PROGRAM BOOK

2015 ANNUAL MEETING & EXPO
October 23–26 • Grapevine, Texas
asbointl.org/AnnualMeeting

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GENERAL INFORMATION

Registration Hours
FRIDAY: 7:00 a.m. – 6:00 p.m.
SATURDAY / 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: 11:30 a.m. – 2:15 p.m.

BE IN THE KNOW
For the latest on daily Annual Meeting & Expo activities, visit Registration located on the Ballroom Level of the Convention Center.

ASBO International staff will be wearing black or blue shirts and will happily assist you.

COMPLIMENTARY WI-FI
Wi-Fi is available in Convention Center public areas and meeting rooms. (Note: Please select ASBO International from the list of available networks and provide the Username and Password below to complete Wi-Fi login).
> Username: ASBO International
> Password: ASBO2015
Sponsored by Colonial Life

CHARGING STATION
Need a battery boost? Stop by the charging station located near Registration to power up your mobile device. Sponsored by Ricoh Americas Corporation

BADGES
An official 2015 Annual Meeting & Expo badge is required to enter the General Sessions, educational sessions, Workshops and Seminars, Exhibit Hall, and social events. To earn CPE credits for designated sessions, be sure to have your badge scanned to verify attendance. Attendees who scan in for a session will receive an email with CPE login and evaluation information.

ASBO ANNUAL MEETINGS = PINS
Long-time annual meeting attendees know that part of our history and culture includes collectible pin trading. To continue this fun tradition, look in your registration bag to find two new ASBO pins to add to your collection this year! Sponsored by Siemens Industry, Inc., Building Technologies Division

WRITE IT DOWN
Use the event journal found in your registration bag to keep your notes and insights all in one place. Sponsored by ABMM Financial

FIRST AID
In the event of a medical emergency or accident, please call security at extension 333 for assistance.

ANNUAL MEETING & EXPO MOBILE APP
Back by popular demand! The full annual meeting program is available for smart phone and tablet users with the Annual Meeting & Expo App. Search ASBO Intl 15 in the App Store or Google Play to connect with attendees and create your personal conference itinerary. Sponsored by Johnson Controls

SESSION RECORDINGS
Can’t decide which session to attend? No problem! Unless otherwise noted, all Discussion Groups and Deep Dig Sessions will be recorded and made available on Education On Demand.

RIBBON BAR
Help yourself to unlimited badge ribbons at the ribbon bar located near Registration on the Ballroom Level of the Convention Center.

To celebrate the Annual Meeting & Expo in the Lone Star State, keep your eye out for the exclusive 2015 “Everything’s Bigger in Texas” ribbon. Visit Motorola’s Booth 805 in the Exhibit Hall to pick up your special ribbon! Sponsored by Motorola

ASBO BOOTH, BOOKSTORE, AND PIN TRADING ZONE
See page 71 for details about these and other Exhibit Hall highlights.

Programming Note
ASBO International’s 2015 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.
I want to work with a 403(b) provider who focuses on the same thing I do: education

As the #1 provider of 403(b) plans in the K-12 market,* we provide your members with the resources and tools they need to learn how to prepare for retirement.

At AXA we can help you help your members prepare for retirement by taking small, manageable steps.

Can we help you take the next step?

Visit Our Booth #432 During the Conference

Unable to stop by? To schedule an appointment call 866-401-3030, option 3.

*Source: LIMRA, Not-for-Profit Survey, based on total participants for three consecutive years (2012-2014) and contributions for two consecutive years (2013-2014).

“AXA” is the brand name for the AXA Equitable Financial Services, LLC family of companies, including AXA Equitable Life Insurance Company, AXA Advisors, LLC and AXA Distributors, LLC. AXA S.A. is a French holding company for a group of international insurance and financial services companies, including AXA Equitable Financial Services, LLC. The obligations of AXA Equitable Life Insurance Company are backed solely by its claims-paying ability.

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GE-96533 (8/14)
Great Partners Help You Connect the Dots

Great partners are uniquely positioned to help you connect the resources and industry information you need with the solutions you want. Tap into the expertise of ASBO International’s Corporate Partners and see how they can help you optimize success.

Strategic Partners

Event Partners
Erase Student Loan Debt

Help your employees create a successful financial future. Are student loan payments keeping your employees from participating in your school’s retirement plan? Or worse, are those payments forcing your teachers to leave the profession they love? Do your employees wish their students loans would magically disappear?

Learn about student loan forgiveness programs that are available to help reduce or eliminate student loan debts for qualifying education employees.

Visit booth #405 or join the discussion at our Clinic Table.
THE COLLABORATIVE CLASSROOM

Imagine what school could be like.

We're taking school beyond the ordinary and into the realm of extraordinary with out-of-this world, 21st-century products that will leave you wondering, "what will they think of next?" From interactive whiteboards to tablets and more, we've got tons of innovative ideas to help you teach, collaborate and inspire your students every day.

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### Friday, October 23

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 a.m. – 6:00 p.m.</td>
<td>Registration Open</td>
</tr>
<tr>
<td>8:00 a.m. – 5:00 p.m.</td>
<td>Workshops and Seminars</td>
</tr>
<tr>
<td>9:00 a.m. – 12:00 p.m.</td>
<td>Dallas Cowboys Stadium Tour ($)</td>
</tr>
<tr>
<td>9:30 a.m. – 3:00 p.m.</td>
<td>Certification Commission Meeting and Lunch (IO)</td>
</tr>
<tr>
<td>6:00 p.m. – 7:30 p.m.</td>
<td>Welcome Mixer</td>
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### Saturday, October 24

<table>
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<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>7:00 a.m. – 4:00 p.m.</td>
<td>Registration Open</td>
</tr>
<tr>
<td>7:30 a.m. – 8:30 a.m.</td>
<td>SFO® Recipient Breakfast (IO)</td>
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<tr>
<td>8:45 a.m. – 10:45 a.m.</td>
<td>First General Session—Presentation by Michelle Gielan</td>
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<tr>
<td>11:00 a.m. – 12:00 p.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>11:00 a.m. – 12:00 p.m.</td>
<td>Guest Program: Book Club—Mrs. Kennedy and Me by Clint Hill</td>
</tr>
<tr>
<td>11:00 a.m. – 12:00 p.m.</td>
<td>Annual Meeting Program Committee Meeting—All encouraged to attend</td>
</tr>
<tr>
<td>11:00 a.m. – 1:30 p.m.</td>
<td>Affiliate Executive Directors Meeting and Lunch (IO)</td>
</tr>
<tr>
<td>12:00 p.m. – 1:30 p.m.</td>
<td>MBA Advisory Committee Meeting and Lunch (IO)</td>
</tr>
<tr>
<td>12:30 p.m. – 2:30 p.m.</td>
<td>Deep Dig Sessions</td>
</tr>
<tr>
<td>1:15 p.m. – 2:15 p.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>2:30 p.m. – 5:30 p.m.</td>
<td>Exhibit Hall Opening Reception</td>
</tr>
<tr>
<td>7:00 p.m. – 10:00 p.m.</td>
<td>Affiliate Reception at The Ranch of Lonesome Dove</td>
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### Sunday, October 25

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 a.m. – 4:00 p.m.</td>
<td>Registration Open</td>
</tr>
<tr>
<td>8:30 a.m. – 9:45 a.m.</td>
<td>Clinic Tables</td>
</tr>
<tr>
<td>8:45 a.m. – 9:45 a.m.</td>
<td>Open Bylaws Meeting</td>
</tr>
<tr>
<td>10:00 a.m. – 11:30 a.m.</td>
<td>Second General Session—Presentation by Matt McFadyen</td>
</tr>
<tr>
<td>11:00 a.m. – 11:45 a.m.</td>
<td>Guest Program: Dallas History</td>
</tr>
<tr>
<td>11:30 a.m. – 1:00 p.m.</td>
<td>COE Advisory Committee Meeting and Lunch (IO)</td>
</tr>
<tr>
<td>11:30 a.m. – 2:15 p.m.</td>
<td>Exhibit Hall Open</td>
</tr>
<tr>
<td>12:30 p.m. – 1:30 p.m.</td>
<td>Lunch in the Exhibit Hall</td>
</tr>
<tr>
<td>1:15 p.m. – 2:00 p.m.</td>
<td>COE Recipients Reception (IO)</td>
</tr>
<tr>
<td>2:15 p.m. – 3:00 p.m.</td>
<td>Eagle Award Recipients Reception (IO)</td>
</tr>
<tr>
<td>2:30 p.m. – 3:30 p.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>2:30 p.m. – 4:30 p.m.</td>
<td>Deep Dig Sessions</td>
</tr>
<tr>
<td>3:45 p.m. – 4:45 p.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>5:00 p.m. – 6:00 p.m.</td>
<td>Emerging School Business Leaders Scholarship Reception (IO)</td>
</tr>
<tr>
<td>5:15 p.m. – 6:00 p.m.</td>
<td>MBA Recipients Reception (IO)</td>
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### Monday, October 26

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<th>Time</th>
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<tr>
<td>7:00 a.m. – 10:00 a.m.</td>
<td>Registration Open</td>
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<tr>
<td>8:00 a.m. – 9:00 a.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>9:15 a.m. – 10:15 a.m.</td>
<td>Discussion Groups</td>
</tr>
<tr>
<td>9:30 a.m. – 10:15 a.m.</td>
<td>Guest Program: Art of Reflexology</td>
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<tr>
<td>10:30 a.m. – 11:30 a.m.</td>
<td>Discussion Groups</td>
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</tbody>
</table>
A’VIANDS SCHOOL NUTRITION PROGRAMS
DO MORE THAN FEED STUDENTS,
THEY FEED HUNGRY MINDS.

WHAT WE OFFER:

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Visit us at booth 809 and get your questions answered!

EXHIBIT HALL GAME PARTICIPANT - SATURDAY ONLY!

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

Remember, your badge is your ticket to earn CPE credits, so please scan your badge as you enter and exit each session room. To earn SFO recertification hours, remember to have your SFO Contact Hours Record initialed by the presenter or ASBO staff.

**Friday, October 23**

**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**: Engaging Education’s Stakeholders in Financing Our Future
Room: Dallas 6  SFOs: 8 CPEs: 8

**Two-Hour Workshops**

8:00 a.m. – 10:00 a.m.

**Workshop 2**: Alliance for Excellence in School Budgeting
Room: Texas 1-3  SFOs: 2 CPEs: 2

**Workshop 3**: How Your District’s Dining and Nutrition Program Can Impact Student Well-Being, Your Community, and School Climate
Room: Texas 4  SFOs: 2

10:15 a.m. – 12:15 p.m.

**Workshop 4**: How to Create and Deliver Dynamic Presentations
Room: Texas C  SFOs: 2 CPEs: 2

**Workshop 5**: Mentoring Magic: How Professional Mentoring Can Produce Exceptional School Business Officials
Room: Texas 5-6  SFOs: 2 CPEs: 2

1:00 p.m. – 3:00 p.m.

**Workshop 6**: Cool Tools for Managing Data
Room: Texas 1-3  SFOs: 2 CPEs: 2

**Workshop 7**: Design Scalable Staffing and Budgeting Models to Support Academic Goals
Room: Texas 5-6 SFOs: 2 CPEs: 2

**Workshop 8**: Technology, the Law, and Schools: Emerging Issues
Room: San Antonio 4-5  SFOs: 2

**Four-Hour Workshops**

8:00 a.m. – 12:00 p.m.

**Workshop 9**: ACA Strategy and Compliance Tactics for 2016 and Beyond
Room: San Antonio 4-5  SFOs: 4 CPEs: 4

**Workshop 10**: School Tour: Richard J. Lee Elementary School and Lady Bird Johnson Middle School
Room: San Antonio 6  SFOs: 4

**Workshop 11**: The Sustainable Management of Risk
Room: Dallas 5  SFOs: 4

1:00 p.m. – 5:00 p.m.

**Workshop 12**: Internal Controls and Reporting for Athletics, Student Activity Funds, Booster Clubs, and PTOs
Room: Texas C  SFOs: 4 CPEs: 4

**Workshop 13**: Lessons from Corporate America: How Professional Development Builds Leadership
Room: Texas 4  SFOs: 4 CPEs: 4

**SEMINARS**

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

**Full-Day Seminar**

8:00 a.m. – 5:00 p.m.

**Seminar 14**: Skills Refresher for ASBO’s SFO® Certification Exam
Room: San Antonio 1-2  SFOs: 8 CPEs: 8

**Four-Hour Seminars**

8:00 a.m. – 12:00 p.m.

**Seminar 15**: How to Create an Award-Winning Budget
Room: Dallas 7  SFOs: 4 CPEs: 4

1:00 p.m. – 5:00 p.m.

**Seminar 16**: How to Prepare a Comprehensive Annual Financial Report
Room: Dallas 5  SFOs: 4 CPEs: 4
INCREASE 403(b) PLAN SATISFACTION

Tools to Help Grow Savings and Participation

- Security Benefit has been serving education professionals for nearly five decades
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- Personal retirement analysis and reports
- Professional, local service from a professional financial advisor
- Multiple retirement strategies to help meet the different needs of those just beginning their career to those ready for retirement

For more information about retirement programs, or for a comprehensive review of your current plan contact 800.747.5164, option 3  | SecurityBenefit.com
Supporting fiscal transparency for school districts

For more than a decade, VALIC has partnered with the Association of School Business Officials International (ASBO) to support the individuals who work behind the scenes safeguarding education funds in school systems around the world.

By sponsoring the Certificate of Excellence in Financial Reporting (COE), VALIC enables ASBO to recognize education’s financial managers for communicating school district expenditures with utmost clarity and integrity.

At VALIC, we commit ourselves to upholding the “four Ps” — Partnership, People, Process and Promise. It is this commitment to our clients and our industry that has helped us become a leading retirement plan provider, serving nearly 24,000 plan sponsors and more than 2 million participants.

We are dedicated to partnering with you to provide an outstanding benefit to your employees through your retirement plan.

We help customize a solution that is uniquely created for your retirement plan and your employees.

We offer face-to-face service models for you and your employees, and a team of dedicated relationship managers.

We promise to help ensure each employee is retirement ready by offering a full suite of services and providing concrete steps to guide them through their toughest retirement readiness decisions.

When you’re ready to partner with a company dedicated to supporting the education market, call us to learn more.

John Kevin
Vice President K-12 Market

(410) 916-1709
John. Kevin@valic.com

Securities and investment advisory services offered through VALIC Financial Advisors, Inc., member FINRA, SIPC and an SEC-registered investment advisor.

Annuities issued by The Variable Annuity Life Insurance Company. Variable annuities distributed by its affiliate, AIG Capital Services, Inc., member FINRA.

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VC 26917 (06/2015) JS6016 ER
**EARNING CPE CREDITS AND SFO CONTACT HOURS**

Earn up to 16 CPE credits for the entire Annual Meeting & Expo in Personal Development, Finance, Auditing, Specialized Knowledge and Applications, Computer Science, Accounting (Governmental), Administrative Practice, Management Advisory Services, Personnel/HR, Business Law, Regulatory Ethics, and Accounting fields of study.

To receive CPE credit for designated sessions, you must scan your badge to verify attendance and complete the online session evaluation.

Earn up to 16 SFO recertification contact hours Friday through Monday. Use the Contact Hours Record in your registration packet to document your attendance. Remember to have the presenter or ASBO staff initial next to each session you attend. All Workshops, Seminars, Discussion Groups, and Deep Dig sessions award SFO contact hours.

**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 the 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 International will also offer CPE credits for select Discussion Groups and Deep Dig sessions at the Annual Meeting & Expo using the group live instructional delivery method.

**COMPLAINT RESOLUTION AND REFUND POLICY**

For more information regarding administrative policies, such as complaints and refunds, contact ASBO International offices by phone, 866.682.2729 x7080, or by mail, 11401 North Shore Drive, Reston, Virginia, 20190.

ASBO International reserves the right to cancel a Workshop or Seminar due to low enrollment.
**Friday, October 23**

7:00 a.m. – 6:00 p.m.  
Registration  
Center Pre-function, Ballroom Level

8:00 a.m. – 5:00 p.m.  
Workshops and Seminars  
(See page 12 for complete listing.)

9:00 a.m. – 12:00 p.m.  
Dallas Cowboys Stadium Tour  
*Additional Fee and Advance Registration Required*  
Buses depart from the Tour Bus Lobby at 9:15 a.m.

9:30 a.m. – 3:00 p.m.  
Certification Commission Meeting and Lunch  
*By Invitation Only*  
*Room: Appaloosa 1*

6:00 p.m. – 7:30 p.m.  
Welcome Mixer*  
Glass Cactus

Continuous shuttle service will be available from the Gaylord Texan Tour Bus Lobby to the Glass Cactus from 5:45 p.m. to 8:45 p.m. Prefer to walk? The Glass Cactus is a short 10–15 minute walk from the Gaylord Texan along a paved sidewalk.

Attendees are welcome to stay at the Glass Cactus until closing. After 7:30 p.m., food and beverage purchases will be the responsibility of each individual.

*Must be 21+ to attend. Badge required.*

**Saturday, October 24**

7:00 a.m. – 4:00 p.m.  
Registration  
Center Pre-function, Ballroom Level

7:30 a.m. – 8:30 a.m.  
SFO® Recipient Breakfast  
*By Invitation Only*  
*Room: Austin 1-3*  
*Sponsored by The Horace Mann Companies*

8:00 a.m. – 8:45 a.m.  
General Session Coffee Break  
Texas Ballroom Foyer  
*Sponsored by Tyler Technologies*

**FIRST GENERAL SESSION**

8:45 a.m. – 10:45 a.m.  
First General Session  
*Room: Texas Ballroom A*

**Welcome to Grapevine**  
Mark C. Pepera, MBA, RSBO, SFO  
President, ASBO International

**Business Meeting**  
Mark C. Pepera, MBA, RSBO, SFO

**Presentation of the 2015 Eagle Awards**  
Matthew R. Foxhall, CFP®  
Regional Senior Vice President, AXA

**Introduction of Speaker**  
Mark Turner  
Senior Vice President, Security Benefit
11:00 a.m. – 12:00 p.m.
Annual Meeting Program Committee Meeting
*All Encouraged to Attend*
*Room:* Texas C

11:00 a.m. – 12:00 p.m.
*Guest Program*
*Book Club:* *Mrs. Kennedy and Me*
*Room:* Austin 3

Join us for an engaging discussion of Clint Hill’s intimate memoir, *Mrs. Kennedy and Me*. The author, a former Secret Service agent, details his relationship with First Lady Jackie Kennedy in the years surrounding President Kennedy’s assassination.

11:00 a.m. – 1:30 p.m.
Affiliate Executive Directors Meeting and Luncheon
*By Invitation Only*
*Room:* Fort Worth 5-6

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**FIRST GENERAL SESSION SPEAKER**

“Catalyzing Success: Training Your Brain to Seize Opportunities”

**MICHELLE GIELAN**

Ready to get happy? Founder of the Institute for Applied Positive Research and executive producer of “The Happiness Advantage” on PBS, Michelle Gielan has identified the hallmarks of an optimistic mindset and how we can train our brains to process the world for greater happiness and success.

In this inspiring and interactive session, Michelle reveals strategies that can rewire your brain to see more potential, increase your chances of being in the “right place at the right time,” and turn chance encounters and connections into professional success in your school district.

*Sponsored by Security Benefit*

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**AMERICAN FIDELITY ASSURANCE COMPANY**

Welcome to ASBO International’s 2015 Annual Meeting & Expo!

From administrative services to Affordable Care Act guidance, our specialized approach was designed to support the education community and educate you on matters that affect your school. Please join us for our highly interactive ACA Strategy and Compliance Tactics for 2016 and Beyond session on Friday at 8:00 a.m.; visit our Clinic Table, ACA Reporting Requirements, Sunday at 8:30 a.m.; or join us for the Deep Dig, Understanding the Compliance, Financial, and Administrative Requirements of the Affordable Care Act, Sunday at 2:30 p.m. We also invite you to visit us in the Exhibit Hall at Booth 421. American Fidelity is proud to be a partner on your side.

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**DISCUSSION GROUPS**

11:00 a.m. – 12:00 p.m.
Workers Compensation Jeopardy (DG228)
*Room:* Dallas 5

*SFOS:* 1

Participants in this interactive session will learn best practices for controlling workers’ compensation costs, including the importance of safety committees, claims reviews, training, loss control, managed care, and modified duty. Participants will learn from one another’s experiences, develop an understanding of workers’ compensation law, and understand why past medical history and investigation are so crucial.

*Speakers:* Bernardo Giuliana, School Business Administrator, East Brunswick Board of Education, East Brunswick, NJ; Latonya Jackson, Vice President–Public Entity, Arthur J. Gallagher & Company, Princeton, NJ; Derek J. Jess, School Business Administrator,
11:00 a.m. – 12:00 p.m.
How to Prepare and Submit a Comprehensive Annual Financial Report (CAFR) for ASBO’s Certificate of Excellence (COE) Award (DG167)

**CPE**

**Room:** San Antonio 6  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Finance  
**Program Prerequisites:** None  
**Advance Preparation:** None

Learn about the requirements for developing an effective CAFR. Review guidelines and processes to receive the COE award.

**Learning Objectives:** 1. Detail the requirements of a CAFR, providing examples and resources. 2. Explain the COE program process and requirements. 3. Describe the benefits of participating in the COE program.

**Speakers:** Sara Kirk, Audit Manager, Heinfeld, Meech, & Co., P.C., Phoenix, AZ; Members of the COE Advisory Committee

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11:00 a.m. – 12:00 p.m.
Projecting Educational and Financial Solvency for Your District (DG160)

**CPE**

**Room:** Texas 4  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Finance  
**Program Prerequisites:** None  
**Advance Preparation:** None

How many times have you been asked to predict the future? School board members, superintendents, faculty members, and community stakeholders often call upon the school business official (SBO) to forecast the financial stability and resulting educational opportunities for their organizations. Learn how SBOs can use data elements such as expenses, revenues, fund balance, enrollment, class sizes, and staffing demographics to help leaders understand their district’s current reality, use historical financial data to analyze trends, and forecast the district’s long-term financial and educational solvency.

**Learning Objectives:** 1. Demonstrate how to use historical data to evaluate current trends in expenses, revenues, and the resulting fund balance. 2. Discuss how to use data along with your knowledge of future trends to analyze the long-term financial health of your district. 3. Identify which future trends in your district’s financial data would indicate educational solvency.

**Speakers:** Scott Smith, Senior Vice President, Forecast5 Analytics, Inc., Naperville, IL; Jennifer Bolton Carls, Deputy Superintendent, ONC BOCES, Grand Gorge, NY; Greg Carlson, Assistant Superintendent for Business and Management Services, Bryam Hills SD, Armonk, NY

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11:00 a.m. – 12:00 p.m.
Widgital to Digital: Procurement in the Age of Content (DG224)

**Room:** Dallas 6  
**SFOs:** 1

Almost overnight, decisions about everything from desks to devices are driven by learning outcomes. How does the procurement specialist understand, protect, and drive learning outcomes alongside financial efficiency? Learn best practices for device procurement and implementation. Explore scenarios in which the use of tablets goes badly, and examine how learning may decline in a 1:1 school. Learn how to transform technology into content and review new research on the classroom ecosystem that must balance purchasing decisions with learning outcomes.

**Speaker:** Kevin E. Baird, Chairman and National Supervising Faculty, Center for College and Career Readiness, Orlando, FL
11:00 a.m. – 12:00 p.m.
Developing and Implementing Internal Controls for Accounts Payable (DG122)

**CPE**

**Room:** Dallas 7  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Auditing  
**Program Prerequisites:** None  
**Advance Preparation:** None

Learn practical tips to develop and implement internal controls for accounts payable processing in your school district. This session will also provide a great opportunity to share your own best practices in managing this repetitive task in the most accurate, efficient, and effective manner. Leave with valuable resources such as procedures and checklists.

**Learning Objectives:**  
1. Discuss the need for internal controls in the accounts payable department.  
2. Describe how to utilize the resources provided during the session to create and/or update your district’s procedures.  
3. Outline your district’s own best practices and challenges in managing accounts payable payments.

**Speaker:** Rebecca Estrada, Executive Director of Finance, Lackland ISD, San Antonio, TX

11:00 a.m. – 12:00 p.m.
Why Food Allergies Matter to Your Staff, Students, and Community (DG201)

**CPE**

**Room:** San Antonio 3  
**SFOs:** 1

Food allergy is a serious medical condition affecting up to 15 million people in the United States, including 1 in 13 children. Allergic reactions can be life-threatening and have far-reaching effects on children and their families, as well as on the schools they attend. Meeting the needs of this growing population must be addressed in all school foodservice venues. Staff in schools should develop plans for preventing an allergic reaction and responding to a food allergy emergency. Participants will have the opportunity to receive food allergy and gluten-free foodservice training.

**Speaker:** Stacy Lofton, MS, RD, SNS, Director, Premier Inc., and Master Trainer, MenuTrinfo, LLC

11:00 a.m. – 12:00 p.m.
What I Didn’t Learn in Business Official School (DG149)

**CPE**

**Room:** Texas 5-6  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Personal Development  
**Program Prerequisites:** None  
**Advance Preparation:** None

As school business officials, we often have great plans for what we will get done each day. Then the day starts and the plans promptly get derailed. Sometimes the questions we are asked or tasks we need to accomplish seem easy and straightforward, but because they may be related to an obscure aspect of state or federal law, they consume much more time than we expected. Learn about some of these unusual, time-consuming aspects of school business management,
key approaches for managing time, and strategies for building a network to help get things done quickly. Audience participation is encouraged.

Learning Objectives: 1. Describe how to address typical time-consuming activities in school business. 2. Formulate time-management approaches to make efficient use of time. 3. Outline strategies for developing a resource network to assist in completing school business tasks.

Speaker: David Bein, Assistant Superintendent of Business Services and Chief School Business Official, East Maine SD 63, Des Plaines, IL

11:00 a.m. – 12:00 p.m.
Community Use of Schools Program—Ontario, Canada (DG100)

Room: San Antonio 4-5
SFOs: 1

Examine the benefits of the multi-faceted Community Use of Schools Program now in place for over 10 years at all 72 school boards in the province of Ontario. Discover how the program has positively impacted the community, especially the youth, by allowing programs to be held in school facilities after hours at little or no cost. Issues and best practices will be discussed as well as risk management, balancing the budget, and the program’s impact on other departments.

Speakers: Kelly O’Boyle, Community Use of Schools Outreach Coordinator, Peterborough Victoria Northumberland and Clarington Catholic District School Board, Peterborough, ON; Debbie Dover, Community Use of Schools Officer, Waterloo Catholic District School Board, Kitchener, ON

12:00 p.m. – 1:30 p.m.
Meritorious Budget Award Advisory Committee and Reviewers Meeting and Lunch
By Invitation Only
Room: Austin 4

DEEP DIG SESSIONS

12:30 p.m. – 2:30 p.m.
Developing, Implementing, and Sustaining a Multi-Year Strategic Finance Plan (DD183)

Room: San Antonio 4-5
SFOs: 2  CPEs: 2  Program Level: Basic  Field of Study: Accounting Governmental  Program Prerequisites: None  Advance Preparation: None
Lake County, Florida, Wylie, Texas, and Beaverton, Oregon, school districts are members of a 30-school district Alliance for Excellence in School Budgeting. Using resources from Smarter School Spending and a process created by school business officials, researchers, and education finance experts, districts use the budget process to create a multiyear financial plan to align resources to student outcomes. Learn how these three districts have brought teaching and learning, communication, and finance leaders together to implement the process, and how they are embedding the practice into the culture of their district.

**Learning Objectives:**
1. Discuss the value of each of the five major areas for best practices in school budgeting.
2. Describe a plan for analyzing the current status of your district and determining where to start best practices in your district.
3. Outline a series of next steps for implementing a multiyear strategic finance plan to support instructional strategies for student success.

**Speakers:** Claire Hertz, Chief Financial Officer, Beaverton SD, Beaverton, OR; Carol MacLeod, CPA, Chief Financial Officer, Lake County Schools, Lake County, FL; Michele Trongaard, Chief Financial Officer, Wylie ISD, Wylie, TX

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**12:30 p.m. – 2:30 p.m.**

*A Safer, Healthier School Through Green Cleaning (DD154)*

**Room:** San Antonio 3

**SFOs:** 2

Seeking healthier, safer indoor environments, many school districts have developed environmentally preferable purchasing policies, which is an excellent first step. The next vital step for our K–12 schools is green cleaning. Become familiar with the components of a green cleaning program and discover numerous benefits, including reduced absenteeism and rates of asthma attacks. Learn how green cleaning procedures can help your district save money. The executive directors of two national nonprofits will describe their experiences working with school administrators, facilities teams, unions, purchasers, parents, communities, and trainers to help schools implement green cleaning.

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**12:30 p.m. – 2:30 p.m.**

*Creative Disruption: Using the Student’s Viewpoint to Transform Education (DD212)*

**Room:** San Antonio 1-2

**SFOs:** 2

Creative disruption refers to overturning the norms that result in mediocrity in order to institute innovative and positive change. The unremarkable student outcomes most of us observe suggest that we can discover more about our roles as progressive financial and operations chiefs by seeing the world as our students do. How might we improve educational results by applying our mission-focused wisdom to better provide what students really want: a great teacher, a school experience that aligns with their world, and effective preparation for their future? Explore opportunities for shifting our thinking and resource deployment to re-energize our students’ enthusiasm for learning.

**Speaker:** Carl Harrison Gruenler, Deputy Superintendent for Business Operations, Santa Fe Public Schools, Santa Fe, NM
12:30 p.m. – 2:30 p.m.
Behavioral Finance: How Understanding the Psychology of Investing Can Guide School Employees Toward a More Secure Retirement (DD184)

Room: Texas 1-2
SFOs: 2
CPEs: 2
Program Level: Basic
Field of Study: Personnel/HR
Program Prerequisites: None
Advance Preparation: None

Join a panel of industry experts for a lively and participatory exploration of behavioral finance, a field that combines behavioral psychology and conventional finance to explain why people make irrational financial decisions. Unravel generational differences in attitudes toward retirement saving and gain actionable insights into diffusing negative implications of irrational financial decision making. Examine plan design elements that help employees save more for a secure retirement and address recent legislative updates regarding 403(b)/457 plans.

Learning Objectives:
1. Describe the current landscape of retirement security among school employees.
2. Define behavioral finance and discuss research and implications of employees’ irrational retirement planning behaviors.
3. Discuss generational differences in attitudes toward retirement planning.
4. Explain the role of employee engagement and education in mitigating negative implications of irrational retirement decisions.
5. Outline educational and retirement plan designs that can help mitigate those negative implications.
6. Identify recent IRS legislative updates regarding 403(b)/457 plans.

Speakers:
John Kevin, Vice President K-12 Market, VALIC, Linthicum, MD; Ketul Thaker, Vice President, Consultant and Industry Relations, Voya Financial®, Windsor, CT; Tom Granger, Assistant Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS; Nick Taylor, Vice President, Marketing Strategies, Horace Mann Companies, Springfield IL; Curtis May, Executive Vice President, AXA Advisors, Milwaukee, WI; Linda Segal Blinn, Vice President, Technical Services, Voya Financial®, Windsor, CT

1:15 p.m. – 2:15 p.m.
What Every School Administrator Should Know about K-12 Security (DG250)

Room: Texas 3
SFOs: 1

Everyone knows that the key to successful K–12 security is preparation. But in today’s school environments, the security needs and challenges are rapidly becoming more complex and require greater collaboration across multiple agencies. Every school employee has a role to play in K–12 security and it starts with understanding what adequate school security and emergency planning look like. Learn about recent recommendations from key federal and state agencies for crisis management in our K–12 districts.

Speakers:
Shamus P. O’Meara, Partner, O’Meara, Leer, Wagner & Kohl, P.A., Minneapolis, MN; Gwenn McDaniel, K–12 Vertical Market Director, Johnson Controls, North Myrtle Beach, SC

1:15 p.m. – 2:15 p.m.
Meritorious Budget Award Discussion Group (DG187)

Room: San Antonio 6
SFOs: 1
CPEs: 1
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

Get answers to your questions and guidance regarding the Meritorious Budget Award (MBA) and Pathway to the MBA programs. This discussion group focuses on specifics of districts’ situations and offers 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 district.
2. Describe techniques for ensuring receipt of the award.
3. Discuss creative ideas/solutions to common problem areas.
Speakers: Karin Smith, Partner, Heinfeld, Meech, & Co. P.C., Phoenix, AZ; Members of the MBA Advisory Committee

1:15 p.m. – 2:15 p.m.
Solutions to Top Bidding and Construction Problems (DG925)

Room: Dallas 5
SFOs: 1

Public bidding and construction can create nightmares for school business officials. This program, presented by two school law attorneys and an assistant superintendent for business, will help you recognize common problems and provide you with practical advice on how to solve these problems. Topics will include critical construction contract issues, pre-qualifying bidders, pre-bid meetings, project labor agreements, liquidated damages, rejecting unqualified bidders, certificates of insurance, payment and performance bonds, and project close-out challenges.

Speakers: Howard Metz, Attorney, Robbins Schwartz, Chicago, IL; Nelson Gray, Assistant Superintendent for Business Services, Des Plaines SD 62, Des Plaines, IL; Ken Florey, Attorney, Robbins Schwartz, Chicago, IL; Terry Fielden, School Board, Naperville High SD 203, Director of K–12 Education, ICI, Elmhurst, IL

1:15 p.m. – 2:15 p.m.
Making School Finance Understandable—Again (DG203)

Room: Texas 5-6
SFOs: 1  CPEs: 1

Are you having difficulty getting teachers, staff, the public, and even your board of education to understand the basics of school finance, much less more complicated issues? Explore how to avoid finance jargon and explain school finance in terms anyone can understand. Clear examples and references will be presented that will engage your district’s staff and community in meaningful dialogue about school finance. Saw this presentation last year? You will find expanded information in this new and improved version.

Learning Objectives: 1. Demonstrate how to translate school finance into layman’s terms. 2. Discuss how to be creative as a school business manager. 3. Explain why effective communication is a necessity to successful financial management.

Speaker: John W. Hutchison, Chief Financial and Operations Officer, Olathe Public Schools, Olathe, KS

1:15 p.m. – 2:15 p.m.
E-Rate Update (DG175)

Room: Texas 4
SFOs: 1  CPEs: 1

Are you having difficulty getting teachers, staff, the public, and even your board of education to understand the basics of school finance, much less more complicated issues? Explore how to avoid finance jargon and explain school finance in terms anyone can understand. Clear examples and references will be presented that will engage your district’s staff and community in meaningful dialogue about school finance. Saw this presentation last year? You will find expanded information in this new and improved version.

Learning Objectives: 1. Demonstrate how to translate school finance into layman’s terms. 2. Discuss how to be creative as a school business manager. 3. Explain why effective communication is a necessity to successful financial management.

Speaker: John W. Hutchison, Chief Financial and Operations Officer, Olathe Public Schools, Olathe, KS

Office Depot
Office Depot® delivers cost-saving solutions that provide real value to K–12 and help budgets go further. The conversation starts with instructional goals and technology vision and ends with customized solutions that drive student achievement. From school supplies and technology to professional development and parent engagement offerings, Office Depot provides a one-stop solutions resource for schools.
ed-tech leaders the resources they need to launch their schools and districts into the 21st century. The unprecedented increase, raising the funding cap by over 60%, will radically re-shape the way the program works going forward.

**Learning Objectives:** 1. Outline the new E-Rate rules and regulations. 2. Explain the changes in three major areas: closing the Wi-Fi gap, maximizing E-Rate spending, and making the E-Rate administration and application processes more efficient. 3. Describe the most effective ways to start leveraging the new regulations to get the most out of the E-Rate program.

**Speaker:** Keith R. Krueger, CEO, Consortium for School Networking (CoSN), Washington, DC

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**1:15 p.m. – 2:15 p.m.**


**Room:** Dallas 6

**SFOs:** 1

Around the world, the delivery of educational programs has been bedeviled by an increasingly uncertain environment characterized by radical changes in financing, structure, content, and systems of inspection and impact measurement. Explore the reasons for these changes and why the role of the school business manager, as both a skilled member of a team and a leader, is of critical importance in this changing environment. The session will draw on evidence and data from the U.S., Canada, Australia, South Africa, and Europe.

**Speaker:** Trevor Summerson, Retired Director, National College for School Leadership, Sheffield, United Kingdom

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**2:30 p.m. – 5:30 p.m.**

**Exhibit Hall Opening Reception**

Exhibit Hall F

*Sponsored by Horizon Software*

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**7:00 p.m. – 10:00 p.m.**

**Affiliate Reception and Candidate Meet-and-Greet* **

The Ranch of Lonesome Dove

2299 Lonesome Dove Road


Join us at Lonesome Dove for a reception and candidate meet-and-greet. Get to know current and future ASBO International board candidates and network with friends and colleagues while you enjoy line dancing instruction, mechanical bull riding, and quick-draw contests. Texas-style appetizers and beverages will be provided.

Continuous shuttle service to Lonesome Dove will be available from the Gaylord Texan Tour Bus Lobby beginning at 6:30 p.m.

*Open to all conference attendees. Badge required.*
Sunday, October 25

7:00 a.m. – 4:00 p.m.
Registration
Center Pre-function, Ballroom Level

8:30 a.m. – 9:45 a.m.
Clinic Tables
Room: Texas C
(See page 48 for complete listing.)

8:45 a.m. – 9:45 a.m.
Open Bylaws Meeting
Room: Texas 5-6

9:15 a.m. – 10:00 a.m.
General Session Coffee Break
Texas Ballroom Foyer
Sponsored by Tyler Technologies

SECOND GENERAL SESSION

10:00 a.m. – 11:30 a.m.
Second General Session
Room: Texas Ballroom A

Business Meeting
Brenda R. Burkett, CPA, CSBA, SFO
Vice President, ASBO International

Installation of Officers
Terrie S. Simmons, RSBA, CSBO
Immediate Past President, ASBO International

Presentation of the 2015 Pinnacle Awards
Brian True, Corporate Director,
National Sales Group, Virco Mfg. Corporation

Introduction of Speaker
Brenda R. Burkett, CPA, CSBA, SFO

ASBO International thanks General Session standby speaker Carolyn Warner, founder and president,
Corporate Education Consulting, Inc.

SECOND GENERAL SESSION SPEAKER

“Reaching the North Pole: Insights on Leading Teams Through Challenge and Change”

MATT MCFADYEN
A brush with death in the icy waters of the Great Southern Ocean ignited a passion in Matt McFadyen to lead others in reaching their peak potential. From surviving 45 degrees below zero to battling powerful ice drifts, Matt knows a thing or two about perseverance, leadership, and teamwork. Taking insights from his incredible expedition to the North Pole, Matt brilliantly illustrates what’s needed when you’re called to lead your team through challenge, change, and ambiguity. Get ready to leave inspired to tackle your personal mountaintop goal!
11:00 a.m. – 11:45 a.m.
**Guest Program**

*Dallas History*

**Room:** Austin 3

Discover the rich and colorful history of Dallas in this educational and entertaining presentation. Author and speaker Rose-Mary Rumbley will guide you through the region’s historical milestones and delight you with stories of the city’s past.

11:30 a.m. – 1:00 p.m.
**Certificate of Excellence Advisory Committee and Reviewers Meeting and Lunch**

*By Invitation Only*

**Room:** Austin 4

11:30 a.m. – 2:15 p.m.
**Exhibit Hall Open**

**Room:** Exhibit Hall F

12:30 p.m. – 1:30 p.m.
**Lunch in the Exhibit Hall**

**Room:** Exhibit Hall F

*Sponsored by BMO Financial Group*

1:00 p.m. – 3:30 p.m.
**Professional Development Networking Group**

*By Invitation Only*

**Room:** Fort Worth 5-6

1:15 p.m. – 2:00 p.m.
**Certificate of Excellence Award Recipients Reception**

*By Invitation Only*

**Room:** Mission Plaza

*Sponsored by VALIC*

2:15 p.m. – 3:00 p.m.
**Eagle Award Recipients Reception**

*By Invitation Only*

**Room:** Yellow Rose Pavilion

*Sponsored by AXA*

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**DISCUSSION GROUPS**

2:30 p.m. – 3:30 p.m.
**Entrepreneurial Transportation Services (DG216)**

*Room:* San Antonio 3

*SFOs:* 1

Hemet USD developed an award-winning and income-producing transportation service that serves students in multiple school districts across California. This program has enabled the district, despite fiscal challenges and cutbacks in transportation services, to provide an excellent transportation program plus increased revenue. Explore how the district created joint partnerships and affiliations with other public agencies to meet student needs and decrease costs, and learn about the program’s impact on vendors and for-profit providers.

**Speakers:** Vince Christakos, Assistant Superintendent, Hemet USD, Hemet, CA; Michael Fogerty, Director of Internal & External Transportation, Hemet USD, Hemet, CA

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2:30 p.m. – 3:30 p.m.
**Purchasing Fundamentals (DG123)**

*Room:* San Antonio 6

*SFOs:* 1

This interactive presentation offers a narrative coupled with audience participation through scenarios and group discussion. While the presentation focuses mainly on the area of how to purchase and offers information for those who are new to purchasing, it also provides insight and tips for those whose job requires purchasing only on an occasional basis.

**Speaker:** Kimberly Bauer, Purchasing Director, Norman Public Schools, Norman, OK
**Daily Schedule: Sunday**

**2:30 p.m. – 3:30 p.m.**
*Overcoming the Rising Costs of School Meal Regulations (DG028)*

**Room:** Dallas 5  
**SFOs:** 1

The Healthy, Hunger-Free Kids Act brought healthier foods to more than 31 million school children; however, many school districts are facing rising costs as a result of the new requirements. Gain a bird’s eye view of the issue with comprehensive data on trends across America’s schools, then hear first-hand how a Texas school district is successfully meeting challenges head-on through a combination of savvy procurement, serving line creativity, and advocacy efforts for regulatory flexibility.

**Speaker:** Chris Kamradt, Director of Child Nutrition Services, Spring Branch ISD, Spring Branch, TX

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**U.S. Communities**

ASBO International 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. uscommunities.org/education-purchasing

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**2:30 p.m. – 3:30 p.m.**
*Legislative Issues That Could Affect Your State (DG205)*

**Room:** Dallas 7  
**SFOs:** 1

Explore legislative issues that affect school business management and the education of your district’s students.

**Speakers:** Jay Himes, Executive Director, Pennsylvania ASBO, Harrisburg, PA; Tracy Ginsburg, Executive Director, Texas ASBO, Austin, TX; Michael Borges, Executive Director, New York ASBO, Albany, NY; David Lenihan, Legislative Liaison, Connecticut ASBO, West Hartford, CT

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**2:30 p.m. – 3:30 p.m.**
*Leadership Lessons Learned from the Life and Presidency of FDR (DG147)*

**Room:** Texas 5-6  
**SFOs:** 1

Set politics aside and look at the life and presidency of Franklin Delano Roosevelt. What lessons in leadership can we learn from America’s only four-term president? This presentation will examine 10 events in FDR’s life that offer the opportunity to learn—what he did, what he didn’t do, and what he could have done differently—from his example and his mistakes. How can we then apply these lessons to the challenges that we face as leaders?

**Speaker:** Bob Avery, Director of Business Services, Beaver Dam USD, Beaver Dam, WI
2:30 p.m. – 3:30 p.m.
Invest for Student Success Strategic Planner Tool for Educational Planning, Budgeting, and Resource Allocation (DG211)

**CPE**

**Room:** San Antonio 4-5  
**SFOs:** 1  **CEPs:** 1  **Program Level:** Basic  
**Field of Study:** Finance  
**Program Prerequisites:** None  
**Advance Preparation:** None

The Strategic Planner is a tool designed to facilitate planning and budgeting processes that explicitly align resources to programmatic goals. Users perform a needs assessment and establish goals. A series of strategies necessary to achieve the goals is then defined, under which staffing and materials resources are specified and automatically costed out, allowing the user to simulate different programmatic designs and their corresponding costs. The result is a transparent program design that details not only staffing and materials resources and their costs, but also documents how the resources are to be used to achieve the goals. Learn more about the tool and see a live demonstration.

**Learning Objectives:** 1. Describe the state-of-the-art Strategic Planner planning/budgeting system that can be used to align resource allocation to educational objectives. 2. Explain how planning/budgeting systems can be used to develop and monitor school- and district-level programs that promote innovation and efficiency in achieving educational goals. 3. Outline effective resource allocation practices that can enhance professional learning and continuous improvement.

**Speaker:** Jesse Levin, Principal Research Economist, American Institutes for Research, San Mateo, CA

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2:30 p.m. – 3:30 p.m.
How One District’s Printing Program Transformation Is Saving Money, Securing Documents, and Improving Sustainability (DG155)

**Room:** Texas 3  
**SFOs:** 1

Shawnee Mission, Kansas, leveraged Ricoh’s U.S. Community Contract to create a complete document management program. The plan transformed the way district employees interact with technology and relieved teachers of administrative time that they are now able to spend on student instruction. Explore how the plan enabled the district to allocate 4,000 printers; reduce print volume by 43%; transform and outsource print shop management; reduce FTEs; shorten the submittal process from four steps to one; and increase the number of print jobs from 2,000 per year to 15,000 in nine months. Card authentication is used to securely access multifunction device functions and protect printed documents. Live analytics and monthly reporting are generated for bill back purposes and ongoing change management.

**Speaker:** Drew Lane, Executive Director of Information Services, Shawnee Mission SD, Shawnee Mission, KS

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DEEP DIG SESSIONS

2:30 p.m. – 4:30 p.m.
Understanding the Compliance, Financial, and Administrative Requirements of the Affordable Care Act (DD198)

**CPE**

**Room:** Texas 1-2  
**SFOs:** 2  **CEPs:** 2  **Program Level:** Basic  
**Field of Study:** Specialized Knowledge and Applications  
**Program Prerequisites:** None  
**Advance Preparation:** None

The Affordable Care Act (ACA) came at a time of budget constraints and limited resources for many employers. However, not being compliant or cognizant of future
DAILY SCHEDULE: Sunday

obligations can be costly and time-consuming for your school district. Review the Patient Protection and ACA requirements imposed today and expected to take effect in the future, understand your responsibilities, and identify your level of preparedness using a checklist approach you can take back to your district.

Learning Objectives:
1. Identify reporting requirements, such as the new IRS 1094/1095 forms required in early 2016. 2. Discuss the upcoming ACA requirements, such as the Excise Tax on High Cost Plans (“Cadillac Tax”) and how your district can prepare now. 3. Detail how to prepare a compliance action plan for steps your district needs to take or needs to confirm are being handled by a third party.

Speakers: Susan Relland, CEO, American Fidelity Administrative Services, LLC, Oklahoma City, OK; Jessica Frier, Senior Health and Welfare Plan Consultant, American Fidelity Administrative Services, LLC, Long Beach, CA

2:30 p.m. – 4:30 p.m.
Time to Implement Uniform Grant Guidance: The OMB Omni Circular (DD133)

The Office of Management and Budget (OMB) issued its long-awaited grant reform rules, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. OMB is streamlining the federal government's guidance on administrative requirements as a key component to more effectively focus federal resources on improving performance and outcomes while ensuring financial integrity of taxpayer dollars. This guidance provides a government-wide framework for grants management that will be complemented by additional efforts to strengthen program outcomes through innovative and effective use of grant-making models, performance metrics, and evaluation. Learn the latest information about the OMB requirements.

Learning Objectives:
1. Outline the requirements of the new OMB guidelines.
2. Define the new terminology related to the guidelines.
3. Describe the potential impact of the standard on your school district's grant programs.
4. Explain the new audit and oversight requirements for federal grants.

Speakers: Bert Neuhring, Partner, Crowe, Horwath LLP, Oak Brook, IL; Corey Arvizu, Partner, Heinfeld, Meech & Co, Tucson, AZ; Christine Torres, Partner, Crowe Horwath LLP, Oak Brook, IL; Phillip W. Saurman, Shareholder, Hungerford Nichols, Grand Rapids, MI; Laura Cowburn, Assistant to the Superintendent for Business Services, Columbia SD, Columbia, PA

2:30 p.m. – 4:30 p.m.
FMLA and ADA Compliance and Administration—The Confessions of a Lawyer (DD092)

Get up to date on the latest interpretations, compliance obligations, and offering strategies for employers. Explore state and federal compliance issues and compliance strategies to minimize record keeping responsibilities and maximize employee satisfaction.

Speaker: Robert J. Simandl, Attorney, Simandl Law Group, S.C., Waukesha, WI
3:45 p.m. – 4:45 p.m.

Stay in the Black by Going Green: Realizing Benefits by Greening Your Schools (DG139)

Room: San Antonio 3
SFOs: 1

With operating costs and expenses continuing to rise, school business officials are often tasked with trying to maintain or improve existing facilities and build new ones with limited resources in support of the educational mission of the district. Green features in schools such as proper daylighting, ventilation, or sustainable materials can reduce operation and maintenance costs, but also have been shown to dramatically improve student learning and performance. Explore the benefits of developing and implementing a green school master plan in your district, including its alignment with your current long-range facility plans as well as the economic, environmental, and educational challenges and opportunities. Also look at how such measures align with national recognition programs such as Green Ribbon Schools, LEED, and Eco-Schools.

Speakers: Greg Somjen, Principal, Parette Somjen Architects, Rockaway, NJ; Jason Kliwinski, Director of Sustainable Design, Parette Somjen Architects, Rockaway, NJ; Derek Jess, Business Administrator, Perth Amboy SD, Perth Amboy, NJ

3:45 p.m. – 4:45 p.m.

Understanding the Impact of Risk Management in Your Schools (DG142)

Room: Texas 3
SFOs: 1

Risk management—two words that are rarely fully understood. Simply having insurance is not enough. It is critical to understand the dynamic nature of risks in schools and how to manage them. Schools have a plethora of risks that range from everyday occurrences such as slips and falls to bus accidents, and even the more rare occurrences such as
earthquakes. How does your school district identify and mitigate risks and control losses? Learn about proactive school risk management measures from expert risk managers.

**Speakers:** Tom Wohlleber, Chief Financial Officer, Gilbert Public Schools, Gilbert, AZ; Jim Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN; Amy Kohl, CSRM, Director of Business Services, School District of Greenfield, Greenfield, WI; Judyann Robinson, Risk Manager, Irving ISD, Irving, TX; Christina Ford, Risk Management/Operations Manager, Mesquite ISD, Mesquite, TX

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3:45 p.m. – 4:45 p.m.  
**Capital Forecasting and Planning (DG207)**

**Room:** Dallas 5  
**SFOs:** 1

Every part of your school building and its equipment will need repair or replacement, whether in the near or distant future. These projects can range from small work orders to multimillion-dollar contracts. Putting off repairs can result in bigger, more costly problems down the line. But business and facility professionals face constant pressures such as fluctuating budgets, unexpected repairs and improvements, as well as the need to prioritize what to do and when to do it in light of capital project priorities and associated costs. Seeing the big picture is essential to optimizing building maintenance by not only tending to current projects, but also forecasting and planning for future ones.

**Speaker:** Chris DeJuneas, Applications Engineer, SchoolDude, Cary, NC

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3:45 p.m. – 4:45 p.m.  
**The Value of the SFO® Certification (DG146)**

**Room:** San Antonio 6  
**SFOs:** 1

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**3:45 p.m. – 4:45 p.m.**

**Building Community and School Board Trust: Creating a Transparent, Collaborative, Data-Driven Community Process for Long-Range Financial Planning (DG238)**

**Room:** Texas 5-6  
**SFOs:** 1

Building trust is an important part of our role as school business officials as we create budgets, complete audits, and oversee internal controls. Come along on one district’s journey toward the creation of a transparent, collaborative, data-driven process for long-range financial planning (LRFP). Learn how this staff, board, and community came together to develop a LRFP framework that aligns the district’s mission and
strategies with available resources. Learn about tools for using data in a way that leads to improved financial decision making while building trust and transparency with your community, school board, and staff.

Speakers: Patricia Magnuson, Executive Director of Finance and Operations, Osseo Area Schools–ISD 279, Maple Grove, MN; Kelly Benusa, Director of Business Services, Osseo Area Schools–ISD 279, Maple Grove, MN; Cindy Brown, Coordinator of Accounting and Payroll, Osseo Area Schools–ISD 279, Maple Grove, MN; Michael Hueller, Coordinator of Accounting and Payroll, Osseo Area Schools–ISD 279, Maple Grove, MN

3:45 p.m. – 4:45 p.m.
Consolidation of Services Between Districts—Experiences and Lessons Learned (DG108)

Room: Dallas 7
SFOs: 1

Managing two separate budgets comprising over $55 million and two bond construction projects can be a challenge, to say the least. Learn how one school district finance director did just that for two districts that had wide-scale consolidated efforts and ultimately decided to go their separate ways. What worked well and what were the missteps? What challenges to consolidation can be overcome and what roadblocks are more difficult to navigate? Hear more about this director’s experience, what he learned, and why the consolidation project was permanently put on hold. Would he do it again and would he recommend that you try it?

Speaker: Jason Helsen, Director of Finance, Reeths-Puffer Schools, Muskegon, MI

3:45 p.m. – 4:45 p.m.
We Can Review Your Budget to Help You Make It an MBA Award-Winner (DG926)

Room: Texas C
SFOs: 1

Would you like your budget reviewed by professionals? Bring your budget document to this session and have it reviewed and critiqued. You’ll walk away with suggestions on how to make it worthy of a Meritorious Budget Award.

Speakers: MBA Advisory Committee Members and MBA Reviewers

5:00 p.m. – 6:00 p.m.
Emerging School Business Leaders Scholarship Recipients Reception
By Invitation Only
Texan Station
Sponsored by U.S. Communities

5:15 p.m. – 6:00 p.m.
Meritorious Budget Award Recipients Reception
By Invitation Only
Mission Plaza
Meritorious Budget Award and Pathway to the MBA sponsored by Voya Financial®
Monday, October 26

7:00 a.m. – 10:00 a.m.
Registration
Center Pre-function, Ballroom Level

7:30 a.m. – 8:15 a.m.
Coffee Break
Dallas Foyer, Ballroom Level
Sponsored by Tyler Technologies

DISCUSSION GROUPS

8:00 a.m. – 9:00 a.m.
The Design-Build Delivery Process for School Construction Projects (DG061)

CPE
Room: Dallas 5
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

The design-build delivery method for construction projects is a system of contracting under which one entity performs both architecture/engineering design and construction under a single contract with the owner. Learn about the design-build process, explore examples of real/completed design-build projects, and decide if this delivery system for contracting and completing a construction project is best for your school district.

Learning Objectives: 1. Describe the design-build delivery system for construction projects. 2. Compare the design-build system with the traditional competitive bidding system. 3. Outline potential pros and cons of the design-build system. 4. Discuss potential financial benefits of design-build projects.

Speaker: William Roberson, School Board President, Mooresville Consolidated School Corporation, Mooresville, IN

VOICE FINANCIAL®

Voya Financial® welcomes you to ASBO International’s 2015 Annual Meeting & Expo! We are proud to support your profession as a Strategic Partner of ASBO and the exclusive sponsor of the Meritorious Budget Award (MBA). We encourage you to visit us at Booth 208 to learn how we can help make retirement planning and administration easier for you and your employees. To this year’s MBA recipients: Congratulations on your achievement! Respectfully, The Voya Financial® Team.

8:00 a.m. – 9:00 a.m.
Financial Software Implementation: What Did I Get Myself Into? (DG152)

CPE
Room: Texas 3
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Computer Science
Program Prerequisites: None
Advance Preparation: None

Implementing a new software system is no easy task! The work (and fun) begins once you have selected the product that is best for your district. This interactive session will focus on implementation strategies and best practices, along with the successes and challenges of software implementation. Come prepared to share your experiences and learn from two districts that have implemented new software systems.

Learning Objectives: 1. Outline strategies to ensure a successful software implementation. 2. Discuss ways to effectively manage time and resources during implementation. 3. Describe process changes needed for successful software implementation. 4. Detail the challenges that can occur during software implementation.
Speakers: Brian Marcel, Assistant Superintendent, Administrative and Support Services, Washtenaw ISD, Ann Arbor, MI ; Stephanie Weese, Director of Finance, Kent ISD, Grand Rapids, MI

8:00 a.m. – 9:00 a.m.
Communicating Financial Information to Stakeholders—The Use of Infographics to Spice Up Your Presentation (DG022)

Room: San Antonio 4-5
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

This interactive session is designed to identify important information that can be illustrated in an infographic, that can then be used to communicate necessary financial information to stakeholders.

Learning Objectives: 1. Identify important financial information that needs to be communicated to district stakeholders. 2. Summarize information so that it can be placed in an infographic. 3. Outline the steps to follow in preparing an infographic.

Speaker: Sheri Senger, Associate Superintendent, Business, Wetaskiwin Regional Public Schools, Wetaskiwin, Alberta, Canada

8:00 a.m. - 9:00 a.m.
Reducing the Cost of Early Retiree Health Insurance Using the Affordable Care Act (DG113)

Room: San Antonio 1-2
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Specialized Knowledge and Applications
Program Prerequisites: None
Advance Preparation: None

Many school districts allow early retirees to continue on the group health plan at the same premium as active employees. However, the true age-related cost of coverage for an average 60-year-old retiree is twice that of the average active employee. This cost is often overlooked as a way to reduce premiums while increasing retiree flexibility. Prior to the Affordable Care Act there were no viable alternatives for retirees. Now private and public marketplaces offer plan designs that are more affordable, with no prohibition for pre-existing conditions. Learn how one school district provides increased flexibility to retirees at reduced cost.

Learning Objectives: 1. Identify options other than cost shifting that may yield insurance savings. 2. Describe the often-overlooked driver of health insurance costs. 3. Outline insurance solutions that foster cost-saving relationships. 4. Discuss how to increase the value of retiree benefits at reduced net cost.

Speakers: Ken Zastrow, Market Development, National Insurance Services, Brookfield, WI; David Branback, Director of Market Development, National Insurance Services, Brookfield, WI; Erik Kass, Assistant Superintendent for Finance, Operations, and Human Resources, School District of Elmbrook, Brookfield, WI
As professionals in education, our top priority is the safety of our students, faculty, and staff. We may feel that our current crisis plans are adequate, but it’s important to be aware of the restrictions and problems that may arise from reliance on purely analog communication systems. Binder-based plan documents can be useful for training purposes, but in the event of an actual emergency, when time is the most precious resource you have, do all staff and faculty have access to the binder, poster, or emergency flipchart? Learn what you can do to keep your crisis management plan relevant.

**Speaker:** Chris DeJuneas, Applications Engineer, SchoolDude, Cary, NC

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School boards have looked at the operations and maintenance budget to help fill part of budget shortfalls, including upgrading energy systems and equipment to reduce energy inefficiency. Most energy fixes are directed at low-hanging fruit—simple, common, energy-efficiency measures. One overlooked system lies behind locked doors: low-voltage distribution transformers (LVDT). Learn about the evolution of LVDT in simple, understandable terms, how the U.S. Department of Energy has studied and recommended improvements in the design of LVDTs, and the final ruling on future energy efficiency of buildings and the future requirement to obtain net-zero energy buildings.

**Speaker:** Lorenz Vernon Schoff, Energy Efficiency Consultant, Energy Efficient Solutions, Blacksburg, VA

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Learn, step by step, how to start a purchasing card program from the ground up. Explore risk migration/controls, how cards are being used, strategies for rebates, and why district card programs are increasingly popular.

**Speakers:** Karen Smith, Assistant Superintendent, Business and Finance, Cypress-Fairbanks ISD, Houston, TX; Karen Wiesman, Associate Superintendent, Business and Finance, Mansfield ISD, Mansfield, TX
8:00 a.m. – 9:00 a.m.  
The Successful Charter School Business Official (DG117)

Room: Dallas 6  
SFOs: 1

What happens during a typical day in the life of a charter school business official? There are approximately 6,000 public charter schools operating in nearly every state, all requiring seasoned business professionals to manage their affairs. Unfortunately, charters close every year due to mismanagement and financial deficiencies. Participants will learn about the three commonly accepted tenets of successful charter schools, the duties and responsibilities of charter school business officials, and in-house vs. outsourced charter school business operations. They will leave with information about the resources available from ASBO and ASBO affiliates to help SBOs and their charters succeed.

Speaker: Richard Weeks, Retired School Business Official, Wakefield, MA

9:15 a.m. – 10:15 a.m.  
Mobilizing Alumni to Create a Sustainable Revenue Stream (DG111)

Room: San Antonio 6  
SFOs: 1

Learn about the steps you can take to engage your alumni in generating a revenue stream that supports instructional programs, arts, athletics, and clubs. Explore the merits of a capital campaign, including the sale of naming rights and other nontraditional methods to generate revenue. Take home a framework to maximize social media to provide a strong alumni database for long-term advocacy, engagement, talent, and revenue generation.

Speakers: Dave Van Spankeren, Executive Director of Business Services, CESA #6, Oshkosh, WI; Jim Burgraff, Managing Partner, Alumni Nations, Oshkosh, WI; Alex Burgraff, CEO and Managing Partner, Alumni Nations, Oshkosh, WI

Internal auditors often fill the role of compliance officers as well as proactive protectors of district resources, but not all districts have the luxury of this position. Internal auditing functions are crucial to the prevention and detection of fraud and noncompliance. Learn how to implement procedures traditionally performed by internal auditors without increasing staff size.

Learning Objectives: 1. Discuss internal audit functions and define their benefits. 2. Examine internal controls and describe what can go wrong. 3. Recommend changes that can be made to strengthen already existing internal controls through additional procedures.

Speaker: Sara Kirk, Audit Manager, Heinfeld, Meech & Co., P.C., Phoenix, AZ

DISCUSSION GROUPS

9:15 a.m. – 10:15 a.m.  
Internal Auditing Functions Without the Internal Auditor (DG124)

Room: Dallas 5  
SFOs: 1  
CPE  
Program Level: Basic  
Field of Study: Auditing  
Program Prerequisites: None  
Advance Preparation: None

School business officials are responsible for ensuring their districts meet an ever-increasing number of compliance requirements dictated by state, local, and federal laws, yet they often find themselves without sufficient staff to ensure all requirements are being met.
**9:15 a.m. – 10:15 a.m.**  
**Common Deficiencies in Financial Statements and Single Audits (DG129)**  

**CPE**  

**Room:** San Antonio 3  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Accounting  
**Program Prerequisites:** None  
**Advance Preparation:** None

Examine the most common audit deficiencies for both auditors and auditees in the financial and single audit environments. Learn about audit areas that will receive more attention and ways you can have a quality audit and avoid audit findings. Both auditors and auditees will benefit from knowing these common deficiency areas.

**Learning Objectives:** 1. Identify common audit deficiencies. 2. Describe ways to guard against audit findings. 3. Discuss areas of increased audit focus.

**Speaker:** Phillip W. Saurman, Shareholder Government Services, Hungerford Nichols, Grand Rapids, MI; Laura Cowburn, RSBA, Assistant to the Superintendent for Business Services (Retired), Columbia Borough School District, Columbia, PA

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**9:15 a.m. – 10:15 a.m.**  
**GASB Update (DG265)**  

**CPE**  

**Room:** Texas 4  
**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Accounting Governmental  
**Program Prerequisites:** None  
**Advance Preparation:** None

The Governmental Accounting Standards Board (GASB) is the official source of generally accepted accounting principles for school districts. GASB provides accounting guidance through the issuance of standards and other communications to provide information to preparers and users of school district financial statements. Participants will get the latest information about GASB’s activities and standards.

**Learning Objectives:** 1. List the new reporting requirements from GASB. 2. Describe the potential effects of proposed accounting standards on your school district’s financial statements. 3. Discuss future projects that GASB is considering that improve financial reporting.

**Speaker:** Wesley Galloway, GASB Project Manager, Governmental Accounting Standards Board, Norwalk, CT

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**9:15 a.m. – 10:15 a.m.**  

**Room:** Texas 3  
**SFOs:** 1

Energy efficiency projects and occupant health protection sometimes seem at odds with each other. However, when energy efficiency and indoor air quality (IAQ) projects are well-coordinated, schools can save money and improve occupant health. U.S. EPA’s new Energy Savings Plus Health: Indoor Air Quality Guidelines for School Building Upgrades helps managers understand the relationship between energy and IAQ and identify key steps to realizing substantial improvements. Explore how managers can use the guide to create healthy schools with cost savings and sustainability in mind. Take advantage of a demonstration of management tools like the Energy Savings Plus Health Checklist Generator and the ENERGY STAR® Cash Flow Opportunity Calculator. Learn about the experience of the Carrollton-Farmers Branch Independent School District, which illustrates how integrating IAQ and energy management can improve school environments, reduce energy use, and yield cost savings.
9:15 a.m. – 10:15 a.m.
Data-Driven Fiscal Sustainability (DG164)

Room: San Antonio 1-2

SFOs: 1 CPEs: 1 Program Level: Basic
Field of Study: Computer Science
Program Prerequisites: None
Advance Preparation: None

New technologies in the area of business intelligence and analytics enable school business officials to gain immediate insight into their districts’ operations. This insight provides guidance to gain efficiencies, improve effectiveness, and reduce risks to schools. Applications of this technology include conducting performance reviews, identification of best practices across peers, and data discovery to reveal new inroads to improvements. East Liverpool Schools utilized analytic techniques to make substantial improvements and reduce costs. Learn how to replicate these efforts within your own district.

Learning Objectives:
1. Describe the new business intelligence and analytics technologies available for school districts.
2. Discuss how your district might utilize these tools to lower costs, improve performance, and reduce risks.
3. Outline the benefits of using business analytics and intelligence tools in your district.

Speakers:
Todd Puster, Treasurer/Chief Financial Officer, Orange City School District, Pepper Pike, OH; Dan Romano, Senior Vice President, Forecast5 Analytics, Inc., Toledo, OH

Is there a positive correspondence between the availability of education resources and student achievement? If so, might effective business practices that optimize the provision of education resources for instruction improve learning outcomes? And, ultimately, how might the impact of business decisions on learning be measured? Explore the foundational assumptions behind Australia’s first university course in education business leadership. Learn about the current context of school business and how education business is integrally connected to students’ experiences, school improvement, and educational outcomes. The Australian experience is relevant in all contexts and every school business official should know how their role has direct impact on successful schools, school systems, and educational practices.

Speakers:
Craig A. Schilling, Associate Professor, Concordia University Chicago, River Forest, IL; Mark Donehue, Course Presenter, Deakin University, Burwood, Victoria, Australia; Matthew McDonough, Finance Manager, Deakin University, Burwood, Victoria, Australia; Karen Elizabeth Starr, Professor, Deakin University, Burwood, Victoria, Australia

9:15 a.m. – 10:15 a.m.
Today’s Multi-Generational Workplace (DG127)

Room: Texas 1-2

SFOs: 1

Four generations in one office or on one campus? That is the reality in many work environments today. Each generation—Traditionalists, Baby Boomers, Generation X, and Millennials—has its own perspectives regarding management styles, preferred communication methods, and work values. How can we learn to co-exist as we
strive to achieve success for our students and staff? Learn what has shaped and influenced each generation, their traits, and how best to lead and motivate across the generations.

Speakers: Julie P. Novak, Chief Financial Officer, Fort Sam Houston ISD, San Antonio, TX

9:15 a.m. – 10:15 a.m.
OPEB Solutions Using Retiree-Only Health Reimbursement Arrangements (HRAs) (DG116)

Room: Texas 5-6
SFOs: 1 CPEs: 1 Program Level: Basic
Field of Study: Personnel/HR
Program Prerequisites: None
Advance Preparation: None

Gain a working knowledge of retiree-only health reimbursement arrangements (HRAs) and how districts can use them to help restructure, reduce, and even eliminate OPEB liability. Using retiree HRAs to establish defined contribution plans as opposed to defined benefit plans can help provide a comparable benefit value at lower net cost to the employer. Retiree-only HRAs also offer increased flexibility for retirees, allowing them to purchase insurance outside of the district plan. Case studies will provide examples of how school districts have implemented these solutions and the impact they have had.

Learning Objectives: 1. Define retiree-only HRAs and explain how they can be used. 2. Describe how retiree-only HRAs can increase the value of post-employment benefits at reduced employer cost to increase funds available for the classroom. 3. Explain how retiree-only HRAs can result in reduced costs to the employer coupled with increased flexibility for retirees. 4. Outline practical examples based on district case studies.

Speakers: Erik Kass, Assistant Superintendent for Finance, Operations, and Human Resources, School District of Elmbrook, Brookfield, WI; David Branback, Director of Market Development, National Insurance Services, Brookfield, WI

9:15 a.m. – 10:15 a.m.
Creating a Can-Do Culture in Procurement and School Business (DG217)

Room: Dallas 6
SFOs: 1

Clovis USD is a large suburban school district in central California with a reputation for exceptional facilities, a history of fiscal stability, and high student achievement. The district is committed to working cooperatively and collaboratively with vendors and schools to provide exceptional learning environments and to meet staff and student needs. Learn about the impact that leadership, culture, and the development of best practices in business and procurement can have on a school district. Explore the dynamics of purchasing and procurement in education and methods to improve customer service and provide exceptional service to our schools and students.

Speakers: Leeann Errotabere, Director, Purchasing, Clovis USD, Clovis, CA; Michael Johnston, Assistant Superintendent, Clovis USD, Clovis, CA

9:30 a.m. – 10:15 a.m.
Guest Program
Art of Reflexology
Room: Austin 5

In this enlightening workshop, participants will discover how reflex points on the hands and feet are believed to treat the entire body. In addition to a reflexology demonstration, participants will also learn how to properly administer hand and foot massages.
10:30 a.m. – 11:30 a.m.
If You Build It, They Will Come! Building Market-Driven Compensation Plans for High Performance (DG021)

Room: Dallas 5
SFOs: 1

Competition between school districts is not limited to the football field. In this era of high-stakes accountability and limited financial capacity, districts must compete for the best and brightest teachers and administrators. Districts must develop and implement creative compensation plans to ensure that “they will come.” Clear Creek ISD, a 41,000-student district outside Houston, developed creative solutions and practical tools to move district salaries to market-competitive rates in challenging financial times.

Speaker: Paul McLarty, Deputy Superintendent of Business and Support Services, Clear Creek ISD, League City, TX

10:30 a.m. – 11:30 a.m.
Learning Management Systems 101 (DG177)

Room: Dallas 7
SFOs: 1

Most SBOs today are familiar with 1:1 initiatives, Race-to-the-Top mandates, and even student information systems (SIS). The new kid on the block in K–12 educational technology is the learning management system (LMS). Develop your understanding of what an LMS is, discuss the difference between an LMS and an SIS, and consider the benefits and costs associated with selecting and implementing an LMS.

Speaker: Susan Givens, Chief Financial Officer, Masconomet RSD, Topsfield, MA

10:30 a.m. – 11:30 a.m.
Responsible Contract Management: What Needs to Be Managed? (DG102)

Room: Texas 5-6
SFOs: 1  CPE: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

You’ve successfully completed the procurement process and you think your work is done. Not so fast. After the contract is awarded, the fun begins. Contract management is a vital element in ensuring district resources are used effectively and appropriately. Procurement professionals must ensure proper monitoring takes place from utilization of the contract, to invoice payments, staffing, renewals, and most important, the quality of services provided by the vendor. Ensure your district and your vendor are held contractually accountable for the terms and conditions outlined in the procurement. Participants will receive practical monitoring approaches to take back to their district.

Learning Objectives: 1. Outline the important elements of contract management. 2. Identify common pitfalls of contract management. 3. Describe current contract monitoring applications.

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

10:30 a.m. – 11:30 a.m.
Outsourcing Classified Services to Reduce Your Budget Without Reducing Services (DG159)

Room: San Antonio 4-5
SFOs: 1  CPE: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None
Are you looking for a way to reduce your budget without reducing services? Outsourcing your classified services could be the answer. Xenia Community Schools in Ohio was facing a major budget deficit and had no hope of passing a levy in the near future. The district had cut roughly $10 million over two years and had to think creatively to come up with a way to cut expenses without being forced to cut any additional services or people. Xenia Schools outsourced transportation, custodial, grounds, maintenance services, and IT staffing, and anticipates saving approximately $7 million over the next five years. Learn how Xenia’s experience may work for your district.

Learning Objectives: 1. Enumerate key requirements for successful outsourcing. 2. Explain how to productively negotiate when outsourcing. 3. Discuss how to compare expected savings to actual savings. 4. Explain how outsourcing can help a district reduce costs without reducing services.

Speakers: Christy Fielding, Director of Business and Technology, Xenia Community Schools, Xenia, OH; Tracy Jarvis, Treasurer, Xenia Community Schools, Xenia, OH

10:30 a.m. – 11:30 a.m.
Uncovering Funds to Support Sustainable Education Through Successful Collaborations (DG156)

CPE
Room: San Antonio 1-2
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

A sustainable approach to district operational and capital expenses has significantly reduced Medford Township’s operating costs and environmental impact. For example, the district’s solar electric generation provides 70% of the district’s electric needs while reducing electric expenses by $300,000 per year. These funds are then released from operating expenses and reallocated to support educational goals. Learn about the path that led to the use of sustainable technologies, including alternative transportation fuels, geothermal HVAC systems, and solar electric generation systems. Also explore energy efficiency and related programs/techniques to reduce telecommunications and energy procurement costs and some of the many educational opportunities that emerged as a result of implementing sustainable strategies.

Learning Objectives: 1. Explain how effective leadership is necessary for creating opportunities to improve resource efficiency. 2. Describe strategies for evaluating existing conditions as a basis for crafting fiscal and educational improvement programs. 3. Discuss positive outcomes that may be derived from leveraging public/private partnerships. 4. Describe methods for creating educational opportunities by using school buildings and systems as learning labs. 5. Identify successful energy monitoring and procurement services to reduce energy expenses.

Speakers: Chad Fires, Business Administrator, Medford Township, Medford, NJ; Joe Biluck, Director of Operations and Technology, Medford Township, Medford, NJ

10:30 a.m. – 11:30 a.m.
Measuring the Success of Your Medicaid Program (DG119)

CPE
Room: Texas 1-2
SFOs: 1  CPEs: 1  Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

You can monitor how much money your Medicaid program is bringing into your school district, but how do you know if you’re recovering all the money you should? What data should you be reviewing to identify issues that might be making revenue recovery suboptimal? Learn about best practices for analyzing your Medicaid program performance, including questions to ask and data to review. This session is designed for school administrators, finance administrators, and Medicaid
coordinators to help familiarize them with the best ways to measure the ongoing success of their Medicaid program.

**Learning Objectives:**
1. Outline best practices for analyzing your district’s Medicaid program performance.
2. Identify sources of recovery opportunity in Medicaid spending categories.
3. Discuss and analyze the impact of non-recovery performance on revenues.
4. Describe how to measure and sustain the ongoing success of participation in a district’s Medicaid program.

**Speakers:** Cody Way, Chief Financial Officer, Jenks Public Schools, Jenks, OK; Jann Arnold, Account Executive, SEAS Education, Mountain Home, AR

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**10:30 a.m. – 11:30 a.m.**

**Managing the Millennials: A Comprehensive Look at Employing a New Generation of Teachers (DG173)**

**Room:** San Antonio 6

**SFOs:** 1

As Baby Boomers begin retiring in large numbers, the disparity in size between the exiting generation and Generation X has led economists to predict a 40% shortfall in available workers. This means that the populous Generation Y (Millennials) are being asked to fill the employment hole. The large gap has magnified the cultural and motivational differences that naturally exist between two or more generations. Focus on understanding the mindset and motivations of the Millennial generation and discuss how these differences affect recruiting practices and compensation packages.

**Speaker:** Bret McKitrick, Attorney, Associated Financial Group, Waukesha, WI

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**10:30 a.m. – 11:30 a.m.**

**To Outsource or Not to Outsource Transportation: That Is the Question (DG130)**

**Room:** San Antonio 3

**SFOs:** 1

Deciding to outsource transportation services can be a traumatic decision for school districts. Developing a methodology that best assesses the potential costs and benefits of an outsourced model or of changing a current contractor can be a complex and confusing effort. Learn how to structure both the cost and operational analyses to maximize the efficiency and effectiveness of your school transportation operation.

**Speaker:** Tim Ammon, Vice President, School Bus Consultants, Lee’s Summit, MO

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**10:30 a.m. – 11:30 a.m.**

**Becoming a Charter District: A Reluctant CFO’s Perspective (DG200)**

**Room:** Texas 4

**SFOs:** 1  
**CPEs:** 1  
**Program Level:** Basic  
**Field of Study:** Finance  
**Program Prerequisites:** None  
**Advance Preparation:** None

As school districts in Georgia consider becoming “charter districts,” many wonder how this decision will affect financial and human resource management. After all, doesn’t becoming a charter mean that schools within the district can customize their programs to meet the needs of their unique students? Can’t schools decide between increased professional development, lower/increased class size, or greater options around foreign language and/or music? How does school empowerment affect instruction, compliance requirements (state/federal), operational efficiency, and fiscal responsibility? Explore how Fulton County Schools manages these issues as a charter system.
Learning Objectives: 1. Discuss the characteristics of a charter district and the impact of conversion to a charter on a district’s financial management and human resources operations. 2. Outline the stages of preparation, managing expectations, building anticipation, and implementation involved in becoming a charter district. 3. Discuss reasons a CFO may be reluctant to transition to a charter district and identify factors that might encourage acceptance of the conversion.

Speakers: Marvin Dereef, Deputy Chief Financial Officer, Fulton County Schools, Atlanta, GA; Lisa Bracken, Director of Budget Services, Fulton County Schools, Atlanta, GA; Robert Morales, Chief Financial Officer, Atlanta Public Schools, Atlanta, GA

ASBO International thanks the Texas Association of School Business Officials and the ASBO International Committees for making this year’s meeting one to remember!
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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 15 minutes. Presenters direct the discussion and serve as a source of information on topics such as healthcare reform, 403(b) retirement plans, budget planning, energy efficiency, communications in school districts, and more.

**TABLE 1**
**Run Your Retirement Numbers with Our Informative Tools**

**Speaker:** Ketul Thaker, Vice President of Industry Relations, Voya Financial®, Windsor, CT

**TABLE 2**
**Critical Questions to Ask Before Using a Cooperative Contract**

**Speaker:** Jennifer Sulentic, Program Manager, U.S. Communities, Chicago, IL

**TABLE 3**
**Employer Contributory Plans (Match, Elective, Special Pay)**

**Speaker:** Tom Granger, Assistant Vice President/Sales Director, Qualified Plans, Security Benefit, Topeka, KS

**TABLE 4**
**Understanding Print Procurement in the K–12 Environment**

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

**TABLE 5**
**How Erasing Student Loan Debt Can Improve Teacher Retention**

**Speakers:** Kelly Ruwe, Regional Marketing Officer, The Horace Mann Companies, Springfield, IL; Steven Delisle, Regional Marketing Officer, The Horace Mann Companies, Quakertown, PA

**TABLE 6**
**Pension Tsunami: What Must be Done to Fix It?**

**Speakers:** Fred Makonnen, Regional Vice President, AXA, New York, NY; Clare Ronaghan, Director, Strategic Relations, AXA, Jersey City, NJ

**TABLE 7**
**Affordable Care Act Reporting for K–12 Districts**

**Speakers:** Jillian Pulsifer, Product Manager, Tyler Technologies, Yarmouth, ME; Crystal Alcott, Software Development Analyst, Tyler Technologies, Yarmouth, ME

**TABLE 8**
**Improving Facilities, Technology, and the Educational Experience Through Partnerships**

**Speakers:** Charley Cohen, Sustainability Education Director, Siemens Industry Inc., Building Technologies Division, Buffalo Grove, IL; Jamie Sitter, K12 Marketing Manager, Siemens Industry Inc., Building Technologies Division, Buffalo Grove, IL

**TABLE 9**
**Going Paperless Means Power and Security in the FERPA, HIPAA Records World**

**Speakers:** Tim Beauchamp, National Director of Legal Solutions, Ricoh Americas Corporation, Dallas, TX; Stu Parker, National Program Manager, Ricoh Americas Corporation, Highlands Ranch, CO
### TABLE 10
**Critical Communications: Education and Public Safety Together**

**Speaker:** Connie Allen, Vertical Marketing Manager, Motorola, Schaumburg, IL

### TABLE 11
**Energy Efficiency: Tips from a Grandmother to Save Energy and Money at Home and School**

**Speaker:** Gwenn McDaniel, North America K–12 Vertical Market Director, Johnson Controls, Myrtle Beach, SC

### TABLE 12
**Protecting Parent Payments: Helpful Tips When Choosing an Online Payment Solution**

**Speaker:** Christina L. Carroll, Account Manager, Horizon Software, Atlanta, GA

### TABLE 13
**Simple Solutions for Employee Benefit Challenges**

**Speaker:** Carey Adamson, Vice President–Public Sector, Colonial Life, Columbia, SC

### TABLE 14
**School Credit Card Program Fraud Protection and Management Best Practices**

**Speaker:** David Wintczak, Vice President, Treasury & Payment Solutions, BMO Financial Group, Chicago, IL

### TABLE 15
**What’s New, What’s NOT in K–12 Nutrition? The Potential Impact of the Professional Standards Rule and Other USDA Regulatory Changes**

**Speaker:** Linda Sceurman, MS, RDN, LDN, Director of Nutrition and Operations Support, Aramark K–12 Education, Philadelphia, PA

### TABLE 16
**Budget Planning Improvement Through the Use of Technology**

**Speakers:** Tony Olson, Vice President of Marketing, MyBudgetFile, Stony Plain, Alberta, Canada; Sue Crockett, Director of U.S. Operations, MyBudgetFile, Minneapolis, MN

### TABLE 17
**Don’t Just Collect Your School Fees Online, Manage Them!**

**Speaker:** Helene McMurphy Business Development, Rycor Software, Chandler, AZ

### TABLE 18
**Making the Most of Dollars and Accelerating Student Achievement Through “Owning Standards” with Lincoln Learning Solutions**

**Speaker:** Debi Crimmins, Chief Marketing Officer, Lincoln Learning Solutions, Rochester, PA

### TABLES 19 & 20
**ACA Reporting Requirements**

**Speakers:** Susan Relland, CEO, American Fidelity Administrative Services, LLC, American Fidelity Corporation, Oklahoma City, OK; Jessica Frier, Senior Health and Welfare Plan Consultant, American Fidelity Administrative Services, LLC, American Fidelity Corporation, Long Beach, CA
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2015 Emerging School Business Leaders Scholarship Recipients!

Let’s welcome these 18 outstanding emerging leaders to the profession!
Each recipient earned a $2,000 scholarship to attend the Annual Meeting & Expo
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Tonawanda, New York

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What Every Administrator Should Know About K-12 Security
Saturday, October 24, 2015 - 1:15 p.m. – 2:15 p.m.
Room: Texas 3
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Friday, October 23

9:00 a.m. – 12:00 p.m.
Dallas Cowboys Stadium Tour
Advance Registration Required ($)
Buses depart from the Tour
Bus Lobby at 9:15 a.m.

6:00 p.m. – 7:30 p.m.
Welcome Mixer*
Glass Cactus
(See page 16 for complete listing)
*Must be 21+ to attend. Badge required.

Saturday, October 24

8:00 a.m. – 8:45 a.m.
General Session Coffee Break
Texas Ballroom Foyer
Sponsored by Tyler Technologies

8:45 a.m. – 10:45 a.m.
First General Session
Room: Texas Ballroom A

11:00 a.m. – 12:00 p.m.
Guest Program
Book Club: Mrs. Kennedy and Me
Room: Austin 3
(See page 17 for complete listing)

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

7:00 p.m. – 10:00 p.m.
Affiliate Reception and Candidate Meet-and-Greet
The Ranch of Lonesome Dove
(See page 24 for complete listing)
Registered guests are welcome to attend the **General Sessions**, enjoy the **Welcome Mixer**, and visit the **Exhibit Hall**. Guests may not attend educational sessions.

**Sunday, October 25**

9:15 a.m. – 10:00 a.m.
**General Session Coffee Break**
Texas Ballroom Foyer
*Sponsored by Tyler Technologies*

10:00 a.m. – 11:30 a.m.
**Second General Session**
Room: Texas Ballroom A

11:00 a.m. – 11:45 a.m.
**Guest Program**
Dallas History
Room: Austin 3
(See page 26 for complete listing)

11:30 a.m. – 2:15 p.m.
**Exhibit Hall Open**
Exhibit Hall F

12:30 p.m. – 1:30 p.m.
**Lunch in the Exhibit Hall**
Exhibit Hall F
*Sponsored by BMO Financial Group*

**Monday, October 26**

7:30 a.m. – 8:15 a.m.
**Coffee Break**
Dallas Foyer, Ballroom Level
*Sponsored by Tyler Technologies*

9:30 a.m. – 10:15 a.m.
**Guest Program**
Art of Reflexology
Room: Austin 5
(See page 39 for complete listing)
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Join us at the First General Session as AXA, sponsor of the Eagle Awards and Eagle Institute, proudly presents these deserving recipients with their awards.

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School business officials in all fields come up with creative ideas to improve their school systems, and the Pinnacle Awards celebrate these forward-thinking leaders. This year’s recipients are innovators who have solved their district challenges with resourceful solutions.

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Greenfield, Wisconsin

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Charlotte Gates
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**Friday**, 8:00 a.m. – 5:00 p.m.
Room: San Antonio 1-2

**The Value of the SFO Certification**, a discussion group with current SFO certificants that examines the benefits of pursuing SFO.

**Sunday**, 3:45 p.m. – 4:45 p.m.
Room: San Antonio 6

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Monday, October 26, 2015, 9:15am - 10:15am

Presented by:

**Reducing the Cost of Early Retiree Health Insurance Using the Affordable Care Act**
Monday, October 26, 2015, 8:00am - 9:00am

Presented by:
David Branback, Director of Market Development, National Insurance Services and Erik Kass, Assistant Superintendent of Finance, Operations and Human Resources, Elmbrook Schools

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MidAmerica provides innovative employee benefit programs to over 2,500 plan sponsors and close to a million employees across the country. Founded in 1995, we serve primarily the educational and governmental marketplace.

Our programs include:

- 403(b) and 457(b) TPA
- Social Security Opt-Out Plans
- Special Pay Plans
- ACA Compliance Reviews
- VEBA/HRA/FSA Plans
- GASB 45 Funding Solutions

MidAmerica
Administrative & Retirement Solutions, Inc.
402 South Kentucky Avenue, Suite 500
Lakeland, FL 33801
800.430.7999 • 863.688.4500 • Fax 863.686.9727
www.midamerica.biz

WE ARE THE SOLUTION.
Saturday, October 24

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

Sunday, October 25

12:30 p.m. – 1:30 p.m.
Lunch in the Exhibit Hall
Sponsored by BMO Financial Group

11:30 a.m. – 2:15 p.m.
Meet the Cowboy Strolling Magician
Our Cowboy Magician will dazzle you with his sleight of hand and comedic interactive entertainment performed as he strolls around the Exhibit Hall!

Saturday & Sunday

Recharge at the Relaxation Station
Exhibit Lounge 327
Relax with a complimentary upper body massage provided by professional massage therapists. Visit Booth 205 to pick up a massage ticket. 
Sponsored by Aramark K–12 Education

Have Your Professional Portrait Taken
Booth 315
Improve your professional image with a complimentary headshot. Use your photo on the Global School Business Network, business cards, LinkedIn, or for any other professional business photo need. 
Sponsored by Virco Mfg. Corporation

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Booth 731
The ASBO Booth has it all: the ASBO Bookstore, featuring top-selling publications; ASBO staff to assist you with conference information; and ASBO International program and membership details. Visit daily to turn in your Exhibit Hall game raffle tickets for a chance to win prizes! Two $250 prizes will be given away on Saturday and four $250 prizes will be given away on Sunday!

SFO® Certification Information Center
Thinking about earning the Certified Administrator of School Finance and Operations® (SFO®)—the only nationally recognized school business certification in the United States and Canada? Visit the ASBO Booth to browse books that will assist you in test preparation and find materials to answer your questions.

Exhibit Hall Game
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 booths. 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!

You must be present in the Exhibit Hall to win a prize. Prizes will be announced 15 minutes before the hall closes.
It’s Who You Know That Matters

When you’re on the Global School Business Network—ASBO International’s online member community—you’re instantly connected to thousands of the brightest leaders in school business.

Have a pressing school business issue, like fund balance policy or background check protocol? Start a discussion to get feedback from colleagues facing the same challenges as you.

Looking for a document or resource, maybe an RFP or sample job description? Check the All Member Community for shared resources or request one directly from your peers.

Need more information about current events in education? Browse industry-related blogs for the latest information and updates.

asbointl.org/Network
ABMM Financial
Booth 514
517 Route 1 South
Ste. 4100
Iselin, NJ 08830

ABMM is an independent financial services organization founded on 90 years of experience. We specialize in working with public school, non-profit, and governmental employers and their employees, providing them with a variety of flexible, forward-thinking retirement strategies that fit each individual's needs. www.abmmfinancial.com

Acorn by Rycor
Booth 620
4960 S. Gilbert Rd., Ste. 1-267
Chandler, AZ 85249

Acorn is a software for district and school fee management: Collect and maintain cash, check, credit card, in-person, and online payments. SIS and ERP integration provides real-time information to parents and district staff, including year-to-date and lifetime history of payments. This software allows you to manage fees and to build the foundation necessary for successful collection of all fees. It’s not just a school store—it’s the software to support it.

Andrews Technology HMS Inc.
Booth 725
1213 Culbreth Dr.
Wilmington, NC 28405

Andrews Technology is a nationwide provider of time and attendance solutions. We specialize in school districts, universities, cities, and towns. Our 100% web-based time and attendance system enables organizations to automate the tracking of hours and sick/vacation/personal days. The system will reduce the amount of time it takes to process payroll, eliminate buddy punching with biometric terminals, and eliminate all errors associated with paper timesheets. Please visit Andrews Technology at Booth 725. www.AndrewsTechnology.com

American Fidelity Assurance Co.
Booth 421
2000 N. Classen Blvd.
Oklahoma City, OK 73106

Since 1960, American Fidelity Assurance Company has provided quality insurance products and services to the education community. American Fidelity is endorsed by 44 state and national education associations and 3,600 school districts trust us as their Section 125, Section 403(b), insurance provider, or Affordable Care Act resource. Our knowledge and experience is a valuable resource when making decisions about employee benefits and managing expenses. Find out how we can help at 800.654.8489.

Arizona ASBO
Booth 727
2100 N. Central Ave., Ste. 202
Phoenix, AZ 85004

The mission of the Arizona Association of School Business Officials (AASBO) is to promote the highest standards of school business management by providing quality training and legislative leadership, and cultivating the professional stature of its members.

Arctobell
Booth 633
1302 Industrial Blvd.
Temple, TX 76504

Arctobell is a leading manufacturer of school furniture. Located in Temple, Texas, the company has supported educators with quality classroom furniture since 1927, seating five generations of American students over the past century. Arctobell is part of HNI Corporation, which is the second largest office furniture manufacturer in the world.

Arthur J. Gallagher & Co.
Booth 827
2 Pierce Pl.
Itasca, IL 60143

Gallagher Public Sector Practice offers risk management solutions, services, tools, and consulting. With over 2,000 public sector clients nationwide, we continue to drive innovative thinking and solutions for enterprise risk and human capital management. Our total rewards approach looks beyond the benefits package, extending to compensation, wellness, and absence management. Additionally, we help reduce current spending and protect your future through cooperative purchasing solutions, cyber liability coverage, disaster management, and more.

*As of August 31, 2015
Aspire
Booth 532
4010 Boyscat Blvd., Ste. 450
Tampa, FL 33607

Aspire Financial Services is a leading national service provider of smart retirement solutions. Serving the industry for over 13 years with a conflict-free, open-investment platform, Aspire offers one-view access for management of all plan types [401(k), 403(b), 457, IRA, Defined Benefit, Non-Qualified] and sizes, from micro to large. Aspire provides retirement readiness tools that help plan sponsors streamline plan management administration and help participants prepare for retirement effectively. Visit www.aspireonline.com.

ASSA ABLOY
Booth 710
110 Sargent Dr.
New Haven, CT 06511

Door security solutions.

Association of Educational Purchasing Agencies
Booth 211
753 West Blvd.
Chipley, FL 32428

The Association of Educational Purchasing Agencies (AEPA) is a multi-state nonprofit organization made up of educational service agencies/political subdivisions. AEPA serves to leverage purchasing power to benefit schools and agencies, regardless of size, with the ability to purchase at equal buying levels.

Association of School Business Officials International
Booth 731
11401 N. Shore Dr.
Reston, VA 20190

ASBO International supports school business professionals who are passionate about quality education. We provide programs and services to equip our members with the tools and resources they need to do their jobs effectively and efficiently. Together, we’re leading school business forward.

Automated Financial Systems
Booth 433
3435 Thousand Oaks, #105
San Antonio, TX 78247

We specialize in cash counting systems and equipment. We represent some of the world’s most respected manufacturers, including Cashmaster, Magner, SeeTech, and Semacon. The products we offer include Cashmaster cash counting scales; currency counting and currency discrimination equipment; and coin sorting, counting, and packaging equipment. We also sell a variety of counterfeit detection devices. Comprehensive maintenance agreements are available on all of our products.

A’viands
Booth 809
1751 County Rd. B West, Ste. 300
Roseville, MN 55113

We are your food-focused, flexible management solution. Our service-centric culture of accessibility is designed to exceed expectations. The partnerships we value are based on a shared vision.

AXA
Booth 432
525 Washington Blvd.
Jersey City, NJ 07310

AXA is proud to be a Strategic Partner of ASBO and the sponsor of both the Eagle Award and Eagle Institute. We applaud the commitment to professional development and business solutions that ASBO embodies. With several opportunities this weekend to learn more, we hope to see you at Booth 432, at the 403(b) Panel Presentation on Saturday from 12:30 p.m. to 2:30 p.m., and at our Clinic Table discussion on Sunday from 8:30 a.m. to 9:45 a.m.

BerryDunn
Booth 120
100 Middle St., 4th Floor, East Tower
Portland, ME 04101

BerryDunn is an independent management and IT consulting firm with extensive IT strategic planning, systems consulting, process improvement, and change management expertise. We have partnered with more than 200 public sector clients nationwide, helping to guide their most complex enterprise IT projects. Our K–12 consulting practice is committed to understanding the systems and processes that support K–12 schools. We proudly participate in ASBO to stay abreast of the challenges and opportunities impacting our clients.

BMO Financial Group
Booth 714
55 Bloor St. West
Toronto, ON M4W 3N5
Canada

BMO Financial Group is a highly diversified financial services organization. BMO’s treasury and

*As of August 31, 2015
payment products are widely used by corporations and public sector organizations to manage and control their commercial spending. We help manage cash flow efficiently with a full range of payment solutions, from commercial card products, including purchasing, travel and entertainment, fleet, and all-in-one cards, to electronic payment options such as ACH and DEFT.

**Canon Solutions America, Inc.**
**Booth 533**
One Canon Park
Melville, NY 11747

Canon Solutions America, Inc., a Canon U.S.A. Company, provides industry-leading enterprise, production, and large-format printing solutions supported by exceptional professional service offerings. Canon Solutions America helps companies improve efficiency and control costs through high volume, continuous feed, digital and traditional printing, and document management solutions. Visit [www.csa.canon.com](http://www.csa.canon.com).

**CaseWare**
**Booth 811**
469 King St. West
Toronto, ON M5V 1K4 Canada

CaseWare’s audit and reporting software enables full automation of audit preparation, financial statement preparation, and financial reporting. It specializes in all forms of municipal reporting, including CAFR, PAFR, single audit, component units, SEFA, budget book, and state controller’s report. Customers use our solution to analyze and mitigate risks, and to ensure consistencies and accuracies within all reporting.

**Choice Partners**
**Booth 108**
6005 Westview Dr.
Houston, TX 77055

Gain purchasing power with legal, shared services solutions from Choice Partners national cooperative. Our government competitively procures contracts, providing transparency, oversight, and compliance at no cost! Maximize resources with quality, legal procurement, and contract solutions for facilities services, food/cafeteria products, supplies, technology, and more. [www.choicepartners.org](http://www.choicepartners.org) 877.696.2122.

**Cintas Corporation**
**Booth 326**
6800 Cintas Blvd.
Mason, OH 45040

Headquartered in Cincinnati, Ohio, Cintas Corporation provides highly specialized products and services to over 900,000 customers that range from independent auto repair shops to large hotel chains. Cintas leads the industry in supplying corporate identity uniform programs; entrance and logo mats; restroom supplies; promotional products; first aid, safety, fire protection products and services; and industrial carpet and tile cleaning. We operate more than 400 facilities in North America.

**CoCreation Grass Corp**
**Booth 622**
FL/5 Sports Center Bldg. No 1-6
Wutaishan, Nanjing, Jiangsu, China 210029

CCGrass, the largest manufacturer of artificial grass in the world, is dedicated to providing the best artificial turf system to both sports and landscape applications. After more than 10 years of focused development, CCGrass products have served various clients from different regions with different needs, including professional football clubs, government bodies, schools, and countless households around the world.

**Colonial Life**
**Booth 709**
1200 Colonial Life Blvd.
Columbia, SC 29210

As a leader in the voluntary benefits industry for more than 75 years, Colonial Life offers proven cost-management solutions to help you manage the rising cost of employee benefits while still providing them the financial protection they deserve.

**Crowe Horwath, LLP**
**Booth 611**
3815 River Crossing Pkwy., Ste. 300
Indianapolis, IN 46240

Crowe Horwath LLP is one of the largest public accounting, consulting, and technology firms in the United States and has been working with governmental organizations for more than 50 years. Our industry-focused experts deliver solutions and services to many different types of governmental organizations, including municipalities, counties, state agencies, federal agencies, school and library districts, special service districts, and quasi-governmental entities.

**DecisionInsite**
**Booth 513**
101 Pacifica, Ste. 380
Irvine, CA 92618

As enrollment impact specialists, we provide a combination of enrollment analytics, mapping technology and expertise, all of which help school district leaders gain a better understanding of their total enrollment...
picture. Instant access to enrollment forecasts, community demographics, mapped student information, interactive boundaries, and residential development data means validating difficult decisions more simply, with more clarity and transparency.

**Digital Schools**  
**Booth 534**  
27764 Volo Village Rd.  
Round Lake, IL 60073

Digital Schools, since 1999, has exclusively served K–12 with a modularized approach to personnel management, position control, time management, budgeting, purchasing, and finance/payroll functionality. It is built on the foundation of personnel information. We are web-based, date-driven, and configurable to your practices. We provide you with the tools that control your costs and enable the ability to generate savings. Manage time and attendance, including authorization of extra duties.

**District Administration Magazine**  
**Booth 213**  
35 Nutmeg Dr.  
Trumbull, CT 06611

*District Administration* is the leading provider of practical insights and strategies for K–12 administrators at school districts throughout the United States. The District Administration Leadership Institute produces special events and creates communities for the nation’s top K–12 leadership.

**Durham School Services**  
**Booth 608**  
4300 Weaver Pkwy.  
Warrenville, IL 60555

Durham School Services (U.S.), Stock Transportation (Canada), and Petermann Ltd. (Ohio) are premiere providers of school bus transportation services in North America. Combined, we operate more than 21,500 school buses, employ over 27,000 people, and serve over 550 school districts in 32 states and four provinces. Our vision is to earn the lifetime loyalty of your school district by delivering safe, high-quality, student transportation services.

**Education Logistics (EDULOG)**  
**Booth 113**  
3000 Palmer St.  
Missoula, MT 59808

Education Logistics, Inc., (EDULOG) supports student achievement worldwide by developing innovative software and technologies to provide safe, efficient, and reliable student transportation. EDULOG has been recognized as the industry leader in pupil transportation solutions since 1978, with more than 150,000 school buses routed by its clients every day.

**Equal Level, Inc.**  
**Booth 109**  
11140 Rockville Pike, Ste. 100–350  
Rockville, MD 20852

Equal Level’s procurement marketplace solution is used by school districts and education service agencies of all sizes, and provides an efficient, intuitive solution for improving their procure-to-pay process. Equal Level marketplace solution is designed for organizations who want to empower their employees or customers, integrate with their suppliers, reduce prices, and ensure 100% contract compliance.

**E-RATE ONLINE**  
**Booth 506**  
856 Main St.  
Monroe, CT 06468

We are a seasoned team of E-Rate professionals with one common goal: to garner the maximum E-Rate funding possible for the benefit of our school and library clients. With in-depth program knowledge, industry insights, and a consultative approach, we understand our clients’ unique opportunities and desired results, and work seamlessly with them to reap the benefits they deserve.

**etfile**  
**Booth 114**  
287 Turnpike Rd., Ste. 125  
Westborough, MA 01581

The paperless central office! Is your central office still dealing with paper records? Does it take too much time to find archived documents? Are you running out of space to store paper? For over a decade, etfile has helped organizations increase efficiency.
and reduce office expenses by going paperless. To learn more, check out www.officescope.com or stop by Booth 114.

**Excent®**
**Booth 235**
60 King St.
Roswell, GA 30075

Excent® develops data management software and student curriculums that empower educators and students to meet their program and academic goals. Our Medicaid billing solution helps schools maximize their Medicaid reimbursement revenue with minimum cost and effort, and with technology that provides administrators with full visibility for better program management.

**First Student, Inc.**
**Booth 510**
600 Vine St., Ste. 1400
Cincinnati, OH 45202

First Student is the leading school transportation solutions provider in North America. The company strives to provide the best start and finish to every school day by completing six million student journeys daily for 1,300 school district contracts. With a team of highly trained drivers and the industry’s strongest safety record, First Student delivers reliable, quality services, including full-service transportation and management, special-needs transportation, route optimization and scheduling, and charter services. Visit www.firststudentinc.com.

**Follett**
**Booth 332**
1340 Ridgeview Dr.
McHenry, IL 60050

Follett provides educationally relevant content, integrated educational technology solutions, and value-added services to over 65,000 PreK–12 schools and districts in the United States and around the world. We focus on earning our customers’ trust every day and helping impact over 35,000,000 PreK–12 students every year.

**Forecast5 Analytics, Inc.**
**Booth 814**
2135 City Gate Lane, 7th Floor
Naperville, IL 60563

Forecast5 Analytics provides powerful analytic tools to help school leaders use data to synchronize financial resources and strategic plans. The Forecast5 platform includes cloud-based business intelligence software, interactive visuals, map-based analytics, survey tools, and a collaborative analytics engine. Forecast5 solutions generate actionable analytics to help drive decisions with increased performance and service delivery.

**Frontline Technologies Group**
**Booth 112**
1140 Atwater Dr.
Malvern, PA 19355

More than 5,000 school districts use Frontline’s suite of human capital management tools, including Aesop (absence management and automated sub-calling), VeriTime (time and attendance), and AppliTrack (recruiting, selection and HR file management).

**The Garland Company Inc.**
**Booth 227**
3800 East 91st St.
Cleveland, OH 44105

GCA Education Services, Inc., is a leading national provider of quality facility services, including custodial services, facilities operations and maintenance, grounds and athletic field management, and more. GCA serves over 250 K–12 school districts, including over 3,200 schools, and over 80 higher education institutions throughout the United States and Puerto Rico. Its client retention rate is an exceptional 96%. For more information, please visit www.gcaservices.com or follow GCA on Twitter @gcaservices.

**Government Finance Officers Association**
**Booth 826**
203 N. LaSalle St., Ste. 2700
Chicago, IL 60601

GFOA is a nonprofit organization dedicated to improving the financial management of school districts and other governments. GFOA provides training and guidance on accounting and financial reporting, debt management, pensions, investments, and budgeting. The Alliance for Excellence in School Budgeting was recently formed by the GFOA to promote the use of best practices in school budgeting.
Graybar
Booth 308
11885 Lackland Rd.
Saint Louis, MO 63146

Graybar is the leading North American distributor of high-quality components, equipment, and materials for the electrical, telecommunication, IT, security, and MRO industries. Graybar adds value to the distribution process through cost-reducing supply chain management and logistics services through our network of 240 nationwide distribution centers. Visit us at www.graybar.com.

Heartland School Solutions
Booth 104
787 Elm Grove Rd., Bldg. 1
Rochester, NY 14624

Heartland School Solutions is the leading provider of secure online and on-campus payment solutions and comprehensive school nutrition management software. We help optimize operations for more than 30,000 schools throughout the United States.

Heinfeld, Meech & Co., PC
Booth 212
10120 N. Oracle Rd.
Tucson, AZ 85704

With more than 29 years of experience in the school district industry, our experts can develop or review your district's Comprehensive Annual Financial Report or Meritorious Budget Award. Our team of dedicated consultants understand school finance operations and have the skills to develop innovative and workable solutions for almost any issue. We are the technical advisors and reviewers to ASBO International's Certificate of Excellence in Financial Reporting and Meritorious Budget Award.

InTouch Receipting
Booth 615
4415 Pacific Hwy. East
Fife, WA 98424

InTouch Receipting is the enterprise-level centralized Microsoft SQL-based cash receipting software for the K–12 market. This easy-to-learn, comprehensive cash receipting suite provides information in real time, from building point of sale with integrated credit card to online payments. InTouch is the #1 rated method to collect monies district-wide. We guarantee users will be ecstatic with your choice!

Horizon Software International
Booth 821
2915 Premier Pkwy., Ste. 300
Duluth, GA 30097-5241

MyPaymentsPlus, by Horizon Software, offers a scalable and user-friendly online payment solution for school fees, activities, meals, exams, course fees, athletics, and more. Take cash handling and paperwork off your teachers and staff. Used in over 10,000 schools and by more than 2 million parents worldwide, this cloud-based program provides a secure way for districts to reduce cash handling, drive revenue, cut labor costs, meet go-green initiatives, and improve parent communications.

Horace Mann
Companies
Booth 405
1 Horace Mann Plaza
Mail #C803
Springfield, IL 62715

Horace Mann is an insurance and financial services company that is committed to helping educators achieve financial success. We help identify existing resources and savings opportunities to fund financial goals. By reducing or eliminating student loan debt, securing classroom funding, and finding savings through insurance program reviews, we work to maximize educators’ hard-earned dollars and help develop a path to a successful financial future.

Johnson Controls
Booth 704
507 E. Michigan St.
Milwaukee, WI 53202

At Johnson Controls, we’re in the business of creating healthier, more productive environments for school districts around the world. We can improve every aspect of your district’s operation, from modernizing the equipment and systems in your facilities to using technology that...
increases productivity. We can even help you fund improvements and on-going maintenance through equipment finance agreements, performance contracts, and planned service agreements. Visit www.johnsoncontrols.com/K12

**Kellermeyer Bergensons Services**  
**Booth 233**  
1575 Henthorne Dr.  
Maumee, OH 43537

Kellermeyer Bergensons Services is a leading national provider of custodial, physical plant maintenance and operations, and grounds maintenance services. With 19,500+ associates, KBS provides service to more than 15,000 locations across the country. For more information please visit us at www.kbs-services.com.

**Kelly Educational Staffing®**  
**Booth 711**  
425 N. Andalusia Ave.  
Santa Rosa Beach, FL 32459

Kelly Educational Staffing® (KES®) is a specialty service of Kelly Services, Inc., a leader in workforce solutions and the first staffing provider to develop a comprehensive education talent management solution. Launched in 1997, KES is the largest provider of substitute teachers nationwide, with a 100% success rate in improving school performance across 35 states. In addition to the staffing of non-instructional positions, KES proudly offers our client schools unique value and unparalleled experience.

**KEV Group, Inc.**  
**Booth 515**  
8080 Tristar Dr.  
Irving, TX 75063

KEV Group is the developer of the industry-leading school cash management solution, the School Cash Suite. The suite offers an end-to-end, web-based solution that tracks every dollar that comes in and out of schools. KEV’s solutions seamlessly integrate online payments, POS, and back-end school accounting to provide better financial visibility for the school district while reducing school bookkeepers’ workload by half.

**Keystone Purchasing Network**  
**Booth 626**  
90 Lawton Lane  
Milton, PA 17847

The Keystone Purchasing Network (KPN) is a cooperative purchasing program operated by the CSIU, serving schools, government, and other nonprofit agencies through free membership. KPN establishes contracts through sealed public bid processes and awards contracts to the most responsive, responsible vendors. Contracts include FieldTurf, Musco, GT Grandstands, Hertz Furniture, Promethean Whiteboards, Playground Equipment, Modular Classrooms, Library Supplies and more. Visit us at www.thekPN.org to apply for free membership.

**KI**  
**Booth 420**  
1330 Bellevue St.  
PO Box 8100  
Green Bay, WI 54302

KI provides the entire furniture package for schools and has been ranked as the number one furniture supplier for educational solutions for 11 years.  
(Source: Contract Magazine Brand Report)

**Lincoln Learning Solutions**  
**Booth 127**  
294 Massachusetts Ave.  
Rochester, PA 15074

Lincoln Learning Solutions (formerly NNDS) is a nonprofit educational solutions organization redefining the PreK–12 learning experience through a continuum of personalized learning. By providing differentiated, customizable digital learning curriculum tools coupled with powerful teacher instruction, we maximize virtual and blended learning so students can “own” national and state content standards.

**Motorola/SchoolSAFE**  
**Booth 805**  
1303 E. Algonquin Rd.  
Schaumburg, IL 60196

Motorola (www.motorolasolutions.com) provides products and services to schools and their surrounding police, fire, and EMS agencies. With our partner SchoolSAFE (www.SchoolSafe.com.org), we offer web-enabled, two-way radio-based solutions that allow for communications interoperability between school radio systems and public safety radio systems.

**MyBudgetFile.com**  
**Booth 427**  
1805 Third Ave. South  
No. 302  
Minneapolis, MN 55404

MyBudgetFile.com is a simple, yet powerful, web-based budgeting and performance planning application for K–12 school districts. Developed by a former school business official, it’s designed to help you create better, more accurate budgets in less time.
NASPO ValuePoint
(formerly WSCA-NASPO)
Booth 926
201 E. Main, #1405
Lexington, KY 40507

NASPO ValuePoint (formerly WSCA-NASPO) provides the highest standard of excellence in public cooperative contracting. Since 1993, we have been the cooperative purchasing arm of NASPO (National Association of State Procurement Officials), guiding the nation’s most significant public contract cooperative. NASPO ValuePoint is a nationally focused cooperative aggregating the demand of all 50 states, the District of Columbia, and the U.S. territories and their political subdivisions, spurring best value, innovation, competition in the marketplace.

National Insurance Services of WI, Inc.
Booth 429
250 S. Executive Dr.
Brookfield, WI 53005

National Insurance Services (NIS) has been a specialist in employee benefits for schools, cities, and counties 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. NIS is a full-benefits consultant providing health, dental, life, disability and vision insurance. Our financial solution products include HRAs, OPEB Trusts, Special Pay Plan, and Flexible Spending Accounts.

National IPA/TCPN
Booth 712
11280 West Rd.
Houston, TX 77065

TCPN is a national governmental purchasing cooperative able to leverage the purchasing power of governmental entities in all 50 states. All TCPN contracts are competitively bid, evaluated, and awarded by a government entity serving in the lead agency role and in accordance with purchasing procedures mandated by state procurement laws.

National Joint Powers Alliance
Booth 520
PO Box 219
202 12th St., NE
Staples, MN 56479

The National Joint Powers Alliance is a governmental agency operating under the legislative authority of M.S. 123A.21. We are a member-owned cooperative serving all public and nonprofit educational systems, governmental agencies, and nonprofits. NJPA establishes and provides nationally leveraged and competitively solicited purchasing contracts in cooperation with the Uniform Municipal Contracting Law. At NJPA we are driven to provide efficient public service through our National Cooperative Purchasing Program.

National Life Group®/LSW®
Booth 815
15455 Dallas Pkwy., Ste. 800
Addison, TX 75001

We are National Life Group®. We serve nearly a million customers with revenues of over a billion dollars annually. The group includes National Life Insurance Company®, founded in Vermont in 1848, and Life Insurance Company of the Southwest® (LSW) in Texas. We’re leaders in the 403(b)/457(b) market and have delivered innovative solutions to meet our clients’ needs. We’ve been delivering on our promises for nearly 170 years and will do so for years to come.

Noodle Markets
Booth 629
59 Chelsea Piers, Ste. 201
New York, NY 10011

Noodle Markets is an education technology company that is revolutionizing K–12 purchasing. Our mission is to dramatically transform the way K–12 school districts and education agencies buy products and services; level the playing field for vendors and spur innovation; and improve procurement processes and promote best practices. Our marketplace will help K–12 buyers and vendors reduce costs, increase efficiency through standardization and digitization, and enhance communication.

*As of August 31, 2015
Office Depot, Inc.  
Booth 409  
6600 N. Military Trail  
MS C314N  
Boca Raton, FL 33496  

We’re more than just office supplies. We’re people, products, and solutions to help your school succeed. From technology to professional development, Office Depot provides a one-stop resource for schools.

The OMNI Group, Inc.  
Booth 508  
Watertower Office Park  
1099 Jay St., Bldg. F  
Rochester, NY 14611  

OMNI is a national, independent 403b/457b third-party administrator providing compliance, remittance, and customer support services, including in-house legal counsel and IRS audit support. Please inquire about OMNI's P3 program.

OSC WORLD  
Booth 813  
170 Earle Ave.  
Wantagh, NY 11563  

OSC WORLD has developed software programs to assist teachers and administrators reduce the time it takes to address bureaucratic requirements and ensure the safety of students from cyber-bullying and other threats. Digital Writing expedites much of the paperwork teachers and administrators are required to complete, using tablet devices. Gradelit takes over the burdensome task of scoring exams. Digital Fly monitors social media, analyzing harmful content and protecting students and faculty.

PEPPM  
Booth 627  
90 Lawton Lane  
Milton, PA 17847  

PEPPM is a national technology bidding and purchasing cooperative administered by the Central Susquehanna Intermediate Unit (CSIU), a political subdivision of the Commonwealth of Pennsylvania. PEPPM aggregates buyers and demand across the country to get the lowest prices while saving time and money on the bidding process. PEPPM can maximize technology budgets and minimize administrative time. Go to www.peppm.org to start saving time and money now.

PMA Financial Network, Inc.  
Booth 812  
2135 City Gate Lane, 7th Floor  
Naperville, IL 60563  

PMA Financial Network, Inc., has been a leading provider of financial services since 1984 and currently provides a diverse lineup of customized financial solutions to over 2,000 school districts and other public entities in 11 states. With services ranging from investment advisory work through Prudent Man Advisors, Inc., to public finance work with PMA Securities, Inc., among others, the PMA companies are focused on achieving long-term financial success for their clients.

Premier  
Booth 322  
1349 Tilton D  
Franklin, TN 37067  

PublicSchoolWORKS  
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**Security Benefit**  
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Security Benefit is proud to be an ASBO Strategic Partner. Join our breakout to learn what Gen X and Gen Y employees think about saving for retirement and ways you can help increase their participation in your district’s 403 (b) retirement plan. Visit us at Booth 605 to explore how your 403 (b) plan can provide possible budget solutions and ways Security Benefit can help your employees To and Through Retirement.

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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 1,800 school districts throughout the world.

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*As of August 31, 2015*
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Houston, TX 77030 US

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San Angelo, TX 76904

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**TIPS**
Booth 614
4845 U.S. Hwy. 271 North
Pittsburg, TX 75686

The Interlocal Purchasing System (TIPS) is a purchasing cooperative serving public and private school districts, colleges, universities, state, county, and city municipalities.

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Booth 713
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Schenectady, NY 12305

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**Tremco**
Booth 504
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Booth 621
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Plano, TX 75024

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**U.S. Communities**
Booth 304
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Booth 726
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Houston, TX 77019

VALIC is an industry leader and currently manages long-term investment programs for more than 24,000 K–12 schools and districts, as well as higher education, healthcare, government, and other not-for-profit institutions serving nearly 2 million plan participants. VALIC markets these plans and services through a national team of financial advisors dedicated to providing unparalleled personal, face-to-face service.
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Wilkes University
Booth 124
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Wilkes Barre, PA 18766

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