Welcome to New Orleans, Louisiana, and the 2013 Executive Leadership Forum

On behalf of ASBO International, I want to thank you—and commend you—for participating in this unique professional development opportunity.

What makes it so unique? The Executive Leadership Forum is designed as a hands-on learning and sharing leadership development opportunity specifically for school business officials. During the next few days, you will be immersed in learning, sharing, and reflection activities that will help you develop and strengthen your leadership skills and, consequently, your ability to help lead the nation’s school districts more effectively.

This year, ASBO is taking advantage of the resources of the host city, New Orleans, to bring you opportunities you won’t find anywhere else. Ritz-Carlton Leadership Center faculty will outline 12 effective leadership principles and explain the concept of “life’s board of directors.” Ritz-Carlton will also describe how to take the lead in social responsibility and community engagement to make a positive impact.

You’ll get an inside look at the high-tech Professional Learning Center in nearby Luling—a testament to the power of vision and collaboration. And you’ll explore principles of crisis management from the New Orleans Convention and Visitors Bureau as they describe how they recovered, rebuilt, and learned from the devastation after Hurricane Katrina. Find out how you can apply their lessons to your own crisis management and planning.

You will also better understand the critical importance of trust as LeRoy Maughan from the Global Speed of Trust Practice at FranklinCovey shares the elements of smart trust and how they affect everything in our lives. This interactive session will no doubt provide some valuable insights for you to take back to your district.

This forum is unique because ASBO limits attendance to ensure each participant has a deep and meaningful personal and professional experience. So please take advantage of the myriad opportunities to actively participate in the sessions and network with your colleagues.

Best wishes for a positive and rewarding experience.

Respectfully,

Ron McCulley, CPPB, RSBO
President, ASBO International

Director of Purchasing and Contracting
Douglas County School District
Castle Rock, Colorado
Schedule

Thursday, February 14

7:00 a.m. – 6:00 p.m.
Registration
Grand Ballroom Foyer

8:30 a.m. – 4:30 p.m.
Strategic Governance Symposium
(Invitation Only)
Lafayette West

2:00 p.m. – 5:00 p.m.
Committees Meeting
(Invitation Only)
Lafayette East

4:00 p.m. – 5:30 p.m.
Affiliate Executive Directors Business Meeting
(Invitation Only)
Audubon

6:00 p.m. – 7:30 p.m.
Welcome Reception and Tabletop Exhibits*
Grand Ballroom, Salons 2-3

Network with your colleagues and visit the tabletop exhibits.

*Open to all registered attendees and registered guests with a conference badge.

Friday, February 15

7:00 a.m. – 12:00 p.m.
Registration
Grand Ballroom Foyer

7:15 a.m. – 8:00 a.m.
Continental Breakfast
Grand Ballroom, Salons 1-2 Foyer

8:00 a.m. – 9:45 a.m.
General Session: It’s All About Leadership
Ritz-Carlton Leadership Center
Grand Ballroom

OUR FAMILY, 
DEDICATED TO YOURS

American Fidelity Assurance Company’s history is deeply rooted in the education community. From Section 125 Plans to Disability Income Insurance, we have more than 50 years of experience providing benefits and services developed specifically for school districts and its employees.

Learn more about the value American Fidelity can bring to your district by contacting your local, salaried Account Representative.

American Fidelity Assurance Company
2000 N. Classen Blvd, Oklahoma City, OK 73106 | 800-654-8489
www.americanfidelity.com

Above insurance products may contain limitations, exclusions and waiting periods. Not all products may be available in all states or eligible for Section 125, plus some products may be inappropriate for Medicaid coverage.
Having the right leadership in place is a critical tenet of Ritz-Carlton’s success. Employees want to be led by authentic leaders who are dynamic, transparent, competent, and fair. Ritz-Carlton Leadership Center faculty will help you take your skills to the next level. Begin with a leader’s self-assessment, then explore Ritz-Carlton’s 12 principles of leadership, consider their approach to driving the employee promise for world-class performance, and learn the significance of what they call “life’s board of directors.”

Learning Objectives: 1. Outline the 12 Ritz-Carlton leadership principles and discuss how they relate to your role as a leader in education. 2. Describe the Ritz-Carlton leadership self-assessment and its value to advancing your leadership skills. 3. Explain what the Ritz-Carlton Leadership Center means by “life’s board of directors” and how adapting the concept to your life and work can enhance your effectiveness as a leader.

Presenter: Alexandra Valentin, CHT, Corporate Director, Culture Transformation, The Ritz-Carlton Leadership Center

9:45 a.m. – 10:00 a.m.
Break
Grand Ballroom, Salons 1-2 Foyer

10:00 a.m. – 11:45 a.m.
General Session: Adding Value Through Social Responsibility and Community Engagement
Ritz-Carlton Leadership Center
Grand Ballroom

CPEs: 1.5
Program Level: Basic
Field of Study: Communications/Personal Development
Program Prerequisites: None
Advance Preparation: None

Ritz-Carlton demonstrates an award-winning commitment to social responsibility through its Community Footprints program, which successfully engages customers, employees, and the community. Learn the role of leadership in making social

planning your retirement
who will you partner with?

We’d be proud to partner with you to build the retirement you’re dreaming about.

AXA Equitable is an ASBO Strategic Partner, sponsor of the Eagle Awards and Eagle Institute, and leader in our industry in the K-12 market—in offering our strong commitment, innovative financial products, and a personalized approach to the educators, administrators and public school employees who build and serve our communities.

To learn how AXA Equitable can help you and your colleagues work toward your retirement goals, visit us at axa-equitable.com, call 201-583-2270 or your AXA Advisors Financial Professional.

Annuities are issued by AXA Equitable Life Insurance Company (AXA Equitable) NY, NY, and are distributed by AXA Advisors, LLC (member FINRA, SIPC). AXA Equitable and AXA Advisors are affiliated companies, located at 1290 Avenue of the Americas, New York, (212) 554-1324, and do not provide tax or legal advice.

*Source: LIMRA, Not-For-Profit Survey, Q2 2011 results, based on contributions.

GE-69669C (8/12) (Exp. 8/14) G30693
responsibility and community engagement a core operating principle. Explore the rewards, benefits, and challenges of a social responsibility commitment and consider how to leverage core competencies of employees and the community in making a positive impact.

Learning Objectives: 1. Discuss the role of leadership in making an authentic social responsibility and community engagement strategy a core operating principle of your district. 2. Identify the rewards, benefits, and challenges of developing and deploying a social responsibility strategy. 3. Explain how an effective social responsibility platform engages employees, students, and the community. 4. Describe how to leverage core competencies in making a positive impact.

Presenter: Sue O. Stephenson, Vice President, Community Footprints, The Ritz-Carlton Hotel Company, LLC

11:45 a.m. – 12:15 p.m.
Pick Up Box Lunch and Board the Buses
Grand Ballroom, Salons 1-2 Foyer

12:15 p.m. – 1:30 p.m.
Lunch on the Bus While En Route to Luling, Louisiana

1:30 p.m. – 5:00 p.m.
Building a High-Tech Professional Learning Center: A Collaborative Vision
Applied Leadership (Field Experience)

CPEs: 3
Program Level: Basic
Field of Study: Communications/Personal Development
Program Prerequisites: None
Advance Preparation: None

Born out of what was once a K-Mart, the high-tech Professional Learning Center (PLC) in Luling, Louisiana, is a stellar example of how visionary school and community leadership can build a state-of-the-art facility for fostering educational excellence at great savings to the community. ASBO member Jim Melohn, CFO with the St. Charles Parish Public Schools, has assembled a team of school and community leaders, the architect, a public relations expert, and others involved in the PLC to take you on a tour of the facility. Participants will also tour the nearby Satellite Center for insight into how
students can experience real-world career preparation and networking in specialties including health care, engineering, interactive media, and the hospitality industry. The tour will highlight the collaborative efforts behind these innovative educational facilities.

**Learning Objectives:**
1. Discuss the potential benefits to students, education employees, and the community of developing a central facility for professional learning and a career-focused satellite high school.
2. Outline the key partnerships involved in designing, funding, and engaging stakeholder commitment to innovative educational facilities of this kind.
3. Discuss how the concepts of centralized professional learning and career-focused satellite facilities for students might be adapted to and implemented in your district.

**Presenters:** James Melohn, CPA, SFO, Chief Financial Officer, St. Charles Parish Public Schools; Michael Tabb, Partner with Murray Architects, Inc.; and members of the St. Charles Parish Public Schools collaborative team

**Schedule**

5:00 p.m. – 5:15 p.m.  
**Board Buses**

5:15 p.m. – 6:30 p.m.  
Return Trip to Ritz-Carlton

6:30pm  
Dinner on Your Own–Explore New Orleans!

**Saturday, February 16**

7:00 a.m. – 1:00 p.m.  
**Registration**  
Grand Ballroom Foyer

7:15 a.m. – 8:00 a.m.  
**Continental Breakfast**  
Grand Ballroom, Salons 1-2 Foyer

8:00 a.m. – 11:00 a.m.  
**General Session: Smart Trust**  
Grand Ballroom  
CPEs: 3  
Program Level: Basic  
Field of Study: Communications/Personal Development  
Program Prerequisites: None  
Advance Preparation: None

---

**We’ll help you help your employees**

Horace Mann provides school districts and their employees with solutions designed to maximize savings, enhance benefits and support the mission of public education. And we’re a proud sponsor of the general session keynote speaker at the Annual Meeting & Expo (AM&E).

*Enter to win a registration pass and front-row seat to see the opening keynote speaker in Boston. Or visit our website, horacemann.com.*
How can individuals learn to operate with high trust in today’s low-trust world? Based on the new book, Smart Trust, by Stephen M. R. Covey and Greg Link, this workshop will help you understand how trust is deeply connected to every situation in life and why trusted people are more likely to be hired or promoted, advance in their careers, and enjoy greater job security and better personal relationships. You will learn the five trust actions that will help you minimize risk while maximizing possibilities and enjoy greater prosperity, energy, and joy—both personally and professionally.

**Learning Objectives:**
1. Outline the five actions that are common in all who practice smart trust.
2. Explain how the principles of smart trust can play a pivotal role in your everyday personal and professional life.
3. Discuss three ways to create trust and influence people.
4. Identify three states of trust in your life and explain how to balance them.

**Presenter:** LeRoy Maughan, professional mentor and keynote speaker for the Global Speed of Trust Practice at FranklinCovey

---

**11:00 a.m. – 11:15 a.m.**

**Break**

Grand Ballroom, Salons 1-2 Foyer

**11:15 a.m. – 2:00 p.m.**

**New Orleans Convention and Visitors Bureau Presentation Luncheon**

Grand Ballroom

CPEs: 2

Program Level: Basic

Field of Study: Communications/Personal Development

Program Prerequisites: None

Advance Preparation: None

When Hurricane Katrina devastated their city, the New Orleans Convention and Visitors Bureau (NOLA CVB) had the formidable responsibilities of implementing their emergency communication plan during the storm and rebuilding tourism in its aftermath. Explore principles of crisis management from a convention/visitors bureau and communications/media perspective that can strengthen preparedness planning in your district.
Learning Objectives: 1. Compare the challenges faced by the NOLA CVB with those that might be encountered by a school district experiencing a disaster. 2. Outline the primary actions that should be taken and the communication tools needed to manage a crisis and restore order and confidence in its aftermath. 3. Describe methods for assessing negative perceptions following a crisis and public relations strategies for developing positive perceptions.

Presenter: Kelly Schulz, Vice President of Communications and Public Relations, New Orleans Convention and Visitors Bureau

Continuing Professional Education (CPE) Credits

ASBO International (ASBO) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be addressed to:

National Registry of CPE Sponsors
150 Fourth Avenue North, Suite 700
Nashville, TN 37219-2471
www.nasba.org

The instructional delivery method for educational sessions is Group – Live, and no prerequisites or advance preparations are necessary for participation, unless otherwise indicated. ASBO staff monitors attendance at educational sessions offering CPE credit. Individuals who have not signed in or have not stayed for the requisite amount of time are not offered the opportunity to earn credit. To receive CPE credit for an educational session, attendees must complete the session evaluation. Note: Session evaluations will be offered online.

Complaint Resolution and Refund Policy
For more information regarding administrative policies, such as complaint and refunds, contact our offices at:

ASBO International
11401 North Shore Drive
Reston, VA 20190
Or call 866.682.2729 ext. 7080.

Do you want to ease the pain of rising post-employment health care expenses?

ING has a solution to help you! Our retirement health reimbursement account, the ING Health Reserve Account offers an integrated program of administration, record keeping, investments, and one-on-one assistance.

Want to learn more?
Contact Ketul R. Thaker – Vice President – ING Retirement Services
860.580.4013 ketul.thaker@us.ing.com

You should consider the investment objectives, risks, charges and expenses of the variable product and it underlying fund options offered through a Health Reserve Account carefully before investing. The information booklets and underlying fund prospectuses containing this and other information can be obtained by contacting your local representative. Please read the information carefully before investing.

ING
Your future. Made easier.

Funding Agreements under a Health Reimbursement Arrangement are long-term investment vehicles which allow you to allocate employer contributions among variable investment options that have the potential to grow tax free. Account values fluctuate with market conditions; when withdrawn the principal may be worth more or less than original amount invested. A Health Reserve Account is not an insurance policy.

Insurance products issued by ING Life Insurance and Annuity Company, One Orange Way, Windsor, CT 06095. Local representatives are Registered Representatives of, and offer securities through ING Financial Partners, member SIPC. Securities are distributed by ING Financial Advisers, LLC (member SIPC). These companies are wholly owned, indirect subsidiaries of ING Groep N.V. Securities may also be through other broker-dealers with which ING has selling agreements. Insurance obligations are the responsibility of each individual company. Product and services may not be available in all states. © 2011 ING North America Insurance Corporation C11-0809-019 (8/11) 3022593.E.G (12/11)
Stand Out.

SFO certification sets you apart from your peers.

By earning the SFO certification, you not only demonstrate that you have the expertise it takes to be an effective school business leader, you stand out as a skilled and knowledgeable professional.

Certified Administrator of School Finance and Operations® (SFO®)
www.asbointl.org/certification

Questions? Call 866.682.2729 x7069 or email certification@asbointl.org
Leading from Behind—
It’s Not About Me: If It Isn’t Broken…Break It!

John D. Musso, RSBA, CAE

Achieving excellence requires leaders who are not content with the status quo.

How often have you heard the phrase, “If it ain’t broken, don’t fix it.” Too often, if you ask me. We know that status quo breeds status quo. In most cases this translates into a lack of results, and in some instances, several steps backward.

Achieving excellence requires leaders who are not content with status quo. If we are truly intent on taking our organizations to the next level, not only must we rock the boat, sometimes we must sink it.

The leaders who fail to rock the boat, assuming that it will be business as usual day after day in a very organized and predictable manner, are kidding themselves. In today’s world, very little is predictable and we cannot effectively lead our organizations with that mindset. By perpetuating the concept of status quo, leaders create an environment in which employees continually put out fires rather than solving problems before they occur. It’s the difference between being proactive and reactive.

As we try to fix problems, many of us turn over rock after rock, looking for the answer beneath. And each rock we turn over seems uglier than the one before it. Eventually, most of us subconsciously stop looking at the rocks, let alone turning them over. We begin to ignore issues and bury our heads in the sand. Unfortunately, doing that doesn’t make the problems go away; it only creates more.

Early in my education career, I had to deal with an employee issue that led to the employee’s termination. It took several years of documentation, blood, sweat, and tears. The documentation could fill three file drawers and the classroom visits were many. Each time I did it, I questioned my sanity, but did it for all of the right reasons. And I did it many more times over the next three decades of my career.

Being a good leader isn’t easy. In fact, at times, even great leaders long for someone else to subordinate problems to. There is a quote from Pope John XXIII that I love that shows none of us are alone in our leadership problems:

“It often happens that I wake at night and begin to think about a serious problem and decide I must tell the Pope about it. Then I wake up completely and remember that I am the Pope….

Great leadership does not go without great stress. Being aware of it is the first step toward dealing with it. The second is acknowledging stress. Balance among ourselves, our profession, our family, our community. Yes, easier said than done, but great leaders realize that in the absence of sound mind and body, great leadership remains a vision.

Simply put:

- If it isn’t broken, break it.
- Turn over those rocks; solve problems and manage issues before they become fires.
- Look below the surface, at the root of issues or problems.
- Sustained performance means deviation from the status quo.
- Never presume predictability.
- Have a sense of balance in your life.

As you lead, I leave you with a quote from Gandhi: “You must be the change you wish to see in the world.”

John D. Musso, RSBA, CAE, is the executive director of ASBO International

Thank you for an inspirational example of what collaborative leadership in education can accomplish for our children.

ASBO International thanks James Melohn, CPA, SFO, Chief Financial Officer, St. Charles Parish Public Schools; Michael Tabb, Partner with Murray Architects, Inc; and members of the St. Charles Parish Public Schools collaborative team for organizing and hosting the tour of the Professional Learning Center and Satellite Center in Luling.
GET INTERACTIVE WITH SCHOOL BUSINESS AFFAIRS

School Business Affairs (SBA), the definitive resource for today’s school business officials, is available to all members in digital format as well as print format.

The digital SBA has the same content and looks just like the hard copy edition, but additional features will save you time and make this an even more effective resource.

Features of the digital format include

- **Easy-to-use technology**: Download, store, and print pages as desired.
- **Keywords and topic search**: A convenient search feature and interactive Table of Contents help you quickly navigate to the articles you want to read.
- **Click-and-go access to information**: Clickable links take you directly from a page to the listed Website...and more.

Visit [www.asbointl.org/sba](http://www.asbointl.org/sba) to take advantage of this member benefit today.
### Exhibitor Directory

<table>
<thead>
<tr>
<th>Company</th>
<th>Address/Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIS</td>
<td>Scott Clapp, Les Marshall</td>
</tr>
<tr>
<td></td>
<td>810 7th Avenue, Suite 1700, New York, NY 10014</td>
</tr>
<tr>
<td>American Fidelity Assurance Company</td>
<td>Faith Grant, Christina Van Skyock</td>
</tr>
<tr>
<td></td>
<td>2000 N Classen Boulevard, Oklahoma City, OK 73106</td>
</tr>
<tr>
<td></td>
<td>800.654.8489 ext. 5150</td>
</tr>
<tr>
<td>ARAMARK Education</td>
<td>Rich Chapman, Steve Herchenrider</td>
</tr>
<tr>
<td></td>
<td>1101 Market Street, Philadelphia, PA 19107</td>
</tr>
<tr>
<td></td>
<td>610.299.5480</td>
</tr>
<tr>
<td>AXA Equitable</td>
<td>Curt May, Bernadette Mitchell</td>
</tr>
<tr>
<td></td>
<td>1290 Avenue of the Americas, New York, NY 10104</td>
</tr>
<tr>
<td></td>
<td>201.583.2270</td>
</tr>
<tr>
<td>The Horace Mann Companies</td>
<td>Rick Schulenburg, Jim Yale</td>
</tr>
<tr>
<td></td>
<td>1 Horace Mann Plaza, Springfield, IL 62715</td>
</tr>
<tr>
<td></td>
<td>217.789.2500</td>
</tr>
<tr>
<td>ING</td>
<td>Leslie Ogden, Ketul Thaker, Teresa Vondrak</td>
</tr>
<tr>
<td></td>
<td>One Orange Way, Windsor, CT 06074</td>
</tr>
<tr>
<td></td>
<td>860.580.4013</td>
</tr>
<tr>
<td>MetLife Resources</td>
<td>Robin Kovacs</td>
</tr>
<tr>
<td></td>
<td>300 Davidson Avenue, Somerset, NJ 08873</td>
</tr>
<tr>
<td></td>
<td>732.652.1328</td>
</tr>
</tbody>
</table>

### The Best Procurement Solution for Public Agencies

- **U.S. Communities:**
  - Resources
  - Experience
  - Savings
  - No User Fees

**Leaders in Providing World Class Procurement Resources and Solutions**

[www.uscommunities.org](http://www.uscommunities.org)
Offic e Depot
Billy Grimmett
Tom Webb
6600 North Military Trail
Boca Raton, FL 33496
561.438.0854

TCPN
Andy Pechacek
Jason Wickel
11280 West Road
Houston, TX 77065
888.884.7695

TIAA-CREF
Kevin Orr
8500 Andrew Carnegie Boulevard
Charlotte, NC 28262
704.988.1191

US Communities
Eric Gould
2033 N. Main Street, Suite 700
Walnut Creek, CA 94596
866.472.7467

VALIC
John Kevin
2929 Allen Parkway
Houston, TX 77019
410.916.1706

Virco Mfg. Corporation
Larry Wonder
2027 Harpers Way
Torrance, CA 90501
310.533.0474

WellCard Health
Jon Gloss
Adam Salomon
7472 S Tucson Way, Suite 100
Centennial, CO 80112
888.479.2000

Call us today at 800-813-4150 or visit www.virco.com
Attractively styled, competitively priced office solutions from Virco.

Parameter ™ Series was designed for Virco by Peter Glass of Peter Glass Design, LLC. and Bob Mills of Hedgehog Design LLC.
ASBO Career Central

Don’t just advance your career, enhance your career

ASBO International’s Career Central is a great place to explore new job opportunities, but it is also a valuable resource to enhance your professional experience. Career Central was developed specifically for school business officials like you—whether you are considering a job transition or interested in building your personal brand, Career Central has all the tools you need.

Are you looking to advance your career? Search Career Central’s job board for new prospects and browse the Career Tips resource to

• Discover ways to stand out in a pool of qualified professionals.
• Find out the best answer to, “Why did you leave your last position?”
• Learn how to describe your work experience so it catches an employer’s attention.
• Get professional tips to write a winning resume.
• Find out what you need to know before negotiating salary with a potential employer.

Or are you looking to enhance your career? Explore the many resources available, including

• How to turn your performance review into a promotion opportunity.
• Tips for succeeding—and excelling—in your current position.
• Time management tips for achieving work-life balance.
• Recommendations for experts in career coaching and social networking development.
• Professional skills assessments to discover your strengths and identify opportunities.

Take the next steps in your career development!

www.asbointl.org/CareerCentral

Proudly sponsored by

EXPERTISE
Real retirement solutions begin here

VALIC is an industry front-runner with more than 50 years of experience.

> First 403(b) plan in public K-12 market
> Retirement Manager leads the industry in 403(b) regulation compliance
> Highly customized retirement planning solutions

Committed to educators

CALL
1-800-972-6978
CLICK
VALIC.com

Securities and investment advisory services are offered by VALIC Financial Advisors, Inc., member FINRA and an SEC-registered investment advisor.
VALIC represents The Variable Annuity Life Insurance Company and its subsidiaries, VALIC Financial Advisors, Inc. and VALIC Retirement Services Company.

Copyright © The Variable Annuity Life Insurance Company.
All rights reserved.
VC 24503 (01/2012) 384837 ER
Map: The Ritz-Carlton, New Orleans

2nd Floor

Strategic Governance Symposium: Lafayette West
Committees Meeting: Lafayette East
Registration: Grand Ballroom Foyer
Board Meeting: Acadia
General Sessions: Grand Ballroom
Continental Breakfast and Boxed Lunch
Opening Reception: Salon II and III
AEDG Meeting: Audubon Room
(located on the first level, not represented in this floor plan)
Go for the networking experience

Connect & Collaborate

“One thing I value most [about the AM&E] is the interaction with professionals from around the world. It is always nice to hear someone express interest or even frustration about an issue I felt was something only I was experiencing. I look forward to this conference each year with great expectations.”

Dolores Cramer, Marysville, Ohio

2013 Annual Meeting & Expo
Boston • October 25 - 28
www.asbointl.org