Health and Wellness Plan Consultant, American Fidelity Assurance Company, Oklahoma City, OK



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Badge required for all events.

Friday, September 22

6:00 pm – 7:30 pm

WELCOME MIXER

Plaza Foyer, Concourse Level

(See page 12 for complete listing)

Saturday, September 23

9:00 am – 9:30 am

COFFEE BREAK

South Convention Lobby, Second Level

9:30 am – 11:30 am

FIRST GENERAL SESSION

Grand Ballroom, Second Level

(See page 15 for complete listing)

11:45 am – 2:30 pm

EXHIBIT HALL OPEN

Plaza Ballroom, Concourse Level

11:45 pm – 12:45 pm

LUNCH IN THE EXHIBIT HALL

Plaza Ballroom, Concourse Level

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2:30 pm – 3:30 pm

GUEST PROGRAM: BOOK CLUB — ORPHAN TRAIN BY CHRISTINA BAKER KLINE

Tower Court D, Second Level

(See page 15 for complete listing)

8:00 pm – 11:00 pm

AFFILIATE RECEPTION: ROCKY MOUNTAIN SPECTACULAR

(See page 19 for complete listing)

8:00 pm – 11:00 pm

AFFILIATE RECEPTION AT ACE'S PING PONG

(See page 19 for complete listing)

Sunday, September 24

10:00 am – 12:15 pm

EXHIBIT HALL OPEN

Plaza Ballroom, Concourse Level

10:00 am – 11:00 am

BRUNCH IN THE EXHIBIT HALL

Plaza Ballroom, Concourse Level

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12:15 pm – 12:45 pm

REFRESHMENT BREAK

South Convention Lobby, Second Level

12:45 pm – 2:15 pm

SECOND GENERAL SESSION

Grand Ballroom, Second Level

(See page 22 for complete listing)

2:30 pm – 3:30 pm

GUEST PROGRAM: A TASTE OF COLORADO

Tower Court D, Second Level

(See page 22 for complete listing)

9:00 pm – 11:00 pm

PRESIDENT DRAGONA AND NJ ASBO'S DESSERT RECEPTION

Grand Ballroom, Second Level

(See page 26 for complete listing)

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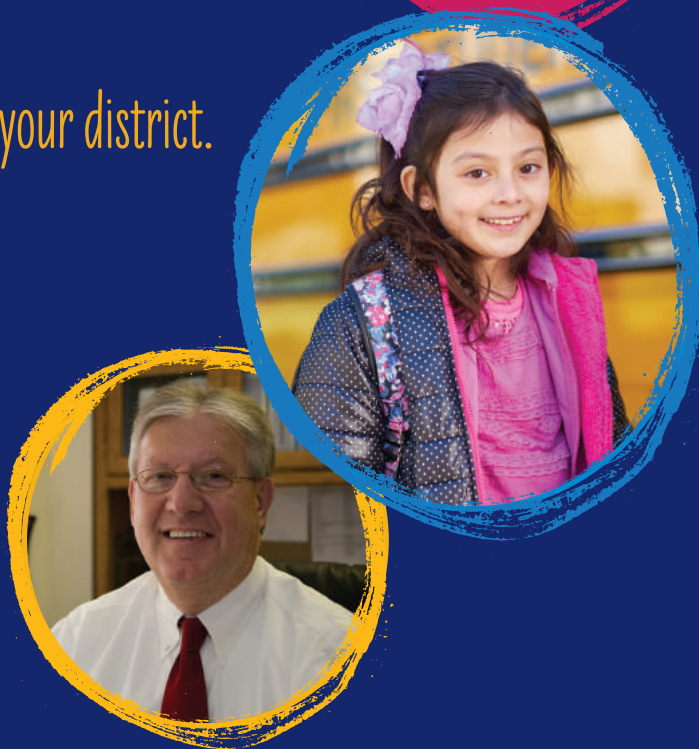
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Booth #306

First Student delivers tailored solutions — for your district.

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 - *2x as safe as industry average (collisions)*
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Collaboratively, we tailor transportation to your needs, creating the best school day for you — and your students.



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Caring for students today, tomorrow, together.™

firststudentinc.com

EXHIBIT HALL *Highlights*

Exhibit Hall Hours

Saturday: 11:45 am – 2:30 pm

11:45 am – 12:45 pm Exhibit Hall Lunch

Lunch Sponsored by Public Trust Advisors, LLC

Sunday: 10:00 am – 12:15 pm

10:00 am – 11:00 am Exhibit Hall Brunch

Brunch Sponsored by BMO Financial Group

ASBO Booth and Pin Trading Zone

Booth 100

Stop by to pick up literature on ASBO International programs. Check out a treasure trove of pins to collect and share. Visit daily to turn in your Exhibit Hall 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!

Exhibit Hall Game – Ticket Trail

Network with partners and exhibitors by participating in this year's Exhibit Hall game. Find your game card in your registration bag and hike around the Exhibit Hall to learn about the products and services these valued companies provide by visiting their booths. During your one-on-one conversations with exhibitors, collect as many raffle tickets as you can so you have more chances to win! It's up to the exhibitors to decide how many raffle tickets you receive, so have your questions about their products and services ready, and plan to gain some knowledge!

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

ASBO Bookstore

Booth 300A

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

Professional Headshots

Booth 500

Refresh your online image with a complimentary professional headshot. Your photo will be sent via email to use on the Global School Business Network, business cards, LinkedIn, or for any other professional business photo need.

Sponsored by Virco, Inc.

Relaxation Station

Booth 122

Regroup and refocus with a complimentary professional massage at the Relaxation Station. Visit Booth 302 to pick up your ticket.

Sponsored by Aramark K-12 Education

2017 ASBO International
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EXHIBITORS 2017

ABMM Financial

BOOTH: 410

517 Route 1 South, Suite 4100
Iselin, NJ 08830

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

ActivityRight By RightLabs

BOOTH: 518

8008 104 St., Suite 217
Edmonton, AB T6E 4E2 Canada

ActivityRight by Rightlabs is an all-in-one integrated mobile application platform that creates and manages digital permission slips, approvals, registration, fee collection, messaging, parent-teacher meetings, forms, and reminders for parents and school staff. Districts ensure compliance with state requirements while improving visibility and mitigating risk. It's everyday engagement done right!

Amazon Business

BOOTH: 511

325 9th Ave. N.
Seattle, WA 98109

Amazon Business has everything you love about Amazon, with new features and benefits tailored to the needs of educational organizations. Amazon Business accounts include free two-day shipping on tens of millions of eligible items, multi-user business accounts, approval workflows, payment solutions, tax-exempt purchasing, dedicated customer support, and much more.

American College of Education

BOOTH: 527

101 W. Ohio St., Suite 1200
Indianapolis, IN 46204

American College of Education provides one of the best educational values in the country at under \$8,000 for an M.Ed. and under \$20,000 for a doctoral degree. ACE is accredited by the Higher Learning Commission and specializes only in education degrees and certificates. Additionally, our programs are conveniently delivered online.

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Oklahoma City, OK 73114



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With decades of supporting schools and districts, American Fidelity offers strategic benefits management and supplemental insurance products designed for the education community. More than 5,600 districts count on us for year-round benefits enrollment support, employee education, and simplifying technologies. Ready for a different opinion? Contact us at 800.654.8489.

Aramark K-12 Education

BOOTH: 302

Aramark Tower, 1101 Market St.
Philadelphia, PA 19107-2988



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To support the K-12 educational mission, Aramark provides innovative food and facilities management for over 500 school districts nationwide. Our 270,000 team members deliver experiences that enrich and nourish millions of lives every day. Learn more at www.aramark.com or connect with us on Facebook and Twitter.

Arthur J. Gallagher & Co.

BOOTH: 217

2850 Golf Rd.
Rolling Meadows, IL 60008

Gallagher's Public Sector Practice focuses exclusively on municipalities and school districts. Our client-centered CORE360™ and Total Rewards Management approaches provide insights and tools to evaluate and minimize the total cost of risk. By looking at your organization holistically, we deliver data-driven solutions that align employee expectations with your operational objectives.

Aspire Financial Services

BOOTH: 426

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

Aspire Financial Services, LLC is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system for all plans. To learn more, visit www.aspireonline.com or call 866.634.5873.

ASSA ABLOY**BOOTH: 318**

110 Sargent Dr.
New Haven, CT 06511

ASSA ABLOY, global leader in door-opening solutions, is dedicated to satisfying end-user needs for security, safety, and convenience. Our product innovations span a full spectrum of security technologies ranging from conventional mechanical locks, security doors, and high-security master key systems, to advanced IP-enabled locking devices featuring wireless connectivity.

Asset Services, Inc.**BOOTH: 123**

6750 Antioch Rd., Suite 300
Merriam, KS 66204

"Boots-on-the-Ground" 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. For more information, visit www.AssetServices.com

Association of Educational Purchasing Agencies (AEPA)**BOOTH: 220**

575 Witt Marsh Rd.
Gamaliel, KY 42140

Take advantage of purchasing contracts that are Nationally Bid, Locally Awarded. AEPA is a non-profit organization, unique to other national cooperatives as each contract is awarded in our 26 member states. The benefit is volume purchasing that is convenient and efficient, providing easy access to state-specific bid protection.

Association of School Business Officials International**BOOTH: 100**

11401 North Shore Dr.
Reston, VA 20190



ASBO INTERNATIONAL

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

AXA**BOOTH: 409**

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



STRATEGIC PARTNER
ASBO INTERNATIONAL

AXA is a proud strategic partner and sponsor of the ASBO Eagle Award. We are passionate about helping our clients secure their financial futures. We leverage our extensive knowledge and experience to create retirement plan strategies tailor-made to meet your needs and those of your employees.

BerryDunn**BOOTH: 327**

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

BerryDunn is an independent management and IT consulting firm with extensive IT strategic planning, systems consulting, process improvement, and change management expertise. Our K-12 team understands the systems and processes that support K-12 schools. We proudly participate in ASBO to stay abreast of the challenges and opportunities impacting our clients.

BMO Financial Group**BOOTH: 211**

111 W. Monroe St., 5E
Chicago, IL 60603



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BMO Financial Group is a highly diversified North American financial services organization widely used by corporations and public sector organizations. Whether it's treasury management solutions to make your payments and collections more efficient, or our corporate card programs, we're focused on one thing: our clients' financial success. Visit bmo.com/cashmanagement.

BRD Noise and Vibration Control, Inc.**BOOTH: 324**

PO Box 127, 112 Fairview Ave.
Wind Gap, PA 18091

ANSI-S12.6 is changing the landscape of acoustics in schools. To help the educational field meet these changes, BRD Noise and Vibration Control provides free consultative analysis and design services to support architects, MEP and acoustical consultants, and design/build contractors in the specification of cost-effective solutions to keep HVAC equipment quiet.

BSN Sports**BOOTH: 522**

1901 Diplomat Dr.
Farmers Branch, TX 75234

Founded in 1972 as a factory-direct equipment company, BSN SPORTS is the largest distributor of team sports apparel and equipment in the United States.

budget4cast

BOOTH: 226

700 Colorado Blvd., #255
Denver, CO 80206

budget4cast is a cloud-based project management software. With budget4cast you can manage your project and program budgets in a collaborative, efficient, and accurate manner. No more spreadsheets, no more expensive project extranets. budget4cast is the premier tool for your next bond campaign or facility projects.

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BOOTH: 519

469 King St. West, 2nd Floor
Toronto, ON, M5V 1K4 Canada

Government Reporting Specialists brings together CaseWare International, Gray CPA Consulting, PC, and F.H. Black & Company Incorporated. Together, Government Reporting Services has more than 60 years of experience working with governments to automate financial reporting, document management, and preparation for audit by implementing CaseWare's GASB Reporting software solution.

CGI Technologies & Solutions

BOOTH: 608

11325 Random Hills Rd.
Fairfax, VA 22030

CGI is one of the world's largest IT and business process services providers. In the public sector, CGI provides built-for-government IT solutions that maximize revenue while minimizing costs. CGI is a full-service systems integrator and managed services provider with the expertise to address business challenges across the public sector spectrum.

Chartwells K12

BOOTH: 611

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

Chartwells K12 provides nutritious and delicious food to more than 600 school districts nationwide, and is committed to nourishing student bodies, minds and spirits, paving the way for a lifetime of success and well-being. Chartwellsk12.com

Cintas

BOOTH: 509

6800 Cintas Blvd.
Mason, OH 45040

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

ClassWallet

BOOTH: 603

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

A SaaS platform enables school administrators to delegate, control, and track spending in real time by combining a central dashboard, virtual wallets, an ecommerce marketplace, reimbursement management, and a prepaid debit card. Administrators get SKU-level tracking of all on-platform transactions, and automated reconciliation in a completely cashless and paperless environment.

Clifton Larson Allen

BOOTH: 624

20 E. Thomas Rd., Suite 2300
Minneapolis, AZ 85012

CliftonLarsonAllen is a professional services firm providing audit, accounting, tax, consulting, and

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Colonial Life

BOOTH: 214

1200 Colonial Life Blvd.
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For more than 75 years, Colonial Life & Accident Insurance Company has provided financial protection benefits through the workplace. Our benefit services and education, innovative enrollment technology, and personal service support more than 80,000 businesses and organizations, representing more than 3 million of America's workers and their families.

Concrete Stabilization Technologies, Inc.

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8500 E. Warren Ave.
Denver, CO 80231

Cooperative Strategies, LLC

BOOTH: 425

8955 Research Dr.
Irvine, CA 92618

Cooperative Strategies provides consulting services to LEAs through focused expertise while maintaining a broad spectrum of customized services in the areas of facilities planning/demographics, financial advisory, special tax/assessment, and program implementation. Utilizing innovative technology, out-of-the-box problem solving, and best practices, we are dedicated to providing quality facilities for America's students.

Crowe Horwath, LLP

BOOTH: 320

One Mid America Plaza, Suite 700
Villa Park, IL 60181

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

Davis Demographics

BOOTH: 600

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Davis Demographics is the nation's premier K-12 demographer, having served hundreds of school districts across the country over the past 24 years with comprehensive student forecasts, redistricting tools and services, detailed demographic studies. SchoolSite GIS planning software is currently licensed by school districts in 33 states. Plan With Confidence.

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Digital Schools

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Round Lake, IL 60073

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District Administration Magazine

BOOTH: 110

35 Nutmeg Dr., Suite 205
Trumbull, CT 06611

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

Durham School Services

BOOTH: 102

4300 Weaver Pkwy.
Warrenville, IL 60555

Durham School Services, Petermann Ltd., and Stock Transportation are premiere providers of school transportation services. Combined, we operate more than 21,500 school buses, employ over 27,000 people, and serve over 550 school districts in 34 states and 4 provinces. Getting students to school safely, on time, and ready to learn®.

E&I Cooperative Services

BOOTH: 225

2 Jericho Plaza
Jericho, NY 11753

With nearly 4,000 institutional members, E&I Cooperative Services is the member-owned, not-for-profit sourcing cooperative focused on education. Established in 1934, E&I provides members with access to a diverse portfolio of competitively awarded contracts, electronic procurement platforms, and

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Education Management Systems

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4110 Shipyard Blvd.
Wilmington, NC 28403

LINQ is a complete enterprise management solution for small to mid-size K-12 school districts. From payroll, general ledger, and HR to electronic payments, school bookkeeping and food service management, LINQ help you keep tabs on ALL the money flowing into and out of your district.

Education Solutions Services

BOOTH: 108

4707 Papermill Rd., Suite 100
Knoxville, TN 37909

Education Solutions Services provides qualified substitute teachers and administrative support personnel to K-12 school districts across the country, allowing educators to focus their time, energy, and skills on providing a quality education to the students.

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With a focus on culinary innovation and exemplary service, Elior North America is committed to making a positive difference in people's 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.

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EqualLevel Inc.

BOOTH: 117

11140 Rockville Pike
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EqualLevel is a cloud-based e-procurement marketplace platform that was founded with the mission of enabling public sector procurement organizations of all sizes to ensure that taxpayers receive the maximum value for their tax dollars.

E-Rate Online, LLC

BOOTH: 207

200 Boston Post Rd., Unit 11
Orange, CT 06477

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BOOTH: 306

600 Vine St., Suite 1400
Cincinnati, OH 45202

As the leading school transportation provider, First Student strives to provide the best start and finish to every school day. First Student completes six million student journeys each day. With highly-trained drivers and the industry's strongest safety record, First Student delivers reliable

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Forecast5 Analytics Inc

BOOTH: 311

2135 CityGate Lane 7th Floor
Naperville, IL 60563

Forecast5 Analytics provides interactive data analytics to schools covering a spectrum of organizational performance areas. The tools allow school business leaders to identify strategic and financial opportunities in areas such as financial performance, compensation, enrollment, and student achievement. More than 1,100 districts are using Forecast5 to maximize their data insights.

Foresters Financial Services

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40 Wall St., 10th Floor
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Foresters Financial™ is proud of its core values and mission, which started over 140 years ago and is focused on helping families secure their financial security. We are privileged to currently serve over 1,800 school districts nationwide and take pride in our heritage of putting "teachers first."

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Malvern, PA 19355

Frontline Education is an integrated insights partner serving more than 10,000 educational organizations and millions of educators in their efforts to develop the next generation of learners.

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The Garland Co., Inc. is one of the worldwide leaders of quality, high-performance roofing and building envelope solutions for the commercial, industrial, and institutional markets.

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A leading provider of quality facility services, including custodial services, facilities operations and maintenance, grounds and athletic field management, GCA serves over 230 K-12 school districts and 100 higher education institutions. For more information, please visit www.gcaservices.com or follow GCA on Twitter, @gcaservices.

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Government Finance Officers Association

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203 N. LaSalle St., Suite 2700
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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.

Grand Canyon University

BOOTH: 618

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Phoenix, AZ 85017

Grand Canyon University is Arizona's premier, private, Christian university with over 200 academic programs with over 150 online programs in high-demand fields of the 21st century. GCU also offers traditional students and working professionals generous scholarships and opportunities to graduate in less than four years. Visit gcu.edu

Heartland School Solutions

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Heartland School Solutions is 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. Districts and parents have a single, secure place to organize and manage all school-related fees and purchases.

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Horace Mann aspires to be the company of choice to help all educators protect what they have today and prepare for a successful tomorrow. We can help attract and retain more of them to the profession by providing solutions that make their financial lives easier and more rewarding.

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Informed K12

BOOTH: 427

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4415 Pacific Hwy. East
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InTouch Receipting Suite cuts costs and saves time by streamlining your online payments and building cash management POS for student fines, fees, clubs, sports, donations, etc. InTouch integrates with finance, student and library systems, and many food service systems for district-wide "one-stop shopping." CPA designed, Auditor approved!

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Visit: www.johnsoncontrols.com/K12

KEV Group Inc.

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BOOTH: 620

200 W. Summit Ave., Suite 270
Wales, WI 53183

Key Benefit Concepts, LLC (KBC) is an actuarial and employee benefits consulting firm. Established in 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.

Keystone Purchasing Network

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90 Lawton Lane
Milton, PA 17847

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KI

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1330 Bellevue St., PO Box 8100
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KI manufactures furniture and moveable wall systems specifically designed for high-performance learning environments, all supporting today's ever-changing technology needs. See KI for all classroom, administrative, auditorium, cafeteria, residence hall, common, and lounge areas. KI is your one source for innovative educational solutions.

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Ramsey, NJ 07446

Kronos

BOOTH: 424

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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.

McKinstry

BOOTH: 627

16025 Table Mountain Pkwy.
Suite 100
Golden, CO 80403

McKinstry is a full-service design, build, operate, and maintain (DBOM) firm. Our professional staff and trades people deliver consulting, construction, energy, and facility services. McKinstry advocates collaborative and sustainable solutions designed to ensure comfort, improve efficiency, reduce operational costs, and ultimately optimize client profitability for the life of their building.

MidAmerica Administrative & Retirement Solutions, Inc.

BOOTH: 525

402 S. Kentucky Ave., Suite 500
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MidAmerica makes benefits funding simple for the public sector. For over 20 years, we have provided a superior service experience through in-house administration, dedicated account management, and ready-to-implement plan designs on a variety of retirement and healthcare funding benefits. Our Solutions: HRA, Special Pay, Employer-Sponsored, FICA Alternative, FSA, and Trusts.

Motorola Solutions

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Chicago, IL 60604

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BOOTH: 310

1581 46th Ave. South
Minneapolis, MN 55660



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333 Bayview
Amityville, NY 11701

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National Alliance for Insurance Education & Research

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Austin, TX 78755-2027

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National Insurance Services of WI, Inc.

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National Insurance Services provides employee benefits solutions specifically for governmental organizations. Our solutions help maintain healthy/productive work environments, give employees peace of mind, make good use of taxpayer funds, and attract/retain a quality workforce. Quality community services increase life quality, promote growth, and secure a bright future for the next generation.

National IPA

BOOTH: 118

2555 Meridian Blvd., Suite 300
Franklin, TN 37067

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

National Joint Powers Alliance

BOOTH: 109

200 First St., NE
Staples, MN 56479

National Joint Powers Alliance® (NJPA) cooperative purchasing offers choice, value, and peace of mind. Our 200+ awarded contracts are competitively solicited on a national level and delivered through your local dealer. Membership is free and open to all education, government, and nonprofit agencies throughout the U.S. and Canada.

NOVAtime Technology, Inc

BOOTH: 125

1440 Bridgegate Dr., Suite 300
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Office Depot, Inc.

BOOTH: 203

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

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U.S. OMNI is the nation's largest 403(b)/457 independent third-party plan administrator offering world class compliance, remittance, and customer support services, including access to in-house legal counsel and IRS audit support.

PaySchools

BOOTH: 420

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

PaySchools is a software company exclusively serving the K-12 market for over 20 years, enhancing schools' ability to collect and track payments, integrating with software systems

to overcome school management challenges. For additional information, visit our website at www.payschools.com.

PEPPM

BOOTH: 218

90 Lawton Lane
Milton, PA 17847

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

PMA Financial Network, Inc.

BOOTH: 309

2135 CityGate Lane, 7th Floor
Naperville, IL 60563

PMA has been a leading provider of financial services since 1984 and provides a diverse lineup of customized financial solutions to over 2,400 school districts and public entities in 11 states. The PMA companies are focused on achieving long-term financial success for their clients. Additional information is available at www.pmanetwork.com.

PowerSchool

BOOTH: 317

3 W. Broad St.
Bethlehem, PA 18018

PowerSchool provides the industry's first unified classroom experience, empowering teachers with best-in-class, secure, and compliant online solutions, including SIS, learning management and classroom collaboration, assessment, analytics, behavior, and special education case management. We streamline school office and administration operations with online solutions for student registration, school choice, and finance/HR/ERP.

Premier Inc.

BOOTH: 625

13034 Ballantyne Corporate Pl.
Charlotte, NC 28277

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Public Surplus is an online auction company that helps government agencies get more money from their old surplus items using a state-of-art online auction system. Public Purchase is an online e-procurement system.

Public Trust Advisors, LLC

BOOTH: 120

717 17th St., Suite 1850
Denver, CO 80202



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Public Trust Advisors, LLC, provides investment management services for the public sector, including the management of local government investment pools and separately managed accounts. Our team has significant experience providing treasury, advisory, and investment management services for a variety of institutional and public funds clients nationwide.

PublicSchoolWORKS

BOOTH: 315

3825 Edwards Rd., Suite 400
Cincinnati, OH 45209

Risk management solution that reduces risk and drives down the related costs associated with injuries on school campuses. The solution includes systems, content, and people resources to implement, manage, and sustain a comprehensive safety compliance program. Smarter Technology! Smarter Schools!

Questica Budget

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

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

RCN Technologies

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Knoxville, TN 37934

RCN Technologies has the capacity to manage enterprise telecommunications and technology solutions, as well as navigate any obstacles along the way. RCN Technologies specializes in project management from hardware, carrier services, training, and installation. RCN aims to fully encompass our customer's needs.

RevTrak, Inc

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Ricoh USA, Inc.

BOOTH: 508

70 Valley Stream Pkwy.
Stamford, PA 19355



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Ricoh improves schools using innovative technologies and services, enabling educators and administrators to work smarter.

Rowman & Littlefield

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Lanham, MD 20706

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Rycor

BOOTH: 104

4960 S. Gilbert Rd., Suite 1-267
Vancouver, AZ 85249

Rycor empowers K-12 school districts to manage school fees like never before with increased collections, control, clarity, and convenience. With a deep understanding of K-12, our solution fully automates district school fee processes and structure, removing the need to manually assess, waive, adjust, or prorate fees throughout the school year.

SafeStop, Inc.**BOOTH: 116**

885 Island Park Dr., Suite 200
Daniel Island, SC 29492

SafeStop is the mobile app that connects parents and students with the vehicles transporting their students. Features include predictive arrival times for your vehicle, an interactive map that allows you to see the location of the vehicle on its route, and an alerts and messaging system to send users transportation-related notifications.

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SchoolDude**BOOTH: 406**

11000 Regency Pkwy., Suite 110
Cary, NC 27518

SchoolDude, a Dude Solutions company, provides cloud-based

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

Security Benefit**BOOTH: 202**

555 Jackson St.
Denver, CO 80206



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Through a combination of innovative products, exceptional investment management, and a unique distribution strategy, Security Benefit has become a leader in a full range of retirement markets and wealth segments. Visit us at Booth 202 to explore all the ways Security Benefit can help your employees To and Through Retirement.

Seon**BOOTH: 107**

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

Seon is ranked as the world's #1 provider of innovative mobile video surveillance and fleet management solutions for the school bus industry (IHS Group Research, 2007-2017). Seon's products help transportation managers record and view on-board security footage, plan safe and efficient routes, and track vehicles and students in real-time.
www.seon.com

Siemens Building Technologies**BOOTH: 206**

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Skyward, Inc.**BOOTH: 222**

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SSC Services for Education**BOOTH: 614**

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TekVisions, Inc.

BOOTH: 523

40970 Anza Rd.
Temecula, CA 92592

TekVisions is dedicated to the improvement of education through smart technology implementations in the classroom. We design our products and services to drive superior productivity, robust reliability, and meaningful innovation wherever it's needed.

TimeClock Plus

BOOTH: 215

1 TimeClock Dr.
San Angelo, TX 76904

TimeClock Plus is a leading provider of time and attendance and workforce management solutions for K-12 organizations, and is the recipient of numerous awards such as CIO Review's Ten Hottest k12 Solution Companies. Mitigate compliance and audit risks by streamlining your time and attendance process with TimeClock Plus.

TIPS

BOOTH: 422

4845 US Hwy. 271 North
Pittsburg, TX 75686

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by streamlining the process and leveraging the purchasing power of our 4,000 member agencies. "Connecting Members and Vendors"

TRA, Inc.

BOOTH: 421

5027 Wrightsville Ave.
Wilmington, NC 28403

TRA offers a cloud-based activity fund accounting package, SchoolFunds, for the K-12 public school market. TRA is in 23 states across the U.S. and has 28 years of extensive experience in the school accounting business. We offer unlimited support, customized implementation, and onsite training. SchoolFunds is proven for school bookkeeping.

Transfinder

BOOTH: 115

440 State St.
Schenectady, NY 12305

Transfinder is a global logistics software developer providing intelligent solutions to school districts. Transfinder, an *Inc.* magazine "fastest-growing company," has satellite offices in Austin, Texas, and Shanghai, China. The company develops routing, scheduling, and preventive maintenance solutions for optimal transportation logistics.

TransPar Group Companies

BOOTH: 623

18 SW 3rd St., Suite 200
Charleston, MO 64063

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Tremco

BOOTH: 221

3735 Green Rd.
Beachwood, OH 44122

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Tyler Technologies, Inc.

BOOTH: 414

1 Tyler Dr.
Yarmouth, ME 04096



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

U.S. Communities

BOOTH: 503

2999 Oak Rd., Suite 710
Washington, CA 94597



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Co-founded by ASBO International, U.S. Communities is the leading government purchasing cooperative providing school districts with cost savings for products and services that address the unique needs of schools. From science and athletic supplies

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VALIC

BOOTH: 210

2929 Allen Pkwy., L6-80
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View Sonic

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Virco, Inc.

BOOTH: 403

6882 SE Raintree Ave.
Stuart, FL 34997



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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

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Voya Financial®

BOOTH: 402

One Orange Way
Windsor, CT 06095



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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. Voya's retirement business is focused on guiding Americans to greater retirement readiness through employer-sponsored savings plans and holistic retirement and income guidance.

Weidenhammer Systems Corp.

BOOTH: 209

935 Berkshire Blvd.
Wyomissing, PA 19610

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

Wilkes University

BOOTH: 520

84 W. South St.
Wilkes Barre, PA 18766

Wilkes University offers several degree options designed specifically 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

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WillSub/PCMI Staffing Services

BOOTH: 604

212 Kent St., PO Box 516
Portland, MI 48875

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Worth Ave. Group

BOOTH: 610

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Gahanna, OH 43230

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YellowFolder

BOOTH: 224

1617 W. Crosby Rd., Suite 100
Carrollton, TX 75006

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