VIRTUAL CONFERENCE
PROGRAM BOOK
September 30–October 2
ASBO International’s Corporate Partners are here for you today, tomorrow, and far into the future as school districts recover and return to normalcy in the aftermath of COVID-19.
Welcome to Envision 2020, ASBO International’s First Virtual Conference!

While this year’s learning and networking experience will be a little different than many of us are used to, the core components will be the same. By the end of the conference, you will have new ideas that can help improve the way your school district serves students. During the conference, you will have access to Live Learn presentations, On-Demand sessions, the inspiring general session, invaluable Roundtable discussions, Micro Courses, a virtual Exhibits Marketplace with product videos, and education sessions loaded with helpful takeaways. Not only will you leave with plenty of useful ideas to bring back to your team and concrete action items that will make your school system stronger, you’ll also gain something on a more personal level: the knowledge that you are not alone. You are part of a movement of individuals who are working together to make a difference for students.

Sincerely,

Claire Hertz, CSBA, SFO
President, ASBO International
Deputy Superintendent of Business and Operations
Portland Public Schools
Portland, Oregon

David J. Lewis
Executive Director, ASBO International
Ashburn, VA
With 30+ years of experience in curating today’s modern products, services and solutions for schools across the nation, Office Depot® is your single source for everything you need to impact learning and help your students succeed.

EMPOWERING YOUR SCHOOL THROUGH PROVEN PARTNERSHIPS
Office Depot is committed to helping you meet the unique demands that your school and district face every day. We’re committed to empowering your school with services that foster ease, efficiency and transparency, so you can focus on your students.

SCHOOL SPIRIT
Promote your school name at fundraising events, pep rallies and more with innovative promotional products.

HEALTHIER AND SAFER SCHOOLS
Help reduce the spread of germs in your school with personal protective equipment (PPE) such as clear desktop divider shields and more.

MODERN LEARNING ENVIRONMENTS
We’ll partner with your school to help you develop innovation learning areas for practicing creativity, collaboration, critical thinking and communication.

CUSTOMIZED MATERIALS
Create custom curriculums that work for you, and we’ll deliver them wherever you need them — from central warehouses to specific school locations.

JOIN US FOR OUR LIVE LESSON SESSION
What: Technology to the Rescue: Revamping Business Office Routines in a COVID-19 World
When: Thursday, October 1, 3:30 p.m.–4:30 p.m. EST
Where: Online virtual event
CLICK HERE TO LEARN MORE.
### Tuesday, September 29

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 am – 11:59 pm</td>
<td>Micro Courses and On-Demand Sessions Available on ASBO Learn</td>
</tr>
</tbody>
</table>

### Wednesday, September 30

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>11:00 am - 12:30 pm</td>
<td>Conference Kickoff and Keynote Address, Michele Norris</td>
</tr>
<tr>
<td>12:30 pm - 1:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>1:00 pm - 2:00 pm</td>
<td>Live Learns</td>
</tr>
<tr>
<td>2:00 pm - 2:15 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:15 pm - 2:45 pm</td>
<td>Solutions Circuit</td>
</tr>
<tr>
<td>2:45 pm - 2:50 pm</td>
<td>Break</td>
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<tr>
<td>2:50 pm - 3:50 pm</td>
<td>Live Learns</td>
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<tr>
<td>3:50 pm - 4:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>4:00 pm - 4:30 pm</td>
<td>Solutions Circuit</td>
</tr>
<tr>
<td>4:30 pm - 4:45 pm</td>
<td>Break</td>
</tr>
<tr>
<td>4:45 pm - 5:30 pm</td>
<td>Roundtables</td>
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</tbody>
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### Thursday, October 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>10:30 am - 11:00 am</td>
<td>System Re-Set (Mental Centering)</td>
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<tr>
<td>11:00 am - 11:25 am</td>
<td>Break</td>
</tr>
<tr>
<td>11:25 am - 11:30 am</td>
<td>Day 2 Live Kickoff</td>
</tr>
<tr>
<td>11:30 am - 12:30 pm</td>
<td>Live Learns</td>
</tr>
<tr>
<td>12:30 pm - 1:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>1:00 pm - 2:00 pm</td>
<td>Live Learns</td>
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<tr>
<td>2:00 pm - 2:15 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:15 pm - 2:45 pm</td>
<td>Solutions Circuit</td>
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<tr>
<td>2:45 pm - 2:50 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:50 pm - 3:20 pm</td>
<td>Solutions Circuit</td>
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<td>3:20 pm - 3:30 pm</td>
<td>Break</td>
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<tr>
<td>3:30 pm - 4:30 pm</td>
<td>Live Learns</td>
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<tr>
<td>4:30 pm - 4:45 pm</td>
<td>Break</td>
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<tr>
<td>4:45 pm - 5:30 pm</td>
<td>Roundtables</td>
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</tbody>
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### Friday, October 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>10:30 am - 11:00 am</td>
<td>Tune In and Tune Up (Mindful Movement)</td>
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<tr>
<td>11:00 am - 11:25 am</td>
<td>Break</td>
</tr>
<tr>
<td>11:25 am - 11:30 am</td>
<td>Day 3 Live Kickoff</td>
</tr>
<tr>
<td>11:30 am - 12:30 pm</td>
<td>Live Learns</td>
</tr>
<tr>
<td>12:30 pm - 1:00 pm</td>
<td>Break</td>
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<tr>
<td>1:00 pm - 2:00 pm</td>
<td>Live Learns</td>
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<tr>
<td>2:00 pm - 2:15 pm</td>
<td>Break</td>
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<tr>
<td>2:15 pm - 3:15 pm</td>
<td>Live Learns</td>
</tr>
<tr>
<td>3:15 pm - 4:15 pm</td>
<td>Closing Celebration</td>
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</tbody>
</table>

The Exhibits Marketplace is open 24-hours a day throughout the duration of the conference. During live hours you can chat directly with company representatives.

For the latest schedule please visit aspointl.org/Envision or the mobile app.
MAKE THE MOST OF THIS VIRTUAL EVENT

GENERAL TIPS
• Block out your calendar as you would if you were out of the office.
• Customize your learning space by selecting a virtual background — create your own or choose from one of our Envision 2020 special backgrounds!

ATTENDEE SERVICE CENTER
The Attendee Service Center is your key to accessing sessions, claiming credits for attending, and exploring the Exhibits Marketplace. Log into the Attendee Service Center using your login and password that was shared in your welcome email.

EXHIBITS MARKETPLACE
Log into the Attendee Service Center to:
• Access the Exhibits Marketplace before, during, and after the conference.
• Chat via text with exhibitors in real time during office hours.
• Search for exhibitors based on products and services.
• Visit exhibitors to earn game points for a chance to win prizes, such as an Amazon gift card or future conference registration! Details in the app.

SELF-CARE, RELAXATION, AND MINDFUL MOVEMENT
School business professionals wear many hats in the course of a day, a week, and a school year, often transitioning from finding solutions in one arena to another without pause. Whatever your schedule or fitness level, adding simple techniques to your “self-care toolkit” can help you regulate your nervous system, maintain or increase physical mobility, and manage your responses to stressful situations.
• Session #1: System Re-Set (Mental Centering)
• Session #2: Tune In and Tune Up (Mindful Movement)
Thank you Event Partners for sponsoring these sessions.

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

SOLUTIONS CIRCUIT
Visit with corporate partners to learn more about their products and services.
All registered attendees who participate in one of the Solutions Circuit sessions will receive a $5 Starbucks e-gift card (1 per person). In addition, for every Solutions Circuit session you attend, you’ll receive an entry for one of two grand prize drawings for a $100 gift card to Amazon (up to 4 chances per person).

Closing Celebration
Friday at 3:15 pm Eastern Time. The Second City comedy group is leading an interactive show just for school business professionals. Finish out the conference and your work week with a few laughs among friends!

ASBO Learn: Access on-demand content through October 2, 2021. LEARN MORE HERE.
Benefits strategies for unusual times

Schools and other educational organizations face difficult challenges in ordinary times. These days, the challenges are even greater. Our expert advisors, virtual enrollment support, administration technology and robust product portfolio help simplify benefits enrollment and administration, giving you one less challenge to face. In unusual times, there’s Aflac.

To learn more, speak to an Aflac representative at the ASBO Envision 2020 International Conference.
EDUCATION INFORMATION

SESSION TYPES

Follow this description reference guide as you plan your virtual agenda. For an even smoother scheduling process, download the Envision 2020 conference app and plan your agenda on the go.

**Live Learns:** These featured sessions are presented live in one-hour slots with interactive elements such as Q & A opportunities, in-session knowledge checks, and eligibility for SFO contact hours and CPE credits.

**Micro Courses:** New! These 10- to 15-minute mini sessions provide incremental concepts and knowledge checks via the new ASBO Learn portal. Eligible for SFO contact hours and CPE credits.

**Roundtables:** Come prepared with questions, share answers, and engage in open discussion with your peers in a moderated video chat.

**On-Demand Sessions:** Learn from peer experts on your own time. Access these sessions anytime on ASBO Learn, up to 90 days after the conference. Eligible for SFO contact hours.

**Solutions Circuit:** Solutions Circuit sessions provide quality facetime with industry suppliers who are ready to share solutions and answer your specific questions in 30-minute group meetings.

SFO AND CPE CREDITS

**Earning SFO® Contact Hours and CPE Credits**

During Live Learns, enter your full name, attend the session for at least 50 minutes, and answer 3 of the 5 polling questions to qualify for CPE credits. We ask that you also complete the online session evaluations that are available in the Attendee Service Center. Attendees will have the option to download, email, or print their certificates after attendance is verified.

SFO contact hours and CPE credits for Micro Courses and On-Demand Sessions will be accounted for in ASBO Learn. Credits earned through the Live Learns will be transferred to your ASBO Learn transcript several weeks after the conference.

**SFOs:** Remember, contact hours must also be entered for recertification into your online SFO Access (Prolydian) account, under Applications / SFO Recertification Application.

**Earn CPE credits** in fields of study including Personal Development, Finance, Information Technology, Accounting (Governmental), Business Management & Organization, Production, Personnel/HR, Business Law, and Accounting. [View all fields of study here](#).

All ASBO Envision 2020 educational programming is offered at a basic program level and requires no program prerequisites or advance preparation.

The Association of School Business Officials International is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

The instructional delivery method for all workshops, seminars, discussion groups, and deep dives is group live.
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VC 30081 (06/2019) J509702 ER

AIG Retirement Services
TWITTER TIPS
How to Use Twitter During #ASBOEnvision2020

Use Twitter to connect with your colleagues and your community. Share successes, ask questions, and provide advice. Here are some tips to help you get started!

- A tweet can be 280 characters MAX.
- If you only use 200–240 it allows your tweet to be retweeted with comments.
- When you mention another Twitter user in your tweet make sure you use @ and their twitter handle so they are notified of the mention.
- If you begin a tweet with a mention, place a period “.” before the “@” to broaden the reach of your tweet. **Example:** @asbointl enjoyed the live learns during #ASBOEnvision2020.
- Use hashtags to maximize the number of people who see your tweet. Hashtags also help you find and follow others with the same interest! For a full list of related hashtags #ASBOEnvision2020    #schoolbusiness    #schoolfinance    #edfinance    #EdFinChat    #ASBOMember

Here are a few presenters to tag in your posts. Find others using #ASBOEnvision2020!

@Michele_Norris  @Noellerson  @johnWhutch  @MargueriteRoza
@MatthewMLentz  @ISBLTraining  @jnovak_julie  @joshpeachspeaks  @ASBOUSA
@TogaFinance  @DrMimiMom  @sutterb  @slharkin

Keep tweeting even after the conference is over. Stay engaged to build an ongoing relationship. Follow those who add value to the conversation and those that you want to follow you.
EMPLOYEE RETIREMENT IS YOUR FINAL TEST. DON’T FAIL IT.

Your employees are cramming for retirement. But they’re struggling to understand how to fill benefit gaps, plus handle copays, deductibles, COBRA, and more.

AMBA CAN HELP
We’ve aced benefits, providing them to over 60 associations nationwide, for 40 years, including active workers, retired teachers, state employees, and more. AMBA is ready to help school business officials like you fill gaps in coverage as employees approach retirement.

To learn about easy-to-implement retirement packages, contact:
Omarr Guerrero
VP Member Experience
omarr.guerrero@amba.info
512-934-4675

Excelling in the Strangest School Year Yet

DON’T MISS

“Schools Open (Maybe): Facilities and Dining Considerations for Reopening and Potential Reclosing”
Wednesday, September 30, 4pm–4:30pm
Thursday, October 1, 2:50pm–3:20pm

But first, your guide to a safe reopening and sustainable management.

CLICK HERE

www.aramark.com
We know that this is an unprecedented time for schools, and your role as school business officials has quickly expanded to cover many new responsibilities. Security Benefit has been a provider of retirement plans to schools for over 50 years. We recognize that you will need all the resources possible to get through the upcoming months. We want to be there to help you move forward.

As an ASBO partner, we want you to know that we are available as your resource partner. We have a dedicated team to support you on topics such as the CARES Act and SECURE Act. In addition, we have a team with an extensive background on retirement plan types such as special pay plans and other options for schools. Contact us today for more information on how we can help.

Don Wiley  
National Director  
Eastern Division  
609.306.0817  
Don.Wiley@SecurityBenefit.com

Brianne Johnson  
Regional Director, Affiliated Relationships  
Western Division  
785.230.7017  
Brianne.Johnson@SecurityBenefit.com

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An award-winning journalist and one of the most-recognized voices in radio, Michele Norris engages audiences in candid discussion about race, culture, and communication in America.

From the radio airwaves of NPR and primetime television to leading news publications such as *The Washington Post*, Norris is one of the most-trusted voices in American journalism. On stage, she inspires open and honest dialogue, with memorable stories and fascinating perspectives drawn from her personal journey, investigative research, and interviews with world leaders, Nobel laureates, and influential newsmakers.

For a decade, as host of National Public Radio’s longest-running program, *All Things Considered*, she captivated audiences nationwide while earning some of journalism’s highest honors. As a *Washington Post* Opinions contributor, Norris sparks important dialogue on current events, social issues, and the power to make change as she breaks down commonly held beliefs and attitudes on race, diversity, and bias. She makes complex and taboo issues remarkably accessible. Her audiences walk away empowered to stimulate discussion around challenging topics within their communities.

Norris’ efforts to promote conversation about race throughout her accomplished career resulted in her critically acclaimed book, *The Grace of Silence: A Memoir*. She received accolades for a Peabody Award-winning initiative, “The Race Card Project,” which fosters conversation among individuals about their differences. Norris is also the director of “The Bridge”—the Aspen Institute’s program on race, cultural identity, and inclusion—which addresses some of America’s most complex issues by encouraging people to explore and engage with differing perspectives.

*Proud Sponsor: Security Benefit*
Connect with ASBO International Corporate Partners who are ready to share solutions and answer your specific questions in 30-minute group meetings.

Attendees who opt in during any Solutions Circuit session will receive a $5 Starbucks gift card! (Gift cards are limited to one per attendee.) Every time you attend. You will be entered into a drawing to win a $100 Amazon gift card (up to 4 entries/person).

**Wednesday, September 30**

**2:15 pm - 2:45 pm**

- **SC01** American Fidelity Assurance Company: CORONA, CARES, and Cafeteria Plans (S125 Plans)
- **SC02** Equitable: Women and Money: Taking Control of Your Financial Future
- **SC03** The Horace Mann Companies: Student Loan Solutions: Unique Strategies Available to Reduce the Burden of Student Loan Debt
- **SC04** Ricoh USA, Inc.: Improving Student Engagement (In Virtual and Hybrid Classrooms)
- **SC05** U.S. Retirement & Benefits Partners: 403(b)/457(b) TPAs: The Cost Savings & Benefits to Districts

**4:00 pm - 4:30 pm**

- **SC07** Security Benefit: ‘Special Pay’ and Matching 403(b) Plans, a Win-Win for Everyone
- **SC08** Aflac: Benefits Strategies to Help Move Educational Organizations Through and Beyond the Pandemic
- **SC09** AIG Retirement Services: An Insider’s View on K-12 Retirement Plan Consortia
- **SC10** Association Member Benefits Advisors (AMBA): Benefits Gaps Exist as Your Employees Transition into New Life Stages
- **SC11** Aramark: Schools Open (Maybe): Facilities and Dining Considerations for Reopening and Potential Reclosing
- **SC12** Tyler Technologies, LLC: Budget Uncertainty: Agile K-12 Planning During Crisis

**Thursday, October 1**

**2:15 pm - 2:45 pm**

- **SC13** Aflac: Benefits Strategies to Help Move Educational Organizations Through and Beyond the Pandemic
- **SC14** AIG Retirement Services: The Student Loan Crises Is a Challenge and an Opportunity for Employers
- **SC15** American Fidelity Assurance Company: CORONA, CARES, and Cafeteria Plans (S125 Plans)
- **SC16** Equitable: Improving Schools, Health & Wellness Programs — Maintaining a Healthy & Engaged Workforce.
- **SC17** Security Benefit: Improving Retirement Savings for America's Public Educators (A comprehensive survey of public education 403(b) Retirement Plans) National Tax Deferred Savings Association

**2:50 pm - 3:20 pm**

- **SC19** Aramark: Schools Open (Maybe): Facilities and Dining Considerations for Reopening and Potential Reclosing
- **SC20** The Horace Mann Companies: Student Loan Solutions: Unique Strategies Available to Reduce the Burden of Student Loan Debt
- **SC21** Ricoh USA, Inc.: Information Mobility and the Digital Transformation
- **SC22** Tyler Technologies, LLC: Understanding and Protecting Against Your Cybersecurity Risks
- **SC23** U.S. Retirements & Benefits Partners: Reducing Your Benefits Compliance & Administration Costs: ACA, FMLA, COBRA, and Benefits Administration
- **SC24** Association Member Benefits Advisors (AMBA): Benefits Gaps Exist as Your Employees Transition into New Life Stages.
EDUCATORS STRUGGLE WITH SKY HIGH STUDENT LOAN DEBT

That’s why Horace Mann has partnered with Tuition.io to help educators successfully reduce their student loan debt burden.

Join our Solutions Circuit Session on Sept. 30 and Oct. 1 to learn how this program could help attract, support and retain your employees.

Sign up today
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YOU ASKED. WE ANSWERED!

MBA and Pathway to the MBA Answers Revealed

We asked you to share your budget development, Meritorious Budget Award (MBA), and Pathway to the MBA questions.

Then, we asked one of our long-time reviewers for the answers!

Q: HOW DOES APPLYING FOR THE MBA (OR PATHWAY) ACTUALLY IMPROVE MY BUDGET?

Reviewer: There is an increased emphasis on transparency with our schools' parents, staff, and community. The MBA program allows you the opportunity to provide your community with the full picture of your budget, the factors and process used to build your budget, the district's goals and objectives, and comparable data from prior years and projected years. The reviewer comments give you the opportunity to further explain sections within your budget in a more meaningful, easy-to-understand format.

Q: WHAT ADVICE WOULD YOU GIVE SOMEONE WHO IS CONSIDERING APPLYING?

Reviewer: Consider building an MBA committee within your district. The MBA includes information beyond just the numbers, so it is important to have team members who can help you gather information such as enrollment, student achievement, tax rates, assessments, etc. Consider including a team member who has no school finance expertise. This person will be a great sounding board to ensure you are clearly explaining the elements of your budget in an easy-to-understand format. The person's role will be to build your glossary of terms!

Q: WHO SHOULD CONSIDER APPLYING FOR THE PATHWAY TO THE MBA?

Reviewer: If this is the district's first time applying, the Pathway to the MBA is a great place to start. Districts submit a cover letter, the MBA Criteria Checklist, the Executive Summary and one other budget section. The next year, they can submit the Executive Summary and a different section, or submit for the full MBA.
CAFR COMPLETE?

Submit your CAFR for review in ASBO International’s Certificate of Excellence in Financial Reporting (COE)!

VISIT asbointl.org/COE TODAY!

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a different opinion
84% of employees prefer a guided experience when enrolling in their benefits.

During a national health crisis, benefits education is more important than ever.

Learn about our in-person and virtual enrollment options

americanfidelity.com/ASBO
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 district challenges with ingenuity and resourcefulness.

**Pinnacle of Excellence Award**

JIMMY HAY  
Director of Finance  
Paola Unified School District 368  
Paola, Kansas

**Pinnacle of Achievement Award**

JIM ANDERSON  
Chief Financial Officer  
Anchorage School District  
Anchorage, Alaska

**Pinnacle of Achievement Award**

KEVIN HEGARTY  
Chief Financial Officer  
Laveen Elementary School District  
Laveen, Arizona

**Pinnacle of Achievement Award**

RYAN PENDLETON  
Chief Financial Officer/Treasurer  
Akron Public Schools  
Akron, Ohio

Check out the [2020 Pinnacle Winners and their projects](#)
When you need school furniture, Virco is here to help.

Throughout our 70-year history, Virco has been a US manufacturer committed to supporting our K-12 community. Virco offers Quick Ship and Campus Basics Programs, which include a selection of stocked furniture favorites that are ready to ship when you need them.
You are all taking extraordinary measures to lead your students, staff, and communities. This year we will recognize all the School Business Champions around the world who ensure students continue to receive education and services from their school districts.

Share how you and your team have risen to the challenge, conquered it, and continue to serve students and the surrounding community.

Share your story on Twitter using #SchoolBusinessChampions.
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The courage to be honest – to have tough conversations – so you can always do what’s right.

The strength to stand up to ever-changing circumstances without losing sight of the bigger picture.

And the wisdom to know that the most important work we do is also the most human. Because at the end of the day, financial planning is about helping people get what they really want out of life.

We have over 160 years of experience helping people secure their financial well-being so they can pursue long and fulfilling lives. And, yes, times change, but when you’ve been around for as long as we have, you know how to change with them.

It’s time for the next chapter in our long and fruitful legacy. America, on the path to financial fulfillment, meet your guide.

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“In light of the unprecedented events that have resulted in social distancing and other preventive measures, it was a sigh of relief that ASBO International offered an online proctored version of the SFO exam. Being able to take the exam in an environment of my choosing helped to deescalate concerns that an in-person exam would have caused.”

Mike Vigil II, MBA, CGFM, SFO
Real Solutions for Current Challenges

We’re excited to share valuable information on how you can reduce costs, increase productivity, and ensure compliance in your employee benefits plans.

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403(b)/457(b) TPAs: The Cost Savings & Benefits to Districts

Wednesday, September 30, 2020
2:15 p.m. – 2:45 p.m. EST

Reducing Your Benefits Compliance & Administration Costs: ACA, FMLA, COBRA, and Benefits Administration

Thursday, October 1, 2020
2:50 p.m. – 3:20 p.m. EST

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