Program Book

Executive Leadership Forum
February 19–21, 2015
The Westin San Diego Gaslamp Quarter
I’m a member of ASBO International because...

“Membership provides me with the shared knowledge, resources, and best practices I need to continually improve, learn, and develop as a school business leader. With ASBO, I’m always finding better and smarter ways to do my job.”

Leyton Miles, CPA, MBA
Member Since 2005
Business Manager
Victoria, Australia

Membership with ASBO International is more than instant access to the best professional development for today’s school business leaders; it’s about being part of a global network.

Are you taking advantage of all that your membership offers?

Visit asbointl.org/Network to connect with Leyton and many more of your colleagues.
Dear Dedicated Leader,

Welcome to San Diego and the 2015 Executive Leadership Forum!

Thank you for setting aside the time to attend this formative leadership experience. Your attendance this week speaks volumes about your dedication to your district’s success.

Your commitment to a clear vision is what makes your district’s success a reality. The leaders who make the most positive impact are those who do what you’re doing this week: sharpening their own perspectives by observing and learning from others. The insights you’ll learn from speakers and fellow school business leaders over the next couple of days will not only refine your vision, but will also help you clearly communicate that vision to your team back home.

You’ll also absorb new ways to apply your vision as you learn how SeaWorld staff members implement leadership skills behind the scenes. This unique encounter will show you that the same skills SeaWorld uses to run their attractions can be effectively applied to how you manage your school business operations.

While it’s easy to discuss new skills and goals with visionary leaders, convincing your team of the need for change is not as simple. Even the slightest disruption in routine can cause disunity in a workplace, which is especially difficult, since team unity is pivotal for any type of smooth transition. However, after Saturday’s session, you’ll leave with innovative ways to lead your workplace through change, putting halted projects back into steady motion.

I know this exclusive leadership experience will equip you to lead your district forward toward positive change!

Sincerely,

Mark Pepera, MBA, RSBO, SFO
President, ASBO International

Tweet @ASBOIntl #ASBOForum15 asbointl.org/Forum
Let ASBO International recognize your hard work and dedication to the profession. From recognizing best practices in financial reporting to honoring lifetime achievements, ASBO International’s awards and scholarships help you and your district shine.

**EAGLE AWARDS**

The highest honor in school business, the Eagle Awards are lifetime achievement awards given to exemplary school business leaders. Proudly sponsored by AXA.

*Apply by June 1*

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

**PINNACLE AWARDS**

Celebrating the unique ingenuity of school finance managers, the Pinnacle Awards recognize innovative or outstanding practices that result in cost savings, improvements, or enhancements for their districts. Proudly sponsored by Virco.

*Apply by May 1*

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

**New! EMERGING SCHOOL BUSINESS LEADERS SCHOLARSHIP**

This scholarship welcomes 18 new school business managers to the profession with $2,000 scholarships to attend the Annual Meeting & Expo—offering unparalleled professional development and networking opportunities to start their career. Proudly sponsored by U.S. Communities.

*Apply by May 1*

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

**CERTIFICATE OF EXCELLENCE IN FINANCIAL REPORTING (COE)**

Promoting the highest standards in financial reporting, the COE honors school districts for quality and transparency in the preparation of their Comprehensive Annual Financial Report. Proudly sponsored by VALIC.

*Apply within 6 months of your district’s fiscal year close*

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**MERITORIOUS BUDGET AWARD (MBA) & PATHWAY TO THE MBA**

The MBA and Pathway to the MBA recognize school districts that demonstrate proficiency in presenting clear, sound budgets, while enhancing applicants’ skills in developing, analyzing, and presenting effective budgets. Proudly sponsored by Voya Financial™.

*Apply within 90 days of your budget’s approval*

[asbointl.org/MBA](http://asbointl.org/MBA)
Thursday, February 19

7:00 a.m. – 6:00 p.m.
Registration
California Foyer (Second Level)

8:30 a.m. – 4:00 p.m.
Strategic Governance Symposium
(Invitation Only)
Plaza Ballroom (Second Level)

3:00 p.m. – 5:00 p.m.
Committees Meeting
(Invitation Only)
California Ballroom C (Second Level)

4:15 p.m. – 5:30 p.m.
Affiliate Executive Directors Business Meeting
(Invitation Only)
San Diego Ballroom (Fourth Level)

6:00 p.m. – 7:30 p.m.
Welcome Reception and Tabletop Exhibits*
California Ballroom A and B (Second Level)

Network with your colleagues and visit the tabletop exhibits.

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

Your to-do list is hectic enough.

With over 50 years in providing employee benefits to the education community, American Fidelity Assurance Company is here to assist. Let us help you save time, simplify plan administration, and identify possible cost-savings opportunities today.

AmericanFidelity.com
2000 North Classen Blvd. Oklahoma City, OK 73106 800-638-4268 ext. 104
Friday, February 20

7:00 a.m. – 12:00 p.m.
Registration
California Foyer (Second Level)

7:15 a.m. - 8:00 a.m.
Continental Breakfast
California Foyer (Second Level)

8:00 a.m. – 11:30 a.m.
General Session: Developing Your Leadership Point of View
California Ballroom (Second Level)

SFOs: 3.0
CPEs: 3.0
Program Level: Basic
Field of Study: Personal Development
Program Prerequisites: None
Advance Preparation: None

Successful leaders want the people they support and depend on to succeed—a goal that requires an environment of trust and mutual understanding. Your ability to communicate your Leadership Point-of-View (LPOV) is key to fostering trust among your colleagues. The LPOV is your personal “elevator pitch”—it describes your own journey, values, goals, and expectations. Learn how to craft your LPOV and be prepared and inspired to share it with those you lead.

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Source: LIMRA, Not-For-Profit Survey, Participants as of 12/31/2013 and contributions for full year 2013.

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GE-96533 (8/14) (Exp. 8/16)
**Learning Objectives:**
1. Discuss how the ability to communicate one’s LPOV fosters an environment of trust.
2. Outline the process by which a leader can create a meaningful and engaging LPOV.
3. Describe the potential positive effects of sharing one’s LPOV with others.

**Presenter:** Marjorie Blanchard, Ph.D., Master of Science in Executive Leadership faculty at the University of San Diego, has earned a worldwide reputation as an accomplished management consultant, a best-selling author, and an entrepreneur. She was the co-recipient with her husband, Kenneth Blanchard, Ph.D., of the Entrepreneur of the Year award from Cornell University.

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Horace Mann is a national sponsor of [DonorsChoose.org](http://www.donorschoose.org), a website dedicated to funding classroom projects. It’s just one way Horace Mann says “thank you” to educators.

*To learn more, visit DonorsChoose.org, [horacemann.com](http://www.horacemann.com) or talk to your local Horace Mann agent.*

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**Program Details:**

- **9:30 a.m. - 9:45 a.m.**
  Break
  California Foyer (Second Level)

- **11:30 a.m. – 12:15 p.m.**
  Lunch
  Garden Terrace (Fourth Level)
  (Rain Location: San Diego Ballroom)

- **12:30 p.m. – 5:30 p.m.**
  Behind the Scenes at SeaWorld
  (Field Experience)
  1st Avenue Bus Loading Zone (Lobby Level)

**Program Information:**

- SFOs: 4.0
- CPEs: 4.0
- Program Level: Basic
- Field of Study: Personal Development
- Program Prerequisites: None
Advance Preparation: None

For more than 50 years, SeaWorld has been a leading marine zoological park, delivering personal, interactive, and educational experiences that blend imagination with nature and enabling guests to celebrate, connect with, and care for the natural world we share.

What leadership skills does it take to run the shows, attractions, and rides at SeaWorld while maintaining the core commitment to animal care and well-being, conservation, and education? Speak with experts in animal care and training, as well as those behind the scenes in production, operations, culinary, and communications, to gain insights that are applicable to leading your school district. Behind-the-scenes areas may include the Animal Rescue and Rehabilitation Center, Wild Arctic, Water Quality Facility, Education Center, and more. Please wear comfortable shoes and casual attire for this outdoor experience.

Learning Objectives: 1. Identify five leadership skills/strategies involved in running SeaWorld that you think would benefit your school district or organization. 2. Discuss operational issues SeaWorld faces that parallel those in your district or organization and how you would effectively address them. 3. Describe steps leaders may take to ensure that day-to-day operations align with core commitments and goals.

Presenters: SeaWorld Professional Staff
Saturday, February 21

5:30 p.m. – 6:30 p.m.
Wine and Cheese Reception*
Garden Terrace (Fourth Level)
(Rain Location: San Diego Ballroom)

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

Saturday, February 21

7:15 a.m. – 8:00 a.m.
Continental Breakfast
California Foyer (Second Level)

8:00 a.m. – 12:00 p.m.
General Session: Leading Change
California Ballroom (Second Level)

SFOs: 4.0
CPEs: 4.0
Program Level: Basic
Field of Study: Personal Development
Program Prerequisites: None
Advance Preparation: None

Is your workplace changing at a rapid pace? New procedures, new technology, and new initiatives are exciting in principle, but are also disruptive. Most change efforts require significant adjustments in how your team members get work done, and you need their buy-in and commitment. Roughly 70% of change efforts fail or get derailed for predictable reasons. Learn how to use this predictability to minimize the risks associated with change.

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PUT YOUR DISTRICT ON THE MAP

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Tweet @ASBOIntl #ASBOForum15
asbointl.org/Forum
Learning Objectives: 1. Describe how to identify and address employee concerns/questions during change. 2. Outline strategies for increasing buy-in and decreasing resistance by actively involving those impacted by the change in the change process (doing it with them not to them). 3. Discuss how to use appropriate change leadership strategies to resolve concerns.

Presenter: Patricia Zigarmi, Ed.D., Master of Science in Executive Leadership faculty at the University of San Diego, is a highly regarded leadership and change management coach, best-selling author, and experienced businesswoman. She is vice president of business development for The Ken Blanchard Companies and is coauthor of Leadership and the One Minute Manager.

9:30 a.m. - 9:45 a.m.
Break
California Foyer (Second Level)

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U.S. Communities is the leading cooperative purchasing program for a reason. The value we deliver to public agencies and the commitments of our suppliers to deliver solutions, support and the lowest pricing draws more than 500 new users a month. What separates U.S. Communities from other cooperatives?

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What are your professional goals for 2015?

Now’s the time to take your career to the next level. Whether you’re new to the profession, looking for advancement, or considering transitioning to consulting, earning the SFO sets you apart as a school business professional who has the skills, know-how, and real-world expertise it takes to lead a school district.
6 Tips for Productive Meetings

Leadership coach John Keyser warns that although meetings can be a great way to share information and encourage inclusive decision making, having too many of them wastes time and has serious opportunity costs. Here are his tips for running efficient, productive meetings.

1. Share an agenda beforehand so attendees can review and prepare.
2. Identify and share desired outcomes for the meeting.
3. Only invite employees who need to be there.
4. Run the meeting crisply and begin/end on schedule.
5. Provide actionable tasks and deadlines at the end.
6. Record and distribute minutes afterwards.

Adapted from “People Can Work or They Can Attend Meetings; They Cannot Do Both!” by John Keyser. Common Sense Leadership, commonsenseleadership.com, February 2014.

Featured in School Business Leader Volume 1 Issue 5

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Check your mailbox for School Business Leader, ASBO International’s newest leadership resource. Learn more at asbointl.org/Leader.

School Business Leader

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Continuing Professional Education (CPE) Credits

Earn up to 11 CPE credits.

ASBO International will issue 11 CPE credits for the Friday and Saturday sessions in the Personal Development field of study. Visit asbointl.org for details.

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 the final authority on the acceptance of individual courses for CPE credit.

The instructional delivery method for all 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 following the conference.

Complaint Resolution and Refund Policy

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website learningmarket.org.

SFO Recertification Contact Hours

Earn up to 11 recertification contact hours.

To document the contact hours you have earned at the 2015 Executive Leadership Forum toward recertification, use the SFO Contact Hour Record in your registration packet to verify your attendance. Remember to have the presenter or ASBO staff initial next to each session you attend.
Exhibitor Directory

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Networking is essential, and nothing beats face-to-face interaction. In fact, attendees from the 2014 Annual Meeting & Expo ranked networking with colleagues as one of the most valuable aspects of the meeting—second only to the quality professional development.

Attend the 2015 Annual Meeting & Expo, October 23–26 in Grapevine, Texas, and continue the conversations you’ve started and the connections you’ve made here at the Executive Leadership Forum.

SAVE the DATE
October 23–26 • Grapevine, Texas
asbointl.org/AnnualMeeting