



PROGRAM BOOK

2013 Annual Meeting & Expo
Boston • October 25–28



ASBO International
11401 North Shore Drive
Reston, VA 20190-4200

P 866.682.2729
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asbointl.org

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GENERAL INFORMATION

Registration Hours

Friday: 7:00 a.m. – 6:00 p.m.

Saturday and Sunday: 7:00 a.m. – 4:00 p.m.

Monday: 7:00 a.m. – 10:00 a.m.

Exhibit Hall Hours

Saturday: 2:30 p.m. – 5:30 p.m.

Sunday: 10:30 a.m. – 2:15 p.m.

BE IN THE KNOW

For the latest information on daily AM&E activities, visit the registration area located on the Second Level of the Convention Center.

ASBO International staff will be wearing blue shirts and badges with the ASBO logo, and will happily assist you.

COMPLIMENTARY WIRELESS INTERNET

The Hynes Convention Center provides complimentary Wi-Fi in the public areas and meeting rooms. Grab a seat, check email, and peruse the ASBO AM&E App and electronic *amDaily*.

BADGES

An official 2013 AM&E badge is required for admission to all functions, including General Sessions, educational sessions, Workshops and Seminars, the Exhibit Hall, and social events. Your badge is also your ticket to earn CPE credits, so be sure to have your badge scanned when entering the room for a CPE-bearing session.

ASBO BOOTH, BOOKSTORE, AND PIN TRADING ZONE

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



ASBO AM&E APP

Yes, now there's an app for that. The full AM&E program is available for smart phone or tablet users through the ASBO AM&E App. Search for "ASBOIntl 13" in the App StoreSM or Google PlayTM to view and highlight sessions and create your own personal conference itinerary.

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SESSION RECORDINGS

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

PICK YOUR FAVORITE TEAM

Help yourself to unlimited ribbons at the ribbon bar located across from registration on the Second Level of the Convention Center. Boston is home to several major league sports teams. Visit TIAA-CREF's Booth 604 to "vote" for your favorite team—the Red Sox (baseball), the Celtics (basketball), the Bruins (hockey), or the New England Patriots (football)—by picking up the corresponding ribbon. Votes will be tallied at the close of the Exhibit Hall on Saturday and attendees' preferred sports team will be revealed at the Second General Session.

Sponsored by TIAA-CREF

ASBO ANNUAL MEETINGS = PINS

Long-time ASBO International members know that part of the history and culture of our association is the pin trading that goes on at every annual meeting. Back by popular demand again this year, we'll add two pins to the ASBO chronicles and your collection.

Sponsored by Siemens Industry, Inc., Building Technologies Division

REFILLABLE WATER BOTTLES

Help minimize our environmental impact during the AM&E by using the refillable water bottle provided with your registration materials. Look for water-filling stations throughout the Convention Center.

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FIRST AID

In the event of a medical emergency, please call 617.954.2111 or dial extension 2111 from any Convention Center house phone. You can also ask any uniformed Convention Center employee with a radio to assist you. The nurse is located on Level 1 outside of Hall A.

Programming Note: The ASBO International 2013 Annual Meeting & Expo, its programs and materials, including the views and opinions expressed therein, are those of the individual speakers, presenters, and authors, and do not necessarily represent the views and opinions of the Association of School Business Officials International, any of its respective affiliates, officers, directors, board members, or employees. As a courtesy to your colleagues, please turn off all cell phones while in the sessions.

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Budget Shield, from Absence Insurance Services and Sutton Special Risk protects school districts against the costs incurred from:

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Budget Shield — Protecting your budget & caring for staff

For more information please contact:

In the US:

Scott Lapp, 212.459.3920 or
sclapp@suttonspecialrisk.com

In Canada:

Dylan Friedmann, 416.307.5617 or
dfriedmann@suttonspecialrisk.com

Get a quote at www.ais-na.com



2013 CORPORATE PARTNERS

Good Partners Help You Make Your Next Move

With an abundance of resources and knowledge, a good partner is always positioned to help you plan your next move. **ASBO International's Corporate Partners** provide the industry expertise you need to make the best decisions for your district.

asbointl.org/CorporatePartners



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Come visit us at Booth #201 on October 26–27, 2013.

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SCHEDULE OF EVENTS

\$ = Additional Fee, IO = Invitation Only



Friday, October 25

7:00 a.m. – 6:00 p.m.	Registration Open
8:00 a.m. – 5:00 p.m.	Workshops and Seminars
8:00 a.m. – 5:00 p.m.	Tour: The Elegance and Charm of Newport, RI (\$)
10:30 a.m. – 3:00 p.m.	Bridges to the Future Scholarship Workshop (IO)
1:00 p.m. – 2:00 p.m.	Orientation Workshop—Great for Newcomers!
2:30 p.m. – 4:30 p.m.	ASBO Choir Rehearsal
6:00 p.m. – 7:30 p.m.	Welcome Mixer
8:00 p.m. – 10:00 p.m.	MASBO Reception at Prudential Center Skywalk Observatory

Saturday, October 26

6:45 a.m. – 8:00 a.m.	Charity Fun Run
7:00 a.m. – 4:00 p.m.	Registration Open
7:30 a.m. – 8:30 a.m.	ASBO Choir Rehearsal
8:30 a.m. – 10:30 a.m.	First General Session—Steve Gross
10:45 a.m. – 1:30 p.m.	Affiliate Executive Directors Meeting and Luncheon (IO)
11:00 a.m. – 12:00 p.m.	Discussion Groups
11:00 a.m. – 12:00 p.m.	Guest Program: Book Club— <i>The Bostonians</i> by Henry James
12:00 p.m. – 1:30 p.m.	MBA Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:15 p.m. – 1:30 p.m.	Committees Meeting and Luncheon (IO)
12:30 p.m. – 2:30 p.m.	Deep Dig Sessions
1:15 p.m. – 2:15 p.m.	Discussion Groups
2:30 p.m. – 5:30 p.m.	Exhibit Hall Opening Reception
8:00 p.m. – 11:00 p.m.	Joint Affiliate Reception at Tequila Rain/Jillian's Boston

Sunday, October 27

7:00 a.m. – 4:00 p.m.	Registration Open
8:30 a.m. – 10:15 a.m.	Second General Session—Emily Pilloton
10:30 a.m. – 11:30 a.m.	Open Bylaws Meeting
10:30 a.m. – 2:15 p.m.	Exhibit Hall Open
10:45 a.m. – 12:00 p.m.	Clinic Tables
11:00 a.m. – 12:00 p.m.	Guest Program: Paul Revere Program
11:30 a.m. – 1:00 p.m.	COE Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:00 p.m. – 1:00 p.m.	Lunch in the Exhibit Hall
1:15 p.m. – 2:00 p.m.	COE Award Recipients Reception (IO)
2:15 p.m. – 3:15 p.m.	Eagle Award Recipients Reception (IO)
2:15 p.m. – 3:30 p.m.	Gold Mine Sessions
2:30 p.m. – 3:30 p.m.	Discussion Groups
2:30 p.m. – 4:30 p.m.	Deep Dig Sessions
3:45 p.m. – 4:45 p.m.	Discussion Groups
7:00 p.m. – 10:00 p.m.	Colorado ASBO Reception at McGreevy's Irish Pub

Monday, October 28

7:00 a.m. – 10:00 a.m.	Registration Open
8:00 a.m. – 9:00 a.m.	Discussion Groups
8:15 a.m. – 10:15 a.m.	Deep Dig Sessions
9:15 a.m. – 10:15 a.m.	Discussion Groups
10:30 a.m. – 11:30 a.m.	Discussion Groups
10:30 a.m. – 12:30 p.m.	Deep Dig Sessions

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Horace Mann is a national sponsor of **DonorsChoose.org**, a website dedicated to funding classroom projects. It's just one way Horace Mann says "thank you" to educators.

*For a chance to win a completed project in your district, visit Horace Mann at **booth 209**.*



"DonorsChoose.org has really been an inspiration to me. There have been several occasions when I was able to complete funding for a project in my home town as well as here in Reston at several of our community schools. It just gives me such a good feeling to receive the letters from the children and how much the project meant to them.

Thanks for introducing me to this organization."

John D. Musso, CAE, RSBA
ASBO Executive Director

WORKSHOPS AND SEMINARS

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

Visit asbointl.org/WorkshopsAndSeminars for session descriptions and to find out which sessions offer CEU and CPE credit. Remember, your signature is your ticket to earn credits. Please make sure to sign the roster when you enter and exit the session room.

Friday, October 25

WORKSHOPS

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

Full-Day Workshop

8:00 a.m. – 5:00 p.m.

Workshop 1 **Room: 306**
Emergency Management for School Districts

Two-Hour Workshops

8:00 a.m. – 10:00 a.m.

Workshop 2 **Room: 310**
Update on the Law of Special Education

Workshop 3 **Room: 313**
Lead Well: What Is Your Personal Well-Being Strategy?

10:15 a.m. – 12:15 p.m.

Workshop 4 **Room: 302**
Budget Prioritization

Workshop 5 **Room: 309**
Improve Your Federal Programs Process: Better Compliance and Audit Documentation

1:00 p.m. – 3:00 p.m.

Workshop 6 - **CANCELLED** **Room: 310**
Self Insurance: Navigating the Decision

Workshop 7 **Room: 304**
Technology, the Law, and Schools

Four-Hour Workshops

8:00 a.m. – 12:00 p.m.

Workshop 8 **Room: 304**
In-Depth Study of the Health Care Reform Rules Affecting School Districts

Workshop 9 **Room: 301**
School Tour: Boston Public Schools

Workshop 10 **Room: 308**
Internal Controls and Reporting for Athletics, Student Activity Funds, Booster Clubs, and PTOs

1:00 p.m. – 5:00 p.m.

Workshop 11 **Room: 309**
SmartIT: Strategically Managing IT Through Difficult Budgets

Workshop 12 **Room: 302**
Moving from Management to Leadership: The Key to Your Success

SEMINARS

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

Full-Day Seminars

8:00 a.m. – 5:00 p.m.

Seminar 13 **Room: 305**
Skills Refresher for ASBO's SFO® Certification Exam

Four-Hour Seminars

8:00 a.m. – 12:00 p.m.

Seminar 14 **Room: 303**
How to Create an Award-Winning Budget

1:00 p.m. – 5:00 p.m.

Seminar 15 **Room: 313**
How to Prepare a Comprehensive Annual Financial Report

*Mark Twain once wrote of
three iconic U.S. cities:*



In New York they ask, *"How much money does he have?"*

In Philadelphia, they ask, *"Who were his parents?"*

In Boston they ask, *"How much does he know?"*

In the spirit of Twain's writing, we hope you find the **2013 ASBO Annual Meeting & Exhibits** in Boston to be filled with inspiring and stimulating *knowledge*.

Visit ING U.S. at booth #301 to learn about how we can help you with administration of your district's 403(b) and/or 457 retirement plans.



Or contact Ketul Thaker

*Vice President, ING U.S. Retirement
Services – Tax-Exempt Markets*

860-580-4013

Ketul.Thaker@us.ing.com

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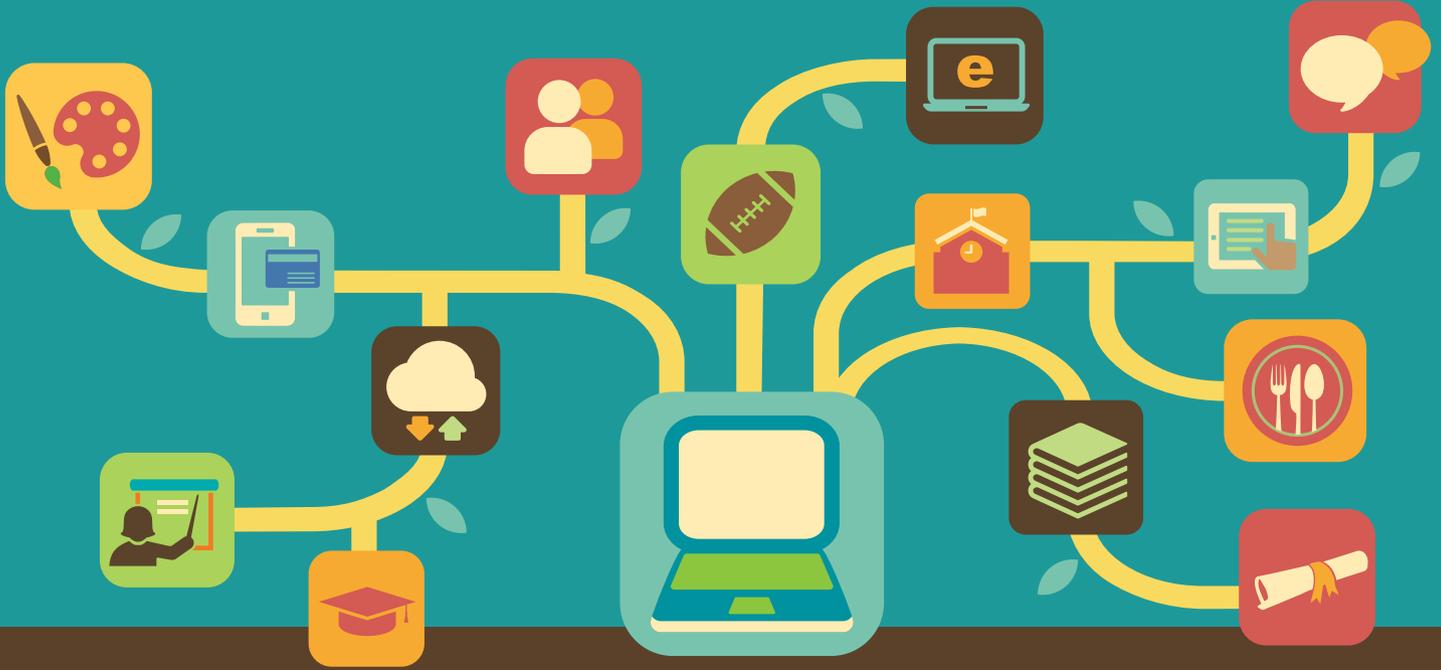
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MyHorizonPlus helps you simplify your operation, reduce costs, *and* improve customer satisfaction by **drastically reducing paperwork and money handling** within your district.



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- Summer school registration
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- Facilities management
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“ Horizon develops great products that make online payments and registration both simple and secure for members of the community and those who manage the District’s Adult and Continuing Education finances and operations. ”

Yvonne Klancko, Director of Continuing Education, Amity Regional School District No. 5



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SESSION TRACKS

 **Educational Enterprise**
Focuses on public policy, intergovernmental relations, and the legal frameworks that affect schools.

 **Financial Resource Management**
Provides expertise on the effects of financial management on budgeting, financial planning and reporting, accounting, investments, debt management, and business technology.

 **Human Resource Management**
Addresses personnel management concepts and leadership styles, including personnel and benefits administration, professional development, labor relations, and employment agreements.

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

 **Property Acquisition and Management**
Focuses on purchasing, supply and fixed-asset management, and real estate management.

 **Information Management**
Deals with critical information on strategic planning, instructional support programs, and management information systems.

 **Ancillary Services**
Addresses issues involving transportation, risk management, and food service.

 **International Aspects**
Focuses on global school business management issues.

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

CPE Continuing Professional Education
Earn up to 17 CPE credits Friday through Monday by attending Workshops, Seminars, Discussion Groups, and Deep Digs designated as offering CPEs.

 **Recertification Contact Hours**
Attending professional development sessions is an excellent way to earn the contact hours you need for recertification. Use the SFO Contact Hour Record in your registration packet to document your attendance. Remember to have the presenters initial next to the session you attended.



CPE INFORMATION

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

The instructional delivery method for Workshops and Seminars is Group-Live and no prerequisites or advance preparations are necessary for participation, unless otherwise indicated. ASBO will offer CPE credit for select Discussion Group and Deep Dig sessions using the Group-Live instructional delivery method. Visit asbointl.org/AnnualMeeting for more information about these sessions.

To receive CPE credit, attendees must verify attendance by having their badge scanned when entering the room and by completing the session evaluation online after the meeting. CPE certificates can be printed at your home computer after completing the online evaluation.

Complaint Resolution and Refund Policy
For more information regarding administrative policies, such as complaints and refunds, contact our office at ASBO International, 11401 North Shore Drive, Reston, VA, 20190 or call 866.682.2729 x7080. ASBO International reserves the right to cancel a session due to low enrollment.

DAILY SCHEDULE: FRIDAY - SATURDAY

Friday, October 25

7:00 a.m. – 6:00 p.m.

Registration

Prefunction Hall C, Second Level

8:00 a.m. – 5:00 p.m.

Workshops and Seminars

(See page 12 for complete listing.)

8:00 a.m. – 5:00 p.m.

Tour: The Elegance and Charm of Newport, RI

Additional Fee and Advance Registration Required

Buses depart from the Sheraton Boston Hotel Lobby at 8:00 a.m.

10:30 a.m. – 3:00 p.m.

Bridges to the Future Scholarship Workshop

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Hampton

1:00 p.m. – 2:00 p.m.

Welcome Orientation

All welcome; newcomers encouraged to attend
Room: 210

2:30 p.m. – 4:30 p.m.

ASBO Choir Rehearsal

Room: 201

6:00 p.m. – 7:30 p.m.

Welcome Mixer

Sheraton Boston Hotel, Grand, Liberty, & Independence Ballrooms

8:00 p.m. – 10:00 p.m.

50 Floors Above Boston!

Prudential Center Skywalk Observatory
800 Boylston Street

Hosted by the Massachusetts Association of School Business Officials (MASBO)

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

Join us for breathtaking views, desserts, and drinks 50 floors above Boston. The Prudential Center Skywalk

Observatory offers 360-degree views of Boston and beyond. What a venue to catch your first glimpse of the Boston landmarks: Fenway Park, the Hancock Tower, Boston Common and Public Gardens, MIT and Harvard Universities, and unbelievable vistas. This welcoming gathering is a must on Friday evening, following ASBO's Welcome Mixer.

Saturday, October 26

6:45 a.m. – 8:00 a.m.

Charity Fun Run

Boylston Street in front of the Hynes Convention Center, across from Gloucester Street

7:00 a.m. – 4:00 p.m.

Registration

Prefunction Hall C, Second Level

7:00 a.m. – 8:00 a.m.

Texas ASBO Breakfast

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Hampton

7:30 a.m. – 8:30 a.m.

Oklahoma ASBO Breakfast

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Fairfax A

7:30 a.m. – 8:30 a.m.

ASBO Choir Rehearsal

Room: 201

7:45 a.m. – 8:30 a.m.

General Session Coffee Break

Ballroom Prefunction, Third Level

Sponsored by Tyler Technologies

7:45 a.m. – 8:15 a.m.

SFO Meet & Greet

Ballroom B Prefunction

8:30 a.m. – 10:30 a.m.

First General Session

Room: Ballroom B, Third Level

DAILY SCHEDULE: SATURDAY

Welcome to Boston

Ron McCulley, CPPB, RSBO
President, ASBO International

ASBO International Choir

Director: Michael A. Jacoby, Ed.D., Illinois ASBO

Business Meeting

Ron McCulley, CPPB, RSBO
President, ASBO International

Presentation of the 2013 ASBO International Eagle Awards

David Ciotta
Executive Management, Head of Employer Sponsor
Business, AXA Equitable

Introduction of Speaker

Richard R. Schulenburg
Vice President, National Sales
The Horace Mann Companies

First Keynote

“How Joy and Optimism Ignite the Best in All of Us”



Steve Gross, MSW

Life is good Kids Foundation

Steve Gross, MSW, executive director and chief playmaker of the Life is good Kids Foundation, is a creative and

dynamic leader who has devoted his career to helping frontline professionals use the power of play to build healing, life-changing relationships with our most vulnerable children. A gifted, inspirational, and passionate speaker, Steve will help you access your own playfulness, energy, and creativity to reach your full potential.

Sponsored by The Horace Mann Companies

10:45 a.m. – 1:30 p.m.

Affiliate Executive Directors Group Meeting and Luncheon

By Invitation Only

Sheraton Boston Hotel, Back Bay Ballroom D

AIS

We are very proud to be an ASBO Strategic Partner. We hope you can join us at Clinic Table 9 on Sunday and visit us at Booth 300 to discover a staff absence and maternity insurance solution for school districts and take the Lead Well test. One Lead Well test participant will win a trip to Spain for four people.



11:00 a.m. – 12:00 p.m.

Guest Program

Book Club: *The Bostonians*

Room: 208

Join us for a lively discussion of Henry James’s brilliant satire about Boston society and the women’s rights movement in America. *The Bostonians* is one of James’s most provocative and astute portrayals of a world caught between old values and the lure of progress.

DISCUSSION GROUPS (1-HOUR)

11:00 a.m. – 12:00 p.m.

Balance Your Life, Recharge Your Battery, and Thrive, DG367



Room: 303

SFOs: 1.0

School business continues to become more complicated. How do we manage all of the changes and keep our sanity? The discussion will focus on various strategies school business officials are using to stay ahead of the game and avoid being consumed by the job.

Speakers: Mark Rajter, Assistant Superintendent, Troy School District, Troy, MI; Stephanie Weese, Director, Fiscal Services, Kent Intermediate School District, Grand Rapids, MI

DAILY SCHEDULE: SATURDAY

11:00 a.m. – 12:00 p.m.

Choosing the Optimal Workers' Compensation Program, DG123



CPE

Room: 310

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Administrative Practice

Program Prerequisites: None

Advance Preparation: None

The presenters will analyze the various types of workers' compensation programs, illustrate the process for choosing between fully insured and self-insured structures, and review key strategies to control and monitor workers' compensation costs.

Learning Objectives: 1. Discuss the differences between fully insured plans and alternative-funding plans. 2. Outline the steps in performing a comparative financial analysis of different plans. 3. Identify basic tools for managing the costs of workers' compensation. 4. Detail how to monitor the success of your plan.

Speakers: Barbara Salatto, Associate Superintendent for Management Services, ESBOCES, Patchogue, NY; Shelley Levine, Executive Vice President, Bollinger Inc., New York, NY

11:00 a.m. – 12:00 p.m.

Coming Soon: Required Professional Standards for School Nutrition Staff, DG433



Room: 302

SFOs: 1.0

The Healthy, Hunger-Free Kids Act of 2010 outlines the requirements for establishing professional standards for state agency nutrition directors, school foodservice directors, managers, and all other school nutrition staff. The new standards will be discussed, along with tips on how school districts can implement them.

Speakers: Barbara Nissel, President, SOS Group, Inc., Malvern, PA; Jan Barrett, Senior Nutritionist, U.S. Department

of Agriculture, Alexandria, VA; Kathleen Millett, Executive Director, Office for Nutrition, Health, and Safety Programs, Massachusetts Department of Elementary and Secondary Education, Malden, MA

11:00 a.m. – 12:00 p.m.

Devolved School Financial Management Under a Student-Based Funding Model, DG065



Room: 304

SFOs: 1.0

Victoria, Australia has one of the most devolved school management approaches among OECD nations. The funding strategies for government schools combine self-management with recognition of diversity in learning needs and an expectation of shared responsibility and cooperation between schools, all within a context of a transparent and rigorous accountability framework. Explore the fundamentals of this successful funding model; the rationale behind it; the linkages between this funding model and student learning outcomes; and the day-to-day decision making required of school leaders and business officials in a self-managing school environment.

Speaker: Nino Napoli, Director, Financial Services Division, Department of Education and Early Childhood Development, Victoria, East Melbourne, AU

11:00 a.m. – 12:00 p.m.

Does a UK School Improve by Becoming an Academy?, DG362



Room: 308

SFOs: 1.0

All schools in the UK are required to change to academy status. This has been, and still is, a difficult process, but it is taking many schools away from local authority control and giving them total autonomy. Learn how the conversion process has demanded additional financial competencies from school business managers and about many other changes in the management of the schools.

Speaker: Trevor Summerson, Former School Business Director, National College for School Leadership, Nottingham, UK

DAILY SCHEDULE: SATURDAY

11:00 a.m. – 12:00 p.m.

Ethics in Procurement: Just Doing It Right, DG279



Room: 309

SFOs: 1.0

Ethical practice is essential in all areas of school business management, including the procurement process. Avoidable mistakes are often made due to the lack of knowledge of policies, procedures, and regulations, rather than the intent to engage in unethical activities. Explore the educational practices and safeguards that school districts can implement to ensure ethical conduct in procurement.

Speaker: Kimberly J. Bauer, Purchasing Coordinator, Norman Public Schools ISD #29, Norman, OK

11:00 a.m. – 12:00 p.m.

Understanding Print Procurement in the K-12 Environment, DG471



Room: 306

SFOs: 1.0

Learn strategies to work with your sales representative to achieve a level of partnership and trust to ultimately meet your objectives of saving money in the procurement process, while still maintaining the highest level of quality in products and service.

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

11:00 a.m. – 12:00 p.m.

GASB Pension Requirements: Does This Obligation Belong to You?, DG274



CPE

Room: 311

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Accounting Governmental

Program Prerequisites: None

Advance Preparation: None

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American Fidelity

Welcome to ASBO International's 2013 Annual Meeting! From administrative services to healthcare reform guidance, our specialized approach was designed to support the education community. Please join us for our healthcare reform Workshop on Friday at 8:00 a.m. and our Deep Dig Discussion Saturday at 12:30 p.m. We also invite you to visit us in the Exhibit Hall at Booth 309. American Fidelity is proud to be a partner on your side.



Our Family. Dedicated To Yours.™

The funded status of pension plans has received a lot of attention in the past year. Media reports have spotlighted the concerns about retirement plans, not just in the United States, but worldwide. GASB recently issued new standards to address the reporting of pension plans, which will significantly affect the financial statements of school districts. Learn the latest about GASB's pension requirements and how you can take steps now to prepare to implement them.

Learning Objectives: 1. Outline the requirements of the proposed GASB pension standard. 2. List and define the new terminology related to pension reporting. 3. Explain the potential effects of the proposed standard on your school district's financial statements.

Speakers: Christine Torres, Senior Manager, Crowe Horwath LLP, Oak Brook, IL; Corey Arvizu, Partner, Heinfeld, Meech & Co., Tucson, AZ; Neil A. Sullivan, RSBO, CGFM, Executive Director of Finance, Portland Public Schools, Portland, OR

11:00 a.m. – 12:00 p.m.

Reducing the Budget Impact of Community Use of Schools, DG202



CPE

Room: 301

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

DAILY SCHEDULE: SATURDAY

Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

School officials strive to be good stewards of taxpayer dollars by opening their facilities to the public. However, community use of schools can significantly drain budgets due to increased costs for event administration, energy and other utilities, custodial and staff overtime, and building upkeep. Learn how implementing community use of schools best practices for improving cost recovery, process efficiency, and energy efficiency can help you serve the public while reducing the negative impact on your budget.

Learning Objectives: 1. Explain how to improve cost recovery by documenting actual costs for all facility use expenses, establishing fees, and invoicing for facility use. 2. Describe how to increase process efficiency by shortening administrative time for facility use approvals and set up, and by scheduling all events on a single calendar. 3. Discuss how energy costs can be reduced by automatically coordinating building automation systems with event schedules and by conditioning space after hours for scheduled events.

Speaker: Richard Krumrine, Supervisor of Buildings and Grounds, Great Valley School District, Malvern, PA

11:00 a.m. – 12:00 p.m.

Tablets vs. Netbooks/Laptops, DG634



CPE

Room: 312

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

Tablet or netbook? Masconomet Regional School District conducted a study in FY12 that compared the use of Windows netbooks and Android tablets. The study included student, parent, teacher, and IT support feedback. Learn what the district found out in terms of instructional effectiveness and infrastructure support, including set-up,

content filtering, wireless access, bandwidth, appropriate use, Google Apps, and device durability.

Learning Objectives: 1. Discuss the differences in device usability in an instructional environment. 2. Explain the infrastructure support challenges associated with accommodating mobile devices. 3. Describe infrastructure upgrades required to support a 1:1 mobile device program.

Speakers: Seth Goodman, IT Director, Masconomet Regional School District, Topsfield, MA; Susan K. Givens, CFO, Masconomet Regional School District, Topsfield, MA

11:00 a.m. – 12:00 p.m.

Taking Your Shopping Carts Online for Improved Procurement Operations, DG358



Room: 313

SFOs: 1.0

Implementation of a centralized, online purchasing solution can improve the efficiency and effectiveness of agency purchasing. Through ecommerce you can achieve better contract compliance, improve tracking, and comparison shop to maximize savings. Join this panel of eprocurement experts who have tested, rolled out, and are now using some form of ecommerce for their online ordering. They'll discuss their experience, outcomes, and next steps in online shopping.

Speaker: Alexis Turner, Program Manager, U.S. Communities, Walnut Creek, CA

11:00 a.m. – 12:00 p.m.

They Want to Do What with Student Activity Funds?, DG341



Room: 305

SFOs: 1.0

Just when you think you have heard everything that could go wrong with student activity funds, something else comes up that tops the last issue. Activity funds must be

DAILY SCHEDULE: SATURDAY

consistent with the policies of the school board and the educational goals of the district. This session explores how student activity funds are used to account for monies earned and received by the students, to be used for the benefit of the students. The do's and don'ts will be discussed by way of real-life examples and how they were handled.

Speaker: Stephen F. Martin, Business Administrator, SAU-28, Pelham School District, Windham, NH

12:00 p.m. – 1:30 p.m.

Meritorious Budget Award Advisory Committee and Reviewers Meeting and Luncheon

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Dalton

12:15 p.m. – 1:30 p.m.

Committees Meeting and Luncheon

By Invitation Only

Room: 210

DEEP DIG SESSIONS (2-HOUR)

12:30 p.m. – 2:30 p.m.

Creative Disruption: The Expanded Transformative Role of the Chief Business Officer, DD365



Room: 313

SFOs: 2.0

A recent survey of more than 1,500 CEOs indicated the most-valued organizational trait is “creative disruption”—fresh thinking and continuous innovation. Explore how a Santa Fe district is transforming itself out of mediocrity and reaching for excellence, and how the chief business officer is involved in cultural, systemic, and programmatic change.

Speaker: Carl Gruenler, Chief Business Officer, Santa Fe Public Schools, Santa Fe, NM

AXA Equitable

AXA Equitable is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and the Eagle Institute. We applaud the commitment to the professional development that ASBO embodies and we support your efforts by providing you with the products and services to address all your retirement planning needs. Please visit us at Booth 201 and enjoy the conference!



12:30 p.m. – 2:30 p.m.

Finalizing Your Compliance Plans for the 2014 Healthcare Reform Requirements, DD370



CPE

Room: 302

SFOs: 2.0

CPEs: 2.0

Program Level: Basic

Field of Study: Specialized Knowledge and Application

Program Prerequisites: None

Advance Preparation: None

Many of the most significant Affordable Care Act provisions take effect in 2014, including the Free Rider Penalty, a number of new plan design mandates, and new fees. Review those provisions that affect plan sponsors and get help creating an action plan for each. The presenters will also answer frequently asked compliance questions.

Learning Objectives: 1. Describe the healthcare reform provisions impacting employers that take effect in 2014. 2. Analyze how the rules apply to educational organizations and their unique staffing arrangements. 3. Create an action plan for complying with applicable 2014 obligations.

Speaker: Susan Relland, Vice President, Attorney, and Chief Marketing Officer, American Fidelity Corporation, Oklahoma City, OK

DAILY SCHEDULE: SATURDAY

12:30 p.m. – 2:30 p.m.

Uniform Chart of Accounts—Linking Finance to Achievement and More!, DD376



CPE

Room: 312

SFOs: 2.0

CPEs: 2.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Learn about the development of Rhode Island's new uniform chart of accounts and how districts now communicate differently about finances. View the tools that link finance with other data sets and learn about the expansion work underway. Struggling with resource allocation and redirection of funds? Getting push back on changes? Show others how to use data to inform these decisions.

Learning Objectives: 1. Outline the steps to planning and executing a statewide change. 2. Explain how data can be used effectively to inform fiscal decisions. 3. Describe strategies for guiding the conversations surrounding resource redirection. 4. Discuss the power behind linking finance to achievement, demographics, facilities, and other factors.

Speakers: Cynthia Brown, Director, Office of Statewide Efficiencies, Rhode Island Department of Education, Providence, RI; Jane Correia, Executive Director, RIASBO, Providence, RI; Michael Ferry, Director, Office of Data, Research and Analysis, Rhode Island Department of Education, Providence, RI; Pauline Silvia, Finance Director, Bristol Warren Regional School District, Bristol, RI

DISCUSSION GROUPS (1-HOUR)

1:15 p.m. – 2:15 p.m.

Benchmarks and Dashboards: Critical Tools for Employee Performance Management and District Improvement, DG311



CPE

Room: 306

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

Benchmarking is the process of evaluating our performance metrics (key performance indicators or KPIs) against those of our peers. In so doing, we identify model districts or schools, learn about their successes, and replicate or adapt their best practices. Dashboards allow us to monitor our KPIs and focus on what is most important, make more informed decisions, quickly identify and respond to problem areas, improve communication, and enhance transparency. Learn how these tools can transform your district into a true learning organization that focuses on continuous improvement, growth, and student success.

Learning Objectives: 1. Describe how to select or identify benchmarks or key performance metrics. 2. Discuss how to select or identify comparable peers. 3. Outline the process of organizing and presenting your data most effectively. 4. Explain how to quickly and easily set up dashboards for your district.

Speaker: Mary DeLai, Assistant Superintendent, Finance and Administration, Reading Public Schools, Reading, MA

1:15 p.m. – 2:15 p.m.

Developing a Long-Term Partnership with Suppliers to Save Procurement Costs, DG470



Room: 311

SFOs: 1.0

Learn how to work with your sales representatives to establish a level of partnership and trust to ultimately meet your objectives of saving money in the procurement process while maintaining the highest quality of products and services.

Speakers: Chuck Luchen, Sr. Vertical Market Manager, K-12, Staples, Overland Park, KS ; Richard L. Gay, Purchasing Manager, Baltimore County Public Schools, Towson, MD;

DAILY SCHEDULE: SATURDAY

James R. Freeman, CFO, USD 259 Wichita, Wichita, KS;
 David Verdolino, Assistant Superintendent for Finance,
 Medway Public Schools, Medway, MA

1:15 p.m. – 2:15 p.m.

Effective Loss Control Management Through Incident Reporting, Investigation, and Follow-Up, DG334



CPE

Room: 308

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Management Advisory Services

Program Prerequisites: None

Advance Preparation: None

What do you or your staff do when an accident/incident occurs? How involved are your principals, supervisors, other management staff, and safety committees in helping your school district control losses? Participants will get an overview of three key steps in the loss control process—accident/incident reporting, accident/incident investigation, and accident/incident follow-up—and learn effective strategies and best practices to better manage or control their school district's losses.

Learning Objectives: 1. Discuss the role and benefits of an effective accident/incident reporting, investigation, and follow-up process or system. 2. Outline the accident/incident reporting process and identify best practices. 3. Detail the accident/incident investigation process and best practices. 4. Discuss the importance of accident/incident follow-up in preventing or reducing future losses.

Speaker: Tom Wohlleber, Assistant Superintendent, Middleton-Cross Plains Area School District, Middleton, WI

1:15 p.m. – 2:15 p.m.

Health Reimbursement Arrangements (HRAs)—Tax-Free Funds for Healthcare Costs, DG051



Room: 309

SFOs: 1.0

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Horace Mann

Horace Mann provides school districts and their employees with solutions designed to maximize savings, enhance benefits, and support the mission of public education. We offer a full line of personal insurance and retirement planning products, including 403(b) annuities. Stop by Booth 209 to learn more about our educational workshops on state retirement systems and financial literacy; our ability to offer your employees insurance products through payroll deduction; and our best-in-class Section 125 flexible benefit plans.



Health Reimbursement Arrangements (HRAs) are plans designed to help employers lower healthcare costs and to provide tax-free funds for employees for out-of-pocket medical expenses not covered by insurance. Learn about HRAs and post-Affordable Care Act health benefits strategies that can save the employer and the employee money.

Speakers: David Branback, Director of Market Development, National Insurance Services of WI, Inc., Brookfield, WI; Larry Stein, President, Retirement Plan Services of America, Inc., Marietta, GA

1:15 p.m. – 2:15 p.m.

How to Prepare and Submit a Comprehensive Annual Financial Report (CAFR) for ASBO's Certificate of Excellence (COE) Award, DG118



CPE

Room: 310

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Explore what a Comprehensive Annual Financial Report (CAFR) is and what it contains, including the required elements of the introductory, financial, and statistical

DAILY SCHEDULE: SATURDAY

sections. Participants will learn about ASBO's Certificate of Excellence program, including the program's submission process and timeline, and the benefits of preparing a CAFR and receiving the COE award.

Learning Objectives: 1. Describe a CAFR and each of its required elements. 2. Identify the steps for submitting a CAFR for the COE award and the timeline for each. 3. Explain the benefits of preparing a CAFR and of receiving the COE award for your school system. 4. Identify common deficiencies noted by COE program reviewers.

Speakers: Gary Heinfeld, Founding Partner, Heinfeld, Meech, & Co., P.C., Tucson, AZ; Sara Kirk, Audit Manager, Heinfeld, Meech, & Co., P.C., Phoenix, AZ; Mike Hamilton, Altoona, PA

1:15 p.m. – 2:15 p.m.

Leadership: The Correlation Between Great Leaders and Great Schools, DG067



Room: 305

SFOs: 1.0

Participants will examine in detail, practical, real-world examples of leadership to analyze the correlation between great leaders and great schools.

Speakers: Howard Jackson, Managing Director, HCSS Education, Macclesfield, UK; Matt Birch, Consultant, HCSS Education, Macclesfield, UK

1:15 p.m. – 2:15 p.m.

Successfully Managing the Complexities of School Nutrition Programs, DG214



Room: 303

SFOs: 1.0

School nutrition programs have become complex businesses with high customer expectations. Yet insufficient federal reimbursement rates, complex new regulations, and increased labor and food costs have all combined to push these programs into the perfect storm. This session

identifies best practices and efficiencies to help your district survive through turbulent times.

Speaker: Kathryn Wilson, Executive Director, National Food Service Management Institute, University, MS

1:15 p.m. – 2:15 p.m.

Who's Next?: Developing Leadership, DG769



Room: 304

SFOs: 1.0

How do you guarantee the long-term success of an organization? Participants will explore the process of succession planning and examine its relevance to their school district.

Speaker: Marvin L. Dereef, SFO, Deputy Chief Financial Officer, Fulton County Schools, Atlanta, GA

2:30 p.m. – 5:30 p.m.

Exhibit Hall Open

2:30 p.m. – 5:30 p.m.

Exhibit Hall Opening Reception

Exhibition Hall C

Sponsored by Horizon Software

8:00 p.m. – 11:00 p.m.

Affiliate Reception and Candidate Meet-and-Greet

Tequila Rain/Jillian's Boston (first floor)

145 Ipswich Street (next to Fenway)

Hosted by ASBO affiliate organizations in Arizona, Massachusetts, New Jersey, New Mexico, Ohio, Oklahoma, Oregon, Pennsylvania, and Wisconsin.

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

Join us at Tequila Rain/Jillian's Boston for a reception and candidate meet-and-greet. In this casual, upbeat venue, get to know current and future ASBO International board candidates and network with friends and colleagues. It's also a great place to watch some college football and the World Series! Appetizers and beverages will be provided.

The venue is only half a mile from the Hynes Convention Center and is located behind historic Fenway Park.

DAILY SCHEDULE: SUNDAY

Sunday, October 27

7:00 a.m. – 4:00 p.m.

Registration

Prefunction Hall C, Second Level

7:45 a.m. – 8:30 a.m.

General Session Coffee Break

Ballroom Prefunction, Third Level

Sponsored by Tyler Technologies

8:30 a.m. – 10:15 a.m.

Second General Session

Room: Ballroom B, Third Level

Business Meeting

Presiding: Terrie S. Simmons, RSBA, CSBO

Vice President, ASBO International

Installation of Officers

Brian L. Mee, RSBA, SFO

Immediate Past President, ASBO International

Presentation of the 2013 ASBO International

Pinnacle Awards

Don Friesz, Virco Board of Directors, Virco Mfg. Corporation

Brian True, Corporate Director, National Sales Group, Virco

Mfg. Corporation

Introduction of Speaker

Terrie S. Simmons, RSBA, CSBO

Second Keynote

“Humanitarian Design”



Emily Pilloton

Project H Design

Working at the intersection of design and public education, Emily will teach you how to access the untapped opportunities in

creative problem solving and hands-on building to improve lives, empower communities, and transform education.

ING U.S.

ING U.S. welcomes you to ASBO International’s 2013 Annual Meeting! We are proud to support your profession as a Strategic Partner of ASBO and the exclusive sponsor of the ASBO Meritorious Budget Award (MBA). We encourage you to visit us at Booth 301 to learn how we can help make retirement planning and administration easier for you and your employees. Also, to this year’s MBA recipients: Congratulations on your achievement! Respectfully, The ING U.S. Team



10:30 a.m. – 11:30 a.m.

Open Bylaws Meeting

Room: 302

10:30 a.m. – 12:30 p.m.

Professional Development Networking Group

By Invitation Only

Room: 207

10:30 a.m. – 2:15 p.m.

Exhibit Hall Open

10:45 a.m. – 12:00 p.m.

Clinic Tables

Room: 210

(See page 48 for complete listing.)

11:00 a.m. – 12:00 p.m.

Guest Program

One If By Land and Two If By Sea? Paul Revere Today!

Room: 208

Paul Revere comes alive in an innovative and entertaining educational program. David Conner, star of A&E’s *Biography of Paul Revere*, portrays the famous patriot, including tales of a teenage bell-ringer for the Old North Church to the drama of the Revolutionary years. He brings to life a famous figure while unraveling Longfellow’s beloved yet historically incorrect poem, “The Midnight Ride of Paul Revere.”

DAILY SCHEDULE: SUNDAY

Professional Development & Events

Daily Schedule: Sunday

11:30 a.m. – 1:00 p.m.

Certificate of Excellence Advisory Committee and Reviewers Meeting and Luncheon

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Dalton

12:00 p.m. – 1:00 p.m.

Lunch in the Exhibit Hall

Sponsored by BMO Financial Group

1:15 p.m. – 2:00 p.m.

Certificate of Excellence Award Recipients Reception

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Commonwealth

2:15 p.m. – 3:15 p.m.

Eagle Award Recipients Reception

By Invitation Only

Sheraton Boston Hotel, 3rd Floor, Berkley

2:15 p.m. – 3:30 p.m.

Gold Mine Sessions

Room: 210

(See page 51 for complete listing.)

DISCUSSION GROUPS (1-HOUR)

2:30 p.m. – 3:30 p.m.

10 Reasons Strategies Fail in School Districts and Schools, DG066



Room: 308

SFOs: 1.0

Strategic planning is vital to effective school and district operations. This high-impact, high-energy session uses real-world examples to illustrate how strategies can and have gone wrong in school districts and schools—and how to avoid failure.

Speakers: Howard Jackson, Managing Director, HCSS Education, Macclesfield, UK; Matt Birch, Consultant, HCSS Education, Macclesfield, UK

2:30 p.m. – 3:30 p.m.

IRS 403(b) and 457 Plans Update, DG403



Room: 304

SFOs: 1.0

The IRS now focuses on five major areas of compliance when auditing 403(b) plans, including written plan document requirements, universal availability, excessive deferrals, and early distributions. The IRS also performs compliance checks, which may lead to an audit. Learn how to be prepared.

Speaker: Daniel S. Gardner, Mid-Atlantic 403/457 Coordinator, Internal Revenue Service, Independence, OH

2:30 p.m. – 3:30 p.m.

Create a Legacy of Young Millionaires: Money Skills for High School Students, DG161



Room: 313

SFOs: 1.0

Beyond their struggles with acne and raging hormones, students suffer from something debilitating that you can correct: money ignorance. Most high school graduates lack essential finance skills, such as how to save, invest, and prudently spend money. Worse, they do not understand credit, the dangers of debt, or how to fund college. Learn how to share your “money talents” to educate and inspire young people to become financially successful.

Speaker: Edward Seibert, CFO, Sussex Technical School District, Georgetown, DE

2:30 p.m. – 3:30 p.m.

GASB Statements 63 and 65—A New Statement of “Net Position,” DG296



Room: 310

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

DAILY SCHEDULE: SUNDAY

Field of Study: Accounting Governmental
 Program Prerequisites: None
 Advance Preparation: None

Learn about the new reporting requirements of GASB Statements 63 and 65, which introduce the concepts of deferred outflows, deferred inflows of resources, and net position, and establish guidance and presentation standards in a statement of financial position.

Learning Objectives: 1. Define “deferred outflows” and “inflows of resources.” 2. Explain the meaning and significance of net position. 3. Discuss the new presentations on the Statement of Net Position. 4. Present examples of deferred outflows and inflows.

Speakers: Adriane Schrauben, Senior Manager, Hungerford, Aldrin, Nichols & Carter, P.C., Grand Rapids, MI; Phillip W. Saurman, Shareholder-Government Services, Hungerford, Aldrin, Nichols & Carter, P.C., Grand Rapids, MI

2:30 p.m. – 3:30 p.m.

Redefining Healthcare Consortia: An Innovative Solution to Managing Healthcare Costs, DG360



CPE

Room: 312

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Specialized Knowledge and Application

Program Prerequisites: None

Advance Preparation: None

Review the development and implementation of a healthcare consortium that uses more than pooled experience to reduce costs while partnering with labor members. Participants also will explore cost-reduction techniques and ways to manage the impact of healthcare reform from a local perspective. The session will include actual case studies to illustrate cost-reduction calculations that substantiate the shared experience.

Learning Objectives: 1. Discuss the development of a consortium that turned to the market to negotiate prescription costs. 2. Describe initiatives that can reduce medical and prescription drug costs without initial

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MetLife

Welcome to ASBO International’s 2013 Annual Meeting & Expo! MetLife is proud to sponsor ASBO’s Bridges to the Future program, which provides new school business administrators with opportunities for professional growth and development. We invite you to visit us at our Clinic Table on Sunday and at Booth 401 to learn how MetLife can provide the long-term support you need to help your employees enjoy a better life in retirement.

MetLife

modification of the insurer or plan design. 3. Discuss potential plan design changes to reduce costs and a collaborative method to implement changes with labor unions. 4. Outline options for mitigating cost increases due to healthcare reform.

Speaker: Stan Wisler, Chief Financial Officer, Montgomery County Intermediate Unit, Norristown, PA

2:30 p.m. – 3:30 p.m.

SmartIT: Strategically Managing IT Through Difficult Budgets, DG147



CPE

Room: 309

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

For most districts, the worst of the budget cuts may be over, but tight district and related IT budgets are expected to continue as the “new normal.” Additionally, districts face a variety of new IT initiatives, including Common Core online assessments and mobile device support. CoSN, with input from Gartner, developed the SmartIT Leadership Initiative to provide guidance to deal with this budget crisis. Panelists will provide insights into funding and managing these initiatives while continuing to provide existing

DAILY SCHEDULE: SUNDAY

services on continued tight budgets. School district personnel will share some tips and considerations from their experience. Join the discussion with your questions and suggestions.

Learning Objectives: 1. Explain how a district can view IT as a productivity center. 2. Outline tips for effective and efficient IT management. 3. Discuss the value of a holistic understanding of IT TCO. 4. Identify useful SmartIT resources.

Speakers: Kevin Supple, CFO, Francis Howell School District, St. Charles, MO; Rich Kaestner, Project Director, CoSN, Philomath, OR; Therese Mageau, Editorial Director, *T.H.E. Journal*, Irvine, CA

2:30 p.m. – 3:30 p.m.

To Bid or Not to Bid? That Is the Question, DG049



Room: 305

SFOs: 1.0

Participants will gain insights into how school bus contractors prepare RFPs and bids, and whether it is more advantageous to extend or negotiate an existing school bus contract or to solicit proposals for a new one. A comparison of district ownership vs. contracting out school bus operations will be included.

Speaker: John Spang, Assistant Superintendent for Finance and Operations, Avon Public Schools, Avon, CT

DEEP DIG SESSIONS (2-HOUR)

2:30 p.m. – 4:30 p.m.

A Leader's Guide to Diagnosing and Improving District Operations and Financial Health, DD206



Room: 302

SFOs: 2.0

Most school districts are looking for ways to improve efficiency and effectiveness. Few districts, however, have formal performance management systems for doing so.

This session presents a proven process for systematically diagnosing and improving the efficiency and effectiveness of district operations. Key tools include measurement, analytics, and benchmarking, as well as strategies for engaging employees in improvement efforts.

Speakers: Steven Pereus, President, Enlit, LLC, Toledo, OH; Carl Gruenler, Chief Business Officer, Santa Fe Public Schools, Santa Fe, NM

2:30 p.m. – 4:30 p.m.

For What It's Worth: Accurate Property Values for Insurance Purposes, DD459



Room: 301

SFOs: 2.0

The process of evaluating property for replacement/coverage has evolved significantly in recent years. No longer is it sufficient to simply roll old values over on inaccurate schedules and obtain the same rate year after year. This session explores the actual process and methodology involved in valuing property exposures, discusses new challenges school business leaders face during renewals, and outlines the specific data requirements that underwriters/reinsurers are looking for in submittals.

Speaker: Mark Hessel, Vice President, HCA Asset Management, LLC, Milwaukee, WI

2:30 p.m. – 4:30 p.m.

Managing Survival: Revenue Limitations vs. Mandated Expenditures, DD130



CPE

Room: 306

SFOs: 2.0

CPEs: 2.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Pennsylvania serves as a backdrop for an indepth look at the financial challenges that threaten school districts' survival. The critical fiscal issues in the state —pensions, property tax restrictions, personnel salaries, balancing

DAILY SCHEDULE: SUNDAY

budgets under deteriorating economic conditions—are widely reported across the nation. Economic conditions have left fewer dollars available for education at the local and state levels. Political ideologies as the basis of fiscal policy decisions have resulted in a diversion of public school resources to fund pensions, charter schools, and voucher plans. Explore strategies for managing the looming fiscal threats.

Learning Objectives: 1. Enumerate the severe impacts that pension obligations place on school districts. 2. Describe and quantify the cost burdens that mandated charter school payments have on school districts. 3. Identify and evaluate major areas for revenue enhancements and expenditure reductions through effective benchmarking procedures. 4. Discuss the critical fiscal obstacles facing school districts and how they will disrupt instructional programs as budget resources are diverted away from instruction to other mandated areas.

Speakers: Robert Schoch, Director, Business Administration, North Penn School District, Lansdale, PA; Timothy Shrom, Business Manager, Solanco School District, Quarryville, PA; William Hartman, Professor, Penn State University, State College, PA

2:30 p.m. – 4:30 p.m.

School Budgeting in Hard Times: Coping with Cutbacks and Critics, DD069



Room: 311

SFOs: 2.0

Budgeting today requires new thinking, better tools, and more productive processes. Learn about innovative ways to reduce or contain the budget without damaging the educational mission, develop performance-based budgeting techniques that improve quality, implement procedures to ensure the budget is driven by educational needs and strategic planning, anticipate unforeseen consequences of budget reductions, and meet demands to maximize productivity and improve results, even in hard times.

Speaker: William Poston, Emeritus Professor, Iowa State University, Johnston, IA

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Office Depot

As an ASBO Strategic Partner, Office Depot® is proud to provide the school and business resources to help you maximize productivity as well as your budget. Our cost-saving solutions include print procurement, furniture, and janitorial supplies. Visit us at Booth 308 to learn how we can help your organization succeed.

Office DEPOT

DISCUSSION GROUPS (1-HOUR)

3:45 p.m. – 4:45 p.m.

1:1 with the iPad: Mobile Devices for a New Age of Digital Learners, DG227



Room: 313

SFOs: 1.0

Students are growing up in a digital world, and as educators, it is our responsibility to keep them engaged and learning in the modalities to which they have become accustomed. Going into its fourth year with mobile devices, District 214 will share how the district made the move by shifting budget allocations, how the “flipped 1:1 model” has revolutionized the way 1:1 initiatives are implemented, and how instruction is steering the use of mobile devices. Participants will learn how to effectively roll out and sustain a mobile device program.

Speakers: Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL; Rudy Gomez, Technology Services Supervisor, Township High School District 214, Arlington Heights, IL

3:45 p.m. – 4:45 p.m.

Construction Litigation: A Survival Guide, DG466



Room: 308

SFOs: 1.0

DAILY SCHEDULE: SUNDAY

Construction litigation is a taxing and challenging experience. Learn what you need to know about the do's and don'ts of construction litigation and how to win your case before, during, and after the lawsuit is filed.

Speakers: Howard Metz, Partner, Robbins Schwartz, Chicago, IL; Ken Florey, Partner, Robbins Schwartz, Chicago, IL

3:45 p.m. – 4:45 p.m.

Grow Your Own: A Step-by-Step Guide to Succession Planning, DG216



Room: 310

SFOs: 1.0

Succession planning as a governmental accounting standard can be critical for successful operations in a public school setting. This session focuses on fostering confidence among all the stakeholders to enhance accountability; promoting and supporting required internal control standards; developing a cadre of leaders; inspiring a culture of vision and motivation; providing practical, wise, and efficient stewardship; promoting success through effective leadership; and more. Participants will leave with a step-by-step plan to strengthen in-house talent.

Speaker: Caron Snow, Retired School Business Official, Instructor/Consultant, Alto, NM

3:45 p.m. – 4:45 p.m.

Innovative Tools—Using Financial Solutions to Solve Aging Infrastructure Problems, DG455



Room: 303

SFOs: 1.0

In 2012–2013, the Lee's Summit R-7 School District in Missouri implemented a successful lease purchase initiatives program that allowed the district to purchase 106 alternative fueled buses and related infrastructure valued at nearly \$15.6 million, replace district-wide technology costing nearly \$5.5 million, and acquire a new industrial building for \$625K. Learn about this novel financing program that allowed the district to replace aging buses,

provided a long-term solution to rising fuel and maintenance costs, and use outside resources to lower local taxpayer expenditures.

Speakers: Ron Cox, Director of Purchasing and Distribution Services, Lee's Summit Missouri R-7 School District, Lee's Summit, MO; Thomas Kurucz, Deputy Superintendent of Operations, Lee's Summit R-7 School District, Lee's Summit, MO

3:45 p.m. – 4:45 p.m.

Survival Guide to Refreshing Your 403(b) and 457 Plans, DG210



CPE

Room: 312

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Personnel/HR

Program Prerequisites: None

Advance Preparation: None

Your retirement plans are not a “set it and forget it” item; they must adapt to meet your district's needs and satisfy regulatory requirements. Join a panel of experts to learn how to enhance your plans to attract and retain valuable employees, help educate your employees to prepare for their retirement needs, and understand the importance of procedures to operate and provide correction mechanisms for your plans. They also will address any recently issued or planned IRS regulatory guidance.

Learning Objectives: 1. Explain how to use retirement plan design options to meet the needs of your district. 2. Discuss why there is a need to educate employees on saving for retirement. 3. Describe ways in which school districts are addressing retirement education. 4. Outline the internal controls needed to identify and resolve operational issues that your retirement plans may encounter. 5. Detail key aspects of upcoming regulatory guidance impacting retirement plans.

Speakers: Phil Haslam, Divisional Sales Director, MetLife, Carlsbad, CA; Rick Schulenburg, Vice President of National Market Alliance, Horace Mann Companies, Springfield, IL;

DAILY SCHEDULE: SUNDAY

Curt May, Divisional Senior Vice President, AXA Equitable, Deerfield, IL; Linda Segal Blinn, Vice President, Technical Services, ING, Hartford, CT; Bob Architect, Vice President, Compliance and Market Strategy, VALIC, Amarillo, TX

3:45 p.m. – 4:45 p.m.

The Game-Changers: Radical, Transformational Challenges Confronting Traditional Education, DG966



Room: 304

SFOs: 1.0

We are on the brink of game-changing forces that will radically affect education and business and we need to be ready for them. This session highlights radical changes at all levels of education that have education and business implications. The challenges include competition from a rapidly expanding unregulated private sector; the proliferation of massive open online courses in higher education; the decline of union power, secure education jobs, and working conditions; the demise of traditional school campuses and hours; and internationalization and the significance of league-table test rankings.

Speaker: Karen Starr, Chair, School Development and Leadership, Deakin University, Melbourne, AU

3:45 p.m. – 4:45 p.m.

The GASB's New Pension Standards—What Are the Implications?, DG777



Room: 309

SFOs: 1.0

In 2012, the GASB issued new pension standards that will have a profound effect on information reported in school district financial statements. These standards are effective next year and the time for planning is now. This session will assist business officials in understanding the impact of the new standards and what needs to be done to prepare for the implementation of those standards.

U.S. Communities

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

www.uscommunities.org/education-purchasing



Speaker: David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT

3:45 p.m. – 4:45 p.m.

The Value of the SFO® Certification, DG533



Room: 305

SFOs: 1.0

This panel discussion, featuring current SFO certificants, examines the benefits of pursuing the SFO credential. Topics include the value to the individual, the value to the entities served by the certificant, and the value to the school business profession overall. Join a discussion exploring two questions: What's in it for me and my career? What's my next step toward SFO certification?

Speakers: Cynthia Reilly, Business Manager, Wautoma Area School District, Wautoma, WI; Edward Chabal, Business and Finance Director, Mt. Pleasant Community School District, Mt. Pleasant, IA

DAILY SCHEDULE: SUNDAY - MONDAY

7:00 p.m. – 10:00 p.m.

“Sláinte!” A Celebration Honoring the Current ASBO President from Colorado, Ron McCulley

McGreevy’s Irish Pub

911 Boylston Street

Hosted By Colorado ASBO

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

May good fortune be yours, may your joys never end. Join us at McGreevy’s as we celebrate the good fortune of the members of ASBO and honor the presidency of Ron McCulley with appetizers, beverages, and entertainment.

The venue is a traditional Irish Pub located across the street from the Hynes Convention Center. McGreevy’s is known as America’s first sports bar, home of the Dropkick Murphys, and the birth of the Red Sox Nation.

Monday, October 28

7:00 a.m. – 10:00 a.m.

Registration

Prefunction Hall C, Second Level

7:30 a.m. – 8:15 a.m.

Coffee Break

Boylston Hall Foyer, Third Level

Sponsored by Tyler Technologies

DISCUSSION GROUPS (1-HOUR)

8:00 a.m. – 9:00 a.m.

Are You Active or Reactive in Budget Planning?, DG985



Room: 309

SFOs: 1.0

Seeing the big picture throughout the budget planning process is critical to making informed decisions that affect the future of the district. If you have the right information at your fingertips, you can make better, faster, smarter decisions. The presenters will share a new approach to budget planning using web-based technology that

interfaces seamlessly with their accounting system. The budget process has allowed them to focus on the big picture.

Speakers: Beth Regulbuto, Assistant Superintendent for Business, Hampden-Wilbraham Regional School District, Wilbraham, MA; Christina Gagnon, Assistant Treasurer, Hampden-Wilbraham Regional School District, Wilbraham, MA; Tony Olson, Vice President of Marketing, MyBudgetFile.com, Stony Plain, AB, Canada

8:00 a.m. – 9:00 a.m.

Best Practices for Improving Financial Management and Operations Performance, DG958



CPE

Room: 311

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Optimizing a district’s financial management and operations performance is essential to minimizing the effects of funding reductions in school districts across the nation. How does one monitor key performance trends? What useful best practices have other districts implemented? How should information in various reports be interpreted? Learn best practices in monitoring and improving your district’s financial management and operations performance.

Learning Objectives: 1. Outline current best practices for monitoring and improving your district’s financial management and operations performance. 2. Outline the process of monitoring key performance trends. 3. Discuss useful best practices other school districts have implemented. 4. Explain how information in various reports may be accurately interpreted.

Speakers: Gwen Santiago, Former Executive Director, Texas ASBO, Austin, TX; Rebecca Bunte, CFO/Director of Professional Development, TASBO, Austin, TX; Thomas Canby, Director of Research and Technology, TASBO, Austin, TX

DAILY SCHEDULE: MONDAY

8:00 a.m. – 9:00 a.m.

Don't Reinvent the Wheel: Using the Electronic Resource Center (ERC), DG137



Room: 303

SFOs: 1.0

The Electronic Resource Center (ERC) is a website that provides an online database of best practices and resources across many aspects of school district operations. The ERC has gathered submissions from many different states. Learn how to use the database and how to post your own submissions.

Speaker: Jeffrey Ammerman, Director of Technical Assistance, PASBO, Harrisburg, PA

8:00 a.m. – 9:00 a.m.

Emergency Preparedness Using 21st Century Tools, DG087



CPE

Room: 312

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Management Advisory Services

Program Prerequisites: None

Advance Preparation: None

Imagine giving your local law enforcement the opportunity to see into every corner of your school buildings without the expense of surveillance cameras. Learn about a technology tool that allows you to view internal building images via the Internet and how one school district implemented this solution, which merges two distinct technologies—geo-referenced aerial imagery, and 360-degree IPIX photos—in a simple-to-use interface.

Learning Objectives: 1. Describe new technology tools that enhance emergency preparedness. 2. Discuss how to locate resources for emergency preparedness tools in a difficult K–12 budget climate. 3. Discuss hurdles and lessons learned in implementing emergency preparedness technologies.

Tweet ASBO: @asbointl #AME13

VALIC

VALIC welcomes you to Boston and the 2013 ASBO International AM&E. VALIC, as a leading provider of retirement plans to public K–12 school districts, has proudly sponsored ASBO International for over 20 years. Please visit us in the Exhibit Hall at Booth 501. VALIC 403(b) experts will also be participating in the Clinic Tables on Sunday at 10:45 in Room 210 and at the 403(b) panel discussion on Sunday at 3:45 in Room 312.

VALIC

Speakers: John D. Abbott, Deputy Superintendent, East Irondequoit Central School District, Rochester, NY; Joseph Sutorius, Director of Information Technology, East Irondequoit Central School District, Rochester, NY; Patrick O'Flynn, Sheriff, Monroe County, Rochester, NY

8:00 a.m. – 9:00 a.m.

Employment Law Grab Bag: Focus on Four Issues Affecting District Human Resources, DG178



CPE

Room: 308

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Business Law

Program Prerequisites: None

Advance Preparation: None

This session focuses on analyzing and solving problems increasingly encountered by HR managers in the context of four areas: addressing attendance and leave issues, addressing social media usage concerns, classifying employees and independent contractors, and managing the millennial generation.

DAILY SCHEDULE: MONDAY

Learning Objectives: 1. Identify and analyze risk associated with the HR risk areas of attendance and leave issues; social media usage concerns; classifying employees and independent contractors; and managing the millennial generation. 2. Outline solutions and policies that protect a district and its employees from the major areas of HR risk. 3. Discuss strategies for troubleshooting specific HR risk in the four major areas of concern.

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

8:00 a.m. – 9:00 a.m.

From Assessment to Infrastructure Software Installation, DG354



Room: 310

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Computer Science

Program Prerequisites: None

Advance Preparation: None

Learn about infrastructure assessment and audit—from license review and cost analysis to planning a staged installation of new and/or replacement functionality. Presenters will discuss assessing emerging technologies and reviewing an emerging software technology for infrastructure, networking, security, and telephony (VoIP) and its applicability, cost effectiveness, and efficiency for the K–12 sector. Strategies for minimizing hardware expenditures also will be discussed.

Learning Objectives: 1. Identify the steps involved in an infrastructure assessment and audit. 2. Discuss various strategies to save technology dollars. 3. Describe emerging technologies for the K–12 education sector.

Speakers: Chris Beyne, Director of Business Development, Atom AMPD, Volo, IL; Craig A. Schilling, Associate Professor, Department of Leadership, Concordia University, Northbrook, IL

8:00 a.m. – 9:00 a.m.

Technology and School Tax Elections: Victory Is a Tweet Away, DG001



Room: 313

SFOs: 1.0

Although school tax elections always lag behind innovations at the national level, many technology-based campaign strategies used in the November 2012 general election will find their way into your next school tax election. Whether it's a viral email driving voters to a YouTube endorsement, Google Adwords helping supporters find the campaign website, or Tweeting GOTV reminders, technology will be vital to successful campaigns in the future. Learn how to harness the power of technology in planning and executing the “big three” campaign functions: canvassing, communications, and get-out-the-vote.

Speakers: Don Lifto, Sr. Vice President, Springsted Incorporated, St. Paul, MN; J. Bradford Senden, Principal, Center for Community Opinion, San Ramon, CA; Trevor Peterson, Director of Business Services, Alexandria Public Schools, Alexandria, MN

8:00 a.m. – 9:00 a.m.

The Impact of the Affordable Care Act on Budgeting, Bargaining, and Compliance, DG369



Room: 302

SFOs: 1.0

Your district faces a critical moment relative to your healthcare program. Should you stay the course and see what happens? Should you “pay or play”? What are other districts doing? How do you know what's right for you? This session will help you make more confident strategic decisions surrounding your benefits and total rewards program. We will examine the impact of reform on your ability to project long-term costs, bargain in a responsible and informed manner, and comply with the law to mitigate penalties. Engage with experts on these topics and more, gaining valuable insight on how to make strategic long-term benefit decisions as a district.

DAILY SCHEDULE: MONDAY

Speakers: David Bein, Executive Director of Business Services, East Maine School District 63, Des Plaines, IL; Keith Friede, Area Vice President, Training and Organization Development, Gallagher Benefit Services, Inc., Bloomington, MN; Scott Baldwin, Managing Director, Public Entity & Scholastic Group, Gallagher Benefit Services, Inc., Itasca, IL

8:00 a.m. – 9:00 a.m.

The Importance of Facility Management to Core District Issues, DG033



Room: 305

SFOs: 1.0

This presentation discusses the importance of facilities management to the key issues facing school districts today, including student achievement, student safety, cost management, scarce resources, credibility, staff morale, and strategies to avoid the “bumps in the night.”

Speaker: Roger Young, Retired Assistant Superintendent for Finance/Facilities, FacilityMastersOnline.com, Andover, MA

DEEP DIG SESSIONS (2-HOUR)

8:15 a.m. – 10:15 a.m.

Managing FMLA and ADA Compliance for Ill and Injured Employees, DD175



Room: 306

SFOs: 2.0

Federal and state legislative bodies’ current approach to ill and injured employees has left a framework of criss-crossing rights and responsibilities. Where does a school business official begin? Learn how to take a reasoned and understandable approach to this tangled web of compliance obligations.

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

Virco

Welcome to ASBO International’s 2013 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 ASBO Pinnacle Awards for over 20 years. We invite you to stop by Virco’s Booth 103 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.



8:15 a.m. – 10:15 a.m.

Riding the Whirlwind: The End of Most Collective Bargaining in Wisconsin, DD034



Room: 304

SFOs: 2.0

Wisconsin school business officials had a unique view on the end of most public sector collective bargaining as it was enacted in early 2011. Officials across the state began creating new patterns for sharing governance, discussing compensation structures, and re-examining smart use of benefit dollars, while working to retain staff confidence. This session presents a range of issues and reactions, as well as some lessons learned about the positive and negative aspects of collective bargaining.

Speaker: Emily Koczela, Director of Finance, School District of Brown Deer, Brown Deer, WI

DAILY SCHEDULE: MONDAY

8:15 a.m. – 10:15 a.m.

Risk, Rage, and Remedies—Dealing with Emergencies, DD075



Room: 301

SFOs: 2.0

When organizations are asked after an emergency what needs improvement, communications is at the top of the list. Communications is a critical component of any response and can literally shape the outcome of an incident—and the education leader's career. This interactive session covers the core components of crisis communications and asks participants to delve into a communications tool chest to tackle an emergency. Be prepared to have your talents, tactics, and time management skills tested.

Speaker: Donna Gingera, CEO, Hour-Zero School Emergency Programs, Edmonton, AB, Canada

DISCUSSION GROUPS (1-HOUR)

9:15 a.m. – 10:15 a.m.

Automating Business Operations—A Case Study, DG026



Room: 309

SFOs: 1.0

Technology automation is a critical component to successful management in these difficult times. Learn how a small school district is implementing technology across its business operations and automating processes to meet increasing requirements through improved productivity and lower costs. This case study will identify the long-term objectives of the plan, the phased implementation approach, problems encountered, the current status of a paperless initiative, and benefits achieved.

Speaker: Stephen Martin, Business Administrator, Pelham School District—SAU 28, Pelham, NH

9:15 a.m. – 10:15 a.m.

Emerging Technology Showcase: Student Tracking, DG192



Room: 308

SFOs: 1.0

Through emerging technology utilizing swipe cards, districts can now automatically track student movement on and off the school bus, monitor route loads, and design their routes for maximum efficiency. The technology can reduce the number of parent calls into the transportation office and increase peace of mind. What's more, the same swipe card that the kids carry on the bus can be used for the point of sale system in the cafeteria and in the school library. Get an overview of this new technology.

Speaker: John Fahey, Senior Consultant, Tyler Technologies, Latham, NY

9:15 a.m. – 10:15 a.m.

Financing State Retirement Plans, DG632



CPE

Room: 302

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

A panel of state affiliate executive directors and leaders will discuss the economic crisis affecting state pension systems and proposals to manage unfunded liabilities.

Learning Objectives: 1. Identify the major global issues associated with funding state pension plans. 2. Discuss ways to address the potential fiscal crises associated with funding pension plans. 3. Propose a method to share information among ASBO affiliates, retirement plan executives, and legislators on the effects of public policy changes at the state level for existing and future school employees.

Speakers: Jay Himes, Executive Director, Pennsylvania ASBO, Harrisburg, PA; Mike Jacoby, Executive Director, Illinois ASBO, DeKalb, IL; David Varda, Executive Director, Ohio ASBO, Columbus, OH

DAILY SCHEDULE: MONDAY

9:15 a.m. – 10:15 a.m.

How to Improve Indoor Environmental Quality (IEQ) in Your School, DG534



Room: 303

SFOs: 1.0

Mooresville Consolidated School Corporation in Indiana has earned two national awards in recognition of their efforts to improve indoor environmental quality. The presenters will demonstrate how the school district got started, trained their staff, and quantified the results to reflect a better learning environment.

Speakers: Jim Diagostino, Assistant Superintendent for Business, Mooresville Consolidated School Corporation, Mooresville, IN; William Roberson, School Board President, Mooresville Consolidated School Corporation, Camby, IN

9:15 a.m. – 10:15 a.m.

Measuring Our Facilities Operations, DG453



Room: 313

SFOs: 1.0

Most of us believe we have a good facilities operation. But how do we measure and document its quality? What should we look at to determine our effectiveness? What are the meaningful metrics and what influences them? Learn strategies and ideas for increasing the effectiveness of the facilities department and communicating the role it plays in a school district's success.

Speaker: Scott Little, Associate Executive Director, Michigan ASBO, Lansing, MI

9:15 a.m. – 10:15 a.m.

Onsite Wellness Clinics: Saving Money and Increasing Employee Satisfaction, DG098



Room: 311

SFOs: 1.0

Combining an onsite wellness clinic with a consumer-driven health plan can save the school district health premium dollars and the employee out-of-pocket expenses. An onsite wellness clinic provides a vehicle for better employee health and attendance. Learn about the process from RFP, to implementation, to return on investment evaluation, and why onsite wellness clinics might be a good fit for your school district.

Speakers: Kimberly Fox, CFO, Tippecanoe School Corporation, Lafayette, IN; Marvin Ward, Consultant, MTW Consulting, Inc., Brownsburg, IN; Richard Sutton, Consultant, RE Sutton, Brownsburg, IN

9:15 a.m. – 10:15 a.m.

Procurement Cards: Minimizing Risk, Maximizing Reward, DG825



Room: 305

SFOs: 1.0

Procurement cards (p-cards) have become an important yet controversial piece in education finance. While they make purchasing easier, it is also easier for fraudulent charges to occur. Join two ASBO members who have worked on multiple sides of the process, as a school business official, as a third-party banking agent, and as a board of education member. The two, who have successfully supervised more than 100 p-cards in a school district, will discuss process implementation from the cardholder side to the business office audit.

Speakers: Jim Grammas, Vice President–Institutional Market, BMO Harris Bank, and School Board Member, Niles Elementary 71, Chicago, IL; Ronald O'Connor, Assistant Director of Finance, Batavia USD 101, Frankfort, IL; Holly Wallace, Member Relations Specialist, IASBO, De Kalb, IL

DAILY SCHEDULE: MONDAY

9:15 a.m. – 10:15 a.m.

Project Schoolhouse: Addressing the Challenge of Under-Utilized Urban School Buildings, DG187



Room: 310

SFOs: 1.0

Urban school districts across the country are facing the challenges associated with under-utilized school buildings. In 2011, Tulsa Public Schools in Oklahoma launched an effort to reduce the number of under-enrolled buildings, provide equity in program offerings, and gain operating efficiencies. Learn how the district garnered broad community support for the plan to close 14 schools, re-align grade levels, and adjust attendance boundaries.

Speakers: Patricia Williams, CFO, Tulsa Public Schools, Tulsa, OK; Stephoni Case, Program Manager, Oklahoma State University, Stillwater, OK

9:15 a.m. – 10:15 a.m.

School Facility Management—A Complete Solution, DG027



Room: 312

SFOs: 1.0

Learn how information technology helped one school district manage multiple buildings in multiple towns using a combination of contracted services and in-house employees. The session will address energy efficiency, applicable regulations, as well as key areas of responsibilities, including planning, implementation, and assessment of facility program goals and objectives. Also find out how an iPad deployment increased productivity and responsiveness to stakeholders.

Speakers: Marian Alese, Business Administrator, ConVal Regional School District, Peterborough, NH; Tim Grossi, Facilities Director, ConVal Regional School District, Peterborough, NH

DISCUSSION GROUPS (1-HOUR)

10:30 a.m. – 11:30 a.m.

Comprehensive Review of Playground Safety, DG976



Room: 310

SFOs: 1.0

This session offers a comprehensive review of all aspects of playground safety, including maintenance of existing playgrounds and their surroundings. The protocols discussed are adaptable to any school district playground.

Speakers: Cole Morris, Director of Facilities and Construction, Paradise Valley Unified School District, Phoenix, AZ; Jeff Barber, President, CPSI, Playground Specialists Inc., Emmitsburg, MD; Kenda Daria, President, CPSI, Safe and Sound Playgrounds, Queen Creek, AZ

10:30 a.m. – 11:30 a.m.

Digging Deep: Using Data Mining to Detect Fraud and Misuse of Public Monies, DG199



CPE

Room: 302

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Accounting

Program Prerequisites: None

Advance Preparation: None

“District Misuses \$2.8M in Public Monies,” “Business Manager Convicted of Embezzling \$400,000 from School Children,” “District Loses \$3M in Fraud Case Involving Fake Vendors.” Have you seen headlines like these in the news? Are you aware of key strategies for digging deeply into district financial data to detect fraud? This session presents tips and techniques for using data mining as a strategy to detect and prevent fraud and misuse of public monies. Learn methods for processing and analyzing data from accounts payable and payroll to increase revenue, cut costs, and detect fraud.

Learning Objectives: 1. Describe the most effective data mining practices. 2. Discuss the benefits of mining data

DAILY SCHEDULE: MONDAY

to protect your district from fraud and misuse of public monies. 3. Identify and describe tips and techniques for preventing fraud in a school district.

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

10:30 a.m. – 11:30 a.m.

Effectively Managing Transportation Contracts, DG015



Room: 308

SFOs: 1.0

Managing transportation contracts effectively is a critical component of providing safe, efficient, and cost-effective services. This session provides a case study of a contract management approach developed in the Province of Ontario that focuses on evaluating contract compliance and operator performance. Using this approach, school districts are better able to maximize the value and effectiveness of their transportation contracts. This approach also promotes a more collaborative and productive relationship between the district and its bus contractor.

Speakers: Lori Powell, Executive Director, Niagara Student Transportation Services, Thorold, ON, Canada; Maureen Heath, General Manager, Southwestern Ontario Student Transportation Services, London, ON, Canada

10:30 a.m. – 11:30 a.m.

GASB Update, DG280



CPE

Room: 312

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Accounting Governmental

Program Prerequisites: None

Advance Preparation: Familiarity with Previous GASB Regulations

The Governmental Accounting Standards Board (GASB) issued several new standards recently. In addition, GASB has undertaken many ongoing projects to

improve accounting and financial reporting for school districts. This session provides an update of changes and pending projects of GASB.

Learning Objectives: 1. Identify recent changes to accounting and financial reporting from the GASB. 2. Discuss how new standards will improve financial reporting for school districts. 3. Describe how new GASB projects will apply to school districts.

Speakers: David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT; David A. Vaudt, Chairman, Governmental Accounting Standards Board, Norwalk, CT; Martin J. Benison, GASAC Chairman, Financial Accounting Foundation, Norwalk, CT

10:30 a.m. – 11:30 a.m.

Meritorious Budget Award Discussion Group, DG142



CPE

Room: 306

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

Get answers to your questions and guidance regarding the MBA and *Pathway* to the MBA. This Discussion Group will focus on specifics of districts' situations and offer sound advice for those who are planning to submit as a first-timer or who want to improve current submissions.

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

Speakers: Gary Frisch, Assistant Superintendent of Business and Operations, Community Consolidated School District 181, Burr Ridge, IL; Ryan Ghizzoni, Treasurer/CFO, Fairview Park City School District, Fairview Park, OH

DAILY SCHEDULE: MONDAY

10:30 a.m. – 11:30 a.m.

Preparing for Common Core Online Assessments, DG148



Room: 309

SFOs: 1.0

If you are in a state or territory that adopted the Common Core State Standards, you likely are somewhere along the path of planning for implementation of next year's Common Core online student assessments. It is critical to review your district's capabilities to meet the student, staff, infrastructure, and device requirements for these online assessments. This session will cover the background of the Common Core State Standards and the state-led assessment consortia developing the aligned assessments; requirements and readiness data collection/reporting tool; the latest school readiness statistics; a transition road map and checklist; and resources.

Speaker: Rich Kaestner, Project Director, CoSN, Philomath, OR

10:30 a.m. – 11:30 a.m.

Special Education's Impact on School Business Operations: A First-Person Perspective, DG189



Room: 311

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

School administrators often get caught up in the myriad immediate tasks that need to be completed to keep their districts moving forward. This couldn't be more apparent than when it comes to helping and supporting students with special needs. And, when we think of children with special needs, we can't forget that we adults carry those same issues into our daily lives as school personnel. While it is impossible to cover every aspect of special education (SPED), this session provides an overview of some key areas that will personalize this whole topic and will help participants better support and understand these amazing children and their own colleagues.

Learning Objectives: 1. Identify the most common SPED diagnoses in schools. 2. Describe how your view of students and colleagues with special needs has changed as a result of this session. 3. Discuss the importance of your role in the school as it relates to all students and, in particular, those served by SPED.

Speakers: John Marcus, Director of Information Technology, Sharon Public Schools, Sharon, MA; Kenneth Wertz, Director of Maintenance and Operations, Sharon Public Schools, Sharon, MA; Paul Anastasi, Facilities Operations Manager, Newton Public Schools, Newton, MA

10:30 a.m. – 11:30 a.m.

Supporting Education Through a Better Classroom Environment, DG083



Room: 313

SFOs: 1.0

Learn how energy-efficient infrastructure upgrades at Old Colony Regional Vocational Technical High School reduced energy consumption by more than 50% while improving the learning and teaching environment and increasing energy and operational efficiency and sustainability. The upgrades represent a major step in transforming the high school into a high-performance building that links to its educational mission. An ongoing service and maintenance program helps ensure systems run at optimum levels.

Speakers: Bruce Kaiser, Business Manager, Old Colony Regional Vocational Technical High School, Rochester, MA; Leo McNeil, Regional Director-Comprehensive Solutions, Trane, Woburn, MA

DEEP DIG SESSIONS (2-HOUR)

10:30 a.m. – 12:30 p.m.

Developing Long-Term Capital Plans in a Collaborative Environment, DD094



Room: 301

SFOs: 2.0

DAILY SCHEDULE: MONDAY

Examine how the Durham Catholic District School Board developed its 10-year long-term capital and program plan by embarking on a planning process involving staff, trustees, and parents that centered around asking the important questions, developing relevant data, and using facilitated discussions to help set the goals and priorities for the board. This approach focused on programming and students' needs rather than numbers.

Speakers: Lewis Morgulis, Manager of Planning and Admissions, Durham Catholic District School Board, Oshawa, ON, Canada; Tim Robins, Superintendent of Facilities Services, Durham Catholic District School Board, Oshawa, ON, Canada

10:30 a.m. – 12:30 p.m.

What Do I Need to Do?—Healthcare Reform 2013 Updates, DD207



Room: 303

SFOs: 2.0

This session will address the U.S. Supreme Court decision on the Affordable Care Act, the resultant regulatory environment, and what will be required of educational organizations to mitigate risk and ensure necessary compliance amid significant change and uncertainty. Participants will examine the strategic business decisions that will need to be made to effectively manage scarce resources and maintain labor competitiveness as we look toward more regulatory mandates, the pending Congressional and presidential elections, and beyond. We'll also discuss the evolving negotiation dynamic given

shrinking budgets, an unpredictable legislative landscape, and competing local political pressures. Strategies to avoid possible penalties also will be discussed.

Speakers: Darcy Hitesman, Attorney, Hitesman & Wold, P.A., Maple Grove, MN; Amy Diedrich, Consultant—Employee Benefits, Marsh McLennan Agency, Minneapolis, MN; James R. Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN

10:30 a.m. – 12:30 p.m.

School Change from a Resource Perspective, DD082



CPE

Room: 305

SFOs: 2.0

CPEs: 2.0

Program Level: Basic

Field of Study: Finance

Program Prerequisites: None

Advance Preparation: None

This session, based on the book, *Leading School Change: Maximizing Resources for School Improvement*, covers the basic concepts, models, data-gathering techniques, and strategies for implementing school district change. Participants will walk away with a perspective of how the school business administrator can be a leader in the change process, as well as a copy of the book.

Learning Objectives: 1. Identify obstacles to change. 2. Outline various strategies for implementing school district change. 3. Describe how to acquire, align, and allocate resources to support school change. 4. Discuss some case studies on school district change.

Speakers: Craig Schilling, Associate Professor, Concordia University Chicago, River Forest, IL; Margaret Trybus, Associate Dean, Concordia University Chicago, River Forest, IL

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Standby Speaker Carolyn Warner
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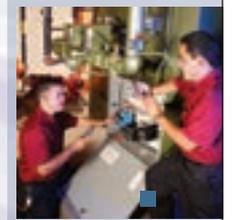
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CLINIC TABLES

Sunday, October 27

10:45 a.m. – 12:00 p.m.

Room: 210

A Clinic Table session features roundtables, each with a discussion topic presented by exhibitors and focused on a specific aspect of school district management. Session participants change tables every 20 minutes, with 10 people at a table each time. Presenters direct the discussion and serve as a source of information on topics such as health-care reform, 403(b) retirement plans, mobile devices in schools, purchasing card programs, and budget planning.

TABLE 1

403(b) Answers and Updates

Speaker: Richard Turner, Deputy General Counsel, VALIC, Houston, TX

TABLE 2

E-commerce Options to Centralize, Save, and Monitor Purchasing Compliance

Speaker: Alexis Turner, Program Manager, U.S. Communities, Gaithersburg, MD

TABLE 3

Understanding Print Procurement in the K-12 Environment

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

TABLE 4

How a Voluntary Benefits Program Can Help You Attract and Retain Employees and Manage the School Budget

Speakers: Doug Peters, Assistant Vice President, MetLife Resources, Somerset, NJ; Garrett Sacken, Divisional Sales Director, MetLife Resources, Somerset, NJ

TABLE 5

Run Your Retirement Numbers with Our Informative Tools

Speaker: Ketul Thaker, Vice President of Industry Relations, ING, Windsor, CT

TABLE 6

Keeping Your 403(b) Plan Compliant: The IRS Fix-It Guide and How to Maintain a Plan Document

Speakers: Jim Yale, Vice President, School District Marketing Alliance, Horace Mann Insurance Co., Springfield, IL; Kelly Ruwe, Director, School District Marketing, Horace Mann Insurance Co., Collinsville, IL

TABLE 7

Tailoring the Best Benefits Package for You and Your Employees

Speaker: Curt May, Vice President and National Sales Manager, 403b/457 Business Markets, AXA Equitable, New York, NY

TABLE 8

What You Need to Know Today About Tracking and Calculating Employee Hours for Healthcare Reform

Speakers: Brian Rossen, Healthcare Reform Consultant, American Fidelity Assurance Company, Madera, CA; Monica Schermier, Healthcare Reform Consultant, American Fidelity Assurance Company, Granger, IN

TABLE 9

Save Resources, Time, and Money with Staff Absence and Maternity Insurance and Lead Well Programs

Speaker: John Brady, President, AIS, New York, NY

TABLE 10

Trending: Mobile Devices in School Districts

Speaker: Lee Marquis, Director of Marketing, ERP & School Division, Tyler Technologies, Yarmouth, ME

TABLE 11

Renewable Energy in the District and in the Classroom

Speakers: Jamie Sitter, Sr. Marketing Specialist, Siemens, Buffalo Grove, IL; Steve Hoiberg, Global BT Market Manager, Education Markets, Siemens, Buffalo Grove, IL

TABLE 12

IRS Audits of 403(b) Plans

Speaker: Phil Hahn, Regional Vice President, Security Benefit, Leominster, MA

TABLE 13

Integrating Online Payments and Cashless Solutions

Speaker: Tina Bennett, Vice President, Horizon Software, Atlanta, GA

TABLE 14

Innovations in Space Management

Speaker: Lois S. Rouder, Sr. Brand Strategy Manager, Education Segment, Grainger, Lake Forest, IL

TABLE 15

How to Benefit from Purchasing Card Programs During Tough Economic Times

Speaker: David Wintczak, Vice President, Senior Relationship Manager, BMO Financial Group, Chicago, IL

TABLE 16

The Nutritional and Financial Implications of a Changing USDA Regulatory Environment

Speakers: Linda Scurman, Director, Nutrition and Menu Development, ARAMARK Education, Philadelphia, PA; John Kandemir, Vice President, Marketing, ARAMARK Education, Philadelphia, PA

TABLE 17

Free WellCard Health

Speakers: Greg Reece, President, Benefits Concepts LLC, Tucson, AZ; Adam Saloman, Associate Sales Manager, WellDyne Rx, Centennial, CO

TABLE 18

Budget Planning Improvement Through the Use of Technology

Speaker: Tony Olson, Vice President of Marketing, MyBudgetFile.com, Stony Plain, AB, Canada

TABLE 19

Best Business Practices for Managing Substitute Labor

Speaker: Pamela Ely, Product Manager, CRS Advanced Technology, Montoursville, PA

TABLE 20

Should We or Shouldn't We? Understanding What Roth 403(b) Will Mean to Employees

Speaker: David Blask, Sr. Pension Consultant, Lincoln Investment Planning, Inc., Wyncote, NJ

TABLE 21

Building Effective Public-Private Partnerships

Speakers: Richard Roque, Doctoral Student, Menlo/American International College; Nicholas Young, Superintendent, South Hadley School District, South Hadley, MA/American International College

TABLE 22

The Benefits of Contracted Student Transportation

Speaker: John BeGasse, Senior Director of Business Development, First Student, Inc., Cincinnati, OH

TABLE 23

Business to Building Systems Integration

Speaker: Gwenn McDaniel, Sales Director, Education Vertical Market, Systems NA, Johnson Controls, Milwaukee, WI



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GOLD MINE SESSIONS

Sunday, October 27

2:15 p.m. – 3:30 p.m.

Room: 210

The Gold Mine Sessions feature roundtables, each focused on a different aspect of school district management. Participants change tables every 20 minutes, with 10 people at a table each time.

TABLE 1

SFO® Certification: When Will You Earn It?

Come learn about the Certified Administrator of School Finance and Operations® (SFO®) program from current SFO-certified professionals and members of ASBO's Certification Commission. Not sure how to prepare for the exam or want to learn more about the steps to earn the certification? Visit this Gold Mine session for a chance to have your questions answered in a small-group setting.

Speakers: Certification Commission

TABLE 2

School Business: It's a Wonderful Life

Join us as we address all the topic areas of school business administration. Learn how to engage workforces and discuss how each area of school business management relates to student learning.

Speaker: Ellen R. Skoviera, Assistant Superintendent for Business Operations, Leander Independent School District, Leander, TX

TABLE 3

Clobber Ignorance and Inspire Action: Arm Your Community with School Finance Literacy

Jettison that PowerPoint and learn how the Wisconsin ASBO is deploying a statewide tool to teach school finance literacy. In just over 18 months, hundreds of school board members, administrators, and community members have taken part in an activity designed to teach school financial literacy.

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Speakers: Scot Ecker, Associate Vice President and Controller, Carthage College, Kenosha, WI; Dan Romano, Senior Vice President, Forecast5 Analytics, Inc. and Co-Owner, Edventures in Learning, Inc., Toledo, OH

TABLE 4

How to Prepare a Comprehensive Annual Financial Report

Learn about the ASBO Certificate of Excellence in Financial Reporting recognition program for the Comprehensive Annual Financial Report (CAFR). Receive practical information about the application and submission process, common mistakes made in CAFRs, and hints to ensure a successful submission.

Speakers: ASBO International Certificate of Excellence Advisory Committee

TABLE 5

Energy Star's Cash Flow Opportunity Calculator

Energy Star's Cash Flow Opportunity Calculator is easy to use and can help your district determine 1) how much new energy efficiency equipment can be purchased from the anticipated savings; 2) if this equipment purchase should be financed now or if it is better to wait and use cash from a future budget; and 3) whether money is being lost by waiting for a lower interest rate.

Speaker: Kudret Utebay, Senior Associate, The Cadmus Group, Inc./ENERGY STAR, Arlington, VA

GOLD MINE SESSIONS

TABLE 6

ASBO International's Meritorious Budget Award Programs

Learn about the Meritorious Budget Award (MBA) and *Pathway* to the MBA programs and what it takes to earn this prestigious recognition. This presentation will include practical advice on how to assemble data and complete the application, and how your district will benefit from the process, which includes peer review.

Speakers: ASBO International Meritorious Budget Award Advisory Committee

TABLE 7

Tackling a Website Redesign

When parents, community members, reporters, or businesses have questions about your district, they are likely to visit your website before giving you a call. Does the website provide the information they are looking for? If you aren't sure, it's probably time to think about an update. ASBO recently did a complete overhaul of the association's website—come learn how the association decided what content to include, where, and how. You'll learn about wireframes, search engine optimization, user analysis, and the keys to creating a website that not only meets visitor needs, but reflects the purpose and priorities of the organization.

Speaker: Siobhan McMahon, Assistant Executive Director, ASBO International, Reston, VA

TABLE 8

Working During a Period of Financial Austerity

This session will involve SBMs/SBOs from the UK, Australia, Canada, the United States, and, potentially, South Africa. The session will build on the previous Discussion Group, enabling colleagues to share openly the problems and issues they are confronting while exchanging good and effective management practices.

Speaker: Trevor Summerson, Former School Business Director, National College for School Leadership, Nottingham, UK

TABLE 9

Using the iPad to Create a Sustainable Ecosystem without Sacrificing the Budget

Going into its third year with mobile devices, Township High School District 214 is using instruction to drive the use of the iPad. Learn why the district chose the iPad as the most effective instructional tool and how the district is moving from a traditional desktop computing environment to mobile devices by shifting budget allocations. Learn how to effectively rollout and sustain a mobile device program without spending extra funds and how to overcome obstacles such as deployment and licensing of apps.

Speakers: Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL; Rudy Gomez, Technical Systems Supervisor, Township High School District 214, Arlington Heights, IL; Debra Parenti, Associate Superintendent of Finance and Operations, Township High School District 214, Arlington Heights, IL



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GUEST ACTIVITIES



Registered guests are welcome to attend the General Sessions, visit the Exhibit Hall, and enjoy the evening receptions alongside full registrants. Guests are not permitted to attend educational sessions. The following programs have been designed specifically for guests.

Saturday, October 26

11:00 a.m. – 12:00 p.m.

Guest Program

Book Club: *The Bostonians*

Room: 208

(See page 17 for complete listing.)

Sunday, October 27

11:00 a.m. – 12:00 p.m.

Guest Program

One If By Land and Two If By Sea? Paul Revere Today!

Room: 208

(See page 25 for complete listing.)

MAKE A DIFFERENCE!

ASBO's Positive Impact Program gives you the opportunity to make a difference in our annual meeting host city and in the lives of its citizens. This year, Massachusetts ASBO is raising money for the Life is good Kids Foundation, a Boston-based nonprofit whose mission is to help kids overcome poverty, violence, and illness with the power of joyful play. The Life is good Playmakers provide innovative training support to child care professionals who positively impact thousands of children. Learn more about the Life is good Kids Foundation from our First General Session speaker, Steve Gross, the organization's executive director and chief playmaker, then join MASBO and ASBO International in making a donation to support their mission.

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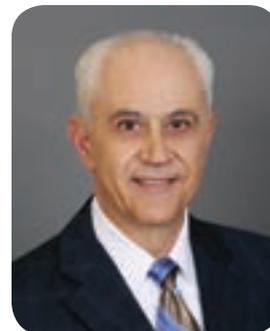
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2013 Eagle Awards

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together in the Global School Business Network. More than a member directory, the Global School Business Network is an interactive online community of school business officials that allows you to leverage your most powerful resource—your colleagues. Interact with professionals on a whole new level. Join a discussion, get answers, share documents, download templates, and access your professional network from anywhere in the world.

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ASBO International's Professional Skills Assessments are comprehensive skills evaluations created to help you review school business management practices. Use the assessment documents available on ASBO's website to discover your strengths as a school business official and identify opportunities for professional development.

Legislative Action Center

ASBO International's Legislative Action Center is one site that every school manager needs to bookmark. Daily updates make it an indispensable online resource for government relations. Find contact information for elected officials, including President Obama, members of Congress, governors, state legislators, and local officials.

ASBO Buyer's Guide

The ASBO Buyer's Guide is a digital purchasing resource that allows school business officials to search more than 225 categories and find the relevant products and services they need—without the unrelated clutter of a general Internet search engine. Search the vendors and bookmark companies that are of interest to you—making them easier to locate on subsequent buyer's guide visits.

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ASBO INTERNATIONAL

CAREER CENTRAL

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- Get professional tips to write a winning resume.
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EXHIBIT HALL HIGHLIGHTS

EXHIBIT HALL HOURS

Saturday: 2:30 p.m. – 5:30 p.m.
 Sunday: 10:30 a.m. – 2:15 p.m.
 (Lunch 12:00 p.m. – 1:00 p.m.)

Saturday, October 26

1:30 p.m. – 1:45 p.m.
Exhibitor Orientation & Welcome
 ASBO Booth 901

2:30 p.m. – 5:30 p.m.
Exhibit Hall Opening Reception
Sponsored by Horizon Software

2:30 p.m. – 5:30 p.m.
Professional Photos
 Exhibit Hall Booth 1012
Sponsored by AIS

Sunday, October 27

10:30 a.m. – 2:15 p.m.
Professional Photos
 Exhibit Hall Booth 1012
Sponsored by AIS

12:00 p.m. – 1:00 p.m.
Lunch in the Hall
Sponsored by BMO Financial Group

12:00 p.m. – 2:15 p.m.
Meet Paul Revere
 Paul Revere comes alive! Meet David Connor, star of A&E's *Biography of Paul Revere*, as he portrays the infamous patriot in an interactive and entertaining Exhibit Hall program.

Saturday & Sunday

Recharge at the Relaxation Station
 Exhibit Hall Booth 615
 Take a moment to relax with a complimentary upper body massage provided by professional massage therapists. Visit Booth 400 to pick up a massage ticket.
Sponsored by ARAMARK Education

Wear Your ASBO Pride
 The ASBO Store is in the Exhibit Hall by Booth 1013. Visit during Exhibit Hall hours to pick up gifts for your staff and colleagues and souvenirs for yourself.

ASBO BOOTH, BOOKSTORE, AND PIN TRADING ZONE Exhibit Hall Booth 901

The ASBO Bookstore features top-selling publications, ASBO staff to assist you with conference information, and ASBO program and membership details. Visit the booth daily to turn in your Exhibit Hall game cards for a chance to win cash prizes!

SFO® Your Certification Information Center
 Thinking about obtaining ASBO's Certified Administrator of School Finance and Operations® (SFO®), the only nationally recognized school business certification program in the United States and Canada? Visit the ASBO booth to talk to SFO certificants, browse books that will assist you in test preparation, and get your questions answered.

Exhibit Hall Game
New this year! Network with partners and exhibitors by participating in this year's Exhibit Hall game. Find your game card in your registration bag and set out to learn about the products and services these valued companies provide by visiting their booth. During your one-on-one conversations with exhibitors, collect as many raffle tickets as you can so you have more chances to win! It is up to the exhibitors to decide how many raffle tickets you receive, so have your questions about their products and services ready, and plan to gain some knowledge!
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Booth 416

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Waterford, MI 48328

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Aesop—Frontline Technologies, Inc

Booth 405

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Exton, PA 19341

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with Aesop, a breakthrough automated substitute placement and absence management system that serves more than 3,600 districts across the United States. Frontline has continued its development of innovative solutions with VeriTime, an automated time and attendance management system integrated with Aesop.



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Monroe, CT 06468

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Tampa, FL 33634



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ING U.S.

Booth 301

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Booth 904

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Johnson Controls delivers products, services, and solutions that increase energy efficiency and lower operating costs in buildings for more than one million customers. Operating from 500 branch offices in more than 150 countries, we are a leading provider of equipment, controls, and services for heating, ventilating, air conditioning, refrigeration, and security systems. We have been involved in more than 500 renewable energy projects, including solar, wind, and geothermal technologies.

Kelly Educational Staffing

Booth 721

132 Fairway Landings Dr.
Canonsburg, PA 15317

Kelly Educational Staffing is a complete education staffing solution provider and is the largest provider of substitute teachers nationwide. We are dedicated to helping districts save money and operate at peak capacity by fulfilling all staffing needs, including substitute teachers as well as non-instructional staff. Kelly Educational Staffing has proudly provided staffing to schools since 1997 with a daily placement rate greater than 98%. Stop by and discuss how we can save your district money.

KEV Group

Booth 605

6221 Riverside Dr., #102
Irving, TX 75039

KEV Group specializes in software solutions that ensure the secure and efficient management of school activity funds and has consistently set the industry standard for almost two decades. Over 6,300 schools work with our industry-leading school-level accounting, online payment processing, auditing, and student obligation-tracking software. Our easy-to-use software, painless implementation, and unique personalized training make choosing KEV Group's products one of the best decisions a district can make.

Keystone Purchasing Network

Booth 226

90 Lawton Ln.
Milton, PA 17847

The Keystone Purchasing Network (KPN) is a cooperative purchasing program offering schools publicly and competitively bid contracts. KPN features athletic contracts with top name brands, including FieldTurf & Beynon for sports surfaces, Musco Lighting for field and parking lot lighting projects, and Sportsfield Specialties for all sports equipment needs. KPN offers Demco library supplies, Hertz furniture systems, Shaw carpet and hard surface flooring, vehicles, power cleaning equipment, portable and modular buildings, kitchen equipment, and document management solutions.

Longleaf Solutions, LLC

Booth 430

350 Town Center Ave., Ste. 202
Suwanee, GA 30024

Dedicated to revolutionizing education and backed by decades of experience building K-12 solutions, Longleaf Solutions, LLC has developed a powerful, easy-to-use learning analytics and operational efficiency suite for education. Longleaf's flagship solution, BaselineEdge, delivers a set of tools to help educators improve student achievement, teacher effectiveness, and operational performance through data analysis, peer benchmarking, educational research, and action planning.

Magic Hour Communications

Booth 523

11 Union Ave., Ste. 200
Bala Cynwyd, PA 19004

Magic Hour Communications partners with schools and colleges to dramatically improve the effectiveness of their communications through the design and development of advanced

websites. We go beyond the narrow focus of "design" or "technology" firms to provide an award-winning communication solution that includes website strategy, digital marketing consultation, as well as design and technology.



MetLife Resources

Booth 401

400 Atrium Dr.
Somerset, NJ 08873

MetLife Resources is a division of Metropolitan Life Insurance Company that specializes in providing retirement plan products and other financial products and services to healthcare, educational, governmental, and other nonprofit employers and their employees. For more information, visit our website: www.metlife.com/mlr

MidAmerica Administrative & Retirement Solutions, Inc.

Booth 801

211 East Main St., Ste. 100
Lakeland, FL 33801

MidAmerica provides innovative employee benefit programs to over 2,200 plan sponsors and close to one million employees across the country. In addition to our 403(b) & 457 TPA, Special Pay, 3121, HRA and other employee benefit programs, we recently introduced our newest service offering, Affordable Care Act Compliance Reviews, designed as an affordable way to find out if your health plan meets the new 2014 regulations.

Mosse & Mosse Associates

Booth 324

50 Salem St., Bldg. B
Lynnfield, MA 01940

Mosse & Mosse Associates offers in-depth employee benefits consulting and brokerage services to over 75 school and municipal organizations throughout New England. While we are a leader in group long-term disability solutions, our firm assists school districts in making strategic decisions for all of their benefit programs, including health insurance, dental plans, and basic and optional life programs. We also provide various voluntary programs, including auto, home, vision, and legal services.



MyBudgetFile.com

Booth 408

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

MyBudgetfile.com allows you to create, store, and modify budgets online, using a secure, web-based program that integrates seamlessly with your existing finance software. It lets you design custom budgets that meet your organization's needs, keeping you in charge of how your budget works and who has access to it. Any changes you make are applied in real-time, so you can make critical decisions faster and more confidently knowing that your data is always accurate and up-to-the-minute.

National Alliance for Insurance Education & Research

Booth 810

3630 N. Hills Dr.
Austin, TX 78731

With a legacy that began in 1969, The National Alliance is recognized across the nation as the best source for continuing education credits,

designation opportunities, and concrete knowledge for insurance and risk management professionals of every experience level. The Certified School Risk Managers program boasts five courses taught by school professionals aimed at educating school administrators on the risk management process from risk identification to administration and monitoring a program.

National Food Service Mgmt. Institute

Booth 808

PO Drawer 188, South Loop Rd.
University, MS 38677

National Food Service Management Institute (NFSMI) offers free education, training, and research resources that help school nutrition professionals build quality programs. As the training arm for the USDA, our materials and training are easily accessible by various methods. FREE Training + FREE Resources = Healthy Food & Happy Students.

National Insurance Services

Booth 800

250 South Executive Dr., Ste. 300
Brookfield, WI 53005-4272

National Insurance Services (NIS) is a leading provider of group insurance and retiree benefits for school districts. As a specialist in public sector employee benefits since 1969, NIS helps employers align their unique and complex benefit challenges with the hard-to-understand language and practices of insurance and investment products. Our expertise results in innovative benefit solutions that help use taxpayer dollars efficiently, build bridges between bargaining units and committees, and avoid employer liability and grievances.

National School

Transportation Association

Booth 321

122 S. Royal St.
Alexandria, VA 22314

NSTA has been the voice for private contractors, manufacturers, and suppliers for more than 40 years. Our mission is to provide school transportation professionals with the tools and resources they need to make school buses safe, affordable, and efficient nationwide. We believe that with the right information, training, and resources, school transportation professionals can strengthen their businesses and provide higher quality service to school districts.

North America Central School Bus

Booth 902

1818 W. Jefferson St. 2nd Fl.
Joliet, IL 60435

We offer complete contract student transportation services including to/from school, regular and special ed., and charters.



Office Depot, Inc.

Booth 308

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

Omni Group, Inc.

Booth 524

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

We offer 403(b) retirement savings plan administration and compliance monitoring for governmental and nonprofit employers.

Paitec USA

Booth 900

15951 S.W. 41st St., Ste. 400
Fort Lauderdale, FL 33331

If your organization is distributing or mailing its grade reports, class schedules, accounts payable or payroll checks, tax forms, and other important single-page documents in an envelope, Paitec USA can help you become a greener mailer and save you time and money with single-page self-mailers processed in our affordable line of pressure seal machines that operate as a standalone machine or can be interfaced with your printers for an automated print-to-seal operation.

Payless ShoeSource

Booth 913

3231 SE Sixth Ave.
Topeka, KS 66607

The world's premier provider of slip-resistant footwear, we are the only company that offers 3,500 stores, online company purchasing options, and convenient payroll deduction programs. Call us at 800.231.9415 to learn more!

PEPPM

Booth 224

90 Lawton Ln.
Milton, PA 17847

PEPPM is a national technology bidding and purchasing program for K-14 schools and agencies, libraries, four-year colleges and universities, government agencies, and other nonprofit organizations. PEPPM aggregates buyers and demand across the country to get the lowest prices while also saving time and money on

the bidding process for eligible buyers. Go to www.peppm.org to start saving time and money now.

Plan Member Services Corporation

Booth 6

6187 Carpinteria Ave.
Carpinteria, CA 93013

PlanMember Services, for nearly three decades, has provided retirement planning, education, and investment services to school districts and nonprofit organizations and their employees. PlanMember serves over 3,000 employer groups nationwide through the PlanMember Model Plan, aggregating mutual fund, fixed, and variable annuity programs under one application, statement, call center, and payroll remittance. To learn more about PlanMember's model plan, financial literacy, compliance self-check, or complimentary plan and savings analysis, call 800.874.6910 or visit www.planmembermodelplan.com

PMA Financial Network, Inc.

Booth 425

2135 City Gate Ln. 7th Fl.
Naperville, IL 60563

PMA Financial Network (PMA)—a trusted financial partner to over 1,450 public entities—offers a diverse lineup of customized financial solutions, including cash flow, bond proceeds management, and long-term financial forecasting services. PMA is a leading provider of administration, distribution, and fixed-rate investment program services to seven local government investment pools.

Premier Inc

Booth 705

1349 Tilton Dr.
Franklin, TN 37067

Provista

Booth 603

220 Las Colinas
Irving, TX 75039

Provista is a leading supply chain improvement company and a strategic partner to more than 2,000 schools in early learning centers and primary and secondary schools across the country. We help you achieve substantial savings on the supplies and services you use. You'll have more than \$43 billion in annual purchasing power working on your behalf, without paying fees or making long-term commitments. And you'll have access to a portfolio of nearly 1,000 contracts.

The Public Group

Booth 115

PO Box 50676
Provo, UT 84605

The Public Group provides web-based solutions to government agencies striving to improve the effectiveness and efficiency of their surplus, e-procurement and contract management programs. The Public Group enables agencies to increase public participation, streamline operations, comply with all regulations, and establish an audit trail. Let's talk about your needs and our solutions.

PublicSchoolWORKS

Booth 327

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Cincinnati, OH 45208

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Real Asset Management

Booth 914

50 Franklin St. 4th Fl.
Boston, MA 02110

SafeSchools

Booth 404

7434 Montgomery Rd.
Cincinnati, OH 45236

Ready to make your district an even safer place to work and learn? Stop by Booth 404 to learn why thousands of districts trust us as their safety partner of choice. Our suite of 100% school-focused products is proven to save your district time and money while increasing safety and compliance. We offer online solutions for staff training, bullying reporting and tracking, MSDS management, and accident tracking. We look forward to working with you!

School Innovations & Achievement

Booth 321

5200 Golden Foothill Pkwy.
El Dorado Hills, CA 95762

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The School Nutrition Association

Booth 12

120 Waterfront St., Ste. 300
Oxon Hill, MD 20745

The School Nutrition Association (SNA) is a nonprofit professional organization representing more than 55,000 members nationwide who provide high-quality, low-cost meals to students. SNA provides members with education and training opportunities; sets standards through certification and credentialing; transmits legislative and industry information; and represents the nutritional interests of students. With 52 state affiliates, hundreds of local chapters, and thousands of school nutrition members and industry partners, SNA brings a firsthand perspective to child nutrition issues.

School Planning & Management

Booth 722

3240 E. Union Hills Dr., Ste. 131
Phoenix, AZ 85050

School Planning & Management is the industry's leading publication for facilities, security, technology, and business in K-12 education. More than 78,000 top-level decision makers in K-12 school districts, colleges, and universities nationwide depend on *SP&M* and its sister publication *College Planning & Management*, for the latest news, developments, and trends in education.

SchoolDude.com

Booths 205, 304

11000 Regency Pkwy., Ste. 200
Cary, NC 27518-8518

SchoolDude, the market leader in education enterprise asset management,

helps public and private schools, colleges, and universities save time and money. Our cloud solutions streamline IT, facilities, and business operations, and provide institutions with a lower cost of ownership, scalable solutions, lifetime support, and benchmarks for success.



Security Benefit Group

Booth 407

5482 Antler Run
Littleton, CO 80125

Security Benefit is a 121-year-old, Kansas-based retirement company that has become one of the fastest-growing retirement savings and income companies in the industry. Through a combination of innovative products, exceptional investment management, and a unique distribution strategy, we have become a leader in a full range of retirement markets and wealth segments. We specialize in helping educators travel down the path To and Through Retirement®. We can help your employees move in the right direction. Visit www.securitybenefit.com

Seon

Booth 222

111-3B Burbridge St.
Coquitlam, British Columbia Canada
V3K7B2

Seon is proud to be the world's #1 supplier of mobile surveillance for the bus and coach industry (IMS Research, 2011). We manufacture world-class video surveillance systems that help capture, record, view, and wirelessly download on-board security footage quickly and reliably. Our fleet management solutions such as live

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Sharp Electronics Corporation

Booth 626

1 Sharp Plaza
Mahwah, NJ 07495

Sharp offers a full line of document systems to meet your needs, improving business processes with high-volume power for production environments or compact desktop units. Sharp MFPs provide copying, printing, scanning, and faxing to manage your information securely. Bring your ideas to life...display them on a Sharp AQUOS BOARD Interactive Whiteboard Display, LCD flat panel monitor and/or projection product—for use in classrooms, conference rooms, and public display areas.

Shaw Contract Group

Booth 220

410 Old Mill Rd.
Cartersville, GA 30120

Shaw Contract Group is a global design leader, manufacturing high performance cradle-to-cradle flooring products ideal for any learning environment. We believe design goes beyond aesthetics. Our education studio focuses on the needs of students, teachers, and maintenance experts, designing flooring solutions for maximum comfort, ease of maintenance, durability, and performance. Shaw Contract Group's EcoWorx carpet tiles are completely recyclable and PVC-free, making product reclamation and

recycling easy and allowing customers to reduce their environmental impact.



Siemens

Booth 600

887 Deerfield Pkwy.
Buffalo Grove, IL 60029

The Siemens Building Technologies Division is the world's market leader for safe and energy-efficient buildings ("green buildings") and infrastructure. As a service provider, system integrator, and product vendor, Building Technologies has offerings for building automation, heating, ventilation and air conditioning (HVAC), fire protection, and security.

Single Path

Booth 623

905 Parkview Blvd.
Lombard, IL 60148

At Single Path, we have become a market leader for our educational partners in the delivery of enabling technologies such as unified communications, advanced wireless solutions, network security, and managed IT services. We have built a managed services practice for our clients who are looking for technology accountability from us.

Skyward, Inc.

Booth 322

5233 Coye Dr.
Stevens Point, WI 54481

Since 1980, Skyward has been serving the K-12 administrative software needs of school districts. Skyward's School Management System represents an integrated student and financial management software system designed to keep administrators, educators, and families connected.

Skyward's software is found in over 1,600 school districts throughout the world. Skyward is committed to providing products that meet or exceed the complex needs and the high expectations of the ever-changing K-12 environment.

SRB Education Solutions, Inc.

Booth 330

400-200 Town Centre Blvd.
Markham, Ontario Canada
L3R 8G5

SSC Service Solutions

Booth 223

1845 Midpark Rd.
Knoxville, TN 37921

For quality-focused educational institutions, SSC Service Solutions is the premium provider of support services. With over 40 years of industry experience and highly trained professionals, we specialize in custodial and campus services, plant operations and maintenance, and grounds management. Our goal is to provide excellent customer service and measurable, consistent quality. We work with you in creating a flexible, customizable, and cost-effective approach that meets your goals and fits your budget. Visit SSC at Booth 223 to see if we can save you 15%-20%!

Stanley Security Solutions

Booth 809

1000 Stanley Dr.
New Britain, CT 06053

As a leader in the security industry, Stanley Security is collaborating with educational facilities to develop comprehensive solutions to keep schools safe. Stanley advisors are your trusted partners in securing K-12 schools.

We are committed to providing comprehensive solutions, support, and service, including intrusion detection, video surveillance, access control, biometric authentication, staff and student protection, lock-down event solutions, door locking hardware, ballistic doors and glass, and monitoring services. We look forward to working in your community.

Staples, Inc.

Booth 415

15813 Maple
Shawnee Mission, KS 66223

Staples Advantage, the business-to-business division of Staples, Inc., offers business supplies to organizations of 20 or more employees up to the Fortune 1000, including global businesses, government, healthcare organizations, and educational institutions.

Steelcase

Booth 527

901 44th St. S.E.
Grand Rapids, MI 49508

For over 100 years, Steelcase has been bringing human insight to business by studying how people work, wherever they work. Those insights can help organizations achieve a higher level of performance by creating places that unlock the promise of their people. Our goal is to help organizations create spaces that support how they work. Our passion is to help people love how they work.
www.steelcase.com

SUBWAY

Booth 231

325 Bic Dr.
Milford, CT 06461

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SunGard K-12 Education

Booths 622, 624

3 W. Broad St.
Bethlehem, PA 18018

SunGard K-12 Education software solutions serve one out of six students nationally. Offering student information, curriculum and assessment, special education, and financial and human resource management, our software products can be deployed to work together or implemented as powerful stand-alone systems. Experience the benefits of working with a single vendor and a fully integrated solution. Call 866.905.8989 for a demonstration, or visit sungard.com/K12 today!

TCPN (The Cooperative Purchasing Network)

Booth 305

7145 West Tidwell Rd.
Houston, TX 77092

TCPN is a national governmental purchasing cooperative able to leverage the purchasing potential of governmental entities in all 50 states. We make cooperative purchasing as simple as possible by competitively bidding and awarding contracts to vendors in accordance with purchasing procedures mandated by state procurement laws and regulations.

TD Bank

Booth 421

1 Portland Sq.
Portland, ME 04101

TD Bank, America's Most Convenient Bank®, is one of the 10 largest banks in the United States, and provides a full range of municipal banking products and services from Maine to Florida. Our knowledgeable and experienced relationship managers offer local decision making and expert service.

Tennant Company

Booth 504

701 N. Lilac Dr.
Minneapolis, MN 55422

The most successful educational institutions provide comfortable, productive learning environments. Incorporate best practices in health and safety, and maintain clean, safe, and healthy schools with help from Tennant Company. Since 1870, Tennant has been dedicated to creating a cleaner, safer, healthier world. Tennant is a world-leading manufacturer of indoor and outdoor environmental cleaning solutions and specialty floor coatings. Tennant's industrial and commercial sweepers, scrubbers, coatings, detergents, carpet-cleaning equipment, vacuums, burnishers, and more deliver award-winning cleaning solutions.



TIAA-CREF

Booth 604

730 Third Ave., 5th Fl.
MS 73/5/40
New York, NY 10117

TIAA-CREF is a full-service financial services company serving the needs of those working in the academic, research, medical, cultural, and governmental fields. We provide advice and guidance, and offer products that provide lifetime income options.

We are mission-driven and committed to helping our more than 3.9 million participants plan for their financial well-being. Lifetime income options are subject to TIAA's claims-paying ability. TIAA-CREF Individual & Institutional Services, LLC, and Teachers Personal Investors Services, Inc., members FINRA, distribute securities products.

TimeClock Plus **Booths 621, 720**

1 Timeclock Dr.
San Angelo, TX 76904

Developed by Data Management Inc., TimeClock Plus is available as a Windows or web application suite and records employee hours for payroll while providing real-time labor reporting functions to over 1,000 schools districts across the nation. A recipient of numerous awards that include Deloitte Technology Fast 500 and Texas Small Business of the Year, the company's multinational team of developers expanded the Windows and web product line to include mobile phone applications and IVR systems. Go to www.timeclockplus.com or call 800.749.8463.

Toshiba **Booth 821**

800 Research Dr.
Wilmington, MA

Toshiba Business Solutions provides schools with digital signage, copiers, printers, printer fleet management, and document management software. Toshiba's machines come preconfigured to print, copy, and scan using OS from PC or MAC. Only Toshiba has an add-on interface to work with

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TransAct Communications **Booth 414**

5105 200th St. SW, #200
Lynnwood, WA 98036

Transaction Point, LLC **Booth 816**

601 Via Tunis
Punta Gorda, FL 33950

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Transdev Student Services **Booth 912**

8601 Georgia Ave., Ste. 604
Silver Spring, MD 20910

Transdev Student Services is a division of Veolia Transportation, North America's largest private sector provider operator of multi-modal transportation, including school bus, transit bus, rail, paratransit, taxi, and shuttle services. For over 100 years, we have earned the trust of our customers. We're particularly proud of our new student transportation partnership with Boston Public Schools, where Transdev delivers superb service

customer service, operational efficiency, and safety using proven expertise and new technology, all done in a cost effective way.

Transfinder **Booths 431, 530**

120 Erie Blvd.
Schenectady, NY 12305

Founded in 1988 and headquartered in Schenectady, New York, Transfinder celebrates its 25th year in business in 2013 as a national leader in student transportation management systems and services, offering routing and scheduling solutions for optimal transportation logistics. Transfinder products allow school districts to manage bus routes, provide safe and efficient student transportation, and access a wealth of critical district information.

Tremco **Booth 522**

3735 Green Rd.
Beachwood, OH 44122

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Tyler Technologies

Booth 509

6500 International Pkwy.,
Ste. 2000
Dallas, TX 75252

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U.S. Communities

Booth 701

2033 N. Main St., Suite 700
Walnut Creek, CA 94596

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



VALIC

Booth 501

2929 Allen Pkwy.
Houston, TX 77019

VALIC, an ASBO Strategic Partner and sponsor of the Certificate of Excellence, is a leading provider of retirement plans and investments to employees of education, healthcare, public sector, and other not-for-profit and for-profit organizations.



Virco Mfg. Corporation

Booth 103

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Torrance, CA 90501

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Weidenhammer Systems Corp.

Booth 802

935 Berkshire Blvd.
Wyomissing, PA 19610

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

Weidenhammer is structured to align the requirements of any school district with the best-suited information technology applications, including the alio financial management and human resources system.



WellCard Health

Booth 410

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Englewood, CO 80112

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Booth 520

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Seattle, WA 98188

Zonar provides verified electronic vehicle inspection, fleet GPS tracking and remote diagnostics systems for public and private fleets. Zonar's onboard computer and vehicle inspection devices help fleets optimize maintenance resources, increase driver performance, reduce fuel costs and improve CSA compliance. Data is available in real-time through Zonar's web-based Ground Traffic Control™ software. Exception reporting and real-time alerts help fleet managers make instant decisions to improve fleet operations and reduce costs. For more information, visit www.zonarsystems.com

EXHIBIT HALL MAP



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September 19–22, 2014



Annual Meeting & Expo



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