PROGRAM BOOK

2013 Annual Meeting & Expo
Boston • October 25–28
For more than 30 years, we've had the public school’s back. Today, our Tyler School Solutions empower districts to make the right decision at the right time through a district-wide software integration. Financials, Payroll/Human Resources, Student Information, Transportation and Data Analytics — all from a single source you can trust. To find out how we can empower you, visit us at Booth #509 at the ASBO International Conference October 25 — 28, 2013 in Boston, visit tylertech.com or email us at info@tylertech.com.
TABLE OF CONTENTS

4  General Information
6  2013 Corporate Partners

Professional Development & Events
9  Schedule of Events
12  Workshops and Seminars
15  Session Tracks
16  Daily Schedule
48  Clinic Tables
51  Gold Mine Sessions
57  Guest Activities

Leaders of the Association
59  Board of Directors
60  Eagle Award Recipients
61  Pinnacle Award Recipients
65  2013 Committee Leaders

All in the Hall
71  Exhibit Hall Highlights
73  2013 Exhibitors
86  Exhibit Hall Map
Registration Hours
Friday: 7:00 a.m. – 6:00 p.m.
Saturday and 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: 10:30 a.m. – 2:15 p.m.

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

PICK YOUR FAVORITE TEAM
Help yourself to unlimited ribbons at the ribbon bar located across from registration on the Second Level of the Convention Center. Boston is home to several major league sports teams. Visit TIAA-CREF’s Booth 604 to “vote” for your favorite team—the Red Sox (baseball), the Celtics (basketball), the Bruins (hockey), or the New England Patriots (football)—by picking up the corresponding ribbon. Votes will be tallied at the close of the Exhibit Hall on Saturday and attendees’ preferred sports team will be revealed at the Second General Session.

ASBO ANNUAL MEETINGS = PINS
Long-time ASBO International members know that part of the history and culture of our association is the pin trading that goes on at every annual meeting. Back by popular demand again this year, we’ll add two pins to the ASBO chronicles and your collection.

REFILLABLE WATER BOTTLES
Help minimize our environmental impact during the AM&E by using the refillable water bottle provided with your registration materials. Look for water-filling stations throughout the Convention Center.

FIRST AID
In the event of a medical emergency, please call 617.954.2111 or dial extension 2111 from any Convention Center house phone. You can also ask any uniformed Convention Center employee with a radio to assist you. The nurse is located on Level 1 outside of Hall A.

Programming Note: The ASBO International 2013 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.
Budget Shield, from Absence Insurance Services and Sutton Special Risk protects school districts against the costs incurred from:

- Maternity Leave
- Sickness
- Accident
- Bereavement
- Personal Days
- Family Medical Leave
- Military Service
- Jury Duty

For School Districts it means budget certainty and risk transfer:

- Dealing with maternity leave, staff absence and sickness no longer needs to be a gamble
- Smoothes out fluctuations in staff costs
- Enables school districts to budget more efficiently and protect against rising substitute staff costs

For Staff it means the care and support of an assistance program and access to services 24/7 via a toll-free helpline number:

- Assessment and referral for personal and family problems
- Short-term counseling, management consultation and educational workshops
- Legal and financial referrals
- Family resource service for child and elder care services

For more information please contact:

In the US:
Scott Lapp, 212.459.3920 or sclapp@suttonspecialrisk.com

In Canada:
Dylan Friedmann, 416.307.5617 or dfriedmann@suttonspecialrisk.com

Get a quote at www.ais-na.com
Good Partners Help You Make Your Next Move

With an abundance of resources and knowledge, a good partner is always positioned to help you plan your next move. ASBO International’s Corporate Partners provide the industry expertise you need to make the best decisions for your district.

asbointl.org/CorporatePartners

Strategic Partners

Event Partners
THINKING OUTSIDE THE BOX FOR RETIREMENT

A commitment to providing security and peace of mind for your employees.

Come visit us at Booth #201 on October 26–27, 2013.

AXA Equitable is the proud sponsor of the ASBO Eagle Award.
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Let’s start the conversation.

Visit us at Booth 500. We’ll answer your questions or suggest a new solution. Whatever your financial needs, it’s all here at BMO Financial Group.

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Friday, October 25
7:00 a.m. – 6:00 p.m. Registration Open
8:00 a.m. – 5:00 p.m. Workshops and Seminars
8:00 a.m. – 5:00 p.m. Tour: The Elegance and Charm of Newport, RI ($)
10:30 a.m. – 3:00 p.m. Bridges to the Future Scholarship Workshop (IO)
1:00 p.m. – 2:00 p.m. Orientation Workshop—Great for Newcomers!
2:30 p.m. – 4:30 p.m. ASBO Choir Rehearsal
6:00 p.m. – 7:30 p.m. Welcome Mixer
8:00 p.m. – 10:00 p.m. MASBO Reception at Prudential Center Skywalk Observatory

Saturday, October 26
6:45 a.m. – 8:00 a.m. Charity Fun Run
7:00 a.m. – 4:00 p.m. Registration Open
7:30 a.m. – 8:30 a.m. ASBO Choir Rehearsal
8:30 a.m. – 10:30 a.m. First General Session—Steve Gross
10:45 a.m. – 1:30 p.m. Affiliate Executive Directors Meeting and Luncheon (IO)
11:00 a.m. – 12:00 p.m. Discussion Groups
11:00 a.m. – 12:00 p.m. Guest Program: Book Club—The Bostonians by Henry James
12:00 p.m. – 1:30 p.m. MBA Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:15 p.m. – 1:30 p.m. Committees Meeting and Luncheon (IO)
12:30 p.m. – 2:30 p.m. Deep Dig Sessions
1:15 p.m. – 2:15 p.m. Discussion Groups
2:30 p.m. – 5:30 p.m. Exhibit Hall Opening Reception
8:00 p.m. – 11:00 p.m. Joint Affiliate Reception at Tequila Rain/Jillian’s Boston

Sunday, October 27
7:00 a.m. – 4:00 p.m. Registration Open
8:30 a.m. – 10:15 a.m. Second General Session—Emily Pilloton
10:30 a.m. – 11:30 a.m. Open Bylaws Meeting
10:30 a.m. – 2:15 p.m. Exhibit Hall Open
10:45 a.m. – 12:00 p.m. Clinic Tables
11:00 a.m. – 12:00 p.m. Guest Program: Paul Revere Program
11:30 a.m. – 1:00 p.m. COE Advisory Committee and Reviewers Meeting and Luncheon (IO)
12:00 p.m. – 1:00 p.m. Lunch in the Exhibit Hall
1:15 p.m. – 2:00 p.m. COE Award Recipients Reception (IO)
2:15 p.m. – 3:15 p.m. Eagle Award Recipients Reception (IO)
2:15 p.m. – 3:30 p.m. Gold Mine Sessions
2:30 p.m. – 3:30 p.m. Discussion Groups
2:30 p.m. – 4:30 p.m. Deep Dig Sessions
3:45 p.m. – 4:45 p.m. Discussion Groups
2:15 p.m. – 3:15 p.m. COE Advisory Committee and Reviewers Meeting and Luncheon (IO)
10:30 a.m. – 11:30 a.m. Discussion Groups
10:30 a.m. – 12:30 p.m. Deep Dig Sessions

Monday, October 28
7:00 a.m. – 10:00 a.m. Registration Open
8:00 a.m. – 9:00 a.m. Discussion Groups
8:15 a.m. – 10:15 a.m. Deep Dig Sessions
9:15 a.m. – 10:15 a.m. Discussion Groups
10:30 a.m. – 11:30 a.m. Discussion Groups
10:30 a.m. – 12:30 p.m. Deep Dig Sessions

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ON THE PHONE at 1-800-GRAINGER or call your Grainger Rep  IN A BRANCH when you want to stop by

VISIT US AT THE ASBO ANNUAL MEETING & EXPO IN BOSTON OCT. 25-28: BOOTH #315
Horace Mann helps fund education

Horace Mann is a national sponsor of DonorsChoose.org, a website dedicated to funding classroom projects. It’s just one way Horace Mann says “thank you” to educators.

For a chance to win a completed project in your district, visit Horace Mann at booth 209.

“DonorsChoose.org has really been an inspiration to me. There have been several occasions when I was able to complete funding for a project in my home town as well as here in Reston at several of our community schools. It just gives me such a good feeling to receive the letters from the children and how much the project meant to them.

Thanks for introducing me to this organization.”

John D. Musso, CAE, RSBA
ASBO Executive Director
Explore critical school business management issues in depth at the Workshops and Seminars.

Visit asbointl.org/WorkshopsAndSeminars for session descriptions and to find out which sessions offer CEU and CPE credit. Remember, your signature is your ticket to earn credits. Please make sure to sign the roster when you enter and exit the session room.

Friday, October 25

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
Room: 306
Emergency Management for School Districts

Two-Hour Workshops
8:00 a.m. - 10:00 a.m.
Workshop 2
Room: 310
Update on the Law of Special Education

Workshop 3
Room: 313
Lead Well: What Is Your Personal Well-Being Strategy?

10:15 a.m. - 12:15 p.m.
Workshop 4
Room: 302
Budget Prioritization

Workshop 5
Room: 309
Improve Your Federal Programs Process: Better Compliance and Audit Documentation

1:00 p.m. - 3:00 p.m.
Workshop 6 - CANCELLED
Room: 310
Self Insurance: Navigating the Decision

Workshop 7
Room: 304
Technology, the Law, and Schools

Four-Hour Workshops
8:00 a.m. - 12:00 p.m.
Workshop 8
Room: 304
In-Depth Study of the Health Care Reform Rules Affecting School Districts

Workshop 9
Room: 301
School Tour: Boston Public Schools

Workshop 10
Room: 308
Internal Controls and Reporting for Athletics, Student Activity Funds, Booster Clubs, and PTOs

1:00 p.m. - 5:00 p.m.
Workshop 11
Room: 309
SmartIT: Strategically Managing IT Through Difficult Budgets

Workshop 12
Room: 302
Moving from Management to Leadership: The Key to Your Success

SEMINARS

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

Full-Day Seminars
8:00 a.m. - 5:00 p.m.
Seminar 13
Room: 305
Skills Refresher for ASBO’s SFO® Certification Exam

Four-Hour Seminars
8:00 a.m. - 12:00 p.m.
Seminar 14
Room: 303
How to Create an Award-Winning Budget

1:00 p.m. - 5:00 p.m.
Seminar 15
Room: 313
How to Prepare a Comprehensive Annual Financial Report
In New York they ask, “How much money does he have?”
In Philadelphia, they ask, “Who were his parents?”
In Boston they ask, “How much does he know?”

In the spirit of Twain’s writing, we hope you find the 2013 ASBO Annual Meeting & Exhibits in Boston to be filled with inspiring and stimulating knowledge.

Visit ING U.S. at booth #301 to learn about how we can help you with administration of your district’s 403(b) and/or 457 retirement plans.

Or contact Ketul Thaker
Vice President, ING U.S. Retirement Services – Tax-Exempt Markets
860-580-4013
Ketul.Thaker@us.ing.com
Ketul Thaker is a Registered Representative of ING Financial Advisers, LLC (Member SIPC).
MyHorizonPlus helps you simplify your operation, reduce costs, and improve customer satisfaction by drastically reducing paperwork and money handling within your district.

MyHorizonPlus gives you one centralized, online solution for all of your enrollments, registrations, and payments. Easily manage:

- Back-to-school orientation, school fees, and school meals
- Extracurricular activities
- Community education
- Summer school registration
- School-age childcare programs
- Facilities management
- And so much more!

With the MyHorizonPlus family of web-based solutions, you simply place all of your registrations and payments online. This enables you to lighten workloads, reduce paper usage, and streamline parent and community interactions.

MyPaymentsPlus
All school-related registrations and payments: orientation, course fees, school meals, parking permits, extracurricular activities, Advanced Placement exams, summer school, and more

MyProgramPlus
Complete before-school and after-school childcare program management: contracts, invoicing, payments, family profiles, and more

MyCommunityEdPlus
Simplified Community and Adult Education program management: course descriptions with video and images, catalog production, instructor tracking, course registrations, payment processing, and more

Horizon develops great products that make online payments and registration both simple and secure for members of the community and those who manage the District’s Adult and Continuing Education finances and operations.

Yvonne Klancko, Director of Continuing Education, Amity Regional School District No. 5

Visit www.HorizonSoftware.com/MyHorizonPlus or call 800.741.7100 to learn more.
SESSION TRACKS

**Educational Enterprise**
Focuses on public policy, intergovernmental relations, and the legal frameworks that affect schools.

**Financial Resource Management**
Provides expertise on the effects of financial management on budgeting, financial planning and reporting, accounting, investments, debt management, and business technology.

**Human Resource Management**
Addresses personnel management concepts and leadership styles, including personnel and benefits administration, professional development, labor relations, and employment agreements.

**Facility Management**
Focuses on the latest in school planning and construction, school maintenance, and the environmental aspects of school operations.

**Property Acquisition and Management**
Focuses on purchasing, supply and fixed-asset management, and real estate management.

**Information Management**
Deals with critical information on strategic planning, instructional support programs, and management information systems.

**Ancillary Services**
Addresses issues involving transportation, risk management, and food service.

**International Aspects**
Focuses on global school business management issues.

**Leadership Development**
Focuses on aspects of developing leadership skills in the field of school business management.

**CPE**
Continuing Professional Education
Earn up to 17 CPE credits Friday through Monday by attending Workshops, Seminars, Discussion Groups, and Deep Digs designated as offering CPEs.

**Recertification Contact Hours**
Attending professional development sessions is an excellent way to earn the contact hours you need for recertification. Use the SFO Contact Hour Record in your registration packet to document your attendance. Remember to have the presenters initial next to the session you attended.

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 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 will offer CPE credit for select Discussion Group and Deep Dig sessions using the Group-Live instructional delivery method. Visit asbointl.org/AnnualMeeting for more information about these sessions.

To receive CPE credit, attendees must verify attendance by having their badge scanned when entering the room and by completing the session evaluation online after the meeting. CPE certificates can be printed at your home computer after completing the online evaluation.

**Complaint Resolution and Refund Policy**
For more information regarding administrative policies, such as complaints and refunds, contact our office at ASBO International, 11401 North Shore Drive, Reston, VA, 20190 or call 866.682.2729 x7080. ASBO International reserves the right to cancel a session due to low enrollment.
All events take place at the Hynes Convention Center unless otherwise noted.

**DAILY SCHEDULE: FRIDAY - SATURDAY**

**Friday, October 25**

7:00 a.m. – 6:00 p.m.  
Registration  
Prefunction Hall C, Second Level

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

8:00 a.m. – 5:00 p.m.  
Tour: The Elegance and Charm of Newport, RI  
Additional Fee and Advance Registration Required  
Buses depart from the Sheraton Boston Hotel Lobby at 8:00 a.m.

10:30 a.m. – 3:00 p.m.  
Bridges to the Future Scholarship Workshop  
By Invitation Only  
Sheraton Boston Hotel, 3rd Floor, Hampton

1:00 p.m. – 2:00 p.m.  
Welcome Orientation  
All welcome; newcomers encouraged to attend  
Room: 210

2:30 p.m. – 4:30 p.m.  
ASBO Choir Rehearsal  
Room: 201

6:00 p.m. – 7:30 p.m.  
Welcome Mixer  
Sheraton Boston Hotel, Grand, Liberty, & Independence Ballrooms

8:00 p.m. – 10:00 p.m.  
50 Floors Above Boston!  
Prudential Center Skywalk Observatory  
800 Boylston Street  
Hosted by the Massachusetts Association of School Business Officials (MASBO)  
*Open to all conference attendees. Badge required.*  
Join us for breathtaking views, desserts, and drinks 50 floors above Boston. The Prudential Center Skywalk Observatory offers 360-degree views of Boston and beyond. What a venue to catch your first glimpse of the Boston landmarks: Fenway Park, the Hancock Tower, Boston Common and Public Gardens, MIT and Harvard Universities, and unbelievable vistas. This welcoming gathering is a must on Friday evening, following ASBO’s Welcome Mixer.

**Saturday, October 26**

6:45 a.m. – 8:00 a.m.  
Charity Fun Run  
Boylston Street in front of the Hynes Convention Center, across from Gloucester Street

7:00 a.m. – 4:00 p.m.  
Registration  
Prefunction Hall C, Second Level

7:00 a.m. – 8:00 a.m.  
Texas ASBO Breakfast  
By Invitation Only  
Sheraton Boston Hotel, 3rd Floor, Hampton

7:30 a.m. – 8:30 a.m.  
Oklahoma ASBO Breakfast  
By Invitation Only  
Sheraton Boston Hotel, 3rd Floor, Fairfax A

7:30 a.m. – 8:30 a.m.  
ASBO Choir Rehearsal  
Room: 201

7:45 a.m. – 8:15 a.m.  
General Session Coffee Break  
Ballroom Prefunction, Third Level  
Sponsored by Tyler Technologies

7:45 a.m. – 8:15 a.m.  
SFO Meet & Greet  
Ballroom B Prefunction

8:30 a.m. – 10:30 a.m.  
First General Session  
Room: Ballroom B, Third Level
**Welcome to Boston**
Ron McCulley, CPPB, RSBO
President, ASBO International

**ASBO International Choir**
Director: Michael A. Jacoby, Ed.D., Illinois ASBO

**Business Meeting**
Ron McCulley, CPPB, RSBO
President, ASBO International

**Presentation of the 2013 ASBO International Eagle Awards**
David Ciotta
Executive Management, Head of Employer Sponsor Business, AXA Equitable

**Introduction of Speaker**
Richard R. Schulenburg
Vice President, National Sales
The Horace Mann Companies

**First Keynote**
“How Joy and Optimism Ignite the Best in All of Us”

*Steve Gross, MSW*
*Life is good Kids Foundation*
Steve Gross, MSW, executive director and chief playmaker of the Life is good Kids Foundation, is a creative and dynamic leader who has devoted his career to helping frontline professionals use the power of play to build healing, life-changing relationships with our most vulnerable children. A gifted, inspirational, and passionate speaker, Steve will help you access your own playfulness, energy, and creativity to reach your full potential.

*Sponsored by The Horace Mann Companies*

**11:00 a.m. – 12:00 p.m.**
**Guest Program**
Book Club: *The Bostonians*
Room: 208

Join us for a lively discussion of Henry James’s brilliant satire about Boston society and the women’s rights movement in America. *The Bostonians* is one of James’s most provocative and astute portrayals of a world caught between old values and the lure of progress.

**DISCUSSION GROUPS (1-HOUR)**

**11:00 a.m. – 12:00 p.m.**
**Balance Your Life, Recharge Your Battery, and Thrive,**
DG367

Room: 303
SF0s: 1.0

School business continues to become more complicated. How do we manage all of the changes and keep our sanity? The discussion will focus on various strategies school business officials are using to stay ahead of the game and avoid being consumed by the job.

**Speakers:** Mark Rajter, Assistant Superintendent, Troy School District, Troy, MI; Stephanie Weese, Director, Fiscal Services, Kent Intermediate School District, Grand Rapids, MI
11:00 a.m. – 12:00 p.m.

Choosing the Optimal Workers’ Compensation Program, DG123

CPE

Room: 310

SFOs: 1.0

CPEs: 1.0

Program Level: Basic

Field of Study: Administrative Practice

Program Prerequisites: None

Advance Preparation: None

The presenters will analyze the various types of workers’ compensation programs, illustrate the process for choosing between fully insured and self-insured structures, and review key strategies to control and monitor workers’ compensation costs.

Learning Objectives:
1. Discuss the differences between fully insured plans and alternative-funding plans.
2. Outline the steps in performing a comparative financial analysis of different plans.
3. Identify basic tools for managing the costs of workers’ compensation.
4. Detail how to monitor the success of your plan.

Speakers: Barbara Salatto, Associate Superintendent for Management Services, ESBOCES, Patchogue, NY; Shelley Levine, Executive Vice President, Bollinger Inc., New York, NY

11:00 a.m. – 12:00 p.m.

Devolved School Financial Management Under a Student-Based Funding Model, DG065

Room: 304

SFOs: 1.0

Victoria, Australia has one of the most devolved school management approaches among OECD nations. The funding strategies for government schools combine self-management with recognition of diversity in learning needs and an expectation of shared responsibility and cooperation between schools, all within a context of a transparent and rigorous accountability framework. Explore the fundamentals of this successful funding model; the rationale behind it; the linkages between this funding model and student learning outcomes; and the day-to-day decision making required of school leaders and business officials in a self-managing school environment.

Speaker: Nino Napoli, Director, Financial Services Division, Department of Education and Early Childhood Development, Victoria, East Melbourne, AU

11:00 a.m. – 12:00 p.m.

Does a UK School Improve by Becoming an Academy?, DG362

Room: 308

SFOs: 1.0

All schools in the UK are required to change to academy status. This has been, and still is, a difficult process, but it is taking many schools away from local authority control and giving them total autonomy. Learn how the conversion process has demanded additional financial competencies from school business managers and about many other changes in the management of the schools.

Speaker: Trevor Summerson, Former School Business Director, National College for School Leadership, Nottingham, UK
Ethical practice is essential in all areas of school business management, including the procurement process. Avoidable mistakes are often made due to the lack of knowledge of policies, procedures, and regulations, rather than the intent to engage in unethical activities. Explore the educational practices and safeguards that school districts can implement to ensure ethical conduct in procurement.

Speaker: Kimberly J. Bauer, Purchasing Coordinator, Norman Public Schools ISD #29, Norman, OK

### Understanding Print Procurement in the K–12 Environment, DG471

Room: 306
SFOs: 1.0

Learn strategies to work with your sales representative to achieve a level of partnership and trust to ultimately meet your objectives of saving money in the procurement process, while still maintaining the highest level of quality in products and service.

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

### GASB Pension Requirements: Does This Obligation Belong to You?, DG274

Room: 311
SFOs: 1.0
CPEs: 1.0

The funded status of pension plans has received a lot of attention in the past year. Media reports have spotlighted the concerns about retirement plans, not just in the United States, but worldwide. GASB recently issued new standards to address the reporting of pension plans, which will significantly affect the financial statements of school districts.

**Learning Objectives:**
1. Outline the requirements of the proposed GASB pension standard.
2. List and define the new terminology related to pension reporting.
3. Explain the potential effects of the proposed standard on your school district’s financial statements.

**Speakers:** Christine Torres, Senior Manager, Crowe Horwath LLP, Oak Brook, IL; Corey Arvizu, Partner, Heinfeld, Meech & Co., Tucson, AZ; Neil A. Sullivan, RSBO, CGFM, Executive Director of Finance, Portland Public Schools, Portland, OR

### Reducing the Budget Impact of Community Use of Schools, DG202

Room: 301
SFOs: 1.0
CPEs: 1.0

This session will focus on strategies to reduce the budget impact of community use of schools. Approaches to the budget impact and best practices for managing community use will be discussed.
School officials strive to be good stewards of taxpayer dollars by opening their facilities to the public. However, community use of schools can significantly drain budgets due to increased costs for event administration, energy and other utilities, custodial and staff overtime, and building upkeep. Learn how implementing community use of schools best practices for improving cost recovery, process efficiency, and energy efficiency can help you serve the public while reducing the negative impact on your budget.

**Learning Objectives:**
1. Explain how to improve cost recovery by documenting actual costs for all facility use expenses, establishing fees, and invoicing for facility use.
2. Describe how to increase process efficiency by shortening administrative time for facility use approvals and set up, and by scheduling all events on a single calendar.
3. Discuss how energy costs can be reduced by automatically coordinating building automation systems with event schedules and by conditioning space after hours for scheduled events.

**Speaker:** Richard Krumrine, Supervisor of Buildings and Grounds, Great Valley School District, Malvern, PA

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**11:00 a.m. – 12:00 p.m.**

**Tablets vs. Netbooks/Laptops, DG634**

**CPE**

Room: 312

SFOs: 1.0

CPEs: 1.0

**Program Level:** Basic

**Field of Study:** Computer Science

**Program Prerequisites:** None

**Advance Preparation:** None

Tablet or netbook? Masconomet Regional School District conducted a study in FY12 that compared the use of Windows netbooks and Android tablets. The study included student, parent, teacher, and IT support feedback. Learn what the district found out in terms of instructional effectiveness and infrastructure support, including set-up, content filtering, wireless access, bandwidth, appropriate use, Google Apps, and device durability.

**Learning Objectives:**
1. Discuss the differences in device usability in an instructional environment.
2. Explain the infrastructure support challenges associated with accommodating mobile devices.
3. Describe infrastructure upgrades required to support a 1:1 mobile device program.

**Speakers:** Seth Goodman, IT Director, Masconomet Regional School District, Topsfield, MA; Susan K. Givens, CFO, Masconomet Regional School District, Topsfield, MA

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**11:00 a.m. – 12:00 p.m.**

**Taking Your Shopping Carts Online for Improved Procurement Operations, DG358**

Room: 313

SFOs: 1.0

Implementation of a centralized, online purchasing solution can improve the efficiency and effectiveness of agency purchasing. Through ecommerce you can achieve better contract compliance, improve tracking, and comparison shop to maximize savings. Join this panel of eprocurement experts who have tested, rolled out, and are now using some form of ecommerce for their online ordering. They’ll discuss their experience, outcomes, and next steps in online shopping.

**Speaker:** Alexis Turner, Program Manager, U.S. Communities, Walnut Creek, CA

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**11:00 a.m. – 12:00 p.m.**

**They Want to Do What with Student Activity Funds?, DG341**

Room: 305

SFOs: 1.0

Just when you think you have heard everything that could go wrong with student activity funds, something else comes up that tops the last issue. Activity funds must be...
consistent with the policies of the school board and the educational goals of the district. This session explores how student activity funds are used to account for monies earned and received by the students, to be used for the benefit of the students. The do’s and don’ts will be discussed by way of real-life examples and how they were handled.

**Speaker:** Stephen F. Martin, Business Administrator, SAU-28, Pelham School District, Windham, NH

**12:00 p.m. – 1:30 p.m.**

Meritorious Budget Award Advisory Committee and Reviewers Meeting and Luncheon

*By Invitation Only*

Sheraton Boston Hotel, 3rd Floor, Dalton

**12:15 p.m. – 1:30 p.m.**

Committees Meeting and Luncheon

*By Invitation Only*

Room: 210

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**DEEP DIG SESSIONS (2-HOUR)**

**12:30 p.m. – 2:30 p.m.**

Creative Disruption: The Expanded Transformative Role of the Chief Business Officer, DD365

*Room: 313*

*SFOs: 2.0*

A recent survey of more than 1,500 CEOs indicated the most-valued organizational trait is “creative disruption”—fresh thinking and continuous innovation. Explore how a Santa Fe district is transforming itself out of mediocrity and reaching for excellence, and how the chief business officer is involved in cultural, systemic, and programmatic change.

**Speaker:** Carl Gruenler, Chief Business Officer, Santa Fe Public Schools, Santa Fe, NM

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**AXA Equitable**

AXA Equitable is proud to be a Strategic Partner of ASBO International and the sponsor of both the Eagle Awards and the Eagle Institute. We applaud the commitment to the professional development that ASBO embodies and we support your efforts by providing you with the products and services to address all your retirement planning needs. Please visit us at Booth 201 and enjoy the conference!

**12:30 p.m. – 2:30 p.m.**

Finalizing Your Compliance Plans for the 2014 Healthcare Reform Requirements, DD370

*CPE*

Room: 302

*SFOs: 2.0*

*CPEs: 2.0*

*Program Level: Basic*

*Field of Study: Specialized Knowledge and Application*

*Program Prerequisites: None*

*Advance Preparation: None*

Many of the most significant Affordable Care Act provisions take effect in 2014, including the Free Rider Penalty, a number of new plan design mandates, and new fees. Review those provisions that affect plan sponsors and get help creating an action plan for each. The presenters will also answer frequently asked compliance questions.

**Learning Objectives:**

1. Describe the healthcare reform provisions impacting employers that take effect in 2014.
2. Analyze how the rules apply to educational organizations and their unique staffing arrangements.
3. Create an action plan for complying with applicable 2014 obligations.

**Speaker:** Susan Relland, Vice President, Attorney, and Chief Marketing Officer, American Fidelity Corporation, Oklahoma City, OK

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asbointl.org/AnnualMeeting
12:30 p.m. – 2:30 p.m.
Uniform Chart of Accounts—Linking Finance to Achievement and More!, DD376

CPE
Room: 312
SFOs: 2.0
CPEs: 2.0
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

Learn about the development of Rhode Island’s new uniform chart of accounts and how districts now communicate differently about finances. View the tools that link finance with other data sets and learn about the expansion work underway. Struggling with resource allocation and redirection of funds? Getting push back on changes? Show others how to use data to inform these decisions.

Learning Objectives: 1. Outline the steps to planning and executing a statewide change. 2. Explain how data can be used effectively to inform fiscal decisions. 3. Describe strategies for guiding the conversations surrounding resource redirection. 4. Discuss the power behind linking finance to achievement, demographics, facilities, and other factors.

Speakers: Cynthia Brown, Director, Office of Statewide Efficiencies, Rhode Island Department of Education, Providence, RI; Jane Correia, Executive Director, RIASBO, Providence, RI; Michael Ferry, Director, Office of Data, Research and Analysis, Rhode Island Department of Education, Providence, RI; Pauline Silvia, Finance Director, Bristol Warren Regional School District, Bristol, RI

DISCUSSION GROUPS (1-HOUR)

1:15 p.m. – 2:15 p.m.
Benchmarks and Dashboards: Critical Tools for Employee Performance Management and District Improvement, DG311

CPE
Room: 306
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Computer Science
Program Prerequisites: None
Advance Preparation: None

Benchmarking is the process of evaluating our performance metrics (key performance indicators or KPIs) against those of our peers. In so doing, we identify model districts or schools, learn about their successes, and replicate or adapt their best practices. Dashboards allow us to monitor our KPIs and focus on what is most important, make more informed decisions, quickly identify and respond to problem areas, improve communication, and enhance transparency. Learn how these tools can transform your district into a true learning organization that focuses on continuous improvement, growth, and student success.

Learning Objectives: 1. Describe how to select or identify benchmarks or key performance metrics. 2. Discuss how to select or identify comparable peers. 3. Outline the process of organizing and presenting your data most effectively. 4. Explain how to quickly and easily set up dashboards for your district.

Speaker: Mary DeLai, Assistant Superintendent, Finance and Administration, Reading Public Schools, Reading, MA

1:15 p.m. – 2:15 p.m.
Developing a Long-Term Partnership with Suppliers to Save Procurement Costs, DG470

Room: 311
SFOs: 1.0

Learn how to work with your sales representatives to establish a level of partnership and trust to ultimately meet your objectives of saving money in the procurement process while maintaining the highest quality of products and services.

Speakers: Chuck Luchen, Sr. Vertical Market Manager, K-12, Staples, Overland Park, KS; Richard L. Gay, Purchasing Manager, Baltimore County Public Schools, Towson, MD;
1:15 p.m. – 2:15 p.m.
Effective Loss Control Management Through Incident Reporting, Investigation, and Follow-Up, DG334

Effective Loss Control Management Through Incident Reporting, Investigation, and Follow-Up, DG334

**CPE**

Room: 308
SFOs: 1.0  
CPEs: 1.0

**Program Level:** Basic
**Field of Study:** Management Advisory Services
**Program Prerequisites:** None
**Advance Preparation:** None

What do you or your staff do when an accident/incident occurs? How involved are your principals, supervisors, other management staff, and safety committees in helping your school district control losses? Participants will get an overview of three key steps in the loss control process—accident/incident reporting, accident/incident investigation, and accident/incident follow-up—and learn effective strategies and best practices to better manage or control their school district’s losses.

**Learning Objectives:**
1. Discuss the role and benefits of an effective accident/incident reporting, investigation, and follow-up process or system.
2. Outline the accident/incident reporting process and identify best practices.
3. Detail the accident/incident investigation process and best practices.
4. Discuss the importance of accident/incident follow-up in preventing or reducing future losses.

**Speaker:** Tom Wohleber, Assistant Superintendent, Middleton-Cross Plains Area School District, Middleton, WI

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1:15 p.m. – 2:15 p.m.
Health Reimbursement Arrangements (HRAs)—Tax-Free Funds for Healthcare Costs, DG051

Health Reimbursement Arrangements (HRAs) are plans designed to help employers lower healthcare costs and to provide tax-free funds for employees for out-of-pocket medical expenses not covered by insurance. Learn about HRAs and post-Affordable Care Act health benefits strategies that can save the employer and the employee money.

**Speakers:** David Branback, Director of Market Development, National Insurance Services of WI, Inc., Brookfield, WI; Larry Stein, President, Retirement Plan Services of America, Inc., Marietta, GA

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1:15 p.m. – 2:15 p.m.
How to Prepare and Submit a Comprehensive Annual Financial Report (CAFR) for ASBO’s Certificate of Excellence (COE) Award, DG118

Explore what a Comprehensive Annual Financial Report (CAFR) is and what it contains, including the required elements of the introductory, financial, and statistical...
sections. Participants will learn about ASBO’s Certificate of Excellence program, including the program’s submission process and timeline, and the benefits of preparing a CAFR and receiving the COE award.

Learning Objectives: 1. Describe a CAFR and each of its required elements. 2. Identify the steps for submitting a CAFR for the COE award and the timeline for each. 3. Explain the benefits of preparing a CAFR and of receiving the COE award for your school system. 4. Identify common deficiencies noted by COE program reviewers.

Speakers: Gary Heinfeld, Founding Partner, Heinfeld, Meech, & Co., P.C., Tucson, AZ; Sara Kirk, Audit Manager, Heinfeld, Meech, & Co., P.C., Phoenix, AZ; Mike Hamilton, Altoona, PA

1:15 p.m. – 2:15 p.m.
Leadership: The Correlation Between Great Leaders and Great Schools, DG067

Room: 305
SFOs: 1.0
Participants will examine in detail, practical, real-world examples of leadership to analyze the correlation between great leaders and great schools.

Speakers: Howard Jackson, Managing Director, HCSS Education, Macclesfield, UK; Matt Birch, Consultant, HCSS Education, Macclesfield, UK

1:15 p.m. – 2:15 p.m.
Successfully Managing the Complexities of School Nutrition Programs, DG214

Room: 303
SFOs: 1.0
School nutrition programs have become complex businesses with high customer expectations. Yet insufficient federal reimbursement rates, complex new regulations, and increased labor and food costs have all combined to push these programs into the perfect storm. This session identifies best practices and efficiencies to help your district survive through turbulent times.

Speaker: Kathryn Wilson, Executive Director, National Food Service Management Institute, University, MS

1:15 p.m. – 2:15 p.m.
Who’s Next?: Developing Leadership, DG769

Room: 304
SFOs: 1.0
How do you guarantee the long-term success of an organization? Participants will explore the process of succession planning and examine its relevance to their school district.

Speaker: Marvin L. Dereef, SFO, Deputy Chief Financial Officer, Fulton County Schools, Atlanta, GA

2:30 p.m. – 5:30 p.m.
Exhibit Hall Open

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

8:00 p.m. – 11:00 p.m.
Affiliate Reception and Candidate Meet-and-Greet
Tequila Rain/Jillian’s Boston (first floor)
145 Ipswich Street (next to Fenway)

Hosted by ASBO affiliate organizations in Arizona, Massachusetts, New Jersey, New Mexico, Ohio, Oklahoma, Oregon, Pennsylvania, and Wisconsin.

*Open to all conference attendees. Badge required.

Join us at Tequila Rain/Jillian’s Boston for a reception and candidate meet-and-greet. In this casual, upbeat venue, get to know current and future ASBO International board candidates and network with friends and colleagues. It’s also a great place to watch some college football and the World Series! Appetizers and beverages will be provided.

The venue is only half a mile from the Hynes Convention Center and is located behind historic Fenway Park.
Sunday, October 27

7:00 a.m. – 4:00 p.m.
Registration
Prefunction Hall C, Second Level

7:45 a.m. – 8:30 a.m.
General Session Coffee Break
Ballroom Prefunction, Third Level
*Sponsored by Tyler Technologies*

8:30 a.m. – 10:15 a.m.
Second General Session
Room: Ballroom B, Third Level

**Business Meeting**
Presiding: Terrie S. Simmons, RSBA, CSBO
Vice President, ASBO International

**Installation of Officers**
Brian L. Mee, RSBA, SFO
Immediate Past President, ASBO International

**Presentation of the 2013 ASBO International Pinnacle Awards**
Don Friesz, Virco Board of Directors, Virco Mfg. Corporation
Brian True, Corporate Director, National Sales Group, Virco Mfg. Corporation

**Introduction of Speaker**
Terrie S. Simmons, RSBA, CSBO

**Second Keynote**
“Humanitarian Design”

*Emily Pilloton*
*Project H Design*

Working at the intersection of design and public education, Emily will teach you how to access the untapped opportunities in creative problem solving and hands-on building to improve lives, empower communities, and transform education.

10:30 a.m. – 11:30 a.m.
Open Bylaws Meeting
Room: 302

10:30 a.m. – 12:30 p.m.
Professional Development Networking Group
*By Invitation Only*
Room: 207

10:30 a.m. – 2:15 p.m.
Exhibit Hall Open

10:45 a.m. – 12:00 p.m.
Clinic Tables
Room: 210
(See page 48 for complete listing.)

11:00 a.m. – 12:00 p.m.
Guest Program
One If By Land and Two If By Sea? Paul Revere Today!
Room: 208

Paul Revere comes alive in an innovative and entertaining educational program. David Conner, star of A&E’s *Biography of Paul Revere*, portrays the famous patriot, including tales of a teenage bell-ringer for the Old North Church to the drama of the Revolutionary years. He brings to life a famous figure while unraveling Longfellow’s beloved yet historically incorrect poem, “The Midnight Ride of Paul Revere.”
11:30 a.m. – 1:00 p.m.
Certificate of Excellence Advisory Committee and Reviewers Meeting and Luncheon
By Invitation Only
Sheraton Boston Hotel, 3rd Floor, Dalton

12:00 p.m. – 1:00 p.m.
Lunch in the Exhibit Hall
Sponsored by BMO Financial Group

1:15 p.m. – 2:00 p.m.
Certificate of Excellence Award Recipients Reception
By Invitation Only
Sheraton Boston Hotel, 3rd Floor, Commonwealth

2:15 p.m. – 3:15 p.m.
Eagle Award Recipients Reception
By Invitation Only
Sheraton Boston Hotel, 3rd Floor, Berkley

2:15 p.m. – 3:30 p.m.
Gold Mine Sessions
Room: 210
(See page 51 for complete listing.)

2:30 p.m. – 3:30 p.m.
IRS 403(b) and 457 Plans Update, DG403
Room: 304
SFOs: 1.0
The IRS now focuses on five major areas of compliance when auditing 403(b) plans, including written plan document requirements, universal availability, excessive deferrals, and early distributions. The IRS also performs compliance checks, which may lead to an audit. Learn how to be prepared.

Speaker: Daniel S. Gardner, Mid-Atlantic 403/457 Coordinator, Internal Revenue Service, Independence, OH

2:30 p.m. – 3:30 p.m.
Create a Legacy of Young Millionaires: Money Skills for High School Students, DG161
Room: 313
SFOs: 1.0
Beyond their struggles with acne and raging hormones, students suffer from something debilitating that you can correct: money ignorance. Most high school graduates lack essential finance skills, such as how to save, invest, and prudently spend money. Worse, they do not understand credit, the dangers of debt, or how to fund college. Learn how to share your “money talents” to educate and inspire young people to become financially successful.

Speaker: Edward Seibert, CFO, Sussex Technical School District, Georgetown, DE

2:30 p.m. – 3:30 p.m.
GASB Statements 63 and 65—A New Statement of “Net Position,” DG296
Room: 310
SFOs: 1.0
CPEs: 1.0
Program Level: Basic

DISCUSSION GROUPS (1-HOUR)

2:30 p.m. – 3:30 p.m.
10 Reasons Strategies Fail in School Districts and Schools, DG066
Room: 308
SFOs: 1.0
Strategic planning is vital to effective school and district operations. This high-impact, high-energy session uses real-world examples to illustrate how strategies can and have gone wrong in school districts and schools—and how to avoid failure.

Speakers: Howard Jackson, Managing Director, HCSS Education, Macclesfield, UK; Matt Birch, Consultant, HCSS Education, Macclesfield, UK
Field of Study: Accounting Governmental  
Program Prerequisites: None  
Advance Preparation: None  

Learn about the new reporting requirements of GASB Statements 63 and 65, which introduce the concepts of deferred outflows, deferred inflows of resources, and net position, and establish guidance and presentation standards in a statement of financial position.

**Learning Objectives:**  
1. Define “deferred outflows” and “inflows of resources.”  
2. Explain the meaning and significance of net position.  
3. Discuss the new presentations on the Statement of Net Position.  
4. Present examples of deferred outflows and inflows.

**Speakers:** Adriane Schrauben, Senior Manager, Hungerford, Aldrin, Nichols & Carter, P.C., Grand Rapids, MI; Phillip W. Saurman, Shareholder-Government Services, Hungerford, Aldrin, Nichols & Carter, P.C., Grand Rapids, MI

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2:30 p.m. – 3:30 p.m.  
**Redefining Healthcare Consortia: An Innovative Solution to Managing Healthcare Costs, DG360**  
**Room:** 312  
**SFOs:** 1.0  
**CPEs:** 1.0  
**Program Level:** Basic  
**Field of Study:** Specialized Knowledge and Application  
**Program Prerequisites:** None  
**Advance Preparation:** None  

Review the development and implementation of a healthcare consortium that uses more than pooled experience to reduce costs while partnering with labor members. Participants also will explore cost-reduction techniques and ways to manage the impact of healthcare reform from a local perspective. The session will include actual case studies to illustrate cost-reduction calculations that substantiate the shared experience.

**Learning Objectives:**  
1. Discuss the development of a consortium that turned to the market to negotiate prescription costs.  
2. Describe initiatives that can reduce medical and prescription drug costs without initial modification of the insurer or plan design.  
3. Discuss potential plan design changes to reduce costs and a collaborative method to implement changes with labor unions.  
4. Outline options for mitigating cost increases due to healthcare reform.

**Speaker:** Stan Wisler, Chief Financial Officer, Montgomery County Intermediate Unit, Norristown, PA
services on continued tight budgets. School district personnel will share some tips and considerations from their experience. Join the discussion with your questions and suggestions.

**Learning Objectives:**
1. Explain how a district can view IT as a productivity center.
2. Outline tips for effective and efficient IT management.
3. Discuss the value of a holistic understanding of IT TCO.
4. Identify useful SmartIT resources.

**Speakers:**
- Kevin Supple, CFO, Francis Howell School District, St. Charles, MO
- Rich Kaestner, Project Director, CoSN, Philomath, OR
- Therese Mageau, Editorial Director, T.H.E. Journal, Irvine, CA

2:30 p.m. – 3:30 p.m.
**To Bid or Not to Bid? That Is the Question, DG049**

Room: 305
SF0s: 1.0

Participants will gain insights into how school bus contractors prepare RFPs and bids, and whether it is more advantageous to extend or negotiate an existing school bus contract or to solicit proposals for a new one. A comparison of district ownership vs. contracting out school bus operations will be included.

**Speaker:** John Spang, Assistant Superintendent for Finance and Operations, Avon Public Schools, Avon, CT

**DEEP DIG SESSIONS (2-HOUR)**

2:30 p.m. – 4:30 p.m.
**A Leader’s Guide to Diagnosing and Improving District Operations and Financial Health, DD206**

Room: 302
SF0s: 2.0

Most school districts are looking for ways to improve efficiency and effectiveness. Few districts, however, have formal performance management systems for doing so.

This session presents a proven process for systematically diagnosing and improving the efficiency and effectiveness of district operations. Key tools include measurement, analytics, and benchmarking, as well as strategies for engaging employees in improvement efforts.

**Speakers:**
- Steven Pereus, President, Enlit, LLC, Toledo, OH
- Carl Gruenler, Chief Business Officer, Santa Fe Public Schools, Santa Fe, NM

2:30 p.m. – 4:30 p.m.
**For What It’s Worth: Accurate Property Values for Insurance Purposes, DD459**

Room: 301
SF0s: 2.0

The process of evaluating property for replacement/coverage has evolved significantly in recent years. No longer is it sufficient to simply roll old values over on inaccurate schedules and obtain the same rate year after year. This session explores the actual process and methodology involved in valuing property exposures, discusses new challenges school business leaders face during renewals, and outlines the specific data requirements that underwriters/reinsurers are looking for in submittals.

**Speaker:** Mark Hessel, Vice President, HCA Asset Management, LLC, Milwaukee, WI

2:30 p.m. – 4:30 p.m.
**Managing Survival: Revenue Limitations vs. Mandated Expenditures, DD130**

Room: 306
SF0s: 2.0
CPEs: 2.0
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

Pennsylvania serves as a backdrop for an in-depth look at the financial challenges that threaten school districts’ survival. The critical fiscal issues in the state—pensions, property tax restrictions, personnel salaries, balancing...
budgets under deteriorating economic conditions—are widely reported across the nation. Economic conditions have left fewer dollars available for education at the local and state levels. Political ideologies as the basis of fiscal policy decisions have resulted in a diversion of public school resources to fund pensions, charter schools, and voucher plans. Explore strategies for managing the looming fiscal threats.

**Learning Objectives:**
1. Enumerate the severe impacts that pension obligations place on school districts.
2. Describe and quantify the cost burdens that mandated charter school payments have on school districts.
3. Identify and evaluate major areas for revenue enhancements and expenditure reductions through effective benchmarking procedures.
4. Discuss the critical fiscal obstacles facing school districts and how they will disrupt instructional programs as budget resources are diverted away from instruction to other mandated areas.

**Speakers:**
- Robert Schoch, Director, Business Administration, North Penn School District, Lansdale, PA
- Timothy Shrom, Business Manager, Solanco School District, Quarryville, PA
- William Hartman, Professor, Penn State University, State College, PA

**2:30 p.m. – 4:30 p.m.**
**School Budgeting in Hard Times: Coping with Cutbacks and Critics, DD069**

**Room:** 311
**SFOs:** 2.0

Budgeting today requires new thinking, better tools, and more productive processes. Learn about innovative ways to reduce or contain the budget without damaging the educational mission, develop performance-based budgeting techniques that improve quality, implement procedures to ensure the budget is driven by educational needs and strategic planning, anticipate unforeseen consequences of budget reductions, and meet demands to maximize productivity and improve results, even in hard times.

**Speaker:** William Poston, Emeritus Professor, Iowa State University, Johnston, IA

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**Office Depot**

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**DISCUSSION GROUPS (1-HOUR)**

**3:45 p.m. – 4:45 p.m.**
**1:1 with the iPad: Mobile Devices for a New Age of Digital Learners, DG227**

**Room:** 313
**SFOs:** 1.0

Students are growing up in a digital world, and as educators, it is our responsibility to keep them engaged and learning in the modalities to which they have become accustomed. Going into its fourth year with mobile devices, District 214 will share how the district made the move by shifting budget allocations, how the “flipped 1:1 model” has revolutionized the way 1:1 initiatives are implemented, and how instruction is steering the use of mobile devices. Participants will learn how to effectively roll out and sustain a mobile device program.

**Speakers:**
- Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL
- Rudy Gomez, Technology Services Supervisor, Township High School District 214, Arlington Heights, IL

**3:45 p.m. – 4:45 p.m.**
**Construction Litigation: A Survival Guide, DG466**

**Room:** 308
**SFOs:** 1.0
Construction litigation is a taxing and challenging experience. Learn what you need to know about the do’s and don’ts of construction litigation and how to win your case before, during, and after the lawsuit is filed.

Speakers: Howard Metz, Partner, Robbins Schwartz, Chicago, IL; Ken Florey, Partner, Robbins Schwartz, Chicago, IL

3:45 p.m. – 4:45 p.m.
Grow Your Own: A Step-by-Step Guide to Succession Planning, DG216

Room: 310
SFOs: 1.0
Succession planning as a governmental accounting standard can be critical for successful operations in a public school setting. This session focuses on fostering confidence among all the stakeholders to enhance accountability; promoting and supporting required internal control standards; developing a cadre of leaders; inspiring a culture of vision and motivation; providing practical, wise, and efficient stewardship; promoting success through effective leadership; and more. Participants will leave with a step-by-step plan to strengthen in-house talent.

Speaker: Caron Snow, Retired School Business Official, Instructor/Consultant, Alto, NM

3:45 p.m. – 4:45 p.m.
Innovative Tools—Using Financial Solutions to Solve Aging Infrastructure Problems, DG455

Room: 303
SFOs: 1.0

In 2012–2013, the Lee’s Summit R-7 School District in Missouri implemented a successful lease purchase initiatives program that allowed the district to purchase 106 alternative fueled buses and related infrastructure valued at nearly $15.6 million, replace district-wide technology costing nearly $5.5 million, and acquire a new industrial building for $625K. Learn about this novel financing program that allowed the district to replace aging buses, provided a long-term solution to rising fuel and maintenance costs, and use outside resources to lower local taxpayer expenditures.

Speakers: Ron Cox, Director of Purchasing and Distribution Services, Lee’s Summit Missouri R-7 School District, Lee’s Summit, MO; Thomas Kurucz, Deputy Superintendent of Operations, Lee’s Summit R-7 School District, Lee’s Summit, MO

3:45 p.m. – 4:45 p.m.
Survival Guide to Refreshing Your 403(b) and 457 Plans, DG210

Room: 312
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Personnel/HR
Program Prerequisites: None
Advance Preparation: None

Your retirement plans are not a “set it and forget it” item; they must adapt to meet your district’s needs and satisfy regulatory requirements. Join a panel of experts to learn how to enhance your plans to attract and retain valuable employees, help educate your employees to prepare for their retirement needs, and understand the importance of procedures to operate and provide correction mechanisms for your plans. They also will address any recently issued or planned IRS regulatory guidance.

Learning Objectives: 1. Explain how to use retirement plan design options to meet the needs of your district. 2. Discuss why there is a need to educate employees on saving for retirement. 3. Describe ways in which school districts are addressing retirement education. 4. Outline the internal controls needed to identify and resolve operational issues that your retirement plans may encounter. 5. Detail key aspects of upcoming regulatory guidance impacting retirement plans.

Speakers: Phil Haslam, Divisional Sales Director, MetLife, Carlsbad, CA; Rick Schulenburg, Vice President of National Market Alliance, Horace Mann Companies, Springfield, IL;
3:45 p.m. – 4:45 p.m.
The Game-Changers: Radical, Transformational Challenges Confronting Traditional Education, DG966

Room: 304
SFOs: 1.0

We are on the brink of game-changing forces that will radically affect education and business and we need to be ready for them. This session highlights radical changes at all levels of education that have education and business implications. The challenges include competition from a rapidly expanding unregulated private sector; the proliferation of massive open online courses in higher education; the decline of union power, secure education jobs, and working conditions; the demise of traditional school campuses and hours; and internationalization and the significance of league-table test rankings.

Speaker: Karen Starr, Chair, School Development and Leadership, Deakin University, Melbourne, AU

3:45 p.m. – 4:45 p.m.
The GASB’s New Pension Standards—What Are the Implications?, DG777

Room: 309
SFOs: 1.0

In 2012, the GASB issued new pension standards that will have a profound effect on information reported in school district financial statements. These standards are effective next year and the time for planning is now. This session will assist business officials in understanding the impact of the new standards and what needs to be done to prepare for the implementation of those standards.

Speaker: David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT

3:45 p.m. – 4:45 p.m.
The Value of the SFO® Certification, DG533

Room: 305
SFOs: 1.0

This panel discussion, featuring current SFO certificants, examines the benefits of pursuing the SFO credential. Topics include the value to the individual, the value to the entities served by the certificant, and the value to the school business profession overall. Join a discussion exploring two questions: What’s in it for me and my career? What’s my next step toward SFO certification?

Speakers: Cynthia Reilly, Business Manager, Wautoma Area School District, Wautoma, WI; Edward Chabal, Business and Finance Director, Mt. Pleasant Community School District, Mt. Pleasant, IA
"Sláinte!" A Celebration Honoring the Current ASBO President from Colorado, Ron McCulley
McGreevy’s Irish Pub
911 Boylston Street
Hosted By Colorado ASBO
*Open to all conference attendees. Badge required.

May good fortune be yours, may your joys never end. Join us at McGreevy’s as we celebrate the good fortune of the members of ASBO and honor the presidency of Ron McCulley with appetizers, beverages, and entertainment.

The venue is a traditional Irish Pub located across the street from the Hynes Convention Center. McGreevy’s is known as America’s first sports bar, home of the Dropkick Murphys, and the birth of the Red Sox Nation.

Monday, October 28

7:00 a.m. – 10:00 a.m.
Registration
Prefunction Hall C, Second Level

7:30 a.m. – 8:15 a.m.
Coffee Break
Boylston Hall Foyer, Third Level
Sponsored by Tyler Technologies

DISCUSSION GROUPS (1-HOUR)

8:00 a.m. – 9:00 a.m.
Are You Active or Reactive in Budget Planning?, DG985

Room: 309
SFOs: 1.0

Seeing the big picture throughout the budget planning process is critical to making informed decisions that affect the future of the district. If you have the right information at your fingertips, you can make better, faster, smarter decisions. The presenters will share a new approach to budget planning using web-based technology that interfaces seamlessly with their accounting system. The budget process has allowed them to focus on the big picture.

Speakers: Beth Regulbuto, Assistant Superintendent for Business, Hampden-Wilbraham Regional School District, Wilbraham, MA; Christina Gagnon, Assistant Treasurer, Hampden-Wilbraham Regional School District, Wilbraham, MA; Tony Olson, Vice President of Marketing, MyBudgetFile.com, Stony Plain, AB, Canada

8:00 a.m. – 9:00 a.m.

Room: 311
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

Optimizing a district’s financial management and operations performance is essential to minimizing the effects of funding reductions in school districts across the nation. How does one monitor key performance trends? What useful best practices have other districts implemented? How should information in various reports be interpreted? Learn best practices in monitoring and improving your district’s financial management and operations performance.

Learning Objectives: 1. Outline current best practices for monitoring and improving your district’s financial management and operations performance. 2. Outline the process of monitoring key performance trends. 3. Discuss useful best practices other school districts have implemented. 4. Explain how information in various reports may be accurately interpreted.

Speakers: Gwen Santiago, Former Executive Director, Texas ASBO, Austin, TX; Rebecca Bunte, CFO/Director of Professional Development, TASBO, Austin, TX; Thomas Canby, Director of Research and Technology, TASBO, Austin, TX
8:00 a.m. – 9:00 a.m.
Don’t Reinvent the Wheel: Using the Electronic Resource Center (ERC), DG137

Room: 303
SFOs: 1.0

The Electronic Resource Center (ERC) is a website that provides an online database of best practices and resources across many aspects of school district operations. The ERC has gathered submissions from many different states. Learn how to use the database and how to post your own submissions.

Speaker: Jeffrey Ammerman, Director of Technical Assistance, PASBO, Harrisburg, PA

8:00 a.m. – 9:00 a.m.
Emergency Preparedness Using 21st Century Tools, DG087

Room: 312
SFOs: 1.0
CPEs: 1.0

Program Level: Basic
Field of Study: Management Advisory Services
Program Prerequisites: None
Advance Preparation: None

Imagine giving your local law enforcement the opportunity to see into every corner of your school buildings without the expense of surveillance cameras. Learn about a technology tool that allows you to view internal building images via the Internet and how one school district implemented this solution, which merges two distinct technologies—geo-referenced aerial imagery, and 360-degree PIX photos—in a simple-to-use interface.

Learning Objectives: 1. Describe new technology tools that enhance emergency preparedness. 2. Discuss how to locate resources for emergency preparedness tools in a difficult K–12 budget climate. 3. Discuss hurdles and lessons learned in implementing emergency preparedness technologies.

8:00 a.m. – 9:00 a.m.
Employment Law Grab Bag: Focus on Four Issues Affecting District Human Resources, DG178

Room: 308
SFOs: 1.0
CPEs: 1.0

Program Level: Basic
Field of Study: Business Law
Program Prerequisites: None
Advance Preparation: None

This session focuses on analyzing and solving problems increasingly encountered by HR managers in the context of four areas: addressing attendance and leave issues, addressing social media usage concerns, classifying employees and independent contractors, and managing the millennial generation.
Learning Objectives: 1. Identify and analyze risk associated with the HR risk areas of attendance and leave issues; social media usage concerns; classifying employees and independent contractors; and managing the millennial generation. 2. Outline solutions and policies that protect a district and its employees from the major areas of HR risk. 3. Discuss strategies for troubleshooting specific HR risk in the four major areas of concern.

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

8:00 a.m. – 9:00 a.m.
From Assessment to Infrastructure Software Installation, DG354
Room: 310
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Computer Science
Program Prerequisites: None
Advance Preparation: None

Learn about infrastructure assessment and audit—from license review and cost analysis to planning a staged installation of new and/or replacement functionality. Presenters will discuss assessing emerging technologies and reviewing an emerging software technology for infrastructure, networking, security, and telephony (VoIP) and its applicability, cost effectiveness, and efficiency for the K–12 sector. Strategies for minimizing hardware expenditures also will be discussed.

Learning Objectives: 1. Identify the steps involved in an infrastructure assessment and audit. 2. Discuss various strategies to save technology dollars. 3. Describe emerging technologies for the K–12 education sector.

Speakers: Chris Beyne, Director of Business Development, Atom AMPD, Volo, IL; Craig A. Schilling, Associate Professor, Department of Leadership, Concordia University, Northbrook, IL

8:00 a.m. – 9:00 a.m.
Technology and School Tax Elections: Victory Is a Tweet Away, DG001
Room: 313
SFOs: 1.0

Although school tax elections always lag behind innovations at the national level, many technology-based campaign strategies used in the November 2012 general election will find their way into your next school tax election. Whether it’s a viral email driving voters to a YouTube endorsement, Google Adwords helping supporters find the campaign website, or Tweeting GOTV reminders, technology will be vital to successful campaigns in the future. Learn how to harness the power of technology in planning and executing the “big three” campaign functions: canvassing, communications, and get-out-the-vote.

Speakers: Don Lifto, Sr. Vice President, Springsted Incorporated, St. Paul, MN; J. Bradford Senden, Principal, Center for Community Opinion, San Ramon, CA; Trevor Peterson, Director of Business Services, Alexandria Public Schools, Alexandria, MN

8:00 a.m. – 9:00 a.m.
The Impact of the Affordable Care Act on Budgeting, Bargaining, and Compliance, DG369
Room: 302
SFOs: 1.0

Your district faces a critical moment relative to your healthcare program. Should you stay the course and see what happens? Should you “pay or play”? What are other districts doing? How do you know what’s right for you? This session will help you make more confident strategic decisions surrounding your benefits and total rewards program. We will examine the impact of reform on your ability to project long-term costs, bargain in a responsible and informed manner, and comply with the law to mitigate penalties. Engage with experts on these topics and more, gaining valuable insight on how to make strategic long-term benefit decisions as a district.
**Speakers:** David Bein, Executive Director of Business Services, East Maine School District 63, Des Plaines, IL; Keith Friede, Area Vice President, Training and Organization Development, Gallagher Benefit Services, Inc., Bloomington, MN; Scott Baldwin, Managing Director, Public Entity & Scholastic Group, Gallagher Benefit Services, Inc., Itasca, IL

**8:00 a.m. – 9:00 a.m.**
The Importance of Facility Management to Core District Issues, DG033

Room: 305
SFOs: 1.0

This presentation discusses the importance of facilities management to the key issues facing school districts today, including student achievement, student safety, cost management, scarce resources, credibility, staff morale, and strategies to avoid the “bumps in the night.”

**Speaker:** Roger Young, Retired Assistant Superintendent for Finance/Facilities, FacilityMastersOnline.com, Andover, MA

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**DEEP DIG SESSIONS (2-HOUR)**

**8:15 a.m. – 10:15 a.m.**
Managing FMLA and ADA Compliance for Ill and Injured Employees, DD175

Room: 306
SFOs: 2.0

Federal and state legislative bodies’ current approach to ill and injured employees has left a framework of criss-crossing rights and responsibilities. Where does a school business official begin? Learn how to take a reasoned and understandable approach to this tangled web of compliance obligations.

**Speaker:** Robert Simandl, Attorney, Simandl Law Group, S.C., Waukesha, WI

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**8:15 a.m. – 10:15 a.m.**
Riding the Whirlwind: The End of Most Collective Bargaining in Wisconsin, DD034

Room: 304
SFOs: 2.0

Wisconsin school business officials had a unique view on the end of most public sector collective bargaining as it was enacted in early 2011. Officials across the state began creating new patterns for sharing governance, discussing compensation structures, and re-examining smart use of benefit dollars, while working to retain staff confidence. This session presents a range of issues and reactions, as well as some lessons learned about the positive and negative aspects of collective bargaining.

**Speaker:** Emily Koczela, Director of Finance, School District of Brown Deer, Brown Deer, WI
8:15 a.m. – 10:15 a.m.
Risk, Rage, and Remedies—Dealing with Emergencies, DD075
Room: 301
SFOs: 2.0
When organizations are asked after an emergency what needs improvement, communications is at the top of the list. Communications is a critical component of any response and can literally shape the outcome of an incident—and the education leader’s career. This interactive session covers the core components of crisis communications and asks participants to delve into a communications tool chest to tackle an emergency. Be prepared to have your talents, tactics, and time management skills tested.

**Speaker:** Donna Gingera, CEO, Hour-Zero School Emergency Programs, Edmonton, AB, Canada

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**DISCUSSION GROUPS (1-HOUR)**

9:15 a.m. – 10:15 a.m.
Automating Business Operations—A Case Study, DG026
Room: 309
SFOs: 1.0
Technology automation is a critical component to successful management in these difficult times. Learn how a small school district is implementing technology across its business operations and automating processes to meet increasing requirements through improved productivity and lower costs. This case study will identify the long-term objectives of the plan, the phased implementation approach, problems encountered, the current status of a paperless initiative, and benefits achieved.

**Speaker:** Stephen Martin, Business Administrator, Pelham School District—SAU 28, Pelham, NH

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9:15 a.m. – 10:15 a.m.
Emerging Technology Showcase: Student Tracking, DG192
Room: 308
SFOs: 1.0
Through emerging technology utilizing swipe cards, districts can now automatically track student movement on and off the school bus, monitor route loads, and design their routes for maximum efficiency. The technology can reduce the number of parent calls into the transportation office and increase peace of mind. What’s more, the same swipe card that the kids carry on the bus can be used for the point of sale system in the cafeteria and in the school library. Get an overview of this new technology.

**Speaker:** John Fahey, Senior Consultant, Tyler Technologies, Latham, NY

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9:15 a.m. – 10:15 a.m.
Financing State Retirement Plans, DG632
Room: 302
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None
A panel of state affiliate executive directors and leaders will discuss the economic crisis affecting state pension systems and proposals to manage unfunded liabilities.

**Learning Objectives:**
1. Identify the major global issues associated with funding state pension plans.
2. Discuss ways to address the potential fiscal crises associated with funding pension plans.
3. Propose a method to share information among ASBO affiliates, retirement plan executives, and legislators on the effects of public policy changes at the state level for existing and future school employees.

**Speakers:** Jay Himes, Executive Director, Pennsylvania ASBO, Harrisburg, PA; Mike Jacoby, Executive Director, Illinois ASBO, DeKalb, IL; David Varda, Executive Director, Ohio ASBO, Columbus, OH
9:15 a.m. – 10:15 a.m.
How to Improve Indoor Environmental Quality (IEQ) in Your School, DG534

Room: 303
SFOs: 1.0

Mooresville Consolidated School Corporation in Indiana has earned two national awards in recognition of their efforts to improve indoor environmental quality. The presenters will demonstrate how the school district got started, trained their staff, and quantified the results to reflect a better learning environment.

Speakers: Jim Diagostino, Assistant Superintendent for Business, Mooresville Consolidated School Corporation, Mooresville, IN; William Roberson, School Board President, Mooresville Consolidated School Corporation, Camby, IN

9:15 a.m. – 10:15 a.m.
Combining an onsite wellness clinic with a consumer-driven health plan can save the school district health premium dollars and the employee out-of-pocket expenses. An onsite wellness clinic provides a vehicle for better employee health and attendance. Learn about the process from RFP, to implementation, to return on investment evaluation, and why onsite wellness clinics might be a good fit for your school district.

Speakers: Kimberly Fox, CFO, Tippecanoe School Corporation, Lafayette, IN; Marvin Ward, Consultant, MTW Consulting, Inc., Brownsburg, IN; Richard Sutton, Consultant, RE Sutton, Brownsburg, IN

9:15 a.m. – 10:15 a.m.
Measuring Our Facilities Operations, DG453

Room: 313
SFOs: 1.0

Most of us believe we have a good facilities operation. But how do we measure and document its quality? What should we look at to determine our effectiveness? What are the meaningful metrics and what influences them? Learn strategies and ideas for increasing the effectiveness of the facilities department and communicating the role it plays in a school district’s success.

Speaker: Scott Little, Associate Executive Director, Michigan ASBO, Lansing, MI

9:15 a.m. – 10:15 a.m.
Onsite Wellness Clinics: Saving Money and Increasing Employee Satisfaction, DG098

Room: 311
SFOs: 1.0
9:15 a.m. – 10:15 a.m.
Project Schoolhouse: Addressing the Challenge of Under-Utilized Urban School Buildings, DG187

Room: 310
SFOs: 1.0

Urban school districts across the country are facing the challenges associated with under-utilized school buildings. In 2011, Tulsa Public Schools in Oklahoma launched an effort to reduce the number of under-enrolled buildings, provide equity in program offerings, and gain operating efficiencies. Learn how the district garnered broad community support for the plan to close 14 schools, re-align grade levels, and adjust attendance boundaries.

Speakers: Patricia Williams, CFO, Tulsa Public Schools, Tulsa, OK; Stephoni Case, Program Manager, Oklahoma State University, Stillwater, OK

9:15 a.m. – 10:15 a.m.
School Facility Management—A Complete Solution, DG027

Room: 312
SFOs: 1.0

Learn how information technology helped one school district manage multiple buildings in multiple towns using a combination of contracted services and in-house employees. The session will address energy efficiency, applicable regulations, as well as key areas of responsibilities, including planning, implementation, and assessment of facility program goals and objectives. Also find out how an iPad deployment increased productivity and responsiveness to stakeholders.

Speakers: Marian Alese, Business Administrator, ConVal Regional School District, Peterborough, NH; Tim Grossi, Facilities Director, ConVal Regional School District, Peterborough, NH

10:30 a.m. – 11:30 a.m.
Comprehensive Review of Playground Safety, DG976

Room: 310
SFOs: 1.0

This session offers a comprehensive review of all aspects of playground safety, including maintenance of existing playgrounds and their surroundings. The protocols discussed are adaptable to any school district playground.

Speakers: Cole Morris, Director of Facilities and Construction, Paradise Valley Unified School District, Phoenix, AZ; Jeff Barber, President, CPSI, Playground Specialists Inc., Emmitsburg, MD; Kenda Daria, President, CPSI, Safe and Sound Playgrounds, Queen Creek, AZ

10:30 a.m. – 11:30 a.m.
Digging Deep: Using Data Mining to Detect Fraud and Misuse of Public Monies, DG199

Room: 302
SFOs: 1.0
CPEs: 1.0
Program Level: Basic
Field of Study: Accounting
Program Prerequisites: None
Advance Preparation: None

“District Misuses $2.8M in Public Monies,” “Business Manager Convicted of Embezzling $400,000 from School Children,” “District Loses $3M in Fraud Case Involving Fake Vendors.” Have you seen headlines like these in the news? Are you aware of key strategies for digging deeply into district financial data to detect fraud? This session presents tips and techniques for using data mining as a strategy to detect and prevent fraud and misuse of public monies. Learn methods for processing and analyzing data from accounts payable and payroll to increase revenue, cut costs, and detect fraud.

Learning Objectives: 1. Describe the most effective data mining practices. 2. Discuss the benefits of mining data
to protect your district from fraud and misuse of public monies. 3. Identify and describe tips and techniques for preventing fraud in a school district.

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

10:30 a.m. – 11:30 a.m.
Effectively Managing Transportation Contracts, DG015

Managing transportation contracts effectively is a critical component of providing safe, efficient, and cost-effective services. This session provides a case study of a contract management approach developed in the Province of Ontario that focuses on evaluating contract compliance and operator performance. Using this approach, school districts are better able to maximize the value and effectiveness of their transportation contracts. This approach also promotes a more collaborative and productive relationship between the district and its bus contractor.

Speakers: Lori Powell, Executive Director, Niagara Student Transportation Services, Thorold, ON, Canada; Maureen Heath, General Manager, Southwestern Ontario Student Transportation Services, London, ON, Canada

10:30 a.m. – 11:30 a.m.
GASB Update, DG280

The Governmental Accounting Standards Board (GASB) issued several new standards recently. In addition, GASB has undertaken many ongoing projects to improve accounting and financial reporting for school districts. This session provides an update of changes and pending projects of GASB.

Learning Objectives: 1. Identify recent changes to accounting and financial reporting from the GASB. 2. Discuss how new standards will improve financial reporting for school districts. 3. Describe how new GASB projects will apply to school districts.

Speakers: David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board, Norwalk, CT; David A. Vaudt, Chairman, Governmental Accounting Standards Board, Norwalk, CT; Martin J. Benson, GASAC Chairman, Financial Accounting Foundation, Norwalk, CT

10:30 a.m. – 11:30 a.m.
Meritorious Budget Award Discussion Group, DG142

Get answers to your questions and guidance regarding the MBA and Pathway to the MBA. This Discussion Group will focus on specifics of districts’ situations and offer 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 entity. 2. Describe techniques for ensuring receipt of the MBA awards. 3. Discuss creative ideas/solutions to common problem areas.

Speakers: Gary Frisch, Assistant Superintendent of Business and Operations, Community Consolidated School District 181, Burr Ridge, IL; Ryan Ghizzoni, Treasurer/CFO, Fairview Park City School District, Fairview Park, OH
10:30 a.m. – 11:30 a.m.
Preparing for Common Core Online Assessments, DG148

Room: 309
SFOs: 1.0

If you are in a state or territory that adopted the Common Core State Standards, you likely are somewhere along the path of planning for implementation of next year’s Common Core online student assessments. It is critical to review your district’s capabilities to meet the student, staff, infrastructure, and device requirements for these online assessments. This session will cover the background of the Common Core State Standards and the state-led assessment consortia developing the aligned assessments; requirements and readiness data collection/reporting tool; the latest school readiness statistics; a transition road map and checklist; and resources.

Speaker: Rich Kaestner, Project Director, CoSN, Philomath, OR

Learning Objectives:
1. Identify the most common SPED diagnoses in schools. 2. Describe how your view of students and colleagues with special needs has changed as a result of this session. 3. Discuss the importance of your role in the school as it relates to all students and, in particular, those served by SPED.

Speakers: John Marcus, Director of Information Technology, Sharon Public Schools, Sharon, MA; Kenneth Wertz, Director of Maintenance and Operations, Sharon Public Schools, Sharon, MA; Paul Anastasi, Facilities Operations Manager, Newton Public Schools, Newton, MA

10:30 a.m. – 11:30 a.m.
Special Education’s Impact on School Business Operations: A First-Person Perspective, DG189

Room: 311
SFOs: 1.0
CPEs: 1.0

Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

School administrators often get caught up in the myriad immediate tasks that need to be completed to keep their districts moving forward. This couldn’t be more apparent than when it comes to helping and supporting students with special needs. And, when we think of children with special needs, we can’t forget that we adults carry those same issues into our daily lives as school personnel. While it is impossible to cover every aspect of special education (SPED), this session provides an overview of some key areas that will personalize this whole topic and will help participants better support and understand these amazing children and their own colleagues.

Learning Objectives:
1. Identify the most common SPED diagnoses in schools. 2. Describe how your view of students and colleagues with special needs has changed as a result of this session. 3. Discuss the importance of your role in the school as it relates to all students and, in particular, those served by SPED.

Speakers: John Marcus, Director of Information Technology, Sharon Public Schools, Sharon, MA; Kenneth Wertz, Director of Maintenance and Operations, Sharon Public Schools, Sharon, MA; Paul Anastasi, Facilities Operations Manager, Newton Public Schools, Newton, MA

10:30 a.m. – 12:30 p.m.
Developing Long-Term Capital Plans in a Collaborative Environment, DD094

Room: 301
SFOs: 2.0
Examine how the Durham Catholic District School Board developed its 10-year long-term capital and program plan by embarking on a planning process involving staff, trustees, and parents that centered around asking the important questions, developing relevant data, and using facilitated discussions to help set the goals and priorities for the board. This approach focused on programming and students’ needs rather than numbers.

Speakers: Lewis Morgulis, Manager of Planning and Admissions, Durham Catholic District School Board, Oshawa, ON, Canada; Tim Robins, Superintendent of Facilities Services, Durham Catholic District School Board, Oshawa, ON, Canada

10:30 a.m. – 12:30 p.m.
What Do I Need to Do?—Healthcare Reform 2013 Updates, DD207

Room: 303
SFOs: 2.0

This session will address the U.S. Supreme Court decision on the Affordable Care Act, the resultant regulatory environment, and what will be required of educational organizations to mitigate risk and ensure necessary compliance amid significant change and uncertainty. Participants will examine the strategic business decisions that will need to be made to effectively manage scarce resources and maintain labor competitiveness as we look toward more regulatory mandates, the pending Congressional and presidential elections, and beyond. We’ll also discuss the evolving negotiation dynamic given shrinking budgets, an unpredictable legislative landscape, and competing local political pressures. Strategies to avoid possible penalties also will be discussed.

Speakers: Darcy Hitesman, Attorney, Hitesman & Wold, P.A., Maple Grove, MN; Amy Diedrich, Consultant–Employee Benefits, Marsh McLennan Agency, Minneapolis, MN; James R. Westrum, Executive Director of Finance and Business, Wayzata Public Schools, Wayzata, MN

10:30 a.m. – 12:30 p.m.
School Change from a Resource Perspective, DD082

Room: 305
SFOs: 2.0
CPEs: 2.0
Program Level: Basic
Field of Study: Finance
Program Prerequisites: None
Advance Preparation: None

This session, based on the book, Leading School Change: Maximizing Resources for School Improvement, covers the basic concepts, models, data-gathering techniques, and strategies for implementing school district change. Participants will walk away with a perspective of how the school business administrator can be a leader in the change process, as well as a copy of the book.

Learning Objectives: 1. Identify obstacles to change. 2. Outline various strategies for implementing school district change. 3. Describe how to acquire, align, and allocate resources to support school change. 4. Discuss some case studies on school district change.

Speakers: Craig Schilling, Associate Professor, Concordia University Chicago, River Forest, IL; Margaret Trybus, Associate Dean, Concordia University Chicago, River Forest, IL
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Sunday, October 27

10:45 a.m. – 12:00 p.m.
Room: 210

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 20 minutes, with 10 people at a table each time. Presenters direct the discussion and serve as a source of information on topics such as healthcare reform, 403(b) retirement plans, mobile devices in schools, purchasing card programs, and budget planning.

**TABLE 1**
403(b) Answers and Updates

**Speaker:** Richard Turner, Deputy General Counsel, VALIC, Houston, TX

**TABLE 2**
E-commerce Options to Centralize, Save, and Monitor Purchasing Compliance

**Speaker:** Alexis Turner, Program Manager, U.S. Communities, Gaithersburg, MD

**TABLE 3**
Understanding Print Procurement in the K–12 Environment

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

**TABLE 4**
How a Voluntary Benefits Program Can Help You Attract and Retain Employees and Manage the School Budget

**Speakers:** Doug Peters, Assistant Vice President, MetLife Resources, Somerset, NJ; Garrett Sacken, Divisional Sales Director, MetLife Resources, Somerset, NJ

**TABLE 5**
Run Your Retirement Numbers with Our Informative Tools

**Speaker:** Ketul Thaker, Vice President of Industry Relations, ING, Windsor, CT

**TABLE 6**
Keeping Your 403(b) Plan Compliant: The IRS Fix-It Guide and How to Maintain a Plan Document

**Speakers:** Jim Yale, Vice President, School District Marketing Alliance, Horace Mann Insurance Co., Springfield, IL; Kelly Ruwe, Director, School District Marketing, Horace Mann Insurance Co., Collinsville, IL

**TABLE 7**
Tailoring the Best Benefits Package for You and Your Employees

**Speaker:** Curt May, Vice President and National Sales Manager, 403b/457 Business Markets, AXA Equitable, New York, NY

**TABLE 8**
What You Need to Know Today About Tracking and Calculating Employee Hours for Healthcare Reform

**Speakers:** Brian Rossen, Healthcare Reform Consultant, American Fidelity Assurance Company, Madera, CA; Monica Schermier, Healthcare Reform Consultant, American Fidelity Assurance Company, Granger, IN

**TABLE 9**
Save Resources, Time, and Money with Staff Absence and Maternity Insurance and Lead Well Programs

**Speaker:** John Brady, President, AIS, New York, NY

**TABLE 10**
Trending: Mobile Devices in School Districts

**Speaker:** Lee Marquis, Director of Marketing, ERP & School Division, Tyler Technologies, Yarmouth, ME

**TABLE 11**
Renewable Energy in the District and in the Classroom

**Speakers:** Jamie Sitter, Sr. Marketing Specialist, Siemens, Buffalo Grove, IL; Steve Hoiberg, Global BT Market Manager, Education Markets, Siemens, Buffalo Grove, IL
TABLE 12  
IRS Audits of 403(b) Plans  
Speaker: Phil Hahn, Regional Vice President, Security Benefit, Leominster, MA  

TABLE 13  
Integrating Online Payments and Cashless Solutions  
Speaker: Tina Bennett, Vice President, Horizon Software, Atlanta, GA  

TABLE 14  
Innovations in Space Management  
Speaker: Lois S. Rouder, Sr. Brand Strategy Manager, Education Segment, Grainger, Lake Forest, IL  

TABLE 15  
How to Benefit from Purchasing Card Programs During Tough Economic Times  
Speaker: David Wintczak, Vice President, Senior Relationship Manager, BMO Financial Group, Chicago, IL  

TABLE 16  
The Nutritional and Financial Implications of a Changing USDA Regulatory Environment  
Speakers: Linda Sceurman, Director, Nutrition and Menu Development, ARAMARK Education, Philadelphia, PA; John Kandemir, Vice President, Marketing, ARAMARK Education, Philadelphia, PA  

TABLE 17  
Free WellCard Health  
Speakers: Greg Reece, President, Benefits Concepts LLC, Tucson, AZ; Adam Saloman, Associate Sales Manager, WellDyne Rx, Centennial, CO  

TABLE 18  
Budget Planning Improvement Through the Use of Technology  
Speaker: Tony Olson, Vice President of Marketing, MyBudgetFile.com, Stony Plain, AB, Canada  

TABLE 19  
Best Business Practices for Managing Substitute Labor  
Speaker: Pamela Ely, Product Manager, CRS Advanced Technology, Montoursville, PA  

TABLE 20  
Should We or Shouldn’t We? Understanding What Roth 403(b) Will Mean to Employees  
Speaker: David Blask, Sr. Pension Consultant, Lincoln Investment Planning, Inc., Wyncote, NJ  

TABLE 21  
Building Effective Public-Private Partnerships  
Speakers: Richard Roque, Doctoral Student, Menlo/American International College; Nicholas Young, Superintendent, South Hadley School District, South Hadley, MA/American International College  

TABLE 22  
The Benefits of Contracted Student Transportation  
Speaker: John BeGasse, Senior Director of Business Development, First Student, Inc., Cincinnati, OH  

TABLE 23  
Business to Building Systems Integration  
Speaker: Gwenn McDaniel, Sales Director, Education Vertical Market, Systems NA, Johnson Controls, Milwaukee, WI
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GOLD MINE SESSIONS

Sunday, October 27

2:15 p.m.–3:30 p.m.
Room: 210

The Gold Mine Sessions feature roundtables, each focused on a different aspect of school district management. Participants change tables every 20 minutes, with 10 people at a table each time.

**TABLE 1**

**SFO® Certification: When Will You Earn It?**

Come learn about the Certified Administrator of School Finance and Operations® (SFO®) program from current SFO-certified professionals and members of ASBO’s Certification Commission. Not sure how to prepare for the exam or want to learn more about the steps to earn the certification? Visit this Gold Mine session for a chance to have your questions answered in a small-group setting.

**Speakers:** Certification Commission

**TABLE 2**

**School Business: It’s a Wonderful Life**

Join us as we address all the topic areas of school business administration. Learn how to engage workforces and discuss how each area of school business management relates to student learning.

**Speaker:** Ellen R. Skoviera, Assistant Superintendent for Business Operations, Leander Independent School District, Leander, TX

**TABLE 3**

**Clobber Ignorance and Inspire Action: Arm Your Community with School Finance Literacy**

Jettison that PowerPoint and learn how the Wisconsin ASBO is deploying a statewide tool to teach school finance literacy. In just over 18 months, hundreds of school board members, administrators, and community members have taken part in an activity designed to teach school financial literacy.

**Speakers:** Scot Ecker, Associate Vice President and Controller, Carthage College, Kenosha, WI; Dan Romano, Senior Vice President, Forecast5 Analytics, Inc. and Co-Owner, Edventures in Learning, Inc., Toledo, OH

**TABLE 4**

**How to Prepare a Comprehensive Annual Financial Report**

Learn about the ASBO Certificate of Excellence in Financial Reporting recognition program for the Comprehensive Annual Financial Report (CAFR). Receive practical information about the application and submission process, common mistakes made in CAFRs, and hints to ensure a successful submission.

**Speakers:** ASBO International Certificate of Excellence Advisory Committee

**TABLE 5**

**Energy Star’s Cash Flow Opportunity Calculator**

Energy Star’s Cash Flow Opportunity Calculator is easy to use and can help your district determine 1) how much new energy efficiency equipment can be purchased from the anticipated savings; 2) if this equipment purchase should be financed now or if it is better to wait and use cash from a future budget; and 3) whether money is being lost by waiting for a lower interest rate.

**Speaker:** Kudret Utebay, Senior Associate, The Cadmus Group, Inc./ENERGY STAR, Arlington, VA
**TABLE 6**

**ASBO International’s Meritorious Budget Award Programs**

Learn about the Meritorious Budget Award (MBA) and Pathway to the MBA programs and what it takes to earn this prestigious recognition. This presentation will include practical advice on how to assemble data and complete the application, and how your district will benefit from the process, which includes peer review.

**Speakers:** ASBO International Meritorious Budget Award Advisory Committee

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**TABLE 7**

**Tackling a Website Redesign**

When parents, community members, reporters, or businesses have questions about your district, they are likely to visit your website before giving you a call. Does the website provide the information they are looking for? If you aren’t sure, it’s probably time to think about an update. ASBO recently did a complete overhaul of the association’s website—come learn how the association decided what content to include, where, and how. You’ll learn about wireframes, search engine optimization, user analysis, and the keys to creating a website that not only meets visitor needs, but reflects the purpose and priorities of the organization.

**Speaker:** Siobhan McMahon, Assistant Executive Director, ASBO International, Reston, VA

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**TABLE 8**

**Working During a Period of Financial Austerity**

This session will involve SBMs/SB Os from the UK, Australia, Canada, the United States, and, potentially, South Africa. The session will build on the previous Discussion Group, enabling colleagues to share openly the problems and issues they are confronting while exchanging good and effective management practices.

**Speaker:** Trevor Summerson, Former School Business Director, National College for School Leadership, Nottingham, UK

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**TABLE 9**

**Using the iPad to Create a Sustainable Ecosystem without Sacrificing the Budget**

Going into its third year with mobile devices, Township High School District 214 is using instruction to drive the use of the iPad. Learn why the district chose the iPad as the most effective instructional tool and how the district is moving from a traditional desktop computing environment to mobile devices by shifting budget allocations. Learn how to effectively rollout and sustain a mobile device program without spending extra funds and how to overcome obstacles such as deployment and licensing of apps.

**Speakers:** Keith Bockwoldt, Director of Technology, Township High School District 214, Arlington Heights, IL; Rudy Gomez, Technical Systems Supervisor, Township High School District 214, Arlington Heights, IL; Debra Parenti, Associate Superintendent of Finance and Operations, Township High School District 214, Arlington Heights, IL
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Registered guests are welcome to attend the General Sessions, visit the Exhibit Hall, and enjoy the evening receptions alongside full registrants. Guests are not permitted to attend educational sessions. The following programs have been designed specifically for guests.

Saturday, October 26

11:00 a.m. – 12:00 p.m.
Guest Program
Book Club: The Bostonians
Room: 208
(See page 17 for complete listing.)

Sunday, October 27

11:00 a.m. – 12:00 p.m.
Guest Program
One If By Land and Two If By Sea? Paul Revere Today!
Room: 208
(See page 25 for complete listing.)

MAKE A DIFFERENCE!

ASBO’s Positive Impact Program gives you the opportunity to make a difference in our annual meeting host city and in the lives of its citizens. This year, Massachusetts ASBO is raising money for the Life is good Kids Foundation, a Boston-based nonprofit whose mission is to help kids overcome poverty, violence, and illness with the power of joyful play. The Life is good Playmakers provide innovative training support to child care professionals who positively impact thousands of children. Learn more about the Life is good Kids Foundation from our First General Session speaker, Steve Gross, the organization’s executive director and chief playmaker, then join MASBO and ASBO International in making a donation to support their mission.
The Executive Leadership Forum is limited to 300 attendees and sells out fast, but as an annual meeting attendee, you have the opportunity to register before anyone else! Visit the registration desk to reserve your spot today. General registration opens November 4, 2013.

asbointl.org/ExecutiveLeadershipForum
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The ASBO International Eagle Awards—the highest tributes ASBO bestows on its members—recognize individuals who have exhibited outstanding and visionary leadership in school business management. For over 20 years, this lifetime achievement award has honored exceptional leaders. AXA Equitable proudly sponsors the Eagle Awards and the Eagle Institute. This year’s recipients will be recognized at the Eagle Awards Ceremony during the First General Session on Saturday, October 26.

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The ASBO International Pinnacle Awards recognize school business officials for implementing innovative practices as models for others in the profession of school business management. Virco Mfg. Corporation is proud to sponsor the Pinnacle Awards since its inception in 1993. The Pinnacle Awards ceremony takes place during the Second General Session on Sunday, October 27.

PINNACLE OF EXCELLENCE AWARD

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**Preparing for the SFO exam?**

Join us Friday, October 25 in Room 305 for *Skills Refresher for ASBO’s SFO Certification*, a full-day seminar focused on an in-depth review of SFO competencies and Sunday, October 27 in Room 210 for the *SFO Certification: When Will You Earn It?* Gold Mine Session. Learn hands-on how you can best prepare for the exam.

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ASBO Buyer’s Guide
The ASBO Buyer’s Guide is a digital purchasing resource that allows school business officials to search more than 225 categories and find the relevant products and services they need—without the unrelated clutter of a general Internet search engine. Search the vendors and bookmark companies that are of interest to you—making them easier to locate on subsequent buyer’s guide visits.

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CAREER CENTRAL

Don’t just advance your career, enhance your career

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EXHIBIT HALL HIGHLIGHTS

EXHIBIT HALL HOURS

Saturday: 2:30 p.m. – 5:30 p.m.
Sunday: 10:30 a.m. – 2:15 p.m.
(Lunch 12:00 p.m. – 1:00 p.m.)

Saturday, October 26

1:30 p.m. – 1:45 p.m.
Exhibitor Orientation & Welcome
ASBO Booth 901

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

2:30 p.m. – 5:30 p.m.
Professional Photos
Exhibit Hall Booth 1012
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Sunday, October 27

10:30 a.m. – 2:15 p.m.
Professional Photos
Exhibit Hall Booth 1012
Sponsored by AIS

12:00 p.m. – 1:00 p.m.
Lunch in the Hall
Sponsored by BMO Financial Group

12:00 p.m. – 2:15 p.m.
Meet Paul Revere
Paul Revere comes alive! Meet David Connor, star of A&E’s Biography of Paul Revere, as he portrays the infamous patriot in an interactive and entertaining Exhibit Hall program.

Saturday & Sunday

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The ASBO Bookstore features top-selling publications, ASBO staff to assist you with conference information, and ASBO program and membership details. Visit the booth daily to turn in your Exhibit Hall game cards for a chance to win cash prizes!

SFO® Your Certification Information Center
Thinking about obtaining ASBO’s Certified Administrator of School Finance and Operations® (SFO®), the only nationally recognized school business certification program in the United States and Canada? Visit the ASBO booth to talk to SFO certificants, browse books that will assist you in test preparation, and get your questions answered.

Exhibit Hall Game
New this year! 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 booth. 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!
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ARAMARK Education provides a complete range of food, facility, uniform, and other support services to more than 500 K–12 school districts across the country. We offer on-site and off-site breakfast and lunch meal programs, after-school snacks, catering, nutrition education, and facilities management services, including maintenance, custodial, grounds, and energy management. Our programs are designed to encourage healthy eating habits, increase meal participation, and create safe, clean, comfortable learning environments for your students and district community.

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At Bankers Trust, our experienced and knowledgeable institutional trust professionals are known for their integrity, attention to detail, and unmatched personal service. Using advanced technology, we provide cost-effective solutions for K–12 school districts, community colleges, and private colleges across the nation. Contact Bankers Trust for services including bond paying agent, registrar, trustee, custodian, escrow agent, and disclosure agent. We also work with local government investment pools and offer a donor management system for school foundations!

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Chicago, IL 60603

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CPI Qualified Plan Consultants, Inc.
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4205 Place De Java
Brossard, QC, Canada J4Y 0C4

An innovation leader in energy management solutions, Distech Controls provides unique building management technologies and services that optimize energy efficiency and comfort in buildings, all the while reducing operating costs. We deliver innovative solutions for greener buildings through our passion for innovation, quality, customer satisfaction, and sustainability. Let Distech Controls show you how our expertise, technology, and innovative solutions can make your school more comfortable, efficient, and sustainable. www.distech-controls.com
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Norwalk, CT 06851

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Monroe, CT 06468

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Irvine, CA 92602

Evisions has been building great products and delivering fantastic service since 1998. Our enterprise reporting solution, Argos, offers low total cost of ownership, is easy to use, and effectively meets K–12 reporting needs from simple ad hoc queries to advanced dashboards and data cubes. Evisions has over 800 clients worldwide in a variety of industries, including higher education and K–12. For more information about Evisions, our products, and services, visit www.evisions.com/k-12

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

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H&A Architects - P3OPMs
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Booth 812
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Booth 301
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Booth 904
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Booth 430
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Magic Hour Communications
Booth 523
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Booth 401
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Somerset, NJ 08873

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MidAmerica Administrative & Retirement Solutions, Inc.
Booth 801
211 East Main St., Ste. 100
Lakeland, FL 33801

MidAmerica provides innovative employee benefit programs to over 2,200 plan sponsors and close to one million employees across the country. In addition to our 403(b) & 457 TPA, Special Pay, 3121, HRA and other employee benefit programs, we recently introduced our newest service offering, Affordable Care Act Compliance Reviews, designed as an affordable way to find out if your health plan meets the new 2014 regulations.

Mosse & Mosse Associates
Booth 324
50 Salem St., Bldg. B
Lynnfield, MA 01940
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Booth 808  
PO Drawer 188, South Loop Rd. University, MS 38677

National Food Service Management Institute (NFSMI) offers free education, training, and research resources that help school nutrition professionals build quality programs. As the training arm for the USDA, our materials and training are easily accessible by various methods. FREE Training + FREE Resources = Healthy Food & Happy Students.

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Booth 6
6187 Carpinteria Ave.
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PMA Financial Network, Inc.
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Naperville, IL 60563

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Buffalo Grove, IL 60029

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Single Path
Booth 623
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Lombard, IL 60148

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SRB Education Solutions, Inc.
Booth 330
400-200 Town Centre Blvd.
Markham, Ontario Canada L3R 8G5

SSC Service Solutions
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1845 Midpark Rd.
Knoxville, TN 37921

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Staples Advantage, the business-to-business division of Staples, Inc., offers business supplies to organizations of 20 or more employees up to the Fortune 1000, including global businesses, government, healthcare organizations, and educational institutions.

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**SunGard K–12 Education**  
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