2018 EAGLE INSTITUTE
ORGANIZATIONAL LEADERSHIP FOR EVERY CIRCUMSTANCE

Philadelphia, Pennsylvania | July 10–13

SCHEDULE OF EVENTS
Welcome to ASBO International’s 2018 Eagle Institute!

Dear Fellow Attendee,

I couldn’t be more excited to welcome you into my home state of Pennsylvania for such an enriching and enlightening conference. I am honored to be surrounded by school business officials who are committed to learning the invaluable leadership lessons of history’s greatest leaders.

As we take the time to strengthen our own leadership philosophies, they will become the firm foundation that enables us to lead through every circumstance.

By the end of this meeting—through focused learning and intentional discussions—we will leave here as individual history-makers, ready to lead our districts by practicing the age-old principles we’ve studied. Just as the authors of the Declaration of Independence penned the beginnings of an entire country, we are responsible for contributing to the narrative of our future: the students in our school districts.

I look forward to learning alongside you!

Sincerely,

Charles E. Peterson, Jr., MBA, PRSBA, SFO  
John Musso, CAE, RSBA

President, ASBO International  
Executive director

Chief Financial Officer  
Central Susquehanna Intermediate Unit 16  
Milton, Pennsylvania
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JULY 10–13, 2018 | PHILADELPHIA, PENNSYLVANIA

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<thead>
<tr>
<th>Name</th>
<th>Title/Membership</th>
<th>Address</th>
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<tbody>
<tr>
<td>David Cline*</td>
<td>Associate Superintendent</td>
<td>Prince William County Public Schools</td>
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<td>Denny Costerison, RSBO</td>
<td>Executive Director</td>
<td>Indiana ASBO</td>
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<td>Kim Cranston</td>
<td>Executive Director</td>
<td>Missouri ASBO</td>
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<td>Kathy Davis</td>
<td>Director of Business &amp; Auxiliary Services</td>
<td>DeForest Area School District</td>
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<td>Deborah Frazier, CPA, CGMA, SFO*</td>
<td>Retired</td>
<td>Spotsylvania County Public Schools</td>
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<td>Jackie Gapp, SFO</td>
<td>Accounting Director</td>
<td>Fargo Public School District 1</td>
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<td>John Gardner</td>
<td>Chief Financial Officer</td>
<td>Horry County Schools</td>
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<td>Scott Germain</td>
<td>Food &amp; Nutrition Services Supervisor</td>
<td>Garrett County Schools</td>
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*Eagle Award 2017 recipients
**Eagle Award recipients in previous years
2017 RECIPIENTS

International Eagle Award
Deborah F. Frazier, CPA, CGMA, SFO
Assistant Superintendent/Chief Financial Officer
Madison County Schools
Richmond, KY

Distinguished Eagle Award
David S. Cline, MBA
Associate Superintendent for Finance and Support Services
Prince William County Public Schools
Manassas, VA

LaShahn Gaines, CPA, CPM, VSBO
Chief Financial Officer
Spotsylvania County Public Schools
Fredericksburg, VA

Ron Orr, CPA, SFO
Chief Financial Officer
Pattonville School District
Saint Ann, MO
**Arrive at The Westin Philadelphia by 4:30 p.m.**
99 South 17th St., Philadelphia, PA 19103

**TUESDAY, JULY 10**

5:00 p.m.
Welcome Reception*
The Georgian Room, The Westin Philadelphia

6:00 p.m.
Welcome Dinner*
The Georgian Room, The Westin Philadelphia

7:00 p.m. – 8:00 p.m.
Leadership in Four Directions, Benjamin Franklin and the Continental Congress
Presented by Jeff McCausland, Ph.D., retired U.S. Army Colonel and Founder and CEO of Diamond6 Leadership and Strategy, LLC
CPEs/SFOs: 1.0

As a leader, you “lead in four directions”: toward your supervisor, your peers, your direct reports, and yourself! Through this session, you will gain a deeper understanding of your multi-faceted leadership roles, learn how to lead more confidently in every direction, and bring more value to your organization.

Learning Objectives:
• Understand the four directions of leadership and how they pertain to each participant.
• Learn how to comfortably lead in all situations and from all positions in an organization.
• Discuss strategies for troubleshooting difficult leadership situations and challenges.
8:00 a.m.
Depart for Science History Institute

8:30 a.m. – 10:00 a.m.
Organizational Culture and Change
Presented by Jeff McCausland, Ph.D., retired U.S. Army Colonel and Founder and CEO of Diamond6 Leadership and Strategy, LLC
CPEs/SFOs: 1.5

Organizational culture gives employees identity, facilitates collective commitment, promotes social system stability, and shapes behavior by helping employees make sense of their surroundings. After considering this carefully, you must aim to align the complexities of your organization’s culture with its mission, vision, purpose, and strategy. As we examine this phenomenon, we’ll also discuss how you must often change the culture of your organization to effect success.

Learning Objectives:
• Understand the importance of considering “organizational culture” and how to do this successfully.
• Discuss an organization’s culture based on its mission, vision, purpose, and strategy.
• Learn how to make positive change in an organization by changing the culture.

10:00 a.m. – 10:30 a.m.
Break – Refreshments or explore the Science History Institute Museum

10:30 a.m. – 12:00 p.m.
Turning Negative Heat Into Positive Energy
Presented by John Draper, Ed.D., NSPRA National Consultant
CPEs/SFOs: 1.5

As communities take a more critical look at education systems, school leaders are expected to lead high-level changes on demand. Sometimes, unfortunately, the only change that occurs is a change in leadership. This presentation lays out a roadmap for leading effective change based on solid research, then translates that research into common-sense actions that will help you lead change under pressure.

12:00 p.m. – 1:15 p.m.
Lunch and Learn – Historical background for Independence Hall
Presented by Steve Plafker

1:15 p.m.
Short walk to Independence Hall

2:00 p.m. – 4:30 p.m.
Tour of Independence Hall, Congress Hall, Supreme Court/Old City Hall
CPEs/SFOs: 2.5

Step into some of the most iconic settings of change-leadership in United States history: Independence Hall, where the Declaration of Independence and the U.S. Constitution were debated and signed; Congress Hall, where the U.S. Congress met from 1790 to 1800; and Old City Hall, where the first Supreme Court was housed. Then, learn how the Liberty Bell’s resounding message was heard throughout the growing pains of a young nation and still rings true today.

Learning Objectives:
• Learn the history of Independence Hall and how it became home to the Continental Congress.
• Discuss the different viewpoints of the founding fathers and how they contributed to the creation of the Declaration of Independence and the U.S. Constitution.
• Understand the importance of the discussions that took place in this historic building.

5:00 p.m.
Happy hour and dinner – City Tavern

7:00 p.m. – 8:00 p.m.
Thoughts About Today’s Experience
Participants will take time to reflect on what they learned throughout the day and how they can apply those lessons.
Building and Leading Effective Organizations Through the Power of Positive Psychology
Presented by Chris Maxwell, Ph.D., Senior Fellow, Center for Leadership & Change Management at the Wharton School, University of Pennsylvania
CPEs/SFOs: 1.5

Positive psychology is the scientific study of the strengths that enable individuals and communities to thrive. The field is founded on the belief that we all want to lead a meaningful and fulfilling life; to cultivate what is best within ourselves; and to enhance our experiences of love, work, and play. This interactive workshop includes a discussion of how to increase well-being, happiness, and resilience. A pre-workshop survey will help you discover and reflect on your own unique strengths.

Learning Objectives:
• Summarize the value of identifying and leveraging your strengths.
• Describe the psychological and physical benefits of experiencing positive emotion.
• Rethink how to manage adversity and build resilience.

10:00 a.m. – 10:30 a.m. – Break

How to Recruit, Develop, and Retain the Best & the Brightest
Presented by Bernadette Mitchell, Chief Strategy Officer, AXA Equitable
CPEs/SFOs: 1.5

Research estimates that 50% of current teachers will either retire or leave the profession over the next five to seven years. Couple that with a growing student population, a lack of diversity among teachers to match the diversity of students, and a need for teachers in specific types of schools, locations, and subject areas and you must be prepared to recruit and retain the best talent possible. Creating a positive culture can become a competitive advantage for your district or organization. This session will help participants outline strategies for recruiting and retaining high-quality employees and building an exceptional culture to keep the organization thriving.

Learning Objectives:
• Learn best practices from leading organizations on methods to recruit, develop, and retain top talent.
• Discuss strategies for attracting and retaining talent while building a great teaming culture.
• Develop tactics to use culture as a competitive advantage.

12:00 p.m. – 1:30 p.m.
Lunch and Learn: Benjamin Franklin Introduction

1:30 p.m.
Board bus to depart for Franklin Court

2:00 p.m. – 4:30 p.m.
Explore Franklin Court, Museum, and Independence Park on your own.

Learn about the life and legacy of one of Philadelphia’s most famous residents by touring the museum dedicated to him and the courtyard where his home once stood.

4:30 p.m.
Bus departs for The Westin from Franklin Court
Strategic leadership is the process a leader uses to affect the achievement of a desirable and clearly understood vision by influencing the organizational culture, allocating resources, directing through policy and directive, and building consensus within a volatile, uncertain, complex, and ambiguous environment for his or her organization. This seminar will examine the essence of strategic leadership, how it differs from direct and organizational leadership, and the various competencies that are important to strategic leaders.

Learning Objectives:
• Understand how to incorporate strategic leadership into your own leadership style.
• Learn how to anticipate opportunities and threats in an environment of strategic leadership.
• Understand the difference between strategic, organizational, and direct leadership.

CPE Credits
Earn up to 11.5 CPE credits in the Personal Development field of study.

SFO Recertification Contact Hours
Earn up to 11.5 SFO contact hours for ASBO International’s Certified Administrator of School Finance and Operations (SFO).

CAE Recertification Credential hours
Earn up to 11.5 CAE contact hours for the Certificated Association Executive (CAE).

To receive CPE credits, SFO contact hours, and CAE credits, you will need to complete the online evaluation. Online evaluations are available at the end of each day of the conference. At the end of the Eagle Institute, attendees may print their online certificate after completing the evaluation. All sessions are a basic program level and require no program prerequisites or advance preparation.

Visit the Earning CPE Credit, SFO Contact Hours & CAE Credits page on ASBO’s website for further details.
INDEPENDENCE PARK
TOUR ITINERARY
WEDNESDAY, JULY 11  **Science History Institute**
315 Chestnut St., Philadelphia, PA

12:00 p.m. – LUNCH BEGINS

12:15 p.m. – 1:00 p.m. – LUNCH AND LEARN
Historical background for Independence Hall presented by Stephen Plafker

1:15 p.m.
Depart for Independence Hall

1:35 p.m.
Arrive at Independence Park Security

2:00 p.m. – 2:45 p.m.
Independence Hall Tour

3:00 p.m. – 3:30 p.m.
Congress Hall Tour

3:40 p.m. – 4:00 p.m.
Supreme Court/Old City Hall

4:00 p.m. – 4:45 p.m.
Liberty Bell Center*

*If security line for Liberty Bell is long, or if other activities are delayed, attendees will have time to return to the Liberty Bell on Thursday afternoon.

4:45 p.m.
Meet at the corner of 5th Street and Chestnut Street to walk to City Tavern for Happy Hour and Dinner.

THURSDAY, JULY 12  **Franklin Institute**
222 N 20th St., Philadelphia, PA

12:00 p.m. – 1:00 p.m. – LUNCH AND LEARN
Benjamin Franklin Overview presented by Stephen Plafker

1:30 p.m.
Group photo in front of Ben Franklin memorial statue

1:40 p.m.
Board bus to Franklin Court

2:00 p.m.
Arrive at Franklin Court
Explore the Benjamin Franklin Museum, Courtyard, Printing Office, or Fragments of Franklin Court Exhibit or walk to the Portrait Gallery and/or Liberty Bell Center on your own.

4:30 p.m.
Bus departs for The Westin from Franklin Court
Jeffrey McCausland

Dr. Jeff McCausland is the Founder and CEO of Diamond6 Leadership and Strategy, LLC. Since 2000, both domestic and internationally, Dr. McCausland has conducted numerous executive leadership development workshops and consulted for leaders in public education, U.S. government institutions, nonprofit organizations, and corporations.

He is a graduate of the U.S. Military Academy at West Point, the U.S. Army Airborne and Ranger schools, and the Command and General Staff College at Ft. Leavenworth, Kansas. He holds both a Master’s and Ph.D. from the Fletcher School of Law and Diplomacy, Tufts University.

Dr. McCausland is a Visiting Professor of International Security at Dickinson College, serves as a Senior Fellow at the Stockdale Center for Ethical Leadership at the U.S. Naval Academy and the Carnegie Council for Ethics in International Affairs in New York. He is also an adjunct fellow at both CSIS and the RAND Corporation in Washington, DC.

Dr. McCausland is a retired Colonel from the U.S. Army and former Dean of Academics at the U.S. Army War College. He was a Visiting Professor of International Law and Diplomacy at the Penn State Dickinson School of Law and Graduate School of International Affairs.

During his military career, Dr. McCausland served in a variety of command and staff positions both in the United States and Europe during the Kosovo crisis and Operations Desert Shield and Storm.

Dr. McCausland has both published and lectured broadly on military affairs, European security issues, the Gulf War, and leadership throughout the United States and in over 30 countries. He has been a national security consultant for CBS television and radio since 2003. Consequently, he has been a frequent commentator on the ongoing conflicts in both countries as well as other stories focused on national security. Dr. McCausland has also appeared and been interviewed by news stations and publications such as: MSNBC, CSPAN, CNN, the CBS Evening News, The New York Times, The Wall Street Journal, and The Boston Globe.

Awards:
2010–2015
Distinguished Visiting Professor of Research and Minerva Chairholder, U.S. Army War College

2002–2004
Class of 1961 Chair of Leadership, U.S. Naval Academy, Annapolis, MD
John Draper is the son of two teachers and a product of public schools. After graduating from college and working several years in business, he realized that he was an educator at heart. He began as a middle school science and math teacher in Calera, Alabama, and still enjoys middle school students a great deal!

One of his favorite positions was middle school assistant principal, after which he became the first principal at Oak Mountain Middle School in Shelby County, AL. From there he served just one year as principal at Homewood High School before he was chosen to lead the Council for Leaders in Alabama Schools, a nonprofit association representing all school administrators in the state.

After serving 9 years as the Executive Director for CLAS, John was named CEO of the Educational Research Service—a national, nonprofit, research company. He now serves as a National Consultant for NSPRA, the National School Public Relations Association, working to expand support for the nation's public schools. NSPRA is a membership organization helping school leaders and school districts engage more effectively with communities. John lives in a Virginia suburb of Washington, DC, with his wife, Kathy. They have three grown sons.
Stephen Plafker, a retired lawyer and law teacher, has always had an interest in history, especially early American history. For the past 11 years, he has volunteered at Independence Hall, where he spends most of his time leading tours of the buildings on Independence Square.
Chris Maxwell is a Senior Fellow, Center for Leadership and Change Management, at the Wharton School of the University of Pennsylvania. Chris previously taught “Leadership and Communication in Groups” at the Wharton School and directed a wide variety of domestic and international leadership development programs in remote areas of North America, Mexico, Patagonia, Peru, Quebec, and Iceland.

His programs in the U.S. included leadership exchanges with the U.S. Military Academy at West Point, the U.S. Naval Academy, and the Trauma Center at the Hospital of the University of Pennsylvania. Chris holds two graduate degrees from the University of Pennsylvania (Governmental Administration and Applied Positive Psychology) and earned a Ph.D. in Public Administration from Penn State.

His work has been published in the *Wharton Leadership Digest*, *Organization Management Journal*, *European Business Review*, *Journal of Surgical Education*, and the *American Journal of Public Health*. 
Bernadette Mitchell – Chief Strategy Officer at AXA Equitable, has over 25 years of experience in finance. She was instrumental in building a distribution channel for AXA Equitable’s Retirement Benefits Group (RBG) of over 1,000 financial services representatives nationwide. Her career has been focused on the retirement savings market for educators and nonprofit employees. Bernadette has headed up the Retirement Benefits Group responsible for the strategic development team, including the training and business optimization for AXA Equitable’s pension businesses within the employer-sponsored markets.

Her vast experience and roles at AXA include Chief Sales Officer of the RBG, Chief Strategic Marketing Director, and Vice President of the RBG and Product Management.

Prior to joining AXA, she worked at Simpson Thatcher & Bartlett law firm in Manhattan, the Environmental Protection Agency (EPA) in Washington DC, and a Legislative Aide for a New York Senator on Capitol Hill.

Bernadette is a graduate of Georgetown University in Washington, DC. She is active with many charitable organizations, including the Dress For Success of Morris County & Northern N.J., for which serves on the board of directors.

She is active with StreetSquash Newark & the American Cancer Society, for which she has been named a Legislative Ambassador for her lobbying efforts for cancer aid and funding within New Jersey. She lives in Chatham, New Jersey, with her husband, Geoff, and has two children.
Lincoln P. Bloomfield


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