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Welcome
TO THE 2018 EXECUTIVE LEADERSHIP FORUM

Dear Dedicated Leader,

As ethical leaders, we must constantly re-evaluate our routines and the reasons behind them to ensure we’re making the best use of resources. The sessions over the next two days will help us do just that.

Whether it’s learning how to better protect information through increased cybersecurity, identifying mindsets that prevent progress, or even discussing a challenge with a colleague during a networking event—each opportunity during the next few days has the potential to make a difference in the way we lead.

I am honored to learn alongside the individuals who give the school business profession its good name. Your readiness to devote your time to leadership training shows your sincere commitment to preparedness, stewardship, and growth. Let’s aim to make the most of every moment keeping in mind the students, staff, and communities entrusted to our leadership.

Sincerely,

Charles E. Peterson, Jr., MBA, PRSBA, SFO
President
ASBO International
## Schedule-at-a-Glance

### THURSDAY, FEBRUARY 8

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:00 am – 6:00 pm</td>
<td>REGISTRATION</td>
<td>SALON FG FOYER</td>
</tr>
<tr>
<td>8:30 am – 4:00 pm</td>
<td>STRATEGIC GOVERNANCE SYMPOSIUM (Invitation Only) ($)</td>
<td>MEETING ROOMS 400/402</td>
</tr>
<tr>
<td>4:15 pm – 5:30 pm</td>
<td>AFFILIATE EXECUTIVE DIRECTORS GROUP</td>
<td>BUSINESS MEETING</td>
</tr>
<tr>
<td>6:00 pm – 7:30 pm</td>
<td>WELCOME RECEPTION AND PARTNER SHOWCASE</td>
<td>SALON H</td>
</tr>
</tbody>
</table>

**Attendance:** Attendees & registered guests.

### FRIDAY, FEBRUARY 9

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:00 am – 12:00 pm</td>
<td>REGISTRATION</td>
<td>SALON FG FOYER</td>
</tr>
<tr>
<td>7:15 am – 8:00 am</td>
<td>CONTINENTAL BREAKFAST</td>
<td>SALON FG FOYER</td>
</tr>
<tr>
<td>8:00 am – 8:15 am</td>
<td>WELCOMING REMARKS</td>
<td>Charles E. Peterson, Jr., MBA, PRSBA, SFO</td>
</tr>
<tr>
<td>8:15 am – 10:00 am</td>
<td>FACING CYBERSECURITY CONCERNS HEAD ON</td>
<td>SALON FG</td>
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<tr>
<td>10:00 am – 10:15 am</td>
<td>BREAK</td>
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<tr>
<td>10:15 am – 12:00 pm</td>
<td>LEADING AT THE EDGE</td>
<td>SALON FG</td>
</tr>
<tr>
<td>12:15 pm – 1:15 pm</td>
<td>LUNCH</td>
<td>SALON H</td>
</tr>
<tr>
<td>1:30 pm</td>
<td>SHUTTLES TO CIRCUIT OF THE AMERICAS (COTA)</td>
<td>Depart from the 5th Street Entrance of the Hotel.</td>
</tr>
<tr>
<td>2:00 pm – 5:00 pm</td>
<td>CIRCUIT OF THE AMERICAS (COTA) PRESENTATION &amp; TOUR</td>
<td></td>
</tr>
<tr>
<td>6:00 pm – 7:00 pm</td>
<td>EVENING RECEPTION – AUSTIN TACO PROJECT</td>
<td>LOBBY LEVEL AT HILTON AUSTIN</td>
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</table>

**Attendance:** Attendees & registered guests.

### SATURDAY, FEBRUARY 10

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<th>Time</th>
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<tbody>
<tr>
<td>7:15 am – 8:00 am</td>
<td>CONTINENTAL BREAKFAST</td>
<td>SALON FG FOYER</td>
</tr>
<tr>
<td>8:00 am – 8:15 am</td>
<td>MORNING ROUNDUP</td>
<td>Charles E. Peterson, Jr., MBA, PRSBA, SFO</td>
</tr>
<tr>
<td>8:15 am – 12:00 pm</td>
<td>EAGLE’S FLIGHT – PROMISES, PROMISES!</td>
<td>SALON FGH</td>
</tr>
<tr>
<td>10:00 am – 10:15 am</td>
<td>BREAK</td>
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Earning SFO Contact Hours, CPE and CAE Credits

Earn up to 11.5 SFO recertification contact hours, 11.5 Continuing Professional Education (CPE) credits, and 11.5 Certified Association Executive (CAE) credits for attending Friday and Saturday sessions.

To receive CPE, SFO, or CAE credit, complete session evaluations for each program attended. Instructions for accessing the evaluations will be sent via email at the end of each day. To access the evaluations, you will need to input a unique code that will be provided at the end of each education session to verify attendance. All sessions are a basic program level, group live, and require no program prerequisites or advance preparation.

SFOs, remember to enter your contact hours in your My SFO Manager account. Questions? Email abarton-kramer@asbointl.org.

The online evaluations and certificate take the place of the SFO Contact Hour Records used in the past.

For more details about earning credit hours, please visit asbointl.org/EducationHours
Full Program

THURSDAY, FEBRUARY 8

7:00 am – 6:00 pm
REGISTRATION
SALON FG FOYER

8:30 am – 4:00 pm
STRATEGIC GOVERNANCE SYMPOSIUM
(Invitation Only) ($)
MEETING ROOMS 400/402

4:15 pm – 5:30 pm
AFFILIATE EXECUTIVE DIRECTORS GROUP
BUSINESS MEETING
(Invitation Only)
SALON F

6:00 pm – 7:30 pm | SALON H

Welcome Reception and Partner Showcase

Connect with colleagues and learn about the latest solutions for challenges you’re facing in your schools.

Open to all registered attendees and registered guests with a conference badge.
School business officials are charged with ensuring the security of sensitive information. Two perspectives on cybersecurity will be presented: one from a local school business official and another from a detective with the Austin Police Department. They will discuss the challenges they face within their organizations and help school business officials understand how to protect sensitive student records and financial information that is susceptible to hackers and what to do when it is compromised. Learn how to combat phishing scams, hackers, malware and virus attacks, and other emerging cybersecurity threats.

LEARNING OBJECTIVES:

1. Provide examples of existing and emerging cybersecurity threats that your district could be confronted with.
2. Identify best practices for educating your employees on recognizing potential threats.
3. Describe the appropriate legal and ethical actions to take if your district experiences a data breach.

PRESENTERS: Charles Riley, Detective and Digital Forensic Examiner, Digital Forensics Unit, Austin Police Department, and Kevin Schwartz, Certified Educational Technology Leader (CETL), Technology Officer for Learning and Systems, Austin Independent School District

At every turn, school business officials face crucial choices. Relying solely on past mindsets and inadequate skill sets can halt your school
system’s progress. With first-hand experience in change management, effective communication, building a positive work culture, and strategic planning, Dr. Eddie Erlandson, MD, will share parallels between building the Dell Medical School and rallying your community to lead your team into new territory.

**LEARNING OBJECTIVES:**

1. Discuss critical choices school business officials in leadership positions face.
2. Identify strategies for communicating more effectively, building a positive work culture, and planning strategically within your district.
3. Describe how a “team of teams” approach optimizes the effectiveness of leaders in managing challenges and change.

**PRESENTER:** Dr. Eddie Erlandson, MD, Executive Coach, Director of Leadership and Coaching, Dell Medical School

**12:15 pm – 1:15 pm LUNCH**

**1:30 pm DEPART FOR CIRCUIT OF THE AMERICAS (COTA)**

*Board buses for this experience at the 5th Street entrance of the hotel on the main level (located near the concierge desk and Starbucks).*

**2:00 pm – 3:00 pm CIRCUIT OF THE AMERICAS (COTA) PRESENTATION**

*MEDIA CENTER – CIRCUIT OF THE AMERICAS*

*SFQs: 1 CPEs: 1 CAEs: 1*

Members of CoTA’s leadership team will provide background and history on CoTA, a world-class racing and entertainment destination, and discuss the importance of teamwork, communication, public relations, time management, and emergency preparedness in the successful operation of this large-scale public venue, teaching best practices and lessons learned that you can apply within your schools.

**LEARNING OBJECTIVES:**

1. Describe effective leadership and management techniques used at CoTA that may be applicable within your school district.
2. Discuss best practices embraced by CoTA leaders on issues like safety and security, public relations, and teamwork and collaboration, and how these practices relate to your school district.
3. Demonstrate an understanding of how appealing to the community for support can help meet your organization’s goals.

**PRESENTERS:** Eric Paradis, Vice President of Business Development, Circuit of the Americas, and Al Mays, Director of Tours, Circuit of the Americas

### 3:00 pm – 5:00 pm  CIRCUIT OF THE AMERICAS (COTA) VENUE TOUR

**SFOs: 2  CPEs: 2  CAEs: 2**

See leadership strategies and results in action through a tour of the 1,500-acre facility. Stops around the Circuit include the 3.4-mile racetrack, the legendary uphill Turn 1, the Austin360 Amphitheater, race control, the pit and paddock building, and the grand stand. Learn firsthand how the CoTA team manages the day-to-day operations of a large-scale, state-of-the-art facility.

**LEARNING OBJECTIVES:**

1. Describe CoTA's solutions to facilities-management challenges and how those solutions may apply within your district.

2. Provide examples of effective operations management employed at CoTA that would be relevant to managing school district operations.

3. Identify new opportunities for promoting collaboration and teamwork in your district based on your experience at CoTA.

### 6:00 pm – 7:00 pm  |  AUSTIN TACO PROJECT  
**LOBBY LEVEL AT HILTON AUSTIN**

**Evening Reception**

Enjoy refreshments and light hors d’oeuvres as you network with colleagues before enjoying a night out in Austin on your own.

*Open to all registered attendees and registered guests with a conference badge.*
### SATURDAY, FEBRUARY 10

<table>
<thead>
<tr>
<th>Time</th>
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| 7:15 am – 8:00 am | CONTINENTAL BREAKFAST  
Salon FG Foyer                                                   |
| 8:00 am – 8:15 am | MORNING RUNDUP  
Salon FGH  
Charles E. Peterson, Jr., MBA, PRSBA, SFO  
President, ASBO International                                  |
| 8:15 am – 12:00 pm | EAGLE’S FLIGHT – PROMISES, PROMISES!  
SFOs: 4.5  CPEs: 4.5  CAEs: 4.5                                  |

Promises, Promises™ focuses on trust, effective communication, teamwork, maximizing resources, improving negotiation skills, and developing a common vision, helping you understand how your role impacts broader goals. Through a program that has educated professionals in over 100 countries and over 30 languages, you’ll experience why the interdependence between teams is critical to overall success.

**LEARNING OBJECTIVES:**

1. Describe strategies to maintain and grow trusting relationships.
2. Understand how teamwork and effective communication can help you achieve desired results.
3. Outline methods for maximizing resources and improving negotiation skills to meet organizational goals.

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<tr>
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<td>BREAK</td>
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Who doesn’t love extra credit?

The Friday Workshops at the Annual Meeting & Expo allow attendees to power up on educational opportunities above and beyond the Saturday through Monday sessions, which means more CPE credits, SFO contact hours, and practical takeaways for districts. These information-rich sessions offer a variety of topics to kick off the meeting.

Linda Darling, business manager at Lebanon Community School District in Lebanon, Oregon, shares how the Friday Workshops enriched her time at the annual meeting:

“I was able to connect with individuals from other districts around the world that had similar issues. During the workshops, I learned several things that will help save money and help my district to become more efficient. This was a win-win for me and my new connections.”

This year’s workshops will be announced May 1 when registration opens for the 2018 Annual Meeting & Expo in Kissimmee, Florida.
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*LIMRA, Not-for-Profit Survey, based on total participants for four consecutive years (2012-2015) and contributions for three consecutive years (2013-2015).

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How School Business Leaders Soar

LEADERSHIP RECOGNITION AND DEVELOPMENT

The highest honor in school business, the Eagle Awards celebrate visionary leaders in the profession whose outstanding leadership and dedication have improved student achievement and enriched communities.

David Cline, 2017 Distinguished Eagle Award recipient, shares how this recognition opportunity elevates school business officials, their districts, and the profession:

“The Eagle Awards provide external validation to the public and taxpayers of the hard work and dedication of our school division and staff as we seek to educate students. By recognizing the school business official and their district’s accomplishments on a national scale, the Eagle Awards highlight the professionalism and quality of the school system’s programs and staff to the school board and parents.”

Apply or nominate a colleague for the Eagle Awards now through June 1 at asbointl.org/EagleAwards.

Award recipients attend ASBO International’s Eagle Institute, offering exceptional leadership training for a group of only 55 school business professionals. This immersive leadership event offers a 360-degree view of leadership concepts from academic, historical, and philosophical perspectives.

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A school business official fills a unique role requiring expertise in a variety of education administration areas. Learn how Cindy W. Parker, chief school financial officer at Blount County Board of Education in Oneonta, Alabama, realized the Certified Administrator of School Finance and Operations® (SFO®) was the way to distinguish her school business skills and take her career to the next level.

“With a bachelor’s in business administration, 17 years of private accounting, and 10 years’ experience as a local school bookkeeper, I was looking for a certification that clearly reflects my school business skillset and personal commitment to education finance. After learning about the Certified Administrator of School Finance and Operations (SFO) through my state affiliate, I investigated the process and what it would enable me to learn. I realized the SFO was the perfect fit for continuing my education as a chief school financial officer. I accepted the SFO challenge and began the certification process in March 2017—by mid-June I completed the requirements and became an SFO!”

BEGIN YOUR OWN SFO SUCCESS STORY TODAY! sign up to take the SFO by September challenge at asbointl.org/SFObySept
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School Business Minute highlights the key takeaways from our most popular annual meeting sessions in a quick, easy-to-read format.
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Getting approval from a supervisor to attend a professional development conference depends on many different factors within your school system, but securing permission certainly is easier when your meeting registration is free.

Every year, 16 school business officials win a free Annual Meeting & Expo registration by simply entering a drawing. These lucky winners not only receive a complimentary registration, they also get the opportunity to spend time with the meeting’s First General Session speaker. This year, winners have the chance to meet Sally Hogshead, NY Times bestselling author, member of the Speaker Hall of Fame, fascination expert, and creator of the Fascination Advantage Assessment®.

Previous drawing winner Patrick Ruddy, assistant district manager at the School District of Reedsburg in Wisconsin, explains how entering the drawing opened his eyes to the value of attending the Annual Meeting & Expo:

“With over 20 years of experience as a business official, I had never attended ASBO International’s Annual Meeting & Expo—and that was a mistake. The general sessions were excellent, the workshops and seminars were high-quality presentations, and I thoroughly enjoyed the discussions with attendees from other states.”

Don’t miss out on your chance to win a registration for the 2018 Annual Meeting & Expo, September 21–24, in Kissimmee, Florida.

Visit asbointl.org/SecurityBenefit and enter by April 19.
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Visit us at [www.uscommunities.org](http://www.uscommunities.org)
School business officials understand better than anyone that district funds do not always allow for professional development beyond state or provincial boundaries. Thanks to the support of U.S. Communities, 18 rising school business leaders are able to attend the Annual Meeting & Expo through ASBO International’s Emerging School Business Leaders Scholarship.

Chris May, a financial specialist from Jackson, Michigan, describes his scholarship experience at the 2017 annual meeting: “While the education environment varies greatly between states and countries, best practices and problem-solving techniques exist that can be applied to nearly any situation—and this conference is an excellent investment in business officials’ professional development.”

Another 2017 recipient, Karri Burgess, a maintenance buyer from Boulder, Colorado, says, “The 2017 Annual Meeting & Expo was probably the most valuable four days I spent all year. It doesn’t matter if you have been in the school business field for 2 years or 10 years, you will leave the meeting with knowledge and lessons you can apply to your district immediately, not to mention all the new friends and valuable insights they bring to this excellent event.”

If you’re a school business official who has been in the profession for five years or less, you can apply for the Emerging School Business Leaders Scholarship online at asbointl.org/Scholarship. Or, if you know someone who would be a great candidate, you can also nominate a colleague!
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VC 25132 (12/2017) J100612 ER
CREATE A CAFR
I learned my district had never prepared a Comprehensive Annual Financial Report (CAFR) before, and I always love to be first—especially in achievements that benefit students.

RECOGNIZE THE VALUE
Preparing the CAFR, especially the statistical and financial sections, helped us understand and analyze trends that would enable us to direct as much money as possible to the campus level.

PAY IT FORWARD
With the help of another district, we were able to receive the COE on our first try. Now we are paying it forward by assisting the other districts in our region to achieve the same.

Martha E. Piekarski, CPA/CFF, RTSBA
Chief Financial Officer
Canutillo Independent School District
El Paso, Texas

GO-GETTER
First-time Certificate of Excellence in Financial Reporting recipient Martha Piekarski shares insider advice on creating a CAFR.

USE THE NEW VIDEO RESOURCES TO START PLANNING YOUR FIRST CAFR!

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Clark J. Godshall, district superintendent at Orleans–Niagara BOCES in Medina, New York, shares thoughts on school business recognition.

What are some benefits of receiving the Pinnacle Award?
As a school administrator with 33 years of experience, a good day means addressing only a few complaints, issues, or disgruntled taxpayers. Recognition is rarely in the cards for us school business officials. ASBO International and its vendor partners have done a very thoughtful and conscientious job of providing accolades that keep us motivated toward achieving greater success. Shared experiences and stories of dedicated school business officials, whether senior-level executives or entry-level professionals, will always have the ability to influence peers. And when we do communicate the good that we do, our organizations will benefit, our students will be recognized, our programs will be praised, and our communities will feel empowered with what we have accomplished as an educational entity to help others.

Why would you encourage other school business officials to apply to the Pinnacle Awards Program?
“Why not me?” should be the first question you ask yourself when you see your peers earning awards or recognitions. We all have programs and success stories from our schools, students, and communities to share. Take a few minutes to write yours up. Each year, ASBO International and the judges should have hundreds of stories to sort through based on the myriad high-quality activities our ASBO members are sponsoring, funding, and supporting. It’s easy—take the next step and tell your story!
We think you get the point.

There may be no better investment than an education. That’s why Voya Financial® is proud to support those who work so hard to ensure our children’s future. We believe that the best investments are the ones that continue to grow over a long period of time. And that’s exactly the kind of investments our educators make in our children.

Contact us for more information.

Mark Jackowitz, Senior Vice President, Voya Financial®
518-813-5107, mark.jackowitz@voyacom
Communication and community stem from communis—which means joint, common, or shared. For school business officials, communicating the financial plan to the community is a prime opportunity to foster trust. Much more than a document, a carefully crafted budget presentation can be used as a tool to tell the story of school system and create a shared vision for the future. That’s why many school business officials build their budgets using the Meritorious Budget Award (MBA) Criteria Checklist, which helps school budget planners create an organized, reader-friendly document. When your stakeholders have a clear understanding of the big picture, your budget document becomes something you’re confident in sharing with your community.

Wendy Boarder, business manager at Schuylkill Valley School District in Leesport, Pennsylvania, shares how using the MBA guidelines have benefitted her district:

“Our budget document provides the community with an accessible and understandable process explaining the financial plan that supports the educational endeavors provided for all Schuylkill Valley students. Meeting the MBA criteria demonstrates the high standards set for budget preparation and transparency at Schuylkill Valley School District.”
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Assistant Superintendent for Business and Operations
West Valley School District No. 208
Yakima, Washington

DIRECTOR THROUGH 2020
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Deputy Chief Financial Officer
Fulton County Schools
Atlanta, Georgia

DIRECTOR THROUGH 2020
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Chief Financial Officer
Boulder Valley School District
Boulder, Colorado
SAVE THE DATE!
REGISTRATION OPENS MAY 1

STRATEGIC PARTNERS

REGISTRATION OPENS MAY 1