

SEPTEMBER 21-24  
KISSIMMEE, FLORIDA

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

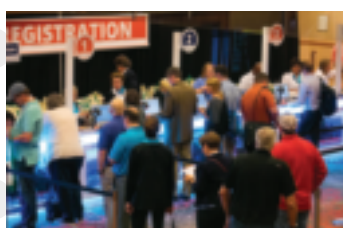
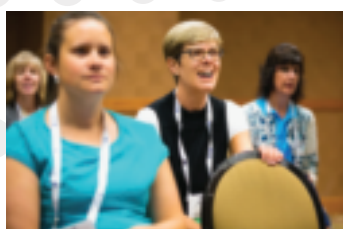
2018  
ASB ANNUAL MEETING & EXPO  
PROGRAM BOOK

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BOOTH  
221





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## Welcome to ASBO International's 2018 Annual Meeting & Expo!



Dear Fellow Attendee,

Over the next few days, we'll be surrounded by other professionals who have school business experience ranging from less than a year to more than five decades. As a school business official who has attended this conference for 17 years, I can confidently say I learn new things every year from the collaborative synergy, the world-class keynote speakers, and the awesome educational sessions.

As ethical leaders, we have a responsibility to our students, staff, and communities to be excellent stewards of both monetary resources and our own professional skillsets.

This meeting will help us uphold those responsibilities by teaching us new ways to efficiently and effectively manage our ever-growing plethora of responsibilities, to engage in transparent communication with all stakeholders, to always lead with integrity, and to widen our perspectives so that we can see more of what the world has to offer our schools.

In addition to the wealth of new information and practices you'll take back to your school, don't be surprised to leave this meeting on Monday a different leader than you were on Friday—refreshed, reconnected, and recharged in your responsibility to students.

Sincerely,

A handwritten signature in black ink that reads "Charles E. Peterson, Jr." with a stylized flourish at the end.

**Charles E. Peterson, Jr., MBA, PRSBA, SFO**  
**President, ASBO International**  
**Chief Financial Officer**  
**Central Susquehanna Intermediate Unit 16**  
**Milton, Pennsylvania**

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## Welcome to Kissimmee



### CITY OF KISSIMMEE

Office of the City Commission | Mayor Jose Alvarez  
101 Church Street . Kissimmee, Florida 34741-5054 . Phone 407-518-2318 . FAX 407-846-8369

September 21, 2018

Dear ASBO Member:

It is with great pleasure that I welcome you and the Association of School Business Officials International (ASBO) to the City of Kissimmee. We are elated to have your association visiting our City, a place where history and progress collide.

Our City, located in Osceola County, is home to approximately 70,000 residents and is one of the fastest-growing communities in central Florida. During your stay, you will find the City of Kissimmee is the ultimate location as it has a variety of amenities that make us a unique place to work, play, and live.

This Annual Meeting & Expo for the Association of School Business Officials International brings passionate education professionals from around the world to further their knowledge and participate in networking opportunities.

For us at the City, it is an honor to have you visiting our region and we thank you for your dedication and commitment to improving the quality of education for our youth.

We hope you have a pleasant stay and look forward to networking with you in the future.

Best Regards,

**Jose Alvarez**  
Mayor  
City of Kissimmee

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## GENERAL 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** 11:00 am – 1:45 pm  
 Lunch 11:45 am – 12:45 pm  
**Sunday** 12:30 pm – 2:45 pm  
 Lunch 1:00 pm – 2:00 pm

*All events  
 take place in  
 the Gaylord Palms  
 unless otherwise  
 noted.*

**Be In the Know —** ASBO International staff will be wearing **blue shirts** and are happy to assist you. You can also visit the registration desk, located **in the lobby outside of Osceola A Ballroom at the Gaylord Convention Center.**

**First Aid —** In the event of a medical emergency, please dial 33 from any house phone or 407.586.2080 from an outside line or ask any Gaylord employee for assistance.

**Badges —** An official 2018 Annual Meeting & Expo badge is required to enter workshops, education sessions, General Sessions, the Exhibits Marketplace, and all social events.

**ASBO Booth and Pin Trading Zone —** See page 72 for details about these and other Exhibits Marketplace highlights.

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

*Sponsored by Aflac*

**Complimentary Wi-Fi —** Free Wi-Fi is available in conference meeting spaces.

**Network: ASBO International • Password: ASBO2018**

*Sponsored by U.S. Retirement & Benefits Partners*

**asbointl.org/AnnualMeeting | @ASBOIntl #ASBOAM18**

*\* As a courtesy to your colleagues, and for recording purposes, please silence cell phones during sessions.*

**Learning Log —** You are 42% more likely to achieve your goals simply by writing them down on a regular basis. Use the Learning Log to summarize what you learned during each session.

Answer the five reflection questions and retain valuable information to increase the likelihood of turning your great ideas into change-agents in your school system.

*Sponsored by Tyler Technologies, Inc.*

**Self-Scanning Attendance —** New this year: Please use our self-scanning units located inside each classroom to scan the barcode on your badge when you enter and exit each education session. Scanning in and out of sessions will allow you to earn CPE credits and/or SFO contact hours for the sessions you attend and will allow ASBO to capture attendance information.

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

*Sponsored by Ricoh USA, Inc.*

**2018 Annual Meeting**

**& Expo App —** Don't miss out on the digital conversations happening during the meeting! Use the app to connect with attendees, create your personal itinerary, search for sessions and slides, and evaluate sessions. Search **ASBO International** in iTunes or Google Play and download the app.

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## SCHEDULE-AT-A-GLANCE **2018**

[asbointl.org/AnnualMeeting](http://asbointl.org/AnnualMeeting) | @ASBOIntl #ASBOAM18

(IO) = Invitation only

(\$ ) = Additional Fee

### THURSDAY, SEPTEMBER 20

4:00 pm – 7:00 pm Emerging School Business Leaders Scholarship Workshop (IO)

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

7:00 pm – 8:00 pm Emerging School Business Leaders Scholarship Dinner (IO)

### FRIDAY, SEPTEMBER 21

6:30 am – 8:00 am Pop-up Breakfast Station (\$)

7:00 am – 6:00 pm Registration

7:30 am – 8:00 am Coffee Break

6:45 am – 2:00 pm Golf Tournament (\$) *Pre-Registration required.*

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

12:00 pm – 1:00 pm Pop-up Lunch Station (\$)

12:30 pm – 1:30 pm **New! Annual Meeting Program Planning Session and Lunch**

5:30 pm – 6:00 pm First-Timer Networking Reception

6:00 pm – 7:30 pm Welcome Mixer

### SATURDAY, SEPTEMBER 22

6:30 am – 8:00 am Pop-up Breakfast Station (\$)

7:00 am – 4:00 pm Registration

7:30 am – 8:30 am SFO® Breakfast (IO)

8:15 am – 8:45 am Coffee Break

8:45 am – 10:45 am **First General Session: Presentation by Sally Hogshead**

11:00 am – 1:45 pm **Exhibits Marketplace Open**

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

11:45 am – 12:45 pm **Lunch in Exhibits Marketplace**

1:00 pm – 1:45 pm COE Reception (IO)

1:00 pm – 2:45 pm Affiliate Executive Directors Group Meeting (IO)

1:20 pm – 1:45 pm **New! Mini-Modules**

1:30 pm – 5:00 pm SFO® Testing *Pre-Registration required.*

2:00 pm – 3:00 pm **Discussion Groups**

2:30 pm – 3:30 pm Guest Program: Book Club — *A Man Called Ove* by Fredrik Backman

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

3:15 pm – 4:15 pm **Discussion Groups**

## SATURDAY, SEPTEMBER 22 (continued)

3:15 pm – 5:15 pm	<b>Deep Dives</b>
4:30 pm – 4:55 pm	<b>New! Mini-Modules</b>
5:00 pm – 6:00 pm	Pinnacle Awards Reception (IO)
5:30 pm – 6:15 pm	Emerging School Business Leaders Scholarship Reception (IO)
6:00 pm – 8:00 pm	Pinnacle Awards Dinner (IO)
6:00 pm – 8:00 pm	Eagle Awards Dinner (IO)
8:00 pm – 11:00 pm	Joint Affiliate Reception at Hard Rock Cafe

## SUNDAY, SEPTEMBER 23

7:00 am – 8:00 am	Pop-up Breakfast Station (\$)
7:30 am – 4:00 pm	Registration
8:00 am – 9:15 am	Clinic Tables
9:00 am – 9:30 am	Coffee Break
9:30 am – 10:30 am	<b>Discussion Groups</b>
10:30 am – 10:45 am	Beverage Break
10:45 am – 12:15 pm	<b>Second General Session:</b> Presentation by Colonel Arthur J. Athens, USMC (Ret.)
12:30 pm – 1:45 pm	MBA Advisory Committee and Reviewers Meeting and Lunch (IO)
12:30 pm – 2:45 pm	<b>Exhibits Marketplace Open</b>
12:45 pm – 2:45 pm	Advocacy as Leadership: Advice for the SBO
1:00 pm – 2:00 pm	<b>Lunch in Exhibits Marketplace</b>
1:45 pm – 2:30 pm	MBA and <i>Pathway</i> to the MBA Reception (IO)
2:45 pm – 3:45 pm	<b>Discussion Groups</b>
2:45 pm – 4:45 pm	<b>Deep Dives</b>
3:00 pm – 4:00 pm	Guest Program: Chocolate Candy Bar Class
4:00 pm – 4:25 pm	<b>New! Mini-Modules</b>
9:00 pm – 11:00 pm	President's Dessert Reception



## MONDAY, SEPTEMBER 24

7:30 am – 10:00 am	Registration
7:30 am – 8:00 am	Coffee Break
8:00 am – 9:00 am	<b>Discussion Groups</b>
9:15 am – 10:15 am	<b>Discussion Groups</b>
10:30 am – 11:30 am	<b>Discussion Groups</b>
11:45 am – 12:30 pm	<b>New! Peer-to-Peer Wrap-Up</b>

## GUEST SCHEDULE 2018

We invite all registered guests to participate in the following Annual Meeting & Expo activities. See the daily schedule for more information.

An official Annual Meeting & Expo registration badge is required for admittance to events for all attendees, including guests. Guests are not permitted to attend educational sessions.

### FRIDAY, SEPTEMBER 21

- 6:45 am – 2:00 pm Golf Tournament (\$) Pre-Registration required. Falcon's Fire Golf Club
- 6:00 pm – 7:30 pm Welcome Mixer Atrium Plaza

### SATURDAY, SEPTEMBER 22

- 8:15 am – 8:45 am Coffee Break Osceola Lobby C
- 8:45 am – 10:45 am **First General Session** Osceola Ballroom C-D
- 11:00 am – 1:45 pm Exhibits Marketplace Exhibit Hall D-F
- 11:45 am – 12:45 pm Lunch in Exhibits Marketplace Exhibit Hall D-F  
Sponsored by Public Trust Advisors, LLC
- 2:30 pm – 3:30 pm Guest Program: Book Club  
— A Man Called Ove by Fredrik Backman Sanibel 2
- 8:00 pm – 11:00 pm Joint ASBO Affiliate Reception Hard Rock Cafe

### SUNDAY, SEPTEMBER 23

- 9:00 am – 9:30 am Coffee Break Osceola Lobby C
- 10:45 am – 12:15 pm **Second General Session** Osceola Ballroom C-D
- 12:30 pm – 2:45 pm Exhibits Marketplace Exhibit Hall D-F
- 1:00 pm – 2:00 pm Lunch in Exhibits Marketplace Exhibit Hall D-F  
Sponsored by BMO Financial Group
- 3:00 pm – 4:00 pm Guest Program: Chocolate Candy Bar Class\* Gaylord Palms Pastry Kitchen  
\*Space is limited. Meet in the Exhibit Hall Lobby at 2:50 pm.
- 9:00 pm – 11:00 pm President's Dessert Reception Sun Ballroom C-D





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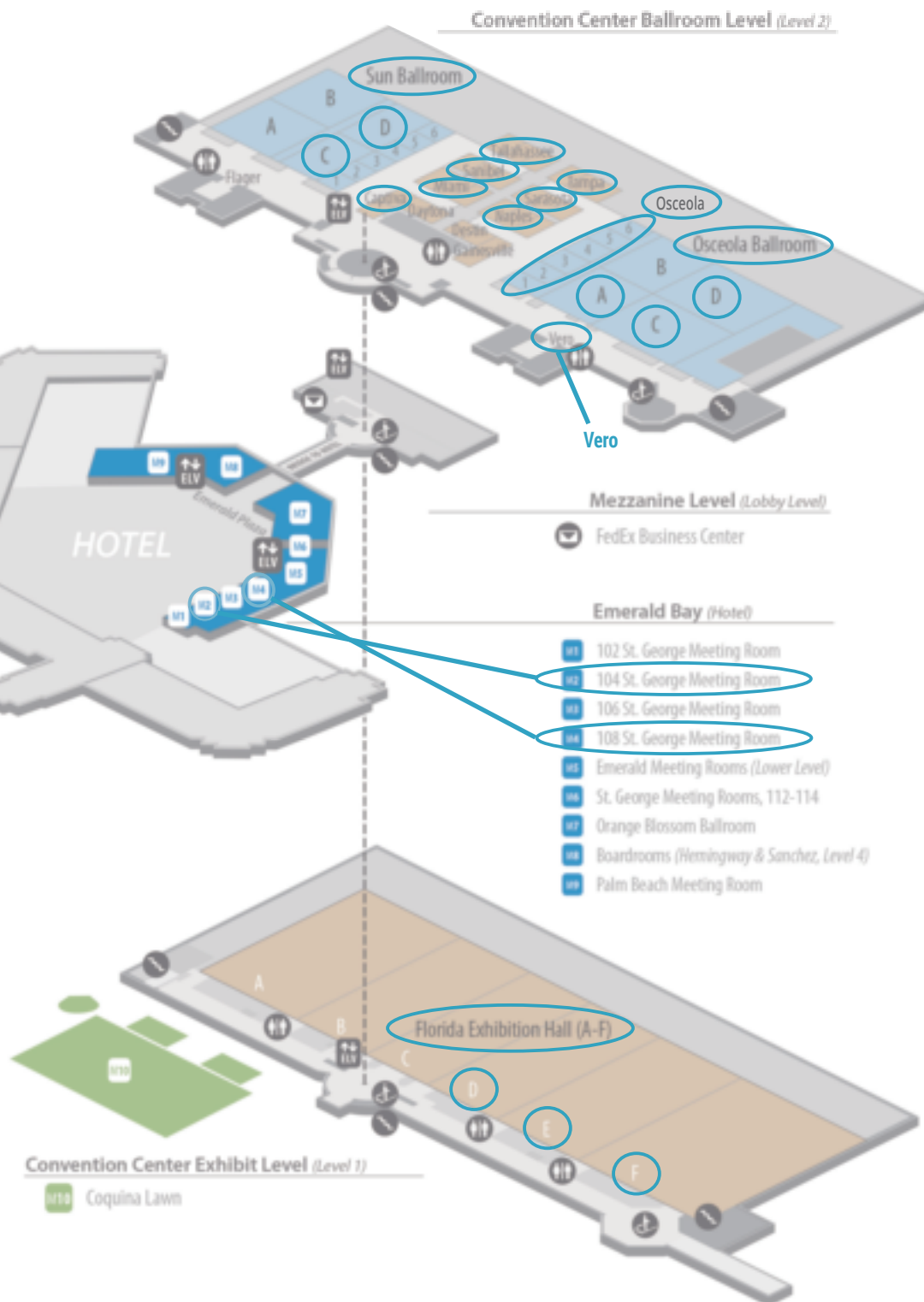
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VC 25132 (06/2018) J125001 ER





## HOTEL & CONVENTION CENTER MAPS



### Events

**Sun Ballroom C-D**  
President's Dessert Reception

**Sanibel 1**  
• MBA Advisory Committee Meeting and Lunch  
• COE Advisory Committee Meeting and Lunch

**Sanibel 2**  
• Book Club  
• MBA and Pathway to the MBA Reception

**Naples 1**  
Certification Commission Meeting and Dinner

**Tallahassee 1-2**  
Affiliate Executive Director Meeting

**Captiva 1-2**  
SFO® Testing

**Miami**  
SFO® Breakfast

**Sessions:**  
Naples 1,2,3  
Sarasota 1,2,3  
Tampa 1,2,3  
Osceola 1,2,3,4,5,6

**Osceola A**  
• Clinic Tables  
• Annual Meeting Program Planning Session and Lunch

**Osceola Lobby A**  
• Registration

**Osceola Foyer**  
• Pop-up Breakfast Station  
• Pop-up Lunch Station

**Osceola Lobby C**  
Coffee Break

**Osceola Ballroom C-D**  
General Session

**Osceola 4-5**  
Emerging School Business Leaders Scholarship Workshop

**Osceola 6**  
Emerging School Business Leaders Scholarship Dinner

**Vero**  
• Eagle Awards Reception  
• Emerging School Business Leaders Scholarship Reception  
• COE Reception

**Exhibit Hall D-F**  
• Lunch in the Exhibits Marketplace  
• Exhibits Marketplace

**Atrium Plaza**  
Welcome Mixer

**St. George 104**  
Pinnacle Awards Reception

**St. George 108**  
First-Timer Networking Reception

(next page)

**Castillo de San Marcos**  
Pinnacle Awards Dinner—  
Upper Level

**MOOR**  
Eagle Awards Dinner



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#### COLOR LEGEND

- St. Augustine
- Key West
- Emerald Bay
- Everglades
- Convention Center
- Property Grounds

#### KEY

- Concierge
- Front Desk
- Valet
- Bus
- Taxi
- Car Rental
- Bell Services
- Smoking Area
- Restrooms
- Elevator
- Stairs
- Escalator
- FedEx Office Business Center
- ATM
- Guest Laundry (lower level)

#### DINING & DRINKS

- MOOR
- Villa de Flora (Mediterranean Buffet)
- Wreckers Sports Bar
- SandBar
- Old Hickory Steakhouse
- Socio

#### EATERY

- The Cocoa Bean Express
- The Cocoa Bean Coffee House
- Honeybells Frozen Yogurt
- Emerald Bay Marketplace

#### SHOPPING

- Mallory Square Market
- Island Paradise
- Emerald Bay Emporium
- PGA TOUR Shop
- Brighton Collectibles
- Alligator Alley
- Relâche Spa Boutique

#### AMENITIES

- Arcade
- Relâche Spa (lower level)
- Relâche Fitness Center (lower level)
- South Beach Pool (adults only)
- Cypress Springs Family Fun Water Park

#### MEETING SPACE

- M1 102 St. George Meeting Room
- M2 104 St. George Meeting Room
- M3 106 St. George Meeting Room
- M4 108 St. George Meeting Room
- M5 Emerald Meeting Rooms (Lower Level)
- M6 St. George Meeting Rooms, 112 - 114
- M7 Orange Blossom Ballroom
- M8 Boardrooms (Level 4)
- M9 Palm Beach Meeting Room
- M10 Coquina Lawn

Please note that our hotel, atriums and pool areas are smoke-free. Smoking is permitted in various outdoor locations.

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99-00485-58 2017/11/10

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STRATEGIC PARTNER  
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# COMMITTED TO LEARNING

One Student at a Time



Visit us at ASBO 2018

September 21-24

Booth 604

Plus, we're proudly presenting at the following session:

## **How to Increase Efficiency in Your District to Improve All Programs**

September 23

2:45 pm - 3:45 pm

Room Sarasota 1



## EDUCATION OVERVIEW

### **Workshops (WS) — FRIDAY ONLY!**

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

### **Seminars (SM) — FRIDAY ONLY!**

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

### **Discussion Groups (DG) —**

#### **SATURDAY, SUNDAY, MONDAY**

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

### **Deep Dives (DD) —**

#### **SATURDAY & SUNDAY AFTERNOON**

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

### **NEW! Mini-Modules (MM) —**

#### **SATURDAY & SUNDAY AFTERNOON**

25-minute sessions intended to explore topics that can easily be covered in a shorter period of time while providing attendees with valuable new knowledge they can implement immediately.

### **Clinic Tables — SUNDAY MORNING ONLY!**

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.

### **NEW! Peer-to-Peer Wrap-Up —**

#### **MONDAY ONLY!**

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

### **CPE Credits and SFO Contact Hours**

**Earn up to 18 CPE credits** for the entire Annual Meeting & Expo across different fields of study. To receive CPE credits, attendees must scan their badge in and out of sessions via self-scanners inside each room to verify attendance. At the conclusion of the meeting, attendees who scan in for sessions will receive an email with instructions to access a certificate for all sessions for which they have earned credit. All sessions are offered at a basic program level, group live, and require no program prerequisites or advance preparation.

**Earn up to 18 SFO recertification contact hours** Friday through Monday. To receive SFO contact hours, attendees must scan their badge in and out of sessions via self-scanners inside each room to verify attendance. At the conclusion of the meeting, attendees who scan in for sessions will receive an email with instructions to access a certificate for all sessions for which they have earned credit; they must then enter the recertification hours in their online account.

**For more details about earning credit hours, please visit [asbointl.org/EducationHours](http://asbointl.org/EducationHours).**

# DAILY SCHEDULE 2018

All events take place in the Gaylord Palms unless otherwise noted.

## THURSDAY, SEPTEMBER 20

- 4:00 pm – 7:00 pm Emerging School Business Leaders Scholarship Workshop  
*Invitation only Osceola 4-5*
- 4:30 pm – 7:00 pm Certification Commission Meeting and Dinner  
*Invitation only Naples 1*
- 7:00 pm – 8:00 pm Emerging School Business Leaders Scholarship Dinner  
*Invitation only Osceola 6*

## FRIDAY, SEPTEMBER 21

- 6:30 am – 8:00 am Pop-up Breakfast Station (\$) *Osceola Foyer*
- 7:00 am – 6:00 pm Registration *Osceola Lobby A*
- 7:30 am – 8:00 am Coffee Break *Osceola Lobby C*
- 6:45 am – 2:00 pm Golf Tournament (\$) *Additional fee and advance registration required.*  
*Buses depart promptly at 6:45 am from the transportation lobby at the Gaylord Palms Hotel.*
- 8:00 am – 5:45 pm **Workshops and Seminars**  
*Workshops brought to you at no charge with the support of American Fidelity Assurance Company.*

8:00 am – 10:00 am **New and Emerging Threats to School Safety (WS01)**  
*Workshop Osceola 1-2*

**Presenter:** Curtis Lavarello, Executive Director, School Safety Advocacy Council, Sarasota, FL

**CPEs:** 2 | **SFOs:** 2 / **Field of Study:** Business Management and Organization • **Content Areas:** Risk Management, School Facilities Management

Discuss an “all-hazards” approach to national school safety and its impact on both schools and district headquarters, while gaining a better understanding of the importance of district-wide communication and coordination during critical incidents. Learn valuable information about liability and legal considerations, as well as how to handle new and emerging threats to school districts, such as cyber extortion, bullying, hazing, and off-site threats.

**Learning Objectives:** 1. Discuss emerging school safety threats facing district leaders and how to prepare for them. 2. Explain the importance of both external and internal communication during times of crisis. 3. Describe school liability and legal considerations related to school safety.

8:00 am – 10:00 am **Technology, the Law, and Schools: Emerging Issues (WS02)**  
*Workshop Osceola 4-5*

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

**CPEs:** 2 | **SFOs:** 2 / **Field of Study:** Business Law • **Content Area:** Legal Aspects

This interactive session will provide a basic working knowledge of emerging issues involving technology, the law, and education. Participants will examine controversies involving both students and school staff over issues relative to social networking sites such as Facebook and 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.

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



Don't Forget!

Use the self-scanning units located inside each classroom to scan the barcode on your badge when you enter and exit each education session. Scanning in and out of sessions will allow you to earn CPE credits and/or SFO contact hours for the sessions you attend and will allow ASBO to capture attendance information.

## FRIDAY, SEPTEMBER 21 (continued)

# FRIDAY

8:00 am – 10:00 am  
Seminar

### Preparing Your First Comprehensive Annual Financial Report (CAFR) (SM17)

*Osceola 3*

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

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Accounting (Governmental) • **Content Area:** School Finance

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

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

8:00 am – 12:00 pm  
Workshop

### School Tour: OCPS Academic Center for Excellence (WS03)

*Naples 1*

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Business Management and Organization • **Content Area:** School Facilities Management

Tour the newly opened OCPS Academic Center for Excellence (OCPS ACE), a first-of-its-kind PreK–8 school serving students on one campus. Learn about OCPS ACE’s unique status as a Community Partnership School and how that benefits students and faculty.

**Learning Objectives:** 1. Describe the purpose of blending a high-quality education experience with a variety of nontraditional onsite services and programs. 2. Explain the benefits of a Community Partnership School. 3. Summarize aspects of the tour that you can use in your district.

8:00 am – 12:00 pm  
Workshop

### From Treasurer to Benefits Administration: A Decision-Maker’s Guide (WS04)

*Naples 2*

**Presenters:** Che Yi, Manager, Director, Chief Administrative Officer, AFAS, American Fidelity Administrative Services, Denver, CO; Lisa Boone, Account Development Coordinator, Benefits Specialist, AFA, American Fidelity Assurance Company, Oklahoma City, OK

**CPEs:** 4 | **SFOs:** 4 | **Field of Study:** Personnel/Human Resources • **Content Area:** Human Resources and Labor Relations

Stepping into the world of employee benefits comes with a tremendous amount of information—and a considerable measure of responsibility. This workshop, designed for everyone who touches employee benefits, begins with historical information about benefits, taxation, and compliance, then covers challenges of the ACA’s Employer Mandate: rehire rules, measurement and stability periods, breaks in service, and more. Participants will also explore future directions and compliance requirements for school districts and employer tax advantages. The session will conclude with best practices for making benefits-related decisions.

**Learning Objectives:** 1. Outline compliance obligations regarding employee benefits. 2. Explain ACA mandates in terms of benefits administration. 3. Describe compliance reporting requirements.

## FRIDAY, SEPTEMBER 21 (continued)

8:00 am – 12:00 pm  
Workshop

### Student Activity Funds: Strengthening Internal Controls, Improving Efficiency, Reducing Fraud Risk, and Complying with the New Standards (WS05)

*Naples 3*

**Presenters:** Bert Nuehring, Partner, Crowe Horwath LLP, Chicago, IL; Jennifer Shields, Partner, Heinfeld Meech & Co., P.C., Phoenix, AZ; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL; Karen Smith, Assistant Superintendent of Business and Financial Services, Cypress-Fairbanks ISD, Houston, TX

**CPEs: 4 | SFOs: 4 / Field of Study:** Accounting • **Content Area:** Accounting, Auditing, and Budgeting

Internal accounts can offer more convenience in paying for extra-curricular activities of students, including clubs and organizations. With that convenience comes increased risks due to decentralized operations, large numbers of transactions, and numerous parties handling money. This session will present proven strategies for improving accounting practices, strengthening internal controls, and documenting procedures. It will also cover audit and control techniques to reduce the risk of fraud, as well as the new standards from the Government Accounting Standards Board (GASB) that will impact student activity fund accounting.

**Learning Objectives:** 1. Identify methods for establishing internal accounts or student activity fund accounting practices. 2. Explain how to implement stronger internal controls over internal accounts and design procedures to help reduce the risk of fraud. 3. Explain the significant impact of GASB's new Standard No. 84, Fiduciary Activities, and the changes needed within your district to comply with the standards.

8:00 am – 12:00 pm  
Workshop

### Proven Strategies for Effective Grant Writing for Schools (WS06)

*Osceola 6*

**Presenter:** Sandra Edling, Assistant Director of Business Services, Montgomery County IU 23, Norristown, PA

**CPEs: 4 | SFOs: 4 / Field of Study:** Accounting • **Content Areas:** School Finance, Sustainability

Get an in-depth look at the grant-writing process. Learn how to find the best grants for schools, get a better understanding of the grant-writing and grant-application process, and learn how to effectively manage grant implementation once grants are obtained. Determine how to use data to help secure grants and form community partnerships to support the process.

**Learning Objectives:** 1. Describe how to identify funding opportunities that best meet the needs of schools and the local community. 2. Outline the grant-writing process, including proven strategies to implement the grant and manage grant budgets. 3. Discuss the importance of using data analytics and forming community partnerships to support funding requests and promote program success.

8:00 am – 3:00 pm  
Seminar

### Need-to-Know Fundamentals for Future SFOs (SM18)

*Tampa 3*

**Presenters:** Brian Moore, Manager for School Climate, Delaware Department of Education, Dover, DE; Marvin Dereef, Deputy CFO, Fulton County Schools, Atlanta, GA; Ann Williams, CFO, Skokie SD 73.5, Skokie, IL; Matthew Malinowski, Business Manager, Upper Moreland SD, Willow Grove, PA; Jim Westrum, Executive Director of Finance and Business Services, Wayzata Public Schools, ISD 284, Wayzata, MN

**CPEs: 6 | SFOs: 6 / Field of Study:** Personal Development • **Content Area:** Leadership Development

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

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

10:00 am – 3:00 pm

YM Users Group **Invitation only** *Vero*

Voya Financial® welcomes you to ASBO International's 2018 Annual Meeting & Expo! We are proud to support your profession as a Strategic Partner of ASBO International and the exclusive sponsor of the Meritorious Budget Award (MBA). Congratulations to this year's recipients! We encourage you to visit us at **Booth 503** to learn how we can help make retirement planning and administration easier for you and your employees. Respectfully, The Voya Financial® Team.

## FRIDAY, SEPTEMBER 21 (continued)

# FRIDAY

10:15 am – 12:15 pm  
Workshop

### Maximizing Your Time with a Credit Rating Analyst in an Effort to Achieve a High Rating (WS07)

*Tampa 2*

**Presenters:** Geoffrey Buswick, Managing Director, S&P Global Ratings, Boston, MA; Tom Wohlleber, Chief Financial Officer, Casa Grande Elementary SD, Casa Grande, AZ

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Finance • **Content Areas:** Management Techniques, School Finance

Obtaining the cheapest cost of capital to meet district needs is important to all school business officials. Discuss the Top 10 Management Characteristics of Highly Rated State and Local Government Borrowers, review criteria fundamentals used to assign a rating to school district borrowings, and highlight practices that lead to robust discussions with credit analysts. The session also will cover hot topics in the municipal bond market, including the credit risks associated with direct bank bonds and the growing threat of cyberattacks. Be prepared for your next discussion with a rating analyst.

**Learning Objectives:** 1. Outline strategies for improving credit rating agency interactions. 2. Discuss top management characteristics of highly rated schools. 3. Identify cyber mitigation strategies.

10:15 am – 12:15 pm  
Workshop

### Construction and Purchasing Disputes and Resolutions (WS08)

*Osceola 4-5*

**Presenters:** Kenneth Florey, Attorney, Robbins Schwartz, Chicago, IL; Howard Metz, Partner, Robbins Schwartz, Chicago, IL; Terence Fielden, Director of K-12, International Contractors, Elmhurst, IL; Sean Carney, Director of Business Services, Adlai E. Stevenson HSD 125, Lincolnshire, IL; Tim Keely, Assistant Superintendent and Chief School Business Official, Addison SD 4, Addison, IL; Carrie Matlock, Partner, DLA Architects, Ltd., Itasca, IL

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Business Management and Organization • **Content Areas:** School Facilities Management, Legal Aspects

Disputes between school districts, vendors, architects, construction managers, contractors, and subcontractors in school construction and purchasing are common. Understanding the various aspects of these disputes and identifying ways to effectively resolve them is critical to the success of your endeavor. Learn from a panel of experienced school construction and purchasing gurus, including a school business official, school board member/construction manager, and school attorneys, who will provide practical advice and solutions.

**Learning Objectives:** 1. Discuss common disputes that arise in construction and purchasing. 2. Describe techniques to solve these disputes. 3. Outline the effectiveness and applicability of the different techniques in handling disputes.

10:15 am – 12:15 pm  
Workshop

### Leading Through Successful Mentoring—Maximizing Relationships (WS09)

*Osceola 1-2*

**Presenter:** Earl Burke, Assistant Superintendent and CFO, Hinds County SD, Raymond, MS

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Personal Development • **Content Areas:** Leadership Development, Management Techniques

School leaders who take mentoring seriously and handle it effectively can have a powerful impact on their own leadership and the leadership of others. Mentoring benefits not only mentors and mentees, but also the organizations that encourage and support mentoring. This interactive presentation will provide participants with an understanding of the importance of mentoring and how to develop successful mentoring relationships.

**Learning Objectives:** 1. Outline the differences between coaching and mentoring. 2. Identify key effective and ineffective characteristics of a mentor and mentee. 3. Describe the benefits of mentoring for the mentors, the mentees, and the supporting organization.

## FRIDAY, SEPTEMBER 21 (continued)

10:15 am – 12:15 pm  
Workshop

### Preparing for and Surviving an E-Rate Audit (WS10)

*Osceola 3*

**Presenter:** Mary Jo Sagnella, Director of Operations, E-RATE ONLINE, Orange, CT

**CPEs:** 2 | **SFOs:** 2 / **Field of Study:** Information Technology • **Content Areas:** Information Technology; Accounting, Auditing, and Budgeting

The E-Rate program has been enhancing schools' Internet access, technology, and budgets since 1998. As with all federal programs, there are rules associated with accepting this funding and audits required to ensure that the rules are being followed. Discuss the four main types of audits associated with this program and how to prepare for them. Find out what schools should do before and after their E-Rate applications are filed to have a successful audit experience.

**Learning Objectives:** 1. Outline steps to prepare for an E-Rate audit. 2. Describe how to structure technology to maximize E-Rate funding. 3. Detail current E-Rate program rules and appropriate recordkeeping.

10:15 am – 12:15 pm  
Seminar

### Create an Award-Winning Budget (SM19)

*Sarasota 1-2*

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

**CPEs:** 2 | **SFOs:** 2 / **Field of Study:** Accounting (Governmental) • **Content Area:** Accounting, Auditing, and Budgeting

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

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

12:00 pm – 1:00 pm

### Pop-up Lunch Station (\$) *Osceola Foyer*

12:30 pm – 1:30 pm  
Workshop

### New! Annual Meeting Program Planning Session and Lunch (WS17)

*Osceola A*

**CPEs:** 1 | **SFOs:** 1 / **Field of Study:** Personal Development • **Content Area:** Leadership Development

Seize the opportunity to influence your profession by brainstorming with other members in planning the professional development curriculum for ASBO International's 2019 Annual Meeting & Expo. All members are encouraged to attend! Lunch provided.

**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.

1:45 pm – 3:45 pm  
Workshop

### Cycle-based Budgeting: Addressing Limitations of Incremental Budgeting and Zero-based Budgeting for Continuous Improvement (WS11)

*Naples 1*

**Presenter:** Bo Yan, Program Evaluation Specialist, Jefferson County Public Schools, Louisville, KY

**CPEs:** 2 | **SFOs:** 2 / **Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; School Finance

In a time of tightening budgets, growing student needs, and increasing demands for accountability, districts must make optimal use of limited resources to improve student achievement. Jefferson County Public Schools in Kentucky developed and implemented a new budgeting model, cycle-based budgeting (CBB), three years ago and, as a result, has aligned \$75.8 million investments with the district's strategic plan and set a review cycle for each of the CBB-accounted investments. Learn about the major components of CBB, lessons learned, and how to implement it in your district.

**Learning Objectives:** 1. Discuss the root cause of difficulty in making budget adjustments. 2. Explain the rationale and design of cycle-based budgeting. 3. Describe a toolkit for introducing and implementing CBB in your district.

Welcome to ASBO International's 2018 Annual Meeting & Expo. Virco's long-standing support for school business officials includes serving as an ASBO International Strategic Partner, as well as sponsoring the Pinnacle Awards for over 20 years. We invite you to stop by Virco's **Booth 303** and visit with us during the annual meeting. We look forward to seeing you and to serving you whenever you need furniture and equipment for your district.

## FRIDAY, SEPTEMBER 21 (continued)

# FRIDAY

**1:45 pm – 3:45 pm**  
**Workshop**

### How Does Your State Funding Stack Up? (WS12)

*Naples 2*

**Presenters:** John Hutchison, Deputy Superintendent for Business and Operations, Olathe Public Schools, Olathe, KS; Marvin Dereef, Deputy CFO, Fulton County Schools, Atlanta, GA; Kent Ellickson, Director of Finance and Business Services, School District of Onalaska, Onalaska, WI; Susan Harkin, Chief Operating Officer, CUSD 300, Algonquin, IL; Jim Westrum, Executive Director of Finance and Business Services, Wayzata Public Schools, ISD 284, Wayzata, MN

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Finance • **Content Area:** School Finance

School funding formulas vary from state to state. Because of legal challenges facing their funding systems, many states have undergone dramatic changes over the past decade. Learn how five states—Georgia, Illinois, Kansas, Minnesota, and Wisconsin—have chosen to fund their education systems. Led by a panel of business leaders from these states, this interactive workshop will show you how your state's system compares and what improvements you might consider seeking through your legislature.

**Learning Objectives:** 1. Compare the philosophy behind each state's funding formulas. 2. Describe key factors used in determining how much funding is provided to each student. 3. Discuss changes that may be initiated and promoted within your state.

**1:45 pm – 3:45 pm**  
**Workshop**

### Harassment, Discrimination, and Workplace Investigations (WS13)

*Naples 3*

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

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resources and Labor Relations, Legal Aspects

When it comes to sexual harassment and other forms of discrimination, the stakes are high. School districts face liability when employees engage in unlawful harassment and discrimination and the employer fails to take prompt and appropriate remedial action. With retaliation claims rising more than 30% over the last decade, employers must also ensure there is no retribution against the employee who brought forth the complaint. Learn how to identify harassment in the workplace and about the importance of instilling a respectful work environment. Leave with a roadmap to conduct internal investigations that will help stop unlawful behavior and reduce the risk of liability.

**Learning Objectives:** 1. Detail the main types of unlawful harassment and the legal obligations of districts to protect their employees. 2. Discuss how to implement harassment prevention policies, training, and reporting procedures. 3. Outline steps to conduct an objective and thorough internal investigation, including investigatory interviews and other related communications.

**1:45 pm – 3:45 pm**  
**Workshop**

### How to Create an Internal Control Structure to Support Student Activities (WS14)

*Osceola 1-2*

**Presenters:** Brianne King, Executive Director, Washington ASBO, Tumwater, WA; Trisha Schock, Assistant Fiscal Director, North Central ESD 171, Wenatchee, WA; Mathew Knott, Director of Business Services, Mead SD, Mead, WA

**CPEs:** 2 | **SFOs:** 2 | **Field of Study:** Finance • **Content Areas:** School Finance; Accounting, Auditing, and Budgeting

Student activities is a high-risk area for financial loss and misuse of funds. Expand your knowledge and understanding by exploring the hazards of fundraisers, fines, fees, student stores, athletics, parent groups, donations, and payment for services. This session will help you identify areas of risk and provide you with a framework to design applicable internal controls within your district. Through careful monitoring of these activities, you can prevent losses and ensure your district has a culture of strong internal control.

**Learning Objectives:** 1. Identify areas of high financial risk in student activities. 2. Detail appropriate internal control protocol. 3. Describe how to implement oversight and controls at both the school and district level.

## FRIDAY, SEPTEMBER 21 (continued)

1:45 pm – 5:45 pm  
Workshop

### Financing, Budgeting, and Forecasting Our Future: Inviting Your Community To Learn, Contribute, and Engage in School Finance (WS15)

*Osceola B*

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

**CPEs:** 4 | **SFOs:** 4 / **Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; Leadership Development

School business officials have a role in building community engagement by creating learning around school finance, inviting participation in budget development, and adding insight to forecasting the financial position of the district. Attendees will participate in several hands-on experiences with resources co-developed by SBOs across the country using methodologies that invite all stakeholders to become involved with their school districts. Activities focus on creating school financial literacy, “crowd-sourcing the wisdom” of your community, and a team-building approach to helping communities understand past, current, and future realities of a district’s financial position.

**Learning Objectives:** 1. Discuss the importance of creating community engagement around school finance, budget best practices, and forecasting a district’s financial position. 2. Outline ways to facilitate learning, community contributions, and financial reviews with the focus on enabling community stakeholders to help their district move forward. 3. Describe new methodologies and technologies used to gather feedback and engage stakeholders.

1:45 pm – 5:45 pm  
Workshop

### The Strategic CFO: Lessons from Social Media (WS16)

*Osceola 6*

**Presenters:** Christopher Wildman, CFO/Treasurer/CSBO, North Shore SD 112, Highland Park, IL; Raoul Gravel, Assistant Superintendent for Business Services/CSBO, Glenbrook HSD 225, Glenview, IL; Daniel Oberg, Director of Business/CSBO, CCSD 21, Wheeling, IL

**CPEs:** 4 | **SFOs:** 4 / **Field of Study:** Personal Development • **Content Areas:** Leadership Development, Global Issues

Explore the value of using social media to become a more strategic CFO. Learn how to use social media (Twitter) to deliver positive messages to stakeholders about the fantastic things happening in public education. Discuss #EdFinChat, a monthly Twitter chat to discuss education and school finance/operations. Examples from #EdFinChat archives will highlight learning outcomes and best practices. Conclude with a live #EdFinChat session in which you can participate and view your tweets live.

**Learning Objectives:** 1. Discuss the value of networking with peers on a national and international level. 2. Analyze best practices and new ideas related to using social media for networking and sharing information. 3. Describe how to use #EdFinChat to problem-solve and collaborate with others.

5:30 pm – 6:00 pm

### First-Timer Networking Reception

*St. George 108*

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

6:00 pm – 7:30 pm

### Welcome Mixer

*Atrium Plaza*

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

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



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*\*State Retirement System Workshops not available in Utah.*

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Visit us in  
Booth 612

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## SATURDAY, SEPTEMBER 22

6:30 am – 8:00 am Pop-up Breakfast Station (\$) *Osceola Foyer*

7:00 am – 4:00 pm Registration *Osceola Lobby A*

7:30 am – 8:30 am SFO® Breakfast **Invitation only** *Miami*  
Sponsored by The Horace Mann Companies

7:45 am – 8:45 am Oklahoma ASBO Breakfast **Invitation only** *Sanibel 2-3*

8:15 am – 8:45 am Coffee Break *Osceola Lobby C*

8:45 am – 10:45 am First General Session *Osceola Ballroom C-D*

**Welcome** *Anthony N. Dragona, Ed.D., RSBA, Immediate Past President, ASBO International*

**Introductions and Acknowledgments** *Charles E. Peterson, Jr., MBA, PRSBA, SFO*  
President, ASBO International

- Volunteer Recognition
- Board of Directors
- Strategic and Event Partners

**Notable Member Achievements** *Charles E. Peterson, Jr., MBA, PRSBA, SFO*

**ASBO International's 2018 Eagle Awards** *Fred Makonnen*  
Divisional Vice President, Head of Retail  
403(b) Sales & Strategic Partnerships, AXA

**Speaker Introduction** *Kim Brown*  
Vice President, Relationship  
Management, Security Benefit



### Keynote Address

*Sponsored by Security Benefit*

### “The Fascination Factor: Authentically Communicate Who You Are at Your Best”

*Sally Hogshead, two-time NY Times bestselling author, member of the Speaker Hall of Fame, fascination expert, and creator of the Fascination Advantage Assessment®*

World-class branding expert and best-selling author Sally Hogshead discovered a new way to measure how people perceive your communication, so the world will see you at your best. Unpack your results from the Fascination Advantage Assessment® and learn the secret to understanding what makes you intensely valuable to others.

11:00 am – 1:45 pm Exhibits Marketplace Open *Exhibit Hall D-F*

11:30 am – 12:45 pm COE Advisory Committee and Reviewers  
Meeting and Lunch **Invitation only** *Sanibel 1*

VALIC welcomes you to Kissimmee and the 2018 ASBO International Annual Meeting & Expo. VALIC, as a leading provider of retirement plans to public K-12 school districts, has proudly sponsored ASBO International for over 20 years. Please visit us in the Exhibits Marketplace at **Booth 309**.

## SATURDAY, SEPTEMBER 22 (continued)

# SATURDAY

**11:45 am – 12:45 pm** Lunch in the Exhibits Marketplace *Exhibit Hall D-F*

*Sponsored by Public Trust Advisors, LLC*

**1:00 pm – 1:45 pm** COE Reception **Invitation only** *Vero*

*Sponsored by VALIC*

**1:00 pm – 2:45 pm** Affiliate Executive Directors Meeting **Invitation only** *Tallahassee 1-2*

**1:20 pm – 1:45 pm** You Are Going to a Conference? Responding to  
Mini-Module Those Who Question Your Priorities (MM01)

*Tampa 1*

**Presenters:** Stacey Viers, Business Manager, Huron ISD, Bad Axe, MI; Christopher May, Financial Specialist, Michigan Department of Education, Lansing, MI

**Content Area:** Leadership Development

Day-to-day operations often overshadow opportunities for employees at all levels to participate in professional development and networking. Learn how a school district and a state department of education have overcome this challenge to improve employee engagement, collaborate with peers, and support education.

**1:20 pm – 1:45 pm** Optimizing Service and Support While Maintaining Accountability (MM02)  
Mini-Module *Tampa 2*

**Presenter:** Shaquita Burke, Director of Financial Operations, Vicksburg Warren SD, Vicksburg, MS

**Content Area:** Management Techniques

We have many roles and responsibilities in the world of school business, and most of them center around what we do to support the instructional goals of our districts while ensuring adherence to board policy and all required laws. This presentation will define key strategies for balancing support with accountability and creating a win-win situation—even if that means saying no—and helping your stakeholders understand why.

**1:20 pm – 1:45 pm** Effective Communications in the Business Office (MM03)  
Mini-Module *Tampa 3*

**Presenter:** Anya Randle, Director of Business Services, Assumption Parish School Board, Napoleonville, LA

**Content Area:** Management Techniques

As business officials, it is important to ensure effective communications within our office. Participants will learn why effective communication is imperative to increasing success and productivity and will leave with a unique strategy for communicating with all stakeholders.

**1:30 pm – 5:00 pm** SFO® Testing **Pre-registration required.** *Captiva 1-2*

## SATURDAY, SEPTEMBER 22 (continued)

2:00 pm – 3:00 pm  
Discussion Group

## Getting More Done (Without Burning Out): Research, Strategies, and Secrets for Controlling Stress (DG01)

*Osceola A*

**Presenter:** Courtney Clark, President, Accelerated Resilience, Austin, TX

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Management and Organization • **Content Areas:** Management Techniques, Leadership Development

In today's busy world, we're constantly being called on to do more with less. But how do you fit in everything that needs to get done without becoming so overwhelmed that you miss something? The research-based strategies from Courtney Clark's new book, *The Successful Struggle*, will have your team managing chaos, stress, and change in the fastest, most productive way possible. Learn the keys to getting more done without burning out.

**Learning Objectives:** 1. Discuss how change and chaos contribute to employee burnout. 2. Explain how to use the "stop, drop, and roll" technique for chaos management. 3. Detail how to apply new strategies for managing stress.

2:00 pm – 3:00 pm  
Discussion Group

## How One District's Document Management Program Is Saving Money, Securing Documents, and Improving Sustainability (DG02)

*Osceola 3*

**Presenter:** Scott Carpenter, Assistant Director of Business Services–Procurement Lead, Olathe Public Schools, Olathe, KS

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Management and Organization • **Content Areas:** Purchasing and Supply Management, Sustainability

When Olathe Public Schools decided to continuously evolve its document management programs, they began a multi-year process to transform the way district employees interacted with documents and technology. These changes have allowed teachers to spend more time with students and less time on administrative duties. Explore how the changes enabled the district to eliminate thousands of printers; automate workflow in their production print center; reduce head count related to servicing printers; and increase print volumes in the print center without adding additional staff.

**Learning Objectives:** 1. Describe how to automate workflow in a production print center. 2. Explain how to increase print volumes in a print center without adding additional staff. 3. Discuss how live data and analytics can provide specific information to help with ongoing change management.

2:00 pm – 3:00 pm  
Discussion Group

## Every Student Succeeds Act (ESSA): The New Reporting Requirement (DG03)

*Osceola 1-2*

**Presenters:** Sharie Lewis, Director of Business Services and Operations, Parkrose SD, Portland, OR; Noelle Ellerson Ng, Legislative Liaison, ASBO International, Ashburn, VA

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Areas:** Legislative Affairs, School Finance

The Every Student Succeeds Act has a new federal requirement for per-pupil spending at the school level. This session will focus on state and local education agency requirements for 2018-2019, help school business officials understand the requirements, and give participants an opportunity to discuss what other schools are doing to comply. Gain a better understanding of ESSA and learn why "transparency" is now our favorite word.

**Learning Objectives:** 1. Explain the school business official's role in complying with ESSA. 2. Outline steps to successfully meet federal compliance requirements. 3. Discuss strategies for working with peers to navigate the changes.

2:00 pm – 3:00 pm  
Discussion Group

## From Risk Assessment to Analyzing Data—Key Fraud Detection Tools (DG04)

*Naples 1*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; School Finance

Learn key strategies for conducting an internal risk assessment and examining financial data to detect fraud. Gather tips and techniques for implementing a risk assessment and using data mining as a strategy to detect and prevent fraud and misuse of public monies. Learn easy-to-implement methods for processing and analyzing data from accounts payable, payroll, and general ledgers to detect errors, fraud, and misuse of funds.

**Learning Objectives:** 1. Outline strategies to implement a fraud risk assessment. 2. Describe the necessary steps to establish management review and internal audit procedures. 3. Identify easy-to-implement Excel tools to analyze financial transactional data.

Security Benefit is proud to be an ASBO Strategic Partner and we applaud your commitment to your district. Attend our Clinic Table to learn about “Matching and Special Pay Plans 403(b)” and our Sunday Discussion Group, “Two Pressing Issues for SBOs: 2018 Tax Reform Impacts on 403(b) Plans and the Benefits of Employer Contributions to a 403(b) Plan.” Visit us at **Booth 621** to learn how Security Benefit can help your employees To and Through Retirement.

## SATURDAY, SEPTEMBER 22 (continued)

# SATURDAY

**2:00 pm – 3:00 pm**  
Discussion Group

### Confidentiality and Privacy in the Business Office (DG05)

*Naples 3*

**Presenters:** Linda Mont, Managing Member, Key Benefit Concepts, LLC, Wales, WI; Lynn Knight, Business Manager, Nekoosa SD, Nekoosa, WI

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resources and Labor Relations, Information Technology

School business office personnel create, work with, distribute, and store personal information about individuals on a regular basis. This session will review these functions and discuss responsibilities associated with handling individual information and provide practical steps to maintain confidentiality and privacy. HIPAA, FERPA, McKinney-Vento Act, and policies for other data and best practices will also be covered.

**Learning Objectives:** 1. Identify the numerous regulations that address confidentiality of information. 2. Outline the steps to establishing policies and procedures that ensure uniformity, training, and monitoring to meet compliance requirements and maintain confidentiality. 3. Explain how to determine and adhere to state and federal confidentiality regulations.

**2:00 pm – 3:00 pm**  
Discussion Group

### Bullying, the Law, and Safe Schools (DG06)

*Naples 2*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Area:** Legal Aspects

This interactive session is designed to provide school business officials with a basic working knowledge of legal and safety issues associated with bullying. The session is divided into three parts: the definition of bullying and bullies and statistics on the pervasiveness of bullying and cyberbullying in schools; a brief overview of statutes and case law addressing bullying; and recommendations for policy development as district leaders seek to eliminate bullying.

**Learning Objectives:** 1. Describe the pervasiveness of bullying and how it is defined. 2. Explain how statutes and litigation have responded to bullying. 3. Discuss how to develop policies to help eliminate or reduce bullying and avoid legal issues involving bullying in schools.

**2:00 pm – 3:00 pm**  
Discussion Group

### A District's Perspective on Food and Nutrition Services Success (DG07)

*Osceola 6*

**Presenter:** Lora Gilbert, Sr. Director of Food and Nutrition Services, Orange County Public Schools, Orlando, FL

**CPEs: 1 | SFOs: 1 / Field of Study:** Production • **Content Area:** School Food and Nutrition Management

As a school district enterprise, the food and nutrition services (FNS) program should provide a budget that shows fiscal fiduciary use of USDA, state, and local funds. The Key Performance Indicator (KPI) is the percent of revenue spent on major expense categories of food and labor. Participants will learn about a results-based performance improvement plan and KPIs for participation.

**Learning Objectives:** 1. Identify the barriers to a balanced food service program budget. 2. Explain the support needed from the district to increase student participation and how this KPI affects the budget. 3. Describe how the district's human resources department can help support a food service program.

## SATURDAY, SEPTEMBER 22 (continued)

2:00 pm – 3:00 pm  
Discussion Group

### Creating a Strategic Financial Plan That Supports Your District's Goals (DG08) *Osceola 4-5*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Finance • **Content Areas:** School Finance; Accounting, Auditing, and Budgeting

Best practices for strategic planning include developing a financial plan that corresponds with the identified goals of the district and details how financial and human resources will be used and re-purposed as necessary to meet the district's primary short- and long-term goals. Participants will learn about successful models 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 and outline steps to develop them. 3. Identify resources and tools available for strategic financial planning.

2:30 pm – 3:30 pm  
Guest Program

### Book Club: *A Man Called Ove* by Fredrik Backman *Sanibel 2*

Enjoy light refreshments as you discuss the *New York Times* bestseller that has taken the world by storm!

A feel-good story in the spirit of *The Unlikely Pilgrimage of Harold Fry* and *Major Pettigrew's Last Stand*, Fredrik Backman's novel about the angry old man next door is a thoughtful exploration of the profound impact one life has on countless others.

3:00 pm – 3:45 pm

### Eagle Awards Reception *Invitation only Vero*

*Sponsored by AXA*

3:15 pm – 4:15 pm  
Discussion Group

### Healthcare Reform: Where Are We Now? (DG09) *Tampa 3*

**Presenters:** Jessica Frier, Attorney, Senior Health & Welfare Plan Consultant, American Fidelity Administrative Services, Oklahoma City, OK; Chris Cuevas, Regional Manager–California, American Fidelity Assurance Company, Fresno, CA

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Area:** Human Resources and Labor Relations

After a frenzy of activity in 2017, the dust has begun to settle on legislative efforts impacting the healthcare reform landscape. Participants will learn about the current state of the Cadillac Tax, the future of tax-advantaged medical savings plans, and plan design considerations that districts should keep top-of-mind.

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

3:15 pm – 4:15 pm  
Discussion Group

### Effectively Managing Resistance to Major Change (DG10) *Tampa 1*

**Presenter:** Karen Starr, Professor and Inaugural Chair, School Development & Leadership, Deakin University, Burwood, VIC, Australia

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Areas:** Leadership Development, Management Techniques

Research suggests that school and school district reforms are often cursory, short-lived, or fail to get off the ground. This session focuses on the micro-politics of change resistance and effective means for overcoming forces against change. The experiences of school business officials and school principals overseeing major change in the context of policy reform will be featured, as well as a range of proven strategies and practical tools to deal with obstacles mounted by change resisters.

**Learning Objectives:** 1. Discuss the primary reasons colleagues and stakeholders resist major change. 2. Discuss typical resistance strategies school business officials encounter. 3. Describe a range of effective strategies and tools for countering forces against major change.

The Ricoh Team welcomes you to sunny Kissimmee! As you build your schedule, we highly recommend you include our presentation, "How One District's Document Management Program Is Saving Money, Securing Documents, and Improving Sustainability," on Saturday, September 22 at 2:00 pm with Scott Carpenter, Assistant Director of Business Services – Procurement Lead, Olathe (Kansas) Public Schools. We also look forward to meeting you at the Clinic Table Session and in the Exhibits Marketplace at **Booth 409**.

## SATURDAY, SEPTEMBER 22 (continued)

# SATURDAY

**3:15 pm – 4:15 pm**  
Discussion Group

### Identifying Key Cost Drivers to Manage Transportation Budgets (DG11)

*Sarasota 2*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Management and Organization • **Content Areas:** Pupil Transportation

Transportation costs are escalating and resources are decreasing. How do you manage the transportation budget development process to best determine the resources you need? This session will analyze the significant impacts of developing alternatives to your existing transportation model, such as insourcing, outsourcing, or mixed service models. We will discuss how reductions in one area of the budget can have consequences elsewhere and cover how to prepare for operational traps before they cause major disruptions to service levels. Learn what factors can affect transportation costs and how you can bring stability and reasonability to an often-uncertain service.

**Learning Objectives:** 1. Identify the critical elements of transportation costs. 2. Develop an analytical framework that allows you to determine the best operating model for your district. 3. Evaluate opportunities to control transportation costs while limiting negative operational impacts.

**3:15 pm – 4:15 pm**  
Discussion Group

### Starter Kit for the New SBO (DG12)

*Osceola 3*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Management and Organization • **Content Area:** Management Techniques

A school business official's transition to a new district can be challenging regardless the circumstances. Often, the 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 succeed 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.

**3:15 pm – 4:15 pm**  
Discussion Group

### Emerging Leaders Academy: An Oklahoma-Based Collaborative School Leadership Program (DG14)

*Sarasota 3*

**Presenters:** Pam Deering, Executive Director, Cooperative Council for Oklahoma School Administration/Oklahoma Association for School Administrators, Oklahoma City, OK; Stephanie Hyder, Director of Strategic Initiatives and Executive Search Services, Oklahoma State School Boards Association, Oklahoma City, OK

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Area:** Leadership Development

Learn about the Oklahoma Emerging Leaders Academy (ELA), a leadership development program for education leaders who aspire to the superintendency and who must hold valid superintendent credentials. The focus of this collaborative initiative between the school administrators' association, school boards association, and higher education is on developing a new cohort of leaders whose training is based on information gained from school board association superintendent searches and higher education research in leadership development. The training is centered around organizational leadership (culture, climate); communications; school finance, ethics, and legal issues; and advocacy, personal resume, application preparation, and interview tips.

**Learning Objectives:** 1. Discuss the ELA's approach to training emerging leaders to fill administrative positions. 2. Describe how this program creates a cohort and network of future administrative applicants. 3. Explain how this program helps applicants distinguish themselves from their colleagues in the hiring process.

## SATURDAY, SEPTEMBER 22 (continued)

3:15 pm – 4:15 pm  
Discussion Group

### Fixed Asset Inventory — If and When Disaster Strikes, Will You Be Prepared? (DG15) *Sarasota 1*

**Presenters:** Tim Michener, National Accounts Director, Asset Services, Inc., Merriam, KS; Eric Hansen, Director of Business/Board Clerk, USD 204 Bonner Springs Edwardsville, Bonner Springs, KS

**CPEs: 1 | SFOs: 1 / Field of Study:** Management Services • **Content Areas:** School Facilities Management, Risk Management

Discuss best practices for planning and performing a physical fixed asset/major movable equipment inventory. Recognize the importance of having regular inventories performed, what assets should be included in the inventory, where inventories need to be completed, when the best times are to perform an inventory, as well as who should perform the inventory. Learn best practices for executing an inventory and maintaining district assets post-inventory.

**Learning Objectives:** 1. Explain the value of a fixed-asset inventory. 2. Define fixed assets and compare a capital threshold to an inventory threshold. 3. Outline important considerations for performing the physical inventory, including methods for maintaining assets post-inventory.

3:15 pm – 5:15 pm  
Deep Dive

### ASBO International Legislative Update (DD01) *Osceola 1-2*

**Presenter:** Noelle Ellerson Ng, Legislative Liaison, ASBO International, Ashburn, VA

**CPEs: 2 | SFOs: 2 / Field of Study:** Business Law • **Content Area:** Legislative Affairs

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

**Learning Objectives:** 1. Explain the federal budget and appropriations process, the state of federal education funding, and how federal spending affects state/local education funding. 2. Analyze the effects of the latest changes and updates for ESSA, IDEA, school meal requirements, and Medicaid reform on your district. 3. Outline ASBO International legislative priorities and resources available to help school business officials advocate for their districts.

3:15 pm – 5:15 pm  
Deep Dive

### School Security and Safety: Keeping Kids Safe (DD02) *Osceola 4-5*

**Presenters:** Brian Moore, Manager for School Climate, Delaware Department of Education, Dover, DE; Paul Timm, Vice President, Facility Engineering Associates, Chicago, IL

**CPEs: 2 | SFOs: 2 / Field of Study:** Business Management and Organization • **Content Area:** Risk Management

Learn best practices in developing, implementing, training, exercising, and updating your school safety plan. School safety experts will cover current threat trends and best practices in keeping students safe. They will describe how a comprehensive Incident Command System can support your school's ability to respond effectively to an emergency and discuss how to successfully communicate with stakeholders and staff during incidents. Participants will also learn strategies for opening the lines of communication about school violence, craft a culture of preparedness, and eliminate the "it won't happen here" mentality.

**Learning Objectives:** 1. Summarize current threat trends and best practices to address them. 2. Describe the role and importance of an Incident Command System in effective incident management. 3. Outline the development of the Emergency Planning Cycle.

3:15 pm – 5:15 pm  
Deep Dive

### The Changing Role of the SBO (DD03) *Osceola A*

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

**CPEs: 2 | SFOs: 2 / Field of Study:** Personal Development • **Content Areas:** Leadership Development, Management Techniques

Technology advances, global financial crises, the rise of big data, and the impact of social and digital media have transformed the role of the school business official over the past two decades. In this interactive session, participants will discuss how these trends are reshaping the face of education, the "business" side of education, and the role of school business officials. They will collectively identify how to address this shift and prepare for current and future challenges, including what new knowledge, skills, and abilities are needed to go beyond surviving and start thriving in this ever-changing environment.

**Learning Objectives:** 1. Identify the evolution of K-12 education over the past several decades and describe "forces of change" outside of schools and how they impact school business officials. 2. Outline a personal and professional response in terms of knowledge, skills, and abilities needed to be successful in today's schools. 3. Discuss best practices in confronting new challenges to the "business side" of schools.

Welcome to Kissimmee and the 2018 ASBO Annual Meeting & Expo. At Office Depot®, we believe education is the foundation for a bright future. Our full spectrum of services and solutions will help transform your school. We're more than just office supplies. We're people, products, and solutions to help your school succeed. Enjoy the conference and be sure to stop by **Booth 604**—we look forward to seeing you!

## SATURDAY, SEPTEMBER 22 (continued)

# SATURDAY

3:15 pm – 5:15 pm  
Deep Dive

### Using Excel Power Query to Clean Data and Automate Processes (DD04)

*Naples 2*

**Presenter:** John A. Williams, CFO, Uinta County SD 1, Evanston, WY

**CPEs: 2 | SFOs: 2 / Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; Management Techniques

Power Query is an Excel-based program that extracts data from files and tables, transforms and cleans data as needed, and loads data into refreshable queries. The program can work with datasets of any size and requires no prior query-writing ability. This presentation will benefit anyone who manages or prepares datasets such as expenditure detail reports, labor distributions, and benefit-liability rosters. The presenter will also provide multiple templates and working examples.

**Learning Objectives:** 1. Describe Excel Power Query and outline how to extract data into the tool. 2. Demonstrate how to edit and transform data using Power Query. 3. Explain how to use provided templates to reconcile, list compare, and summarize information.

3:15 pm – 5:15 pm  
Deep Dive

### Creating State Funding Formulas Laser Focused on Student Needs (DD05)

*Naples 3*

**Presenter:** Michael Jacoby, Executive Director/CEO, Illinois ASBO, DeKalb, IL

**CPEs: 2 | SFOs: 2 / Field of Study:** Finance • **Content Areas:** School Finance, Legislative Affairs

Illinois recently reformed the most regressive school funding formula in the United States and transitioned to an evidence-based formula that will make it the least regressive. The new formula is based on two key actions: adequately assess student needs based on research and calculate capacity based on comparable local ability and current state revenues. Ultimately, this formula will drive state funds to the districts with the greatest need. This session will explore what an evidence-based approach is and how equitable distribution to districts can be achieved over time.

**Learning Objectives:** 1. Summarize an evidence-based funding formula and assess its use in conjunction with ESSA student growth expectations. 2. Discuss strategies for receiving equitable state funds related to actual need. 3. Analyze impacts of funding formulas on low-income populations and English-learner needs.

3:15 pm – 5:15 pm  
Deep Dive

### Bonds from Start to Finish (DD06)

*Osceola 6*

**Presenter:** Karen Wiesman, Associate Superintendent for Business and Finance, Mansfield ISD, Mansfield, TX

**CPEs: 2 | SFOs: 2 / Field of Study:** Finance • **Content Areas:** School Finance; Accounting, Auditing, and Budgeting

Get an in-depth overview of bonds, from the first board presentation to accounting transactions after the bond sale. Participants will explore step-by-step process checklists; a sample board abstract; PowerPoint presentations of various bond types; sample RFQs and processes for dealing with financial advisors, bond counsels, and bond underwriters; sample resolutions of bond authorizations and designation of officials during the bond sale process; rating calls; sample accounting treatments and journal entries booking various types of bond sales; comparisons of different bond instruments; and communications after the bond sale.

**Learning Objectives:** 1. Articulate the bond sale process and outline how to create an accompanying checklist and timeline. 2. Discuss the procurement for professional services required for a bond sale. 3. Detail accounting treatments and transactions required to record different types of bond sales.

## SATURDAY, SEPTEMBER 22 (continued)

4:30 pm – 4:55 pm  
Mini-Module

### Creating a Work-Life Balance (MM05)

*Tampa 1*

**Presenter:** Jeff Feyerer, Business Manager, Fairview South SD 72, Northbrook, IL

**Content Area:** Leadership Development

In a world where business managers have a vast array of responsibilities and are often pulled in many different directions, the importance of work-life balance has never been greater. Learn about the benefits of striking a balance between optimal work performance and time spent away from the office, methods to achieve this balance, and how successfully doing so can create an even more positive work environment.

4:30 pm – 4:55 pm  
Mini-Module

### Using Excel VLOOKUP to Merge Data Sets (MM06)

*Tampa 2*

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

**Content Area:** Information Technology

Wouldn't it be nice to combine two separate data sets into the same spreadsheet—for example, merging a single salary and health benefit census from two separate Excel sheets into one? Learn how to use Excel's VLOOKUP function to pull specific data from one spreadsheet into another, allowing you to work from a unified data set.

4:30 pm – 4:55 pm  
Mini-Module

### Using Google Suite to Improve Organization, Communication, and Efficiency (MM07)

*Tampa 3*

**Presenter:** Jay Staley, Director of Business, Clark-Pleasant Community School Corporation, Whiteland, IN

**Content Area:** Management Techniques

Learn how one district utilized Google Suite to become better organized, increase internal communication, and improve work flow efficiency. Participants will learn through example how folder systems, embedded links, shared documents, surveys, and videos can be used to benefit their district.

4:30 pm – 4:55 pm  
Mini-Module

### GSBN Live! (MM08)

*Sarasota 2*

**Presenter:** Jackie Wallenstein, Director of Membership, Marketing & Communications, ASBO International, Ashburn, VA

**Content Area:** Leadership Development

Take an interactive tour of ASBO International's Global School Business Network (GSBN). Attendees should bring their mobile devices or laptops so they can log in and learn how to use all of the great features the GSBN offers: discussion groups, resource libraries, a searchable member library, and more!

4:30 pm – 4:55 pm  
Mini-Module

### The Art of the CFO Position (MM09)

*Sarasota 3*

**Presenter:** Kevin Supple, COO, Francis Howell R-III SD, Saint Charles, MO

**Content Areas:** Leadership Development, Management Techniques

Much of the CFO job is focused on the “science” of our work, like adjusting the chart of accounts to meet ESSA reporting requirements or understanding new GASB pronouncements. This session, however, will focus on the “art” of being a CFO. Knowing your district's financial position is essential, but it is equally important to be able to effectively communicate that information to your audiences. Based on real-life examples gleaned from a 40+ year career in public education, this session will provide insight into how to know your audience, so you can provide the right information in the right format.

Horace Mann® welcomes you to ASBO International's 2018 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. Attend our Clinic Table on Sunday to learn about "Attracting and Retaining Employees by Helping Reduce Student Loan Debt." Visit us at **Booth 308** for a chance to win funding for a DonorsChoose.org project in your district and learn more about our solutions.

## SATURDAY, SEPTEMBER 22 (continued)

# SATURDAY

- 5:00 pm – 6:00 pm** Pinnacle Awards Reception **Invitation only** *St. George 104*  
*Sponsored by Virco, Inc.*
- 5:30 pm – 6:15 pm** Emerging School Business Leaders  
Scholarship Reception **Invitation only** *Vero*
- 6:00 pm – 8:00 pm** Pinnacle Awards Dinner **Invitation only** *Castillo de San Marcos*  
*Sponsored by Virco, Inc.*
- 6:00 pm – 8:00 pm** Eagle Awards Dinner **Invitation only** *MOOR*  
*Sponsored by AXA*

**8:00 pm – 11:00 pm** Joint ASBO Affiliate Reception at the Hard Rock Cafe  
*Hard Rock Cafe*

Join Colorado, Illinois, Iowa, Kansas, Ohio, Oregon, Pennsylvania, South Africa, Washington, and Wisconsin ASBO affiliates at the Hard Rock Café for an extraordinary joint event.

Meet ASBO candidates for vice president and director and enjoy the music of the John Stone Band, kindly provided by American Fidelity!

Buses begin loading at 7:30 pm from the Gaylord Transportation lobby and run continuously.

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



## SUNDAY, SEPTEMBER 23

7:00 am – 8:00 am Pop-up Breakfast Station (\$) *Osceola Foyer*

7:30 am – 4:00 pm Registration *Osceola Lobby A*

8:00 am – 9:15 am Clinic Tables *Osceola A*

Participate in roundtable discussions hosted by an exhibitor and focused on a specific aspect of school business management, such as healthcare reform, 403(b) retirement plans, budget planning, technology, and more! See page 58 for details.

9:00 am – 9:30 am Coffee Break *Osceola Lobby C*

9:30 am – 10:30 am Crowdfunding Best Practices for K–12 School Business Officers (DG16)  
Discussion Group *Naples 1*

**Presenters:** James Yale, Vice President, Association Relations, The Horace Mann Companies, Springfield, IL; Katie Bisbee, Chief Marketing Officer, DonorsChoose.org, New York, NY

**CPEs: 1 | SFOs: 1 / Field of Study:** Finance • **Content Area:** School Finance

Crowdfunding is becoming a viable funding source for schools across the states, filling resource gaps and providing strategic acceleration for academic programs. However, because the practice is poorly understood, it may result in unexpected liabilities without the proper partners and safeguards in place. Learn how to maximize your teachers' participation in crowdfunding while maintaining financial transparency and accountability, integrity controls, privacy, and safety.

**Learning Objectives:** 1. Describe the characteristics of best-in-class crowdfunding sites. 2. Discuss key questions district leaders should ask when considering crowdfunding sites. 3. Outline important considerations for district leaders when issuing crowdfunding guidelines.

9:30 am – 10:30 am Compliance Through Cooperative Purchasing (DG17)  
Discussion Group *Osceola 3*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Production • **Content Area:** Purchasing and Supply Management

While purchasing through cooperative vehicles will help districts spend less and save more, they must be sure to evaluate available options and stay compliant. This session will highlight the value of cooperative purchasing and discuss how to evaluate cooperatives and how to leverage competitively solicited contracts to benefit your school district's financial objectives.

**Learning Objectives:** 1. Discuss the due diligence required when utilizing cooperatives. 2. Evaluate the differences between cooperatives. 3. Explain cost savings enabled by cooperative purchasing.

9:30 am – 10:30 am Hot Issues in Education (DG18)  
Discussion Group *Osceola 1-2*

**Presenter:** Noelle Ellerson Ng, Legislative Liaison, ASBO International, Ashburn, VA

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Areas:** Legislative Affairs

Learn about emerging issues in education news and policy that are affecting schools across the nation, such as immigration, school safety, free speech and civil rights issues, what the Trump/DeVos administration has in store for education, and more. Discuss these and other news topics with your peers in this interactive presentation and share how your district is planning to handle these issues.

**Learning Objectives:** 1. Identify emerging and current issues in education that are affecting schools across the U.S. 2. Discuss how to recognize challenges and solutions for navigating current affairs. 3. Describe how to handle sensitive political/legal issues that may arise in your district.



AXA is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and Eagle Institute. We are honored to support ASBO and its members' continued commitment to public school systems and the future of our children. We invite you to visit us at **Booth 204** and join our Clinic Table discussion, "Single vs. Multi Provider: Improving Plan Participation While Managing Employer Risk," on Sunday, 8:00 am – 9:15 am.

## SUNDAY, SEPTEMBER 23 (continued)

# SUNDAY

9:30 am – 10:30 am  
Discussion Group

### Processes, Procedures, and Policies for Effectively Handling Money in Schools (DG19)

*Naples 2*

**Presenter:** Jack Stoskopf, Assistant Superintendent for Business and Personnel Services, D.C. Everest Area Public School District, Westin, WI

**CPEs: 1 | SFOs: 1 / Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; Risk Management

More money flows through school offices than most people realize. How these funds are managed and accounted for is critical. Learn how one school district put in place effective policies and procedures to ensure funds are handled effectively, efficiently, and with accountability. Learn what research says about principals' preparedness to handle the financial responsibilities of their jobs and take away valuable ideas for protecting your principals, their secretaries, the financial assets that pass through your school offices every day, and your district's reputation.

**Learning Objectives:** 1. Describe techniques to help principals account for money that flows through school offices. 2. Explain policies and procedures that help protect financial assets and the people who handle those funds. 3. Provide examples of documents that can help reduce the possibility of mishandled funds.

9:30 am – 10:30 am  
Discussion Group

### Staff Wellness Programs That Pay Dividends (DG20)

*Sarasota 3*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Area:** Human Resources and Labor Relations

When done right, employee wellness programs can make a difference in employees' health and happiness while promoting a positive relationship between management and labor. Workplace wellness can offer financial gains beyond just reduced claim expenses, including reduced absenteeism, greater employee engagement and productivity, less unscheduled paid time off, fewer workers' comp claims, greater employee retention, and increased employee satisfaction and morale. Learn what current research says about the monetary return on investment from employee wellness programs, explore key aspects of wellness programs that achieve significant financial returns, and learn about some of the intangible benefits of an effective wellness program.

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

9:30 am – 10:30 am  
Discussion Group

### The Potential Impact of Marijuana Legalization on Schools (DG21)

*Osceola 6*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Area:** Legal Aspects

Significant legal questions are emerging for school district leaders about implications of the legalization of marijuana, including marijuana use by teachers and other school employees in jurisdictions where it is legal to do so, particularly for medical purposes. This presentation looks at federal statutes on marijuana usage, examines related litigation, and offers recommendations school business officials and other educational leaders can consider as they develop and implement policies about marijuana use by employees.

**Learning Objectives:** 1. Discuss current state and federal statutes on marijuana and litigation concerning marijuana use by employees. 2. Outline the rights of school employees who use marijuana for medicinal or recreational purposes. 3. Describe how to develop policies about employee marijuana use.

## SUNDAY, SEPTEMBER 23 (continued)

9:30 am – 10:30 am  
Discussion Group

### Monitoring Data Privacy When Executing Third-Party Contracts (DG22)

*Naples 3*

**Presenters:** Justin Dayhoff, CEO, Equiday, Bethesda, MD; Theodore Hartman, Data Privacy Officer, Howard County Public School System, Ellicott City, MD; Gregory Burnett, Assistant General Counsel, DC Office of the State Superintendent of Education, Washington, DC; Jason Becker, Chief Product Officer, Allovue, Baltimore, MD

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Areas:** Risk Management, Legal Aspects

School business offices review contracts for third-party vendors that often include the exchange of confidential or personally identifiable data. To what extent are they aware of, or adhere to, best practices for negotiating data-sharing agreements that protect data privacy? A school district data privacy officer, a state education office assistant counsel, and third-party consultants will discuss their experiences with data privacy in third-party contracts and data-sharing agreements, and will collaborate with participants to brainstorm best practices for protecting data while executing these contracts.

**Learning Objectives:** 1. Explain how to recognize when and where confidential data may be vulnerable when executing a third-party contract. 2. Discuss best practices for building data protections into contract language. 3. Detail best practices for data sharing once a third-party contract is ratified and data are to be exchanged.

9:30 am – 10:30 am  
Discussion Group

### What Do Ethics Really Mean to You? (DG23)

*Osceola 4-5*

**Presenters:** Cindy Reilmann, Director of Finance, Francis Howell SD, Saint Charles, MO; Patricia Bedborough, CFO, Parkway SD, Chesterfield, MO

**CPEs: 1 | SFOs: 1 / Field of Study:** Behavioral Ethics • **Content Areas:** Leadership Development

This interactive session will prompt attendees to evaluate what factors drive ethical decision making and to reflect on their own ethical behavior. Various ethical dilemmas will be presented and potential pitfalls, warning signs, and pivotal moments within these cases will be discussed.

**Learning Objectives:** 1. Discuss and identify key factors around ethics. 2. Analyze various cases to determine the ethical dilemma. 3. Define what drives your ethical decision making.

10:30 am – 10:45 am

### Beverage Break *Osceola Lobby C*

10:45 am – 12:15 pm

### Second General Session *Osceola Ballroom C-D*

**Welcome** *Tom Wohlleber, CSRM, Vice President, ASBO International*

**Recognition of Past Presidents** *Tom Wohlleber, CSRM*

**Installation of Officers** *Anthony N. Dragona, Ed.D, RSBA  
Immediate Past President, ASBO International*

**ASBO International's  
2018 Pinnacle Awards** *Brian True  
Vice President of Sales, Virco, Inc.*

**Speaker Introduction** *Charles E. Peterson Jr., MBA, PRSBA, SFO, President, ASBO International*

### Keynote Address

#### "The Fulcrum of Leadership"

*Colonel Arthur J. Athens, USMC (Ret.),  
Director, Vice Admiral Stockdale Center for Ethical Leadership, U.S. Naval Academy*

Explore how school business leaders can become more effective at the fulcrum point and lead their districts to higher levels of motivation, achievement, and fulfillment.



Welcome to Kissimmee! We're excited to support you as a Strategic Partner. Join us for the Friday workshop, "From Treasurer to Benefits Administration: A Decision-Maker's Guide," sit in on our Saturday Discussion Group, "Health Care Reform: Where Are We?" or visit our Clinic Table on Sunday for "Lessons From 3 Years of ACA Reporting: Ask Me Anything." Visit American Fidelity at **Booth 511** to learn how we can help ease your worry and workload.

## SUNDAY, SEPTEMBER 23 (continued)

# SUNDAY

**12:30 pm - 1:45 pm** MBA Advisory Committee and Reviewers  
 Meeting and Lunch **Invitation only** *Sanibel 1*

**12:30 pm - 2:45 pm** Exhibits Marketplace Open *Exhibit Hall D-F*

**12:45 pm - 2:45 pm** Advocacy as Leadership: Advice for the SBO *ASBO Booth 130*  
 Drop by for an informal meet and greet with some of ASBO International's most engaged advocacy volunteers, or "ASBOcates," to learn how to effectively advocate for your students. Understand ASBO International's legislative priorities, and discover available tools, resources, and opportunities to help you be a voice for your district at the national level.

**1:00 pm - 2:00 pm** Lunch in the Exhibits Marketplace *Exhibit Hall D-F*  
*Sponsored by BMO Financial Group*

**1:45 pm - 2:30 pm** MBA and *Pathway* to the MBA Reception **Invitation only** *Sanibel 2*  
*Sponsored by Voya Financial®*

**2:45 pm - 3:45 pm** Increase Efficiency in Your District to Improve All Programs (DG24)  
 Discussion Group *Sarasota 1*

**Presenters:** Kenneth Bowen, National Lead K-12 Education Consultant for Finance & Leadership, Office Depot, Inc., Laurinburg, NC; Hank Hurd, Partner, School Efficiency Consultants, Raleigh, NC; Kathy Isenhour, Partner, School Efficiency Consultants, Hickory, NC; Frank Lopes, Partner, School Efficiency Consultants, Fayetteville, NC; Andrea Turner, National Lead Growth Strategy Consultant, Office Depot, Inc., Boca Raton, FL

**CPEs: 1 | SFOs: 1 | Field of Study:** Business Management and Organization • **Content Areas:** Management Techniques, School Finance

Educating students at the highest level with fewer dollars, reduced staff, and decreased overall capacity is a way of life for school and district leaders. Participants will explore key topics, trends, and strategies for getting the job done with maximum efficiency and will acquire a better understanding of how to apply business efficiencies to school operations to gain more resources for all school programs.

**Learning Objectives:** 1. Define business efficiencies. 2. Outline areas where business efficiencies can be applied. 3. Analyze trends in improved resource allocation.

**2:45 pm - 3:45 pm** Two Pressing Issues: 2018 Tax Reform Impacts on 403(b) Plans and the  
 Discussion Group Benefits of Employer Contributions to a 403(b) Plan (DG25)  
*Tampa 2*

**Presenters:** Thomas Granger, Second Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Mike Soetaert, Consultant, OFG Financial Services, Inc., Topeka, KS

**CPEs: 1 | SFOs: 1 | Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resource and Labor Relations, School Finance

It has been more than 30 years since any meaningful tax reform. The presenters will discuss the impacts of this reality, the tax reform impacts on 403(b) plans, and the benefits of employer contributions to 403(b) plans. They will dig into the details of a case study of a school district in Kansas that used effective employer contributions to their 403(b) plan to solve several issues.

**Learning Objectives:** 1. Discuss the impacts of past tax reforms on 403(b) plans. 2. Explain how matching plans can be more beneficial than auto enrollment. 3. Describe effectiveness and efficiency of employer contributions to a 403(b) plan.

## SUNDAY, SEPTEMBER 23 (continued)

2:45 pm – 3:45 pm  
Discussion Group

### Solving the Mystery of Year-End Financial Projections (DG26)

*Sarasota 3*

**Presenters:** Scot Ecker, Senior Analytics Advisor, Forecast5 Analytics, Milwaukee, WI; Linda Darling, Director of Business Services, Lebanon Community Schools, Lebanon, OR

**CPEs: 1 | SFOs: 1 / Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; School Finance

Has your superintendent ever walked into your office mid-year and said, “Do we have money to do....?” Learn how one school district is using forecasting tools to automate the process of predicting where the current year will end so they can confidently answer this question. Presenters will provide an in-depth look at techniques and tools that focus on the strategic value of linking the month-to-month financial activity of a school district with a forecasted year-end position and multi-year projection.

**Learning Objectives:** 1. Explain how operational forecasting enables a school district to create monthly budgets based on historical trends. 2. Outline the process of creating a strategic link between current year budget performance analysis and a multi-year financial plan. 3. Identify strategies for improving transparency and public understanding of your district’s financial position.

2:45 pm – 3:45 pm  
Discussion Group

### Day Zero—Running Your School Without Water (DG27)

*Sarasota 2*

**Presenter:** David Ginsberg, Director, Finance and Administration, United Herzlia Schools, Cape Town, W.C., South Africa

**CPEs: 1 | SFOs: 1 / Field of Study:** Production • **Content Area:** Risk Management

Cape Town in South Africa is experiencing a water shortage so severe that there are plans for Day Zero—the day water no longer flows from taps. Running a school without drinking water and sanitation requires out-of-the-box thinking and clever yet truthful communication. Learn how schools can provide certainty and leadership while preparing for a potential crisis.

**Learning Objectives:** 1. Describe how to align your initial and ongoing communication in response to a crisis based on philosophical analysis. 2. Discuss how to create and maintain confidence in the school’s leadership and decision making by having a plan. 3. Outline steps to scope the extent of the crisis to plan the nature and timing of your interventions.

2:45 pm – 3:45 pm  
Discussion Group

### Establishing a Succession-Focused Organization (DG28)

*Tampa 3*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resources and Labor Relations, School Finance

Do you plan to work for your organization forever? Have you been part of a transition within your organization? Or maybe you just started in a new leadership role within your school district. Transition is inevitable, and every school district will experience a change in staffing. Learn how to develop the needed skills and strategies to build a succession-focused organization.

**Learning Objectives:** 1. Describe effective strategies for building a succession plan. 2. Outline critical decisions an organization needs to make early in succession planning. 3. Discuss lessons learned from entities who did not consider the long-range planning needs.

2:45 pm – 3:45 pm  
Discussion Group

### What CFOs Should Know About Strategic Leadership (DG29)

*Tampa 1*

**Presenters:** Dawn Jacobs, Treasurer/CFO, Huron City SD, Huron, OH ; Steven Pereus, President, Enlit, LLC, Maumee, OH; Dennis Muratori, Superintendent, Huron City SD, Huron, OH

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Areas:** Leadership Development, School Finance

Today’s CFOs must embrace their management focus, concentrating not only on analytics, but management of people, technology, and risk, with an important concentration on effective communication. In addition, they must be able to navigate the politics of the position. Explore the changing role of the chief financial officer in the organizational structure and identify what you need to know to be a strategic leader.

**Learning Objectives:** 1. Describe key hard skills for strategic leadership in areas such as data analytics, risk management, and technology. 2. Outline key soft skills for strategic leadership in areas such as adapting to change, managing people, and evaluating political impact. 3. Discuss effective communication strategies related to board communication, web presence, and transparency.

## SUNDAY, SEPTEMBER 23 (continued)

# SUNDAY

2:45 pm – 3:45 pm  
Discussion Group

### Handling the Catastrophic Loss of Your Administration Building (DG30)

#### Osceola 6

**Presenter:** Bill Parkinson, Treasurer, Willoughby-Eastlake CSD, Willoughby Hills, OH

**CPEs: 1 | SFOs: 1** / **Field of Study:** Business Management and Organization • **Content Areas:** School Facilities Management, School Finance

The Willoughby-Eastlake CSD experienced a fire that quickly and unexpectedly consumed its entire administration building March 14, 2017. Learn about the long, complex, and difficult settlement process the district experienced as well as the monumental tasks of moving 40 staff to a new location, sourcing and purchasing new equipment, moving its fiber connection hub and all its district servers, and attempting to recover and restore all district HR, financial, and student records. Learn how you can make sure your policies and procedures are sound.

**Learning Objectives:** 1. Discuss policies and procedures you should have in place in case of a catastrophic loss. 2. Describe what a facility insurance policy should look like. 3. Detail how to prevent the future loss of HR, financial, and student records and how to handle lost records if necessary.

2:45 pm – 3:45 pm  
Discussion Group

### Asset Management in the 21st Century (DG31)

#### Osceola 3

**Presenters:** Joseph Sutorius, Chief Information Officer, East Irondequoit CSD, Rochester, NY; John Abbott, Deputy Superintendent, East Irondequoit CSD, Rochester, NY

**CPEs: 1 | SFOs: 1** / **Field of Study:** Information Technology • **Content Areas:** Information Technology, School Finance

Districts of every size are tasked with tracking fixed assets. Learn innovative approaches that leverage technology you may already own to make managing your fixed assets less resource-intensive. The presenters will describe a cutting-edge approach that may dramatically change the asset management landscape through a case study of how East Irondequoit CSD integrated Radio Frequency Identification (RFID) technologies into its network.

**Learning Objectives:** 1. Identify ways to manage assets in your district. 2. Analyze new asset management technologies. 3. Discuss the benefits of RFID in managing assets.

2:45 pm – 3:45 pm  
Discussion Group

### #StoptheBlock: Preserve School Meals (DG57)

#### Osceola 1-2

**Presenters:** Nadia Davis, Manager, Federal Affairs, School Nutrition Association, National Harbor, MD; Lynn Harvey, Chief of School Nutrition Services, North Carolina Department of Public Instruction, Raleigh, NC

**CPEs: 1 | SFOs: 1** / **Field of Study:** Management Services • **Content Areas:** School Food and Nutrition Management, Legislative Affairs

Every school day since 1946, more than 30 million students have relied on school meals for not only nourishment, but for overall health, academic achievement, and future success. The U.S. Congress has proposed fixed-sum block grants that would slash funds and leave school districts struggling to make up the difference. Learn how you can lead the local fight against fixed-sum block grants and ensure the overall well-being and future success of our students.

**Learning Objectives:** 1. Discuss how school meal programs contribute to a school's efforts to foster an environment conducive to overall well-being, academic achievement, and future success. 2. Explain the impact of the proposed fixed-sum block grants on academics. 3. Summarize strategies to prevent a block grant implementation.

2:45 pm – 4:45 pm  
Deep Dive

## Emerging Issues and Impacts of Risk Management in Schools (DD07)

*Naples 1*

**Presenters:** Amy Diedrich, CEBS, Marsh & McLennan Agency, Minneapolis, MN; Jim Westrum, Executive Director of Finance and Business Services, Wayzata Public Schools, ISD 284, Wayzata, MN; Stephen Anderson, Business Manager, Proctor Public Schools, Proctor, MN; Tom Strasburger, Vice President, Strategic Alliances, PublicSchoolWORKS, Cincinnati, OH

**CPEs: 2 | SFOs: 2 / Field of Study:** Business Management and Organization • **Content Areas:** Risk Management

Risk management in schools is more than having insurance and understanding and managing the dynamic nature of risks in schools. Risks range from everyday occurrences such as trips and falls, to bus accidents, to tornados and floods. Emerging issues such as drones, international field trips, and cybersecurity pose additional challenges to a district's risk management plans. 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 the various elements of the process. 2. Identify and discuss the impact risk management has on various departments within schools and how to educate and train staff to raise awareness. 3. Discuss resources and strategies for executing a proper risk management program.

2:45 pm – 4:45 pm  
Deep Dive

## Using Visualization Data to Align Resources with Strategic Planning Initiatives (DD08)

*Naples 2*

**Presenters:** Steve Summers, Business Manager, Waunakee CSD, Waunakee, WI; Jeff Carew, Managing Director, Forecast5 Analytics, Milwaukee, WI; Jeff Gross, CFO, Kettle Moraine SD, Wales, WI

**CPEs: 2 | SFOs: 2 / Field of Study:** Management Services • **Content Areas:** Leadership Development; Accounting, Auditing & Budgeting

For the past several budget cycles, the Waunakee Community School District and the Kettle Moraine School District in Wisconsin have been using benchmarked visualization data to improve their alignment of resources toward strategic planning initiatives. Learn how these districts have engaged in a multi-year effort to work toward this goal. During this interactive and engaging session, presenters will share examples from both districts and provide specific examples of data visualization over a multi-year resource allocation improvement process.

**Learning Objectives:** 1. Explain the importance of resource alignment with strategic planning initiatives and why a multi-year effort is necessary to improve budgeting practices. 2. Outline how to present data/research to stakeholders in an easy-to-understand format. 3. Describe the outcomes of this resource alignment process.

2:45 pm – 4:45 pm  
Deep Dive

## By the Numbers: Harnessing the Power of Voter Targeting for Successful School Tax Elections (DD10)

*Naples 3*

**Presenters:** Julie Fitzgerald, Vice President of Marketing, GuideK12, Minnetonka, MN; Don Lifo, Retired Superintendent, Consultant, Springsted Incorporated, Springsted Inc., and GuideK12, Minnetonka, MN; Aaron Bushberger, Finance Director, South St. Paul Public Schools, South St. Paul, MN

**CPEs: 2 | SFOs: 2 / Field of Study:** Finance • **Content Areas:** School Finance, Management Techniques

Planning a successful tax election requires an understanding of three inconvenient truths impacting school districts: scarcity (number of parents who are registered voters); absence (turnout patterns of parents and other young voters); and opposition (size and demographics of "no" votes). Using this knowledge in combination with demographic and predictive databases and GIS technology allows school leaders to obtain the "yes" votes needed to win. The presenters will provide an overview of research and best practices related to successful school tax elections and share how one district capitalized on the strategies and tools outlined in the presentation to win two ballot proposals.

**Learning Objectives:** 1. Describe the three key demographic variables that impact school tax elections. 2. Discuss how to use demographic and predictive databases to target the number of "yes" votes to win. 3. Outline how to effectively link voter targets with GIS mapping for canvassing, communications, and GOTV (get out the vote).

## SUNDAY, SEPTEMBER 23 (continued)

# SUNDAY

2:45 pm – 4:45 pm  
Deep Dive

### Student Success Funding: A District in Transformation (DD11)

*Osceola 4-5*

**Presenters:** Lisa Bracken, CFO, Atlanta Public Schools, Atlanta, GA; Betty Chang, Manager, Education Resource Strategies, Watertown, ME

**CPEs: 2 | SFOs: 2 / Field of Study:** Finance • **Content Areas:** School Finance

Atlanta Public Schools is on a journey of transformation, turning around some of the lowest-performing schools in Georgia with an emphasis on school-based autonomy and principal and community empowerment. With support from Education Resource Strategies (ERS) and with the input from a taskforce of representatives from all divisions and clusters, the district created the Student Success Funding model, an allotment formula focused on equity, transparency, and site-based empowerment. Learn about the driving factors behind the change in allotment formulas, the details of the new formula, and the challenges and lessons learned along the way.

**Learning Objectives:** 1. Articulate challenges in school allotment formulas, especially around equity, transparency, and site-based autonomy. 2. Explain how the Student Success Funding model uses per-pupil allocations and weighted formulas to solve many issues found in previous allotments. 3. Discuss challenges encountered when rolling out a new funding formula, especially around communication strategy and balancing stability with the pursuit of equity.

3:00 pm – 4:00 pm  
Guest Program

### Guest Program: Chocolate Candy Bar Class

*Meet in the Exhibit Hall Lobby D at 2:50 pm to be escorted to the Pastry Kitchen.*

You are in for a special treat! In an exclusive demonstration for ASBO guests, go behind the scenes of the Pastry Kitchen, where you'll learn directly from the chef about the history and process of everyone's favorite candy. Then, get creative with the ingredients as you make your own chocolate bar! Please note: space is limited.

4:00 pm – 4:25 pm  
Mini-Module

### Making Time for Professional Development (MM10)

*Sarasota 3*

**Presenter:** Trisha Schock, Assistant Fiscal Director, North Central ESD 171, Wenatchee, WA

**Content Areas:** Leadership Development

Do you want to be viewed as a leader in your industry? Do you want your colleagues to look to you for guidance and expertise? Or are you trying to skate by in your current position, hoping that no one notices? Learn how making time for quality professional development is imperative to ensure that you continue to be competent within your district and your industry.

4:00 pm – 4:25 pm  
Mini-Module

### The One Where You Get the Floor: SBO Idea Swap (MM11)

*Tampa 1*

**Presenter:** Stephanie Johnson, Marketing & Communications Manager, ASBO International, Ashburn, VA

**Content Areas:** Leadership Development

New school business officials (SBOs), career switchers, and veteran SBOs are invited to reflect on why school business is a personal passion, what tools you rely on to succeed, and what resources you would use if you had them. Leave with job hacks from your peers, access to tools you may not know you had, and be a springboard for great ideas.

4:00 pm – 4:25 pm  
Mini-Module

### Coaching the Coaches (MM12)

*Tampa 2*

**Presenter:** Cyndee Byous, CFO, Raymore-Peculiar School District, Peculiar, MO

**Content Areas:** Management Techniques

This session will present new ideas and useful tools for communication to coaches, club sponsors, and others about finance policies and procedures related to student activities.

## SUNDAY, SEPTEMBER 23 (continued)

4:00 pm – 4:25 pm  
Mini-Module

### Successful Delegation—The Power of Help from Others (MM14) *Sarasota 2*

**Presenter:** R. Mark Youngs, CFO, Keller ISD, Keller, TX

**Content Areas:** Leadership Development, Management Techniques

Some people are reluctant to delegate. Learn when to delegate, who to delegate to, and how to begin delegating. Find out how delegating can expand the amount and quality of work produced by your team and help grow your staff professionally and personally.

9:00 pm – 11:00 pm

### President's Dessert Reception

*Sun Ballroom C-D*

President Charles Peterson invites all conference attendees to celebrate the success of the past year over dessert, coffee, and good company!

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





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Visit us at Booth 731.



## MONDAY, SEPTEMBER 24

7:30 am – 10:00 am Registration *Osceola Lobby A*

7:30 am – 8:00 am Coffee Break *Osceola Lobby C*

8:00 am – 9:00 am GASB Update and More... (Lease Accounting and Student Activity Funds) (DG32)

Discussion Group

*Naples 1*

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

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

The Governmental Accounting Standards Board (GASB) issues standards and other communications to provide information and guidance to preparers and users of school district financial statements. Learn the latest about GASB's activities and standards. This session will also specifically cover the requirements of GASB Statement No. 84, Fiduciary Funds, and Statement No. 87, Leases.

**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 the new requirements of GASB Statements No. 84, Fiduciary Funds, and 87, Leases and their impact on school districts.

8:00 am – 9:00 am Straight Talk on Sales Tax and Booster Clubs (DG33)

Discussion Group

*Sarasota 3*

**Presenter:** Sandra Pfau Englund, CEO, RENOSI, Inc., Winter Garden, FL

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Law • **Content Areas:** Legal Aspects, Risk Management

Booster clubs, PTOs, and other school fundraising groups often misunderstand the difference between federal tax-exemption and state taxes and have no idea that sales tax involves both tax on purchases and a collection obligation on sales. Participants will gain a new understanding of state sales tax issues impacting school booster clubs. They will leave with a Straight Talk on Sales Tax Guide to share with their peers and fundraising volunteers, as well as a copy of Sandra Pfau Englund's book, *School Fundraising: So Much More than Cookie Dough*.

**Learning Objectives:** 1. Explain how state sales tax rules apply to school fundraising groups. 2. Discuss common misunderstandings schools and organizations often have about sales tax obligations. 3. Outline best practices and resources for helping school fundraising groups comply with sales tax requirements.

8:00 am – 9:00 am Leading Through Change—Keys to Impact (DG34)

Discussion Group

*Osceola 1-2*

**Presenter:** Earl Burke, Assistant Superintendent and CFO, Hinds County SD, Raymond, MS

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Area:** Leadership Development

The pace and complexity of change in education today has contributed to intense emotional reactions that often play out in our offices. Fear, uncertainty, and frustration can be the gateway to resentment, anger, distrust, and a sense of unfairness. All of these factors can make it difficult to set a direction, encourage alignment, and gain commitment from the people we lead. This presentation will help your organization successfully embrace, understand, and navigate change.

**Learning Objectives:** 1. Describe how to engage your team to deal effectively with change. 2. Explain how to listen and communicate effectively to address anxiety and inspire commitment to change. 3. Discuss how to set a positive example for colleagues and direct reports when handling significant changes in the workplace.

## MONDAY, SEPTEMBER 24 (continued)

# MONDAY

8:00 am – 9:00 am  
Discussion Group

### Navigating the Demands of Increased Accessibility and Rising Costs for Internet Connectivity (DG35)

#### *Osceola 6*

**Presenters:** Julie Kelly, Assistant Superintendent for Business, Operations and Human Resources, Muskego-Norway SD, Muskego, WI; Kelly Thompson, Superintendent, Muskego-Norway SD, Muskego, WI; Tony Spence, Chief Information Officer, Muskego-Norway SD, Muskego, WI; Dan Becker, Fiber Optic Network Design Specialist, Multimedia Communications & Engineering, Inc. (MCE), Greenbay, WI; Jeff Peterson, Assistant Superintendent of Continuous Improvement, Muskego-Norway SD, Muskego, WI

**CPEs: 1 | SFOs: 1 / Field of Study:** Information Technology • **Content Area:** Information Technology

The trends for 1:1 mobile device ratios, wireless access in all corners of the district, and increasingly higher expectations for system reliability and speed can be expensive and possibly unsustainable. Leaders from Muskego-Norway Schools in Wisconsin will share how they successfully navigated the demands of increased accessibility and rising costs for Internet and connectivity. Learn how they installed their own self-provisioned fiber optic network and positioned themselves as a “future-ready” district.

**Learning Objectives:** 1. Discuss the benefits of a self-provisioned fiber optic network. 2. Explain how to evaluate the ROI of leasing versus owning equipment. 3. Discuss how to leverage partnerships to successfully navigate the RFP process and how to subsidize the project using Category 1 E-Rate funding.

8:00 am – 9:00 am  
Discussion Group

### Avoiding Pitfalls of the Fair Labor Standards Act (DG36)

#### *Naples 2*

**Presenter:** Jennifer Shields, Partner, Heinfeld, Meech & Co., P.C., Phoenix, AZ

**CPEs: 1 | SFOs: 1 / Field of Study:** Accounting (Governmental) • **Content Areas:** Accounting, Auditing, and Budgeting; Human Resources and Labor Relations

The Fair Labor Standards Act (FLSA) affects every employer, and complying with the regulations established by the Department of Labor can be a daunting task—especially when changes occur, whether it be regulatory changes or changes made internally by the school system. Learn why and how school business officials can stay ahead of the changes to ensure their districts are protected.

**Learning Objectives:** 1. Discuss the FLSA, including its history and recent changes that affect your district. 2. Identify challenges schools commonly face in ensuring compliance with the FLSA. 3. Outline appropriate steps to take to avoid potential pitfalls in your district.

8:00 am – 9:00 am  
Discussion Group

### Making School Finance Understandable (DG37)

#### *Osceola 4-5*

**Presenter:** John Hutchison, Deputy Superintendent for Business and Operations, Olathe Public Schools, Olathe, KS

**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 and 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 and use basic presentation design techniques to convey your message. 2. Discuss how to be a creative communicator of school finance issues. 3. Explain why effective communication is critical for successful financial management.

## MONDAY, SEPTEMBER 24 (continued)

8:00 am – 9:00 am  
Discussion Group

### Six Questions to Help You Be a Better Mentor and Coach (DG38)

*Naples 3*

**Presenters:** Jay Himes, Executive Director, Pennsylvania Association of School Business Officials, Harrisburg, PA; Wayne McCullough, Director of Leadership & Development, Pennsylvania Association of School Business Officials, Harrisburg, PA; Hannah Barrick, Director of Advocacy, Pennsylvania Association of School Business Officials, Harrisburg, PA

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Areas:** Leadership Development, Management Techniques

Review the work of one of the premier executive coaches, Marshall Goldsmith, a renowned author and consultant who offers practical advice in coaching his clients to success. The presenters will review Goldsmith's six questions to enhance employee engagement that you can adapt for your team. You can use these questions to replace the often-difficult annual evaluation process with a more informal and ongoing two-way discussion with your staff.

**Learning Objectives:** 1. Discuss the fundamentals of good coaching and mentoring. 2. Outline the essentials of productively engaging your team members. 3. Describe how to create an ongoing dialogue for improvement with your team.

8:00 am – 9:00 am  
Discussion Group

### Surviving 4th Quarter Open Enrollment and Entering a New Year of New Tasks and Challenges (DG39)

*Osceola 3*

**Presenter:** Steven Sonntag, CFO, Steele Benefits Services, Indianapolis, IN

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resources and Labor Relations, Legal Aspects

The end of 4th quarter closes the benefit enrollment season; the new year brings new tasks and challenges for human resources. The new year also marks the start of the ACA reporting process and large employers are required to distribute 1095s to all full-time and participating employees by January 31. Explore how benefit administration systems are alleviating the pain of managing carrier billing, Affordable Care Act (ACA) filing, and qualifying life event management.

**Learning Objectives:** 1. Discuss the many tasks required at the end of open enrollment. 2. Describe efficient methods of handling benefit tasks. 3. Identify how benefit administration systems may help lessen the burden of tracking benefit changes during the year.

9:15 am – 10:15 am  
Discussion Group

### What You Need To Know Before You Sign That Contract (DG40)

*Osceola 1-2*

**Presenter:** Stan Wisler, CFO, Montgomery County IU, Norristown, PA

**CPEs: 1 | SFOs: 1 / Field of Study:** Business Management and Organization • **Content Areas:** Management Techniques, Leadership Development

The ramifications of signing a "bad" contract can be extensive, but it can be expensive to have your legal counsel review each contract to determine if the language is appropriate. Welcome to "contract review 101." Get a layman's overview of contract language and review, including the importance of contracts, the most important provisions to include in every contract, contract provisions that are red flags, establishing a contract review process, and contract signing authority. The presenter will provide a practical approach to contract review, including a list of suggested items to consider every time you are faced with signing a contract.

**Learning Objectives:** 1. Describe critical provisions of contracts. 2. Outline a checklist of contract review items that can be used in your district. 3. Discuss how to be more comfortable and confident when reviewing contracts.

## MONDAY, SEPTEMBER 24 (continued)

# MONDAY

9:15 am – 10:15 am  
Discussion Group

### Preparing for Administrative Reviews of School Nutrition Programs (DG41) *Osceola 3*

**Presenters:** Bert Nuehring, Partner, Crowe Horwath LLP, Chicago, IL; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL; Marvin Dereef, Deputy CFO, Fulton County Schools, Atlanta, GA

**CPEs: 1 | SFOs: 1 | Field of Study:** Production • **Content Areas:** School Food and Nutrition Management, Information Technology

The Healthy, Hunger-Free Kids Act of 2010 requires the state agency's administrative review process in the National School Lunch Program and School Breakfast Program to establish a unified accountability system designed to ensure that school food authorities comply with program requirements. This session will discuss the administrative review process procedures, requirements from the Coordinated Review Effort and the School Meals Initiative, and the fiscal action procedures.

**Learning Objectives:** 1. Discuss how to prepare for the state's School Nutrition Program reviews. 2. Explain the value of performing an internal assessment of your school's food service program. 3. Identify the most common findings noted in program reviews and how to appropriately respond to them.

9:15 am – 10:15 am  
Discussion Group

### Having the Right Tools for Budget Creation (DG42) *Osceola 4-5*

**Presenters:** Cindy Reilmann, Director of Finance, Francis Howell SD, Saint Charles, MO; Lisa Morstad, Senior Analytics Advisor, Forecast5 Analytics, Naperville, IL

**CPEs: 1 | SFOs: 1 | Field of Study:** Accounting • **Content Areas:** Accounting, Auditing, and Budgeting; Management Techniques

Do you want to create a budget worthy of the Meritorious Budget Award, but don't know where to start? Learn how one district coordinated data, graphs, charts, and pictures to present a budget document geared toward building transparency and trust with clear communication to stakeholders. In addition, learn a variety of ways of collecting, projecting, and reporting the budget data.

**Learning Objectives:** 1. Describe how to find and access data from a variety of sources to create an MBA-worthy budget. 2. Evaluate various programs to determine which will help facilitate budgeting, budget projections, and reporting. 3. Outline how to pull all the budgeting pieces together to create your budget document.

9:15 am – 10:15 am  
Discussion Group

### Leverage Vendor Partner Knowledge and Experience to Prevent "Brain Drain" (DG43) *Osceola 6*

**Presenters:** Charles Luchen, Sr. Manager, Vertical Markets K-12, Staples Business Advantage, Overland Park, KS; Tammy Rimes, Executive Director, National Cooperative Procurement Partners, Minneapolis, MN; Lori Vechione, Director of Purchasing, Keller ISD, Keller, TX; Suzanne Lopez, Assistant Director, Procurement, Orange County Public Schools, Orlando, FL; Daniel O'Brien, CFO, Mesa Unified SD 4, Mesa, AZ; John Hutchison, Deputy Superintendent for Business and Operations, Olathe Public Schools, Olathe, KS

**CPEs: 1 | SFOs: 1 | Field of Study:** Production • **Content Areas:** Purchasing and Supply Management

Shrinking budgets, changing infrastructure, and demographic shifts caused by increased retirements (and a loss of "brain trust"), are changing relationships between districts and suppliers. Explore how to utilize your suppliers' knowledge and experience to benefit your district and discuss the benefits of various contract options available to you. This session will be facilitated by a panel of experts bringing expertise from the K-12 industry and school districts.

**Learning Objectives:** 1. Describe challenges and lessons in establishing and cultivating successful vendor/partner relationships. 2. Discuss best practices to combat district changes impacting procurement, including succession planning and mentoring. 3. Outline various contract options available to school districts.

## MONDAY, SEPTEMBER 24 (continued)

9:15 am – 10:15 am  
Discussion Group

### The 360 Degree Leader: Creating a Positive Leadership Culture (DG44)

*Naples 1*

**Presenter:** Randy Evans, Executive Director of Finance, Rio Rancho Public Schools, Rio Rancho, NM

**CPEs: 1 | SFOs: 1 / Field of Study:** Personal Development • **Content Area:** Leadership Development

Using the concepts from John Maxwell's book *The 360 Degree Leader*, this session will explore common myths about leadership, challenges leaders face, and how to be a leader from any position in your organization.

**Learning Objectives:** 1. Discuss John Maxwell's top 7 myths about leadership. 2. Describe John Maxwell's top 7 challenges of leadership. 3. Explain how to lead cross-directionally within your organization.

9:15 am – 10:15 am  
Discussion Group

### Do You Have a Plan Document for That? (DG45)

*Naples 2*

**Presenters:** Linda Mont, Managing Member, Key Benefit Concepts, LLC, Wales, WI; Lynn Knight, Business Manager, Nekoosa SD, Nekoosa, WI

**CPEs: 1 | SFOs: 1 / Field of Study:** Personnel/Human Resources • **Content Areas:** Human Resources and Labor Relations, Management Techniques

When was the last time you reviewed your benefit plans and their related documents? Have changes occurred? Have you implemented plans for which a document may have been overlooked? Do your district's plan documents address the eligibility and plan design for your medical, dental, wellness plan, health reimbursement arrangement, flexible spending account, 403(b) plan, and/or non-elective 403(b) plan? If you do have a document, does it include all the needed items to address proper administration? Learn helpful tips to ensure you not only have the appropriate documents, but that they are thorough and are being used to administer your plans.

**Learning Objectives:** 1. Describe the key elements of every plan document. 2. Outline steps to communicate effectively about benefit plans. 3. Review steps to ensure plan provisions and document language are thorough and current.

9:15 am – 10:15 am  
Discussion Group

### Effective Advocacy: Identifying Your Goals, Targets, and Messaging (DG46)

*Naples 3*

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

**CPEs: 1 | SFOs: 1 / Field of Study:** Specialized Knowledge • **Content Area:** Legislative Affairs

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

**Learning Objectives:** 1. Discuss why political advocacy is important. 2. Explain how to get involved at both the state and federal levels. 3. Describe how to develop advocacy goals and objectives, identify target audiences, and craft persuasive messaging.

9:15 am – 10:15 am  
Discussion Group

### Establishing Standard Operating Procedures to Keep Your Business Office Functioning Under Any Circumstance (DG47)

*Sarasota 3*

**Presenters:** Karen Wiesman, Associate Superintendent for Business and Finance, Mansfield ISD, Mansfield, TX; Holly Teague, Associate Superintendent, Curriculum, Instruction, and Accountability, Mansfield ISD, Mansfield, TX

**CPEs: 1 | SFOs: 1 / Field of Study:** Finance • **Content Areas:** School Finance; Accounting, Auditing, and Budgeting

Standard operating processes and procedures are critical for the efficient and economical operation of a business office. Learn about the "red binders" the Mansfield Independent School District business office staff members use to ensure that if "anyone gets hit by a bus on the way to work," payroll and other essential tasks are not left to chance. The session will introduce the continuous improvement model of tasks and cadence of accountability goals.

**Learning Objectives:** 1. Discuss critical process and risk assessment for documentation of procedures. 2. Explain the importance of cross training staff to ensure coverage. 3. Describe the continuous improvement model for standard operations, including a cadence of accountability system.

## MONDAY, SEPTEMBER 24 (continued)

# MONDAY

10:30 am – 11:30 am  
Discussion Group

### DOL Compliance: Is Your School at Risk? (DG48) *Naples 2*

**Presenter:** Brian Carlisle, Account Executive, TimeClock Plus, San Angelo, TX

**CPEs: 1 | SFOs: 1 | Field of Study:** Personnel/Human Resources • **Content Area:** Human Resources and Labor Relations

Is your school prepared for the coming Department of Labor (DOL) changes? Increased federal and state labor regulations, coupled with restrictive budgets, have made employee management and compliance particularly challenging for K–12 organizations. Learn how the coming changes could affect your organization and gain valuable insight on how the right labor management tools can ensure compliance with FLSA, FMLA, and ACA, while simplifying and improving your workforce management process.

**Learning Objectives:** 1. Identify common areas of non-compliance with Department of Labor regulations for K–12 professionals. 2. Measure the effects of non-compliance and discuss common approaches to prevent non-compliance. 3. Develop a solid workforce management action plan that will ensure state and federal compliance.

10:30 am – 11:30 am  
Discussion Group

### Sustainability and School Districts (DG49) *Osceola 3*

**Presenters:** Patricia Bedborough, CFO, Parkway School District, Chesterfield, MO; Erin Green, Education Consultant, Performance Services, Greendale, WI

**CPEs: 1 | SFOs: 1 | Field of Study:** Business Management and Organization • **Content Area:** Sustainability

Parkway School District (PSD) has incorporated a sustainability philosophy into its strategic plan. This plan includes everything from the basics of solar panels, to buses powered by compressed natural gas fuel, to green cleaning. Recently, the Department of Education recognized two PSD schools as Green Ribbon Schools. Participants will learn how the district developed and implemented their sustainability philosophy and what the plans are to explore the addition of geo-thermal as an energy source and establish a near site clinic for employees.

**Learning Objectives:** 1. Outline the components identified in the Better Building Challenge and the U. S. Department of Education Green Ribbon School recognition programs. 2. Identify potential solutions that provide long-term operating saving opportunities and how to make sustainability part of the district culture. 3. Explain the importance of wellness and implementation of environmental impacts into the curricula and student activity opportunities.

10:30 am – 11:30 am  
Discussion Group

### Crowd-Based Fundraising—Setting Your District Up for Success (DG50) *Osceola 1-2*

**Presenters:** Sara Kirk, Manager, Heinfeld, Meech & Co, P.C., Phoenix, AZ; Charlotte Gates, Director of Business Services, Sahuarita USD, Sahuarita, AZ; Lizette Huie, Business Services Coordinator, Sahuarita USD, Sahuarita, AZ

**CPEs: 1 | SFOs: 1 | Field of Study:** Accounting • **Content Area:** Accounting, Auditing, and Budgeting

Student clubs and athletic teams will continue to explore new and creative ways to raise funds, and crowd-based fundraising is here to stay. It can be intimidating and if not carefully monitored, can cause internal control issues for your district. Learn best practices for establishing a compliant, yet flexible set of crowd-based fundraising policies and procedures for your district.

**Learning Objectives:** 1. Compare common crowd-based fundraising methods employed by school districts. 2. Discuss the issues surrounding crowd-based fundraising that could impact compliance with policies and other regulations. 3. Identify best practices and policies and procedures for crowd-based fundraising.

## MONDAY, SEPTEMBER 24 (continued)

10:30 am – 11:30 am  
Discussion Group

### Words Matter—Guiding Principles for Difficult Conversations (DG51)

*Naples 1*

**Presenter:** Stan Wisler, CFO, Montgomery County IU, Norristown, PA

**CPEs: 1 | SFOs: 1 | Field of Study:** Communications & Marketing • **Content Areas:** Leadership Development, Management Techniques

Words matter. It is important that we choose our words carefully—even more so as we become more comfortable handling situations through texts, email, or social media. The trend is toward short and concise communication, but important elements of a message like verbal intonation and body language are not evident. Consequently, we are becoming less prepared to have face-to-face crucial conversations. This session will review the important elements of difficult conversations.

**Learning Objectives:** 1. Discuss the importance and impact of words in conversations. 2. Describe the key components of an effective conversation. 3. Outline a list of practical standards and concepts to employ when entering a difficult conversation.

10:30 am – 11:30 am  
Discussion Group

### Waste Not, Want Not: Keys to Efficient Sourcing (DG52)

*Sarasota 3*

**Presenters:** David Baker, CFO, Fredericksburg City Schools, Fredericksburg, VA; Jason Isaacs, Sr. Vice President, Noodle Markets, New York, NY

**CPEs: 1 | SFOs: 1 | Field of Study:** Production • **Content Areas:** Purchasing and Supply Management, School Finance

Waste is a top concern for K–12 business officials, whether it is wasting already-reduced funds or wasting valuable time through cumbersome procurement processes. Districts can make improvements at every step in the sourcing cycle to streamline communication with vendors, negotiate pricing, leverage stakeholders, and support compliance. Participants will explore setting a vision, improving solicitation and quote request workflows, and setting benchmarks for success.

**Learning Objectives:** 1. Outline effective methods to better implement and document federal, state, and district/local procurement rules. 2. Explain how sourcing procedures affect efficiency within finance and operations. 3. Discuss how to engage district and school stakeholders to strategically de-centralize procurement.

10:30 am – 11:30 am  
Discussion Group

### Changing Accounting Practices: ESSA's Requirement to Report Expenditures by School (DG53)

*Tampa 3*

**Presenter:** Marguerite Roza, Director, Edunomics Lab and Research Professor, Georgetown University, Washington, D.C.

**CPEs: 1 | SFOs: 1 | Field of Study:** Business Law • **Content Areas:** Legislative Affairs; Accounting, Auditing, and Budgeting

The new federal law is a game changer because it requires expenditure accounting by school—and many districts are underprepared. The provision promises to illuminate school-level financial data that could raise some thorny questions. Participants will learn about implications of the new requirements and will leave better-prepared to answer questions and address concerns from parents, school boards, advocates, politicians, principals—and local news media, of course.

**Learning Objectives:** 1. Evaluate district's school-level financials. 2. Assess district financial policies and practices in light of the new requirement. 3. Analyze the role of school-level financial data on school budgeting.



## MONDAY, SEPTEMBER 24 (continued)

# MONDAY

10:30 am – 11:30 am  
Discussion Group

### Using Shared Leadership to Cultivate Employee Engagement (DG54)

#### *Osceola 4-5*

**Presenters:** Julie Kelly, Assistant Superintendent for Business, Operations, and Human Resources, Muskego-Norway SD, Muskego, WI; Kelly Thompson, Superintendent, Muskego-Norway SD, Muskego, WI; Jeff Petersen, Assistant Superintendent of Continuous Improvement, Muskego-Norway SD, Muskego, WI; Tony Spence, Chief Information Officer, Muskego-Norway SD, Muskego, WI

**CPEs: 1 | SFOs: 1 | Field of Study:** Business Management and Organization • **Content Areas:** Leadership Development, Management Techniques

Muskego-Norway School District boasts high employee engagement, parent satisfaction, and satisfaction with district services to schools. Hear district leaders explain how they effectively engage stakeholders in the continuous improvement process through two-way communication, realize strong financial standings, and maintain allocation of resources to support student-centered programming.

**Learning Objectives:** 1. Discuss how to engage your employees and create a culture of change. 2. Explain why shared leadership is important in your school district. 3. Identify direct and indirect savings due to increased employee engagement and retention.

10:30 am – 11:30 am  
Discussion Group

### Lowering Healthcare Costs Without Moving to High-Deductible Plans (DG55)

#### *Naples 3*

**Presenter:** Janice Klein, Director of Business, Mt. Lebanon SD, Pittsburgh, PA

**CPEs: 1 | SFOs: 1 | Field of Study:** Finance • **Content Areas:** School Finance, Risk Management

Schools and community colleges in Pennsylvania developed a regional consortium to save healthcare dollars in over 50 communities by reducing costs rather than shifting costs to employees. The result was better healthcare through quality networks and innovative support programs to help members get the right treatment early. Learn how the consortium, made up of equal parts labor and management, reduced medical and pharmacy spend while eliminating deductibles and many copays for the 43,000 covered individuals.

**Learning Objectives:** 1. Discuss health plan options available to school districts. 2. Summarize the difference between controlling cost and shifting cost. 3. Discuss how labor and management can work together to control healthcare costs.

11:45 am – 12:30 pm

### **New!** Peer-to-Peer Wrap-Up Session (DG56)

#### *Sarasota 1-2*

Use this additional learning and networking opportunity to reflect on educational content and have further discussions with your colleagues. Session presenters are encouraged to attend to discuss aspects of their session in more depth with attendees and provide additional insights. Bring your Learning Log filled with notes and ideas from the conference and discuss lessons-learned, challenges you face in your district, and/or plans for new programs or changes you intend to make in your district based on knowledge gained during the conference. Take advantage of this final opportunity to brainstorm with your colleagues and make final face-to-face connections before you leave the event.





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## CLINIC TABLES

**Sunday, September 23****8:00 am – 9:15 am** *Osceola A*

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.

**TABLE 1 – American Fidelity Assurance Company**

Lessons From 3 Years of ACA Reporting:  
Ask Me Anything

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

**TABLE 2 – AXA**

Single vs. Multi Provider: Improving Plan  
Participation While Managing Employer Risk

**Presenter:** Fred Makonnen, Divisional Vice President, AXA, Cleveland, OH

**TABLE 3 – The Horace Mann Companies**

Attracting and Retaining Employees by  
Helping Reduce Student Loan Debt

**Presenter:** Jim Yale, Vice President – Industry Relations, The Horace Mann Companies, Springfield, IL

**TABLE 4 – Office Depot, Inc.**

Leveraging National Contracts to  
Boost Efficiency

**Presenter:** Kenneth L. Bowen, National Lead Education Consultant, Office Depot, Inc., Laurinburg, NC

**TABLE 5 – Ricoh USA, Inc.**

Digital Transformation for K–12 Schools

**Presenters:** Deb Scifres-Cushing, Principal Consultant, Office Services Business Group, Ricoh USA Inc., Wichita, KS; John Stewart, Partner Executive – K12 Education and SLG, mindSHIFT, a Ricoh Company, New York, NY

**TABLE 6 – Security Benefit**

Matching and Special Pay Plans 403(b)

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

**TABLE 7 – U.S. Communities**

Leveraging Cooperative Contracts for  
Strategic and Compliant Procurement

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

**TABLE 8 – Voya Financial®**

Rabbits, Squirrels & myOrangeMoney  
Experience—Applying Behavioral Science to  
Create Engagement & Better Savers

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

**TABLE 9 – Aflac**

Enhancing Your Benefits Programs,  
Education, and Enrollment

**Presenter:** Michael Reber, West Territory Sales Manager, Aflac, Columbus, GA

**TABLE 10 – BMO Financial Group**

Top 5 Tips on Growing a Successful  
P-Card Program

**Presenter:** Mark Bockelmann, Sales Manager, BMO Harris Bank, Chicago, IL

**TABLE 11 – Public Trust Advisors, LLC**

Bond Proceeds in Today's Interest  
Rate Environment

**Presenters:** Joe Carroll, Vice President, Investment Advisory Services, Public Trust Advisors, LLC, Denver, CO; Tom Tight, Managing Director, Public Trust Advisors, LLC, Orlando, FL

**TABLE 12 – Sodexo**

Make a Great First Impression on the  
First Day of School—Strategies for  
Seamless School Openings

**Presenters:** Katy Bailey, Director of Business Development, Sodexo, Houston, TX; Jason Winsor, Director of Business Development, Sodexo, Queen Creek, AZ

**TABLE 13 – Tyler Technologies, Inc.**

The Benefits of a Paperless District

**Presenter:** Dana Roberson, Product Marketing Manager, Tyler Technologies, Inc., Plano, TX

**TABLE 14 – U.S. Retirement & Benefits Partners**

Reduce Healthcare Costs Through  
Integrated Online Enrollment Decision  
Support

**Presenter:** Brad Hoard, Managing Partner, U.S. Retirement & Benefits Partners, Tallahassee, FL

## SUNDAY

**TABLE 15 – MyBudgetFile**

Budget Planning Improvement  
Through the Use of Technology

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

**TABLE 16 – Rycor**

Intelligent Fee Management for a District—  
It's Way More Than Just Online Payments

**Presenter:** Scott Allan, Sales Manager, Rycor, Chandler, AZ

**TABLE 17 – ClassWallet**

GoFundMe and ClassWallet Launch New  
Crowdfunding Control Tools for School  
Districts

**Presenter:** Jamie Rosenberg, CEO, ClassWallet, Miami, FL

**TABLE 18 – TimeClock Plus**

Time and Attendance Compliance for K-12

**Presenter:** Brian Carlisle, Account Manager, TimeClock Plus, San  
Angelo, TX

**TABLE 19 – ASSA ABLOY**

Curb to Core Safety and Security;  
Your Strategies, Your Choices

**Presenter:** Ron Baer, Director of Business Development K-12,  
ASSA ABLOY, Smyrna, GA

**TABLE 20 – Harris School Solutions**

Working in the Modern Times: Business  
Offices Deserve the Best Technology!

**Presenters:** Ben Childs, CBO, Elbert County School District, Elberton,  
GA; Helene McMurphy, Account Manager, Harris Software Solutions,  
Gilbert, AZ

**TABLE 21 – KEV Group**

The Problem with Cash in Schools

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

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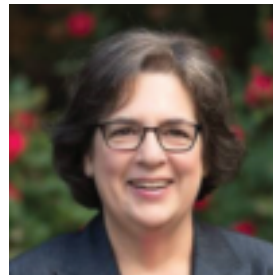
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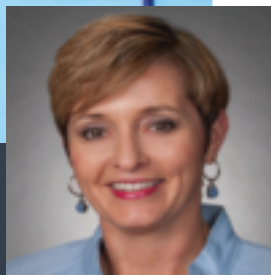
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*Spaces are limited.*

**[asbointl.org/Forum](http://asbointl.org/Forum)**

**STRATEGIC PARTNERS**

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## 2018 PINNACLE AWARDS

School business officials in all fields come up with creative ideas to improve their school districts, and the Pinnacle Awards celebrate these forward-thinking leaders. This year's recipients are innovators who have solved their district challenges with ingenuity and resourcefulness.

*Join us at the Second General Session as ASBO International and Virco, Inc., sponsor of the Pinnacle Awards, present these outstanding recipients with their awards.*



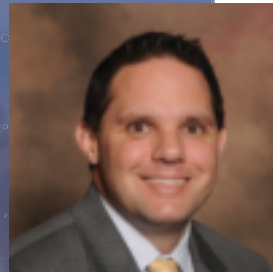
### Pinnacle of Excellence Award



**Robert E. Wilkinson, Jr.**

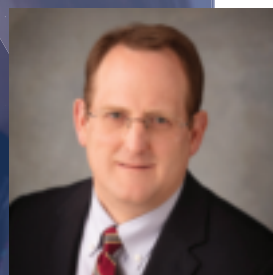
Director, Maintenance and Operations  
Frederick County Public Schools  
Frederick, Maryland

### Pinnacle of Achievement Awards



**Chris Potts**

Chief Operating Officer  
Upper Arlington City Schools  
Upper Arlington, Ohio



**John A. Williams**

Chief Financial Officer  
Uinta County School District 1  
Evanston, Wyoming



**Robert L. Yoder, RSBA**

Assistant Superintendent  
Southern Hancock Schools  
New Palestine, Indiana

Recognizing **innovative**  
district projects...  
...and the **leaders**  
who make them happen



## KEY DIFFERENCES BETWEEN **CERTIFICATE** AND **CERTIFICATION** PROGRAMS

Earning the SFO® certification requires verified experience, evaluation via testing, and maintenance of best practices, creating a competitive distinction in the job marketplace.

<b>CERTIFICATE</b>	<b>CERTIFICATION</b>
Certificate programs typically entail completion of a course or courses with a specific focus. Some may be assessment based.	Certification is an objective assessment of knowledge, skills, and competencies required for competent performance in an occupation. It demonstrates mastery or competency of predetermined standards.
Open to newcomers or experienced professionals.	Open to those who meet eligibility requisites, such as professional experience and/or degree.
The education or institution awarding the certificate provides oversight.	A governing body provides oversight, representing stakeholder's interest and overseeing quality, fairness, and governance.
Should include how learning outcomes are aligned with training.	Standards are met via validation of job responsibilities (a practice analysis or role delineation) to outline required knowledge, skills, and tasks. The analysis requires periodic revision to remain current.  Test items are routinely evaluated and statistics are maintained on performance.
Program provider sponsors and/or conducts training.	The governing body is independent of training programs, thereby ensuring a non-biased testing outcome.
The education or institution awarding the certificate provides oversight.	Practitioners earn the right to list certification designations in their titles, gaining visibility and highlighting credibility.
Certificate programs do not typically award designation usage.	Certification requires ongoing professional development to demonstrate continued competency and to keep knowledge current.

*Adapted from the National Organization for Competency Assurance*

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

**Congratulations to the 2018 Recipients!**



## EMERGING School Business Leaders SCHOLARSHIP

### **Demetri Andrews**

Business Manager  
North Crawford SD  
Soldiers Grove, WI

### **Cari M. Aylsworth**

Business Manager  
Bondurant Farrar Community SD  
Bondurant, IA

### **Alesha P. Broman, MBA**

Chief Financial Officer  
Pass Christian Public SD  
Pass Christian, MS

### **Valerie Caraveo**

Director of Finance  
Glendale Elementary SD  
Glendale, AZ

### **Heather Carignan, MBA, CPA, CFO**

Accounting Supervisor  
Clarkston Community Schools  
Hartland, MI

### **Mark DeBoer, CPA, CA**

Director of Finance  
Lethbridge SD 51  
Lethbridge, Alberta, CA

### **Lesley Doyle, MBA**

Executive Director of Finance  
Deming Public Schools  
Deming, NM

### **Marc Evans**

Budget Analyst  
Montgomery County Public Schools  
Christiansburg, VA

### **Matthew Ferreira, M.S.Ed.**

Business Administrator  
School Administrative Unit 21  
Hampton, NH

### **Lyndsey Fleser**

Finance Manager  
Ottawa Area Intermediate SD  
Holland, MI

### **Jessenia Kan**

Assistant Business Administrator  
Westwood Regional Public Schools  
Ridgefield, NJ

### **Melissa Klaus, PRSPS**

Purchasing Coordinator  
Great Valley SD  
Malvern, PA

### **Michelle D. Kovar, CSBO**

Business Office Coordinator  
Community Unit SD 300  
Algonquin, IL

### **Lorianne O'Donnell**

Chief Operating Officer  
Greenwich Public Schools  
Greenwich, CT

### **Ginger Ramer, CPA, CFE, CTSBA**

General Ledger Coordinator  
Humble Independent SD  
Humble, TX

### **Jeffrey Serak, MBA, M.S.Ed**

Business Manager  
Stone Bank SD  
Oconomowoc, WI

### **Robert Stegmüller**

Budget Analyst  
Adams 12 Five Star Schools  
Thornton, CO

### **Caitlin Wood**

Accountant  
Waltham Public Schools  
Burlington, MA

### **Mentors**

#### **Jeff Feyerer**

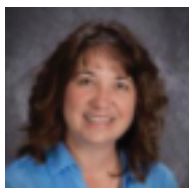
Business Manager  
Fairview South SD 72  
Skokie, IL

#### **Tracey D. Moerer**

Board Clerk/Superintendent Secretary  
Burlington Unified SD 244  
Burlington, KS

COMMITTEE LEADERS **2018****Annual Meeting Program Committee—Content Area Leaders****Committee Chair**

Thomas E. Wohlleber  
Chief Financial Officer  
Casa Grande Elementary SD 4  
Casa Grande, Arizona

**Accounting, Auditing, and Budgeting**

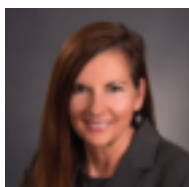
Melissa A. Fekkether  
Business Manager/SBO  
Postville Community SD  
Postville, IA

**Global Issues**

David Joseph Ginsberg  
Director, Finance and Administration  
United Herzlia Schools  
Cape Town, South Africa

**Human Resources and Labor Relations**

Matthew J. Malinowski, MPA, RSBA, PRSBA, SFO  
Business Manager/Board Secretary  
Upper Moreland Township SD  
Willow Grove, Pennsylvania

**Information Technology**

Frankie Jackson  
Chief Technology Officer  
Cypress Fairbanks ISD  
Houston, Texas

**Leadership Development**

Sharie Lewis, CPA  
Director of Business Services and Operations  
Parkrose SD  
Portland, Oregon

**Legal Aspects**

Charles J. Russo, J.D., Ed.D.  
Panzer Chair in Education,  
Research Professor of Law  
University of Dayton  
Dayton, Ohio

**Legislative Affairs**

Brian E. Allen  
Chief Financial and Operations Officer  
Worcester Public Schools  
Worcester, Massachusetts

**Management Techniques**

Thomas C. (Tim) Yetter, SFO  
Director of Financial Services  
Loudoun County Public Schools  
Ashburn, Virginia

**Pupil Transportation**

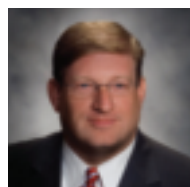
Michael F. Detwiler Sr., PRSBS  
Transportation/Child Accounting/  
Residency Supervisor  
Great Valley SD  
Malvern, Pennsylvania

**Purchasing and Supply Management**

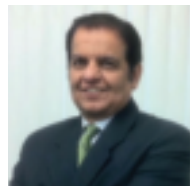
Jeffrey L. Kimball  
Director of Cooperative  
Purchasing Services  
Central Susquehanna IU 16  
Milton, Pennsylvania

**Risk Management**

James R. Westrum, CPA, CSRM, RSBA, SFO  
Executive Director of Finance and Business  
Wayzata Public Schools  
Wayzata, Minnesota

**School Facilities Management**

Brian N. Moore, MBA  
Program Manager for School  
Climate and Discipline  
Delaware Department of Education  
Dover, Delaware

**School Finance**

Mohsin Dada, CFP, RSBA, SFO  
Chief Financial Officer and Treasurer  
Community Consolidated SD 181  
Clarendon Hills, Illinois

**School Food and Nutrition Management**

Nicole M. Melia, RD, LDN  
Food Service Supervisor  
Great Valley SD  
Malvern, Pennsylvania

**Sustainability**

John Hutchison, CPA, MBA, SFO  
Deputy Superintendent for Business  
and Operations  
Olathe Public Schools  
Olathe, Kansas

## Advisory Committees

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Business Administrator/Board Secretary  
Dunellen Public Schools  
Dunellen, New Jersey



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ISD 279—  
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Maple Grove, MN

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Austintown Local SD  
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Lethbridge SD No. 51  
Lethbridge, Alberta, Canada

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Assistant Superintendent of  
Business Services/CSBO  
Barrington CUSD 220  
Barrington, Illinois



#### Vice Chair

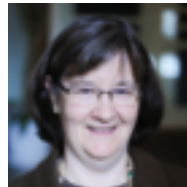
Matthew J. Malinowski, MPA, RSBA, PRSBA, SFO  
Business Manager/Board Secretary  
Upper Moreland Township SD  
Willow Grove, Pennsylvania

### Legislative



#### Chair

Sharie Lewis, CPA  
Director of Business Services  
and Operations  
Parkrose SD  
Portland, Oregon



#### Vice Chair

Emily Koczela  
Chief Financial Officer  
Messmer Catholic Schools  
Milwaukee, Wisconsin

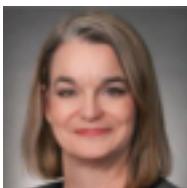
## Standing Committees

### Bylaws



#### Chair

Bert E. Huszcza, MBA, RSBA  
Executive Director  
Colorado ASBO  
Westminster, Colorado



#### Vice Chair

Karen D. Wiesman, Ed.D., CPA  
Associate Superintendent for  
Business and Finance  
Mansfield ISD  
Mansfield, Texas

### Ethics



#### Chair

Michael A. Jacoby, Ed.D., SFO  
Executive Director  
Illinois ASBO  
De Kalb, Illinois

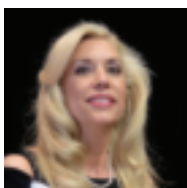
## Independent Commission

### Certification



#### Chair

John Hutchison, CPA, MBA, SFO  
Deputy Superintendent for Business  
and Operations  
Olathe Public Schools  
Olathe, Kansas



#### Vice Chair

Evelyn (Lynn) Purdy Buch, SFO  
Chief School Financial Officer  
Homewood City Schools  
Homewood, Alabama

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At BMO® Financial Group, our team of specialists understands the unique financial service needs of educational institutions. Our education clients count us among their most tested, trusted and effective partners. Whether they rely on us for the advantages of p-Card or cash management services, checking, credit, investments or public finance, they know we're focused on one thing—their financial success.


**Let's start the conversation.**

Visit us at Booth 607. We'll answer your questions or suggest a new solution. Whatever your financial needs, it's all here at BMO Financial Group.

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- Benefits Enrollment Expertise
- Benefits Administration Technology
- FSA and HSA Administration

Aflac has more than 60 years of benefits strategy experience and we proudly serve over 36,000 public sector accounts. To learn more about how Aflac can help, **visit booth 330** at the ASBO Expo.



Aflac product availability varies by state. Please contact your Aflac benefits advisor for additional information regarding availability, costs, benefit options, as well as limitations and exclusions. Individual coverage is underwritten by American Family Life Assurance Company of Columbus. Individual coverage in New York is underwritten by American Family Life Assurance Company of New York. WWWQ | 1932 Wynton Road | Columbus, GA 31999

## EXHIBITS MARKETPLACE HIGHLIGHTS 2018

### Hours —

**Saturday 11:00 am – 1:45 pm**

11:45 am – 12:45 pm

Exhibits Marketplace Lunch

*Lunch sponsored by Public Trust Advisors, LLC*

**Sunday 12:30 pm – 2:45 pm**

1:00 pm – 2:00 pm

Exhibits Marketplace Lunch

*Lunch sponsored by BMO Financial Group*

### Give-Back Backpack Initiative Booth 341

In partnership with the Kids In Need Foundation (KINF), conference attendees can help students in need by packing bookbags full of supply essentials.

Using the provided backpacks and supplies, simply fill the backpack according to the packing list and write a well-wish card to a student.

*Once completed, the 300 backpacks will be distributed throughout Orange County.*



**Join us for Advocacy as Leadership:  
Advice for the SB0—**  
Sunday, 12:45 pm – 2:45 pm, Booth 130.  
See page 41 for more information.



## Relaxation Station

**Booth 821** (Visit Booth 508 to pick up your ticket.)

Regroup and refocus with a complimentary **professional massage** at the Relaxation Station.

*Sponsored by Aramark K-12 Education*

## ASBO Booth, Bookstore, and Pin Trading Zone

**Booth 130**

Stop by to see how ASBO International programs can benefit you and your district. Explore all the print resources ASBO International has to offer and take advantage of the conference discount.

Plus, check out a treasure trove of pins to collect and share. Visit daily to turn in your Exhibits Marketplace game raffle tickets for a chance to win prizes!

## Professional Headshots

**Booth 402**

Refresh your online image with a **complimentary professional headshot** on Saturday.

*Your photos will be sent via email.*

*Sponsored by Virco, Inc.*

## Exhibits Marketplace Game — Ticket Tracker

### Participating Booths

Find your game card in your registration bag and “track your steps” around the marketplace to learn about the products and services these valued companies provide.

**During your one-on-one conversations with exhibitors, collect as many raffle tickets as you can for more chances to win a \$250 prize! Two \$250 prizes will be given away on Saturday and four \$250 prizes will be given away on Sunday!**

Exhibitors decide how many raffle tickets you receive, so have your questions about their products and services ready!

*Prizes will be announced 15 minutes before the hall closes (1:30 pm on Saturday and 2:30 pm on Sunday).*

*You must be present in the Exhibits Marketplace to win a prize.*

# EVENT PARTNER

# AFFINITY PARTNER

735	834
733	832
USRBP 731	830

835	934
833	932
831	930

935
933
931

725	824
723	822
719	820
	818

Relaxation Station 821
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925
923
921
919

713	812
711	810
709	808
707	806
705	804
Public Trust Advisors 703	802

813	912
811	910
809	908
807	906

913	1012
911	1010
909	1008
907	1006
903	1004
	1002

1013
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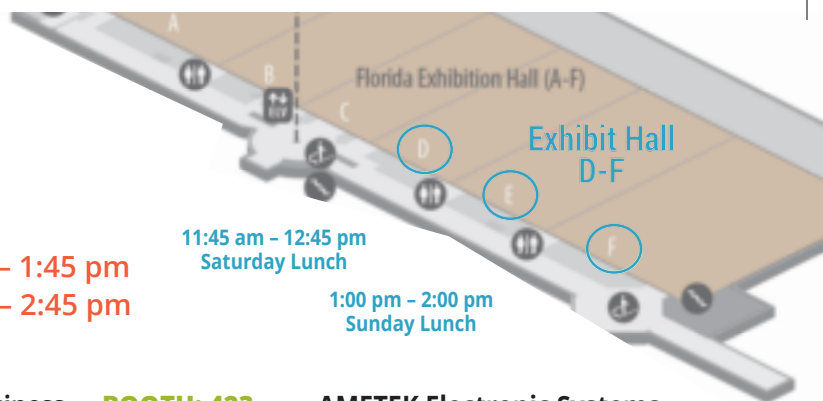
\* As of August 13, 2018

# OUR AMAZING EXHIBITORS 2018

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

**11:45 am – 12:45 pm**  
**Saturday Lunch**

**1:00 pm – 2:00 pm**  
**Sunday Lunch**



## ABM Education — **BOOTH: 1007**

We have extensive experience providing custodial and facility services to K-12 schools. Outsourcing to ABM can cost-effectively create healthier, more comfortable and more sustainable environments for students, faculty, and staff.  
[www.abm.com/education](http://www.abm.com/education)

## ABMM Financial — **BOOTH: 319**

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](http://www.abmmfinancial.com)

## Accent Distributing — **BOOTH: 532**

Accent Distributing is the authorized distributor of 3M solar and security window films for Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, Oklahoma, Tennessee, and Texas. These films are used to enhance safety and improve energy efficiency at hundreds of schools across the country.  
[accentdistributing.com](http://accentdistributing.com)

## Aflac — **BOOTH: 330**

With 60-plus years of experience, Aflac is dedicated to helping public sector employers strengthen their benefits program with creative solutions for their budgetary and administrative challenges. Aflac proudly serves 36,000 public sector accounts and nearly 1 million public sector customers with family-friendly voluntary benefits and services.  
[www.aflac.com](http://www.aflac.com)



## AkitaBox — **BOOTH: 725**

Data is a powerful tool. At AkitaBox, we want to simplify the way you manage your facility's data by offering data collection services, location-based asset mapping, and work order management. Learn more about simplified facility management at AkitaBox.com  
[www.AkitaBox.com](http://www.AkitaBox.com)

## Amazon Business — **BOOTH: 423**

Amazon Business combines the selection, convenience, and value you expect from Amazon with benefits tailored to K-12 schools and higher education institutions. Amazon Business offers easy access to millions of products and benefits, including Business Prime Shipping, quantity discounts, tax-exempt purchasing, reporting and analytics, approval workflows, and much more.  
[www.amazon.com](http://www.amazon.com)

## American College of Education — **BOOTH: 909**

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

## American Fidelity — **BOOTH: 511**

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



## American School Bus Council — **BOOTH: 123**

The American School Bus Council is a coalition of the school transportation community committed to providing safe, effective, efficient, and healthy transportation for the more than 25 million schoolchildren who ride more than 480,000 school buses each day.  
[www.americanschoolbuscouncil.org](http://www.americanschoolbuscouncil.org)

## AMETEK Electronic Systems Protection — **BOOTH: 431**

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

## ARAMARK K-12 Education — **BOOTH: 508**

Our team of chefs, dietitians, and culinary professionals develops innovative recipes that enable districts to meet USDA requirements, and energize students to increase their participation in K-12 dining programs. Our suite of solutions is flexible to fit any budget and is customized to meet the unique needs of your district.  
[www.aramark.com](http://www.aramark.com)



## ASBO International — **BOOTH: 130**

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

## ASBO MD-DC — **BOOTH: 124** 2019 Local Host

The Association of School Business Officials of Maryland and the District of Columbia is a professional organization that provides programs and services to promote the highest standards of school business practices through professional development and the effective management of available resources.  
[www.asbo.org](http://www.asbo.org)

**FIND YOUR GAME CARD IN YOUR BAG AND TRACK YOUR STEPS!**

### Aspire Financial Services — BOOTH: 810

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, call 866.634.5873.

[www.aspireonline.com](http://www.aspireonline.com)

### ASSA ABLOY — BOOTH: 708

ASSA ABLOY Americas provides end-users with unsurpassed security and life-safety solutions as well as essential support services to ensure well-functioning doorway systems. This is accomplished by combining the strengths of industry-leading door and hardware brands.

[www.assaabloydss.com](http://www.assaabloydss.com)

### Asset Services — BOOTH: 822

"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.

[www.AssetServices.com](http://www.AssetServices.com)

### Association of Educational Purchasing Agencies (AEPA) — BOOTH: 512

AEPA is a 27-state national cooperative of education purchasing professionals representing lead agencies in their respective states. Each contract is available statewide and is facilitated by one cooperative member agency. With shrinking budgets, school districts and public agencies are looking to AEPA more than ever to meet their purchasing requirements.

[www.aepacoop.org](http://www.aepacoop.org)

### AXA — BOOTH: 204

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

[www.us.axa.com/teacher-retirement/403b](http://www.us.axa.com/teacher-retirement/403b)



### BerryDunn — BOOTH: 534

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.

[www.berrydunn.com/industries/local](http://www.berrydunn.com/industries/local)

### BMI Systems Group — BOOTH: 832

For over 30 years, BMI Systems Group has specialized in stockroom and fixed asset barcode and RFID scanning systems that interface with many popular financial management software applications for the public sector. We also market standalone scanning and printing systems for various applications.

[www.bmisys.com](http://www.bmisys.com)

### BMO Financial Group — BOOTH: 607

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.

[www.bmoharris.com/governments](http://www.bmoharris.com/governments)



### BSN SPORTS — BOOTH: 509

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. We are the best Supply Network in Sports™.

[www.BSNSPORTS.com](http://www.BSNSPORTS.com)

### BuyBoard Purchasing Cooperative — BOOTH: 331

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

[buyboard.com](http://buyboard.com)

### CaseWare International Inc. — BOOTH: 908

CaseWare, a global leader of audit and reporting software, enables full automation of audit preparation, financial statement preparation, and financial reporting. Customers specializing in municipal reporting, including CAFR and Budget Book, can use CaseWare solutions to analyze and mitigate risks and to ensure efficiency, quality, and value within reporting.

[www.caseware.com](http://www.caseware.com)

### Certified School Risk Manager — BOOTH: 710

The Certified School Risk Manager (CSRM) Program is a career-building, five-part designation and CE program for risk management specialists working with schools, colleges, and universities. Five intensive courses guide participants through the risk management process, emphasizing practice over theory. Each one-day course includes optional multiple-choice examination and state CE Credit.

[thenationalalliance.com](http://thenationalalliance.com)

### Chartwells K12 — BOOTH: 313

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

[Chartwellsk12.com](http://Chartwellsk12.com)

### CherryRoad Technologies Inc. — BOOTH: 237

K-12 clients entrust CherryRoad with the success of their IT solutions, whether it's on-premise ERP, cloud-based application management, business intelligence, process optimization, or change management consulting. Our ability to modernize, optimize, and manage back-office functions allows us to create solutions that deliver practical results—on-time and on-budget.

[www.cherryroad.com](http://www.cherryroad.com)

**ASK QUESTIONS AND GET EXTRA RAFFLE TICKETS!**

**Cintas — BOOTH: 420**

Cintas is America's leader in the service industry. From uniform rental and purchase to safe floor solutions, clean restroom programs, first aid and safety, fire protection, and more, Cintas offers a complete facility solution with exclusive pricing for all U.S. Communities participants.

[www.cintas.com/uscommunities](http://www.cintas.com/uscommunities)

**ClassWallet — BOOTH: 718**

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

[www.classwallet.com](http://www.classwallet.com)

**CliftonLarsonAllen — BOOTH: 808**

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

[CLAconnect.com](http://CLAconnect.com)

**Commerce Bank — BOOTH: 433**

The Commerce Bank Prepaid Expense Card, a prepaid Visa® card, can make expense management easier for any size organization. Load and unload funds, control merchant and cash use, and more, without the requirements or risk of a corporate credit card. It's ideal for per diem, employee travel and supply expenses.

[www.commercebank.com/expensecard](http://www.commercebank.com/expensecard)

**Cooperative Strategies, LLC — BOOTH: 724**

Cooperative Strategies offers LEAs a broad spectrum of customized services in the following areas: facilities planning/demographics, financial advisory, special tax/assessment, and program management. Utilizing innovative technology, out-of-the-box problem solving methods, and inspiration from the best practices across the country, we are dedicated to providing quality facilities for America's students.

[www.coopstrategies.com](http://www.coopstrategies.com)

**Crowe LLP —****BOOTH: 611**

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

[www.crowehorwath.com](http://www.crowehorwath.com)

**Davis Demographics — BOOTH: 919**

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

[www.DavisDemographics.com](http://www.DavisDemographics.com)

**District Administration Magazine — BOOTH: 809**

*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.

[www.districtadministration.com](http://www.districtadministration.com)

**Dude Solutions — BOOTH: 910**

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

[dudesolutions.com](http://dudesolutions.com)

**Durham School Services — BOOTH: 903**

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

[www.durhamschoolservices.com](http://www.durhamschoolservices.com)

**E&I Cooperative Services — BOOTH: 712**

With more than 4,500 institutional members, E&I Cooperative Services is the member-owned, nonprofit sourcing cooperative focused on education. Established in 1934, E&I provides members with access to a diverse portfolio of competitively awarded contracts, electronic procurement solutions, and consulting services to help reduce costs and optimize supply chain efficiencies.

[www.eandi.org](http://www.eandi.org)

**Education Logistics, Inc. — BOOTH: 722**

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

[www.edulog.com](http://www.edulog.com)

**EDUStaff, LLC — BOOTH: 106**

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

[www.edustaff.org](http://www.edustaff.org)

**Elior North America — BOOTH: 220**

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

[www.elior-na.com](http://www.elior-na.com)

**Enlit, LLC — BOOTH: 332**

Enlit offers a digital tool kit for integrating and using data to assess, plan, manage, and improve education organizations.

[enlitllc.com](http://enlitllc.com)

**EqualLevel Inc. — BOOTH: 818**

EqualLevel is the leading provider of eProcurement solutions to the public sector. Our award-winning Marketplace solution features a certified library of over 300 cooperative agreement connections, "InstantConnect," across 20 key categories that enable efficient comparison shopping, savings tracking, and compliance reporting.

[www.equallevel.com](http://www.equallevel.com)

**FIND YOUR GAME CARD IN YOUR BAG AND TRACK YOUR STEPS!**

**equiday — BOOTH: 631**

Students succeed when their districts make smart financial decisions. But resource allocation is complex and imprecise strategic financial planning can interfere with student outcomes. equiday software and support helps school business offices execute intentional and effective resource allocation strategies that consider the unique needs of every student.

[www.equiday.org](http://www.equiday.org)

**E-RATE ONLINE, LLC — BOOTH: 211**

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

[www.erateportal.com](http://www.erateportal.com)

**Ernie Morris Enterprises, Inc. — BOOTH: 1012**

In the last 50 years we have gone from a small office supply dealer to one of the largest educational furniture dealers in the southeast. We use the best practices to fulfill your furniture needs for 21st century classrooms' educational environments. EMEI provides turn-key solutions with over 100 manufacturers.

[www.erniemorris.com](http://www.erniemorris.com)

**ESS — BOOTH: 812**

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

[www.ess.com](http://www.ess.com)

**Facility Engineering Associates, PC — BOOTH: 105**

FEA helps our clients with facility planning, management, and operational effectiveness, which includes facility condition assessments, workforce effectiveness, capital and operational budget analysis and planning, and asset management solutions. We also provide engineering investigation and repair design services for existing facilities.

[www.feapc.com](http://www.feapc.com)

**FieldTurf — BOOTH: 831**

FieldTurf is a leader in synthetic turf.

[fieldturf.com/en](http://fieldturf.com/en)

**First Student — BOOTH: 807**

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

[www.firststudentinc.com](http://www.firststudentinc.com)

**Forecast5 Analytics Inc. — BOOTH: 518**

Forecast5™ Analytics provides decision support systems for school leaders. Our analytics technology helps identify strategic and financial opportunities with visual output in the areas of financial performance, compensation, enrollment, student performance, and ESSA reporting solutions. Over 1,300 school districts across the country are using Forecast5 tools to maximize data insights.

[www.forecast5analytics.com](http://www.forecast5analytics.com)

**Foresters Financial Services, Inc. — BOOTH: 912**

Foresters Financial™ is an international financial services provider with more than three million clients and members in the United States, Canada, and the United Kingdom. With a history of more than 140 years and licensed in all 50 states, we provide personalized retirement solutions that help families.

[www.foresters.com](http://www.foresters.com)

**Frontline Education — BOOTH: 212**

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

[www.frontlineeducation.com](http://www.frontlineeducation.com)

**Gallagher — BOOTH: 233**

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

[www.ajg.com](http://www.ajg.com)

**The Garland Company, Inc. — BOOTH: 419**

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

[www.garlandco.com](http://www.garlandco.com)

**Gordian — BOOTH: 730**

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

[www.Gordian.com](http://www.Gordian.com)

**Government Finance Officers Association — BOOTH: 530**

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

[www.gfoa.org](http://www.gfoa.org)

**Grainger — BOOTH: 633**

Grainger is North America's leading supplier of maintenance, repair, and operating products. We help education customers save time and money. Our dedicated government sales team understands the unique challenges facing education customers. We are committed to helping reduce costs, operate sustainably, and provide a safe workplace for employees.

[grainger.com](http://grainger.com)

**Harris School Solutions — BOOTH: 911**

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

[www.harrisschoolsolutions.com](http://www.harrisschoolsolutions.com)

**ASK QUESTIONS AND GET EXTRA RAFFLE TICKETS!**

**Heinfeld, Meech & Co., P.C. —  
BOOTH: 321**

As specialists in the school district industry, we can develop or review your CAFR or Meritorious Budget Award application and can develop innovative solutions for almost any school finance issue. We are the technical advisors and reviewers to ASBO's Certificate of Excellence in Financial Reporting and the Meritorious Budget Award.  
[www.heinfeldmeech.com](http://www.heinfeldmeech.com)

**The Home Depot — BOOTH: 418**

The Home Depot offers thousands of products in top categories such as Paint, Janitorial, Flooring, Plumbing, Electrical, and more. Everyday services and savings include over 2,200 locations, dedicated account support, job site delivery, competitive product pricing, volume discounts, and more.  
[www.homedepot.com](http://www.homedepot.com)

**The Horace Mann Companies —  
BOOTH: 308**

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

**Horizon Software International —  
BOOTH: 311**

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

**Image API, LLC — BOOTH: 813**

Digitize, organize, and manage content with Image API's Axiom Pro®, a highly configurable digital content management solution that can automate manual processes and eliminate paper.  
[www.imageapi.com](http://www.imageapi.com)

**Infolob — BOOTH: 112**

Infolob is an Oracle Platinum Partner. We help transform K-12 districts into digital organizations by leveraging the Oracle Cloud Platform.  
[www.infolob.com](http://www.infolob.com)

**Informed K12 — BOOTH: 706**

Informed K12 is an easy-to-use workflow automation solution that helps school district administrators digitize routine forms and paperwork, automate critical school business processes, and track approval workflows across departments. We help school district administrators operate efficiently and gain insight into their most critical school business processes.  
[www.informedk12.com](http://www.informedk12.com)

**Intouch Receipting — BOOTH: 719**

Intouch Receipting is a centralized, district-wide cash and credit card receipting system. Intouch has a fully integrated website, TouchBase, which supports fee and fine management and student activity sales. Intouch integrates with all major general ledger, student, asset management, and library systems. Excellent internal financial controls; auditor approved.  
[www.intouchreceipting.com](http://www.intouchreceipting.com)

**IPX — BOOTH: 1013**

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

**JAGGAER — BOOTH: 424**

JAGGAER, the world's largest independent spend management company, offers complete SaaS-based indirect and direct eProcurement solutions with advanced spend analytics, complex sourcing, supplier management, contract lifecycle management, savings tracking, and intelligent workflow capabilities. Our solution suites are trusted by the world's largest companies and public service organizations.  
[www.jaggaer.com](http://www.jaggaer.com)

**Johnson Controls — BOOTH: 522**

Johnson Controls provides the building systems, equipment, technology integration, and know-how to create and maintain safe and secure, quality learning environments. And we offer innovative financing solutions to make these facility improvements a reality today—with minimum impact on your operating budget.  
[www.johnsoncontrols.com](http://www.johnsoncontrols.com)

**Keenan & Associates — BOOTH: 635**

Keenan provides innovative insurance and financial solutions for schools, public agencies, and healthcare organizations. We serve those who support our communities. Our high-quality, cost-effective programs exceed our customers' expectations. We are the experts you can rely on when it comes to employee benefits, risk management, claims services, and technology.  
[www.keenan.com](http://www.keenan.com)

**KEV Group — BOOTH: 630**

KEV Group specializes in creating software solutions to ensure the secure and efficient management of school activity funds. Our industry-leading solution, the School Cash Suite, specializes in school-level accounting, online payment processing, digital forms, and the tracking of student obligations to ensure the transparency and security of school funds.  
[www.kevgroup.com](http://www.kevgroup.com)

**Key Benefit Concepts, LLC —  
BOOTH: 804**

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

**Keystone Purchasing Network —  
BOOTH: 208**

The Keystone Purchasing Network is a national purchasing cooperative saving members across the country time and money on purchasing many of the products and services their schools need. Contracts cover athletic surfaces and lighting, classroom furniture and whiteboards, facilities and equipment and supplies, and much more.  
[www.theKPN.org](http://www.theKPN.org)

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**DON'T MISS LUNCH IN THE EXHIBITS MARKETPLACE!**

**KI — BOOTH: 218**

KI manufactures innovative furniture solutions for today's educational environments. Get cutting-edge innovation, great design, and the most comprehensive furniture offering from KI. Smart—that's why more people imitate us. Proven—that's why more schools choose KI than any other. KI is your one source for educational solutions.  
[www.ki.com](http://www.ki.com)

**Kimball — BOOTH: 913**

At Kimball, we craft what's next. We're always considering new possibilities, sharing ideas, blending technology with materials, and designing new solutions. We apply our rich heritage to create education that support students and teachers today and in the future.  
[www.kimball.com](http://www.kimball.com)

**KMC Controls — BOOTH: 533**

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

**Konica Minolta — BOOTH: 432**

Konica Minolta solves the many problems and challenges facing schools, from decreasing school budget and the need for collaboration tools to security, accountability, and mobility. Our innovative and cost-effective portfolio of technology allows our education customers to concentrate on their core competency: Teaching.  
[kmb.s.konicaminolta.us](http://kmb.s.konicaminolta.us)

**Kronos — BOOTH: 412**

Every K-12 employee plays an important role in student achievement. Our innovative Kronos for K-12 education solutions are designed to create time and attendance efficiencies that let you spend less time on administrative processes and more time on academics and programs.  
[www.kronos.com](http://www.kronos.com)

**LINQ — BOOTH: 209**

LINQ is a complete enterprise management solution for K-12. From payroll, general ledger, and HR to school accounting, electronic payments, and food service management, LINQ optimizes virtually every aspect of your operations with best-in-class technology and support.  
[www.thinklinq.com](http://www.thinklinq.com)

**MidAmerica Administrative & Retirement Solutions — BOOTH: 711**

MidAmerica makes benefits funding simple for the public sector. Since 1995, we have administered retirement and healthcare plans for public sector employers across the nation. Our products and services include HRAs, FSAs, FICA Alternative Plans, Special Pay Plans, Independent 403(b) / 457(b) TPA services, and Trusts.  
[www.MyMidAmerica.com](http://www.MyMidAmerica.com)

**Municipal Leasing Consultants — BOOTH: 1009**

Municipal Leasing Consultants specializes in providing tax-exempt lease purchase financing for essential capital equipment such as energy performance projects/ LED lighting, buses/vehicles, technology, security, furniture, and any other equipment you may want to own.  
[www.powerofleasing.com](http://www.powerofleasing.com)

**MyBudgetFile, Inc. — BOOTH 613**

MyBudgetFile offers cloud software that connects the hundreds of individual department and school budgets into a single, district budget. From school principals up to district superintendents, MyBudgetFile makes it easy for everyone to contribute their expertise to the school district budget.  
[www.mybudgetfile.com](http://www.mybudgetfile.com)

**MySchoolBucks-Heartland School Solutions — BOOTH 602**

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

**National Insurance Services — BOOTH: 705**

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

**National IPA — BOOTH: 608**

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

**National School Boards Association (NSBA) — BOOTH: 107**

Working with and through our state associations, NSBA advocates for equity and excellence in public education through school board leadership. Offering services and information to school business leaders to support optimization of educational resources, with the goal of all children having equal access to an education that maximizes their potential.  
[www.nsba.org](http://www.nsba.org)

**NOVAtime Technology, Inc. — BOOTH: 907**

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

**The Nutrition Group — BOOTH: 422**

Offering complete food service management solutions to K-12 public schools.  
[www.thenutritiongroup.biz](http://www.thenutritiongroup.biz)

**Office Depot, Inc. —  
BOOTH: 604**

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.  
[www.officedepot.com](http://www.officedepot.com)

**OfficeScope — BOOTH: 921**

The paperless central office! Is your central office still dealing with paper records? Does it take too much time to find archived documents? Are you running out of space to store paper? For 20 years we've helped offices increase efficiency and reduce office expenses with automated filing and retrieval.  
[www.officescopek12.com](http://www.officescopek12.com)

**Online School Management Systems, Inc. — BOOTH: 125**

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

**OpenGov, Inc. — BOOTH: 213**

OpenGov is the leader in public sector performance management solutions, with easy-to-use cloud software for better budgeting, improved operational performance, and comprehensive open data.  
[www.opengov.com](http://www.opengov.com)

**Patcraft — BOOTH: 323**

Patcraft is founded on a long-standing commitment to performance. We believe flooring plays a key role in how people interact with a space. We are committed to designing flooring products that not only transform the performance of a space but also transforms human performance.  
[www.patcraft.com](http://www.patcraft.com)

**PaySchools — BOOTH: 709**

PaySchools is a software company exclusively serving the K-12 market. We enhance school districts' ability to collect, track, and manage payments. We offer a secure, web-based solution that allows schools and school districts to easily manage funds and collect fees online for food services, activities, fundraisers etc.  
[www.payschools.com](http://www.payschools.com)

**PEPPM — BOOTH: 210**

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

**PMA Financial Network, Inc. —  
BOOTH: 520**

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.  
[www.pmanetwork.com](http://www.pmanetwork.com)

**PMH Insights Inc. — BOOTH: 820**

PMH Insights is the #1 global implementation partner for Cascade Strategic planning and execution software. Through global experience and dedicated consultants, we pride ourselves on successful long-term implementations and satisfied customers. A must-consider trusted solution for all district school superintendents, public or charter. Over 220 schools can't be wrong!  
[www.pmhinsights.com](http://www.pmhinsights.com)

**Pro-Team Foodservice Advisors —  
BOOTH: 325**

Our consulting team brings an expansive background of food service experience; combined, we provide more than 200 years of industry experience. Our team specializes in helping you achieve your goals by gaining an in-depth understanding of what you need and working with you to craft an effective solution.  
[www.proteamadvisors.com](http://www.proteamadvisors.com)

**PSST — BOOTH: 930**

Providing Munis® integration and ACA compliance.  
[www.psst.com](http://www.psst.com)

**Public Trust Advisors, LLC —  
BOOTH: 703**

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

**PublicSchoolWORKS — BOOTH: 619**

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

**Questica Budget — BOOTH: 625**

Questica's multi-user school budgeting and performance management software simplifies 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/ student information systems. Perform fund gap analysis, FTE, monthly revenue and expenses, and budget vs actual reports.  
[www.questica.com](http://www.questica.com)

**Records Consultants, Inc. —  
BOOTH: 333**

RCI are experts in turn-key services for records retention programs; document imaging solutions, and fixed asset inventory management. We have been in business for over a quarter of a century and serve a wide range of clients.  
[www.rcitech.com](http://www.rcitech.com)

**PRIZES ANNOUNCED 15 MINUTES BEFORE HALL CLOSES (1:30 PM SATURDAY & 2:30 PM SUNDAY).**

**RevTrak — BOOTH: 430**

RevTrak's online payment solution is designed to help K-12 school districts process fees. With robust reporting tools you can reconcile in 10 minutes or less, automatic multiple deposit accounts, and a mobile-friendly design, we are offering you more than just an online payment solution. We are saving you time.

[www.revtrak.com](http://www.revtrak.com)

**Ricoh USA, Inc. — BOOTH: 409**

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

[www.ricoh-usa.com](http://www.ricoh-usa.com)

**RISO, Inc. — BOOTH: 103**

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

[us.riso.com](http://us.riso.com)

**Rycor — BOOTH: 811**

Rycor is all business about schools. We deliver an intuitive and secure SaaS that is supported by unparalleled client service. Our innovative and intuitive components like Rycor Fee Manager, Online Payments, In School POS and Smart Forms accelerate the productivity of your school district.

[www.rycorsoftware.com](http://www.rycorsoftware.com)

**SafeStop, Inc. — BOOTH: 923**

SafeStop is the school bus tracking app that integrates seamlessly with your school's existing GPS provider and gives administrators access to key data and analytics that can help to identify underused bus stops, monitor on-time performance, and build more efficient routes.

[www.SafeStopApp.com](http://www.SafeStopApp.com)

**SaniGLAZE International — BOOTH: 531**

Year after year your tile and grout surfaces get a workout from busy campus activities. From entryways to locker rooms and dorm restrooms, the cleanliness of campus facilities is important to students, athletes, faculty, administrators, donors and visitors. SaniGLAZE processes transform unsightly, unsanitary tile surfaces to like-new condition overnight.

[www.saniglaze.com](http://www.saniglaze.com)

**Script — BOOTH: 119**

Script organizes and automates parent payments and forms/permission slips at schools! Have a powerful dashboard with a proper accountability and financial tracking of all your parent receivables! Visit our booth or website for your school to teach more and manage less today!

[www.scriptapp.com](http://www.scriptapp.com)

**Security Benefit — BOOTH: 621**

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

[www.securitybenefit.com](http://www.securitybenefit.com)

**Seon — BOOTH: 906**

Seon's been trusted for 20 years by bus manufacturers and school districts, to increase the safety of drivers, students, and pedestrians. We're your single-source provider of connected safety solutions. Tomorrow, we're driving safety forward with innovations to predict and prevent accidents, creating better drivers, smarter vehicles, and safer fleets.

[www.seon.com](http://www.seon.com)

**Sharp Electronics Corporation — BOOTH: 734**

Sharp copiers, AQUOS BOARD® Interactive and Professional Displays are available on the NJPA contract. These innovative products offer workflow solutions for cities, counties, educational institutions, and nonprofits. Sharp can help you streamline document processing and enhance collaboration; while helping you avoid the bidding process and take advantage of contract savings.

[www.sharpgov.com/government](http://www.sharpgov.com/government)

**Skyward, Inc. — BOOTH: 507**

Skyward's SIS and ERP solutions are used by more than 2,000 public sector organizations worldwide, from small entities to statewide implementations supporting millions of stakeholders. Skyward has been helping school districts and municipalities work smarter, engage more, and empower everyone since 1980.

[www.skyward.com](http://www.skyward.com)

**Sodexo — BOOTH: 612**

Sodexo, leader of Quality of Daily Life Solutions, helps schools improve the learning environment by focusing on student well-being and achievement. From nutritious school meals to clean classrooms to safe playgrounds and more, Sodexo enhances every student's ability to learn and grow.

[www.sodexoUSA.com](http://www.sodexoUSA.com)

**Sourcewell, formerly NJPA — BOOTH: 732**

Sourcewell is a self-supporting government organization, partnering with education, government, and nonprofits to boost student and community success. We offer training and shared services to our central Minnesota members, and cooperative purchasing solutions throughout North America. We are driven by service and the ability to strategically reinvest in member communities.

[www.njpacoop.org](http://www.njpacoop.org)

**Special-Lite — BOOTH: 1006**

Special-Lite produces complete entrance systems and interior architectural products for high-cycle usage and lasting value. A made-to-order approach and excellent customer service have been our legacy. We have a highly engineered approach to delivering safe and secure entrance systems and strive to innovate beyond convention.

[special-lite.com](http://special-lite.com)

**SSC Services for Education — BOOTH: 312**

With decades of industry experience, SSC partners with educational institutions nationwide to provide quality integrated facilities programs including custodial, maintenance, and grounds services. As a trusted partner, we are committed to our customers' goals, our employees' well-being, and helping you focus on your core objective: educating our future.

[sscserv.com](http://sscserv.com)

**Staples Business Advantage — BOOTH: 222**

A well-rounded education isn't just about homework and exams, and a comprehensive supply solution is about more than just paper and pencils. At Staples Business Advantage®, you'll find thousands of products that make it easy to stock your entire school as well as meet your STEAM objectives.

[www.staples.com](http://www.staples.com)

**Steelcase Inc. — BOOTH: 713**

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

[www.steelcase.com](http://www.steelcase.com)

**Tarkett — BOOTH: 833**

Tarkett produces the industry's most comprehensive flooring portfolios centered around human performance—the Tarkett Solution SPECTrum™, a wide range of sustainable and coordinated floors in different materials and types such as modular carpet, broadloom and woven, vinyl, linoleum, rubber, and laminate.

[www.tarkettna.com](http://www.tarkettna.com)

**TimeClock Plus — BOOTH: 118**

Celebrating 30 years, TimeClock Plus provides premier K-12 solutions helping over 3,000 school districts integrate an automated workforce management strategy. With our scalable software solution, v7, TimeClock Plus is designed to help educators and teachers ensure compliance, mitigate audit risks, and create a streamlined tracking system in real-time.

[www.timeclockplus.com](http://www.timeclockplus.com)

**TIPS — BOOTH: 1002**

TIPS is a national purchasing cooperative offering competitively solicited contracts to education, government, and nonprofit agencies, saving them both time and money. TIPS provides a proven, streamlined process that eliminates the purchasing stress for members. "Purchasing Made Personal"

[www.tips-usa.com](http://www.tips-usa.com)

**TRA, Inc. — BOOTH: 111**

SchoolFunds Online is a true cloud-based activity fund accounting software written for school bookkeepers in the K-12 public school market.

[www.trasoft.net](http://www.trasoft.net)

**Trane — BOOTH: 413**

Trane is dedicated to making schools better places to learn and creating buildings that are healthy, comfortable, and efficient. As your complete energy solutions partner, our main focus is to help you reach your goals through our entire portfolio of equipment, service, installation, and energy services.

[www.trane.com](http://www.trane.com)

**Transfinder — BOOTH: 202**

Headquartered in Schenectady, New York, Transfinder is a global logistics software developer providing intelligent solutions to municipalities, schools, and adult care facilities. Transfinder, an Inc. magazine "fastest-growing company," has satellite offices in Austin, Texas and Shanghai, China. The company develops routing, scheduling, and preventive maintenance solutions for optimal transportation logistics.

[www.transfinder.com](http://www.transfinder.com)

**TransPar Group of Companies — BOOTH: 925**

The TransPar Group of Companies supports school districts in their efforts to make student transportation more efficient and effective. We focus on asset management, operating efficiency, and management practices. We provide a comprehensive array of services that allow districts to minimize transportation costs while maximizing the services offered.

[www.transpargroup.com](http://www.transpargroup.com)

**Tremco Incorporated — BOOTH: 723**

Tremco Roofing and Building Maintenance have been delivering roofing and weatherproofing solutions since 1928. Innovative restoration options offer long-term warranties and can save over half the cost of a traditional replacement. Visit Booth #723 to learn more about our compliantly bid procurement options for all our solutions.

[www.tremcoinc.com](http://www.tremcoinc.com)

**Triple S — BOOTH: 435**

Triple S is a member-owned national distribution services and logistics company that provides facility maintenance solutions to the healthcare, education, commercial, retail, government, and building services contractor markets. We offer a broad range of SSS brand products: cleaners, tools, equipment and supplies for every cleaning task, every day.

[www.triple-s.com](http://www.triple-s.com)

**TSA Consulting Group, Inc. — BOOTH: 609**

TSA Consulting Group is the nation's largest provider of third-party administration and compliance services to public education employer-sponsored 403(b)/457 retirement plans.

[www.tsacg.com](http://www.tsacg.com)

**Tyler Technologies, Inc. — BOOTH: 221**

Now, more than ever, schools need to function as a cohesive system—from the classroom and business office to the transportation department and superintendent's office. With integrated solutions for financials/HR, student information, transportation, and data analytics, Tyler Technologies empowers schools to bridge silos, share information, and build connected district.

[www.tylertech.com](http://www.tylertech.com)

**U.S. Communities — BOOTH: 408**

U.S. Communities is the leading purchasing cooperative that delivers cost savings for products and services that address the unique needs of schools. Registration is free and there are no commitments or minimum orders.

[www.uscommunities.org](http://www.uscommunities.org)

**U.S. OMNI — BOOTH: 830**

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.

[www.omni403b.com](http://www.omni403b.com)

**U.S. Retirement & Benefits Partners — BOOTH: 731**

U.S. Retirement & Benefits Partners (USRBP) is the nation's largest independent employee benefits and retirement planning firm serving K-12 public schools. We are a single-source provider offering a comprehensive suite of employee benefits plan consulting, compliance, administration, communication, and technology services, as well as customized retirement plan counseling.

[www.usrbpartners.com](http://www.usrbpartners.com)



**Utica National Insurance Group — BOOTH: 824**

Utica National, a nationally recognized insurer, provides personal and commercial insurance. For over 40 years it has secured New York public schools through customized coverages. We work with you to manage risk and preserve your resources so you can do what you do so well: educate children. Security, Appreciation, Respect.  
[www.uticanational.com](http://www.uticanational.com)

**VALIC — BOOTH: 309**

VALIC provides customized retirement plan solutions that are tailored to your district's needs. We offer your employees a personalized approach to retirement planning, providing solutions with a flexible mix of services, technology, and support. For more than 50 years, VALIC has been a leading 403(b) plan provider for K-12.  
[www.valic.com](http://www.valic.com)

**Vicon Industries, Inc. — BOOTH: 1008**

Vicon's end-to-end security surveillance solutions deliver simple usability with powerful capabilities, delivering high-performance, easy-to-deploy solutions. Vicon's portfolio includes Valerus, an open platform browser-based VMS, VAX, a cutting-edge access control solution, a broad range of IP network and analog cameras, and network video recorders for analog and IP systems.  
[www.vicon-security.com](http://www.vicon-security.com)

**ViewSonic — BOOTH: 802**

Implementing technology-rich learning environments is critical to achieving 21st century learning standards. ViewSonic can help. From connected devices and projection solutions, to VDI for a Google classroom, we make it easy to connect and collaborate with our broad array of future-ready products.  
[www.viewsonic.com](http://www.viewsonic.com)

**Virco, Inc. — BOOTH: 303**

Since 1950, Virco has proudly manufactured industry-leading furniture and equipment for K-12 schools in the U.S. Collections include seating for healthy movement, technology-ready tables, and a range of collaborative tables and desks for flexible classrooms. For large-scale FF&E purchases, Virco's complimentary, hassle-free PlanSCAPE services delivers on-time, on-budget solutions.  
[www.virco.com](http://www.virco.com)

**Voya Financial — BOOTH: 503**

Voya is a leading provider of retirement products and services in the U.S., serving more than 47,000 institutional clients and nearly 4.5 million individual retirement plan investors.  
[www.voya.com](http://www.voya.com)

**Weidenhammer — BOOTH: 1004**

Weidenhammer is an established education management software leader serving the information technology needs of school districts since 1978. The Alio suite of financial management and human resources solutions provides our clients with robust applications for managing the complexities of today's dynamic school administration needs.  
[www.hammer.net](http://www.hammer.net)

**Wilkes University — BOOTH: 707**

Wilkes University offers several degree options designed for school business officials. Options include a bachelor's degree in business administration with a concentration in school business, a master's degree in school business leadership, an Ed.D. in educational leadership, and other innovative, practical degree programs to improve your career and transform schools.  
[www.wilkes.edu/sbl](http://www.wilkes.edu/sbl)

**Worth Ave. Group — BOOTH: 720**

For over 46 years, Worth Ave. Group has provided a sense of security for individuals nationwide. We specialize in providing electronic device insurance for educational institutions, businesses, and individuals. Our low deductibles and affordable premiums make our insurance beneficial to anyone who owns a portable electronic device.  
[www.worthavegroup.com](http://www.worthavegroup.com)



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