Colorado Association of School Business Officials

“Elevate to Greatness”

66th Annual CASBO Conference & Exhibits Member Information Packet
April 17 - 19, 2019
Westminster Westin Hotel
Westminster, CO
SESSION TRACKS
(The following session track icons will be used to identify the different discipline areas of interest)

**Small Districts and Charter Schools**: Focuses on financial, budgetary, public relations, and the legal issues that affect small districts and charter schools where one individual has many areas of responsibility.

**Business/Finance Resource Management**: Provides expertise on the effects of financial management on budgeting, financial planning, accounting, and financial reporting; cash management, investments, and debt management; and financial technology for school business operations.

**Leadership and Management Development**: Addresses personnel management concepts and leadership styles, professional development, labor regulations, and employment agreements. Also, looks at the public policy, inter-governmental relations, and the legal issues that affect schools.

**Maintenance/Operations and Purchasing Management**: Focuses on the latest in school planning and construction, purchasing, supply and fixed-asset management, contract management, school maintenance and the environmental aspects of school operations.

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

**Support Services**: Brings attendees up-to-date on issues involving: Transportation, Risk Management or Food Service.
66th Annual CASBO Conference & Exhibits

“Elevate to Greatness”

PROGRAM AGENDA

Wednesday, April 17, 2019

Board Meeting ................................................................. 8:30 A.M. – 9:15 A.M.

Registration ........................................................................ 9:30 A.M. – 5:00 P.M.

All Preconference Workshops/Seminars:
(Reduced fee to all conference attendees – registration is required and lunch will be provided)

Workshop

1. School District Accounting ......................................................... 8:30 A.M. – 5:00 P.M.

Presented by: Karin Slater, SFO, CFO, CASBO Instructor

Moderator(s): Bert Huszcza

Description: This School District Accounting workshop is a consolidation of this three-part series. This class provides attendees with a detailed look at accounting, budgeting, and financial monitoring practices in school districts. Through a combination of lecture and classroom discussion, participants will learn the concepts of closing out the fiscal year, property tax calculations, Data Pipeline, School Finance Formula, budgets and budget monitoring as it pertains to school districts. This course is appropriate for anyone interested in school district accounting or looking for a short accounting refresher. No previous accounting background is required.

Seminar

2. Forecast5 Tools........................................................................ 10:00 A.M. – 2:30 P.M.

Presented by: Brian Mee, Senior Analytics Advisors and Tony Jerisha, Client Services Director, Forecast5 Analytics

Moderator(s): Bill Sutter

Description: If you are looking for a tool to forecast out your budget, look at history data all in one location, look at transportation information or even compare district information this session is for you. Forecast5 Analytics provides powerful data analytic and collaboration tools to help school district leaders drive strategic and financial decisions with better information. By utilizing this proprietary Business Intelligence software, schools spend time analyzing rather than trying to find data. The Forecast5 platform includes interactive visuals and the opportunity to perform collaborative analytics. Local governments are quickly gaining meaningful insights across several disciplines of financial management including budgeting, compensation, staffing and strategic planning.

Lunch (for Seminar and Workshop attendees) ........................................... 12:00 P.M. - 12:30 P.M.

Break ...................................................................................... 2:30 P.M. - 2:45 P.M.
Annual Conference Commences:

Capital Construction Assistance Board Meeting (BEST Board) ………………………2:45 P.M.– 5:00 P.M.
Moderator: Andy Stine, CDE
Description: The mission of the Best Board is to protect the health and safety of students, teachers and other persons using public school facilities and maximize student achievement by ensuring that the condition and capacity of public-school facilities are sufficient to provide a safe and un-crowded environment that is conducive to student’s learning.

CSPMA General Membership Meeting ………………………………………………….. 2:45 P.M. – 5:00 P.M.
Speaker(s): Sarah Kruger, Littleton Public Schools, CSPMA President
Moderator(s): Kris Garnhart
Description: General round table discussion on issues concerning operations and facilities, to include maintenance, sites, energy, sustainability, construction, and custodial issues.

2019 Colorado Legislative Update ……………………………………………………….. 2:45 P.M. – 3:30 P.M.
Speaker(s): Dr. Lisa Escárcega, Executive Director, CASE
Moderator(s): Bill Sutter
Lisa will give us an update on the 2019 Legislative Session, the political landscape for public education, education reform efforts and much, much more.

Refreshment Break ………………………………………………………………………….. 3:30 P.M. - 3:45 P.M.

School Finance Update …………………………………………………………………… 3:45 P.M. – 4:45 P.M.
Jennifer Okes, Executive Director of School Finance, Colorado Department of Education
Hear an update on Colorado School Finance and how it affects the Colorado Department of Education and School Districts. A Question and Answer session will follow.

Welcome Reception …………………………………………………………………………. 5:00 P.M. – 6:00 P.M.
In appreciation of all of our Vendors
CASBO welcomes the Associate Business and Active members of Colorado ASBO for casual conversation in a relaxing atmosphere.
Hors d’oeuvres and Refreshments provided by Colorado ASBO

Vendor Hospitality Functions ……………………………………………………………….. 6:00 P.M. – 10:00 P.M.
Come join us for Hors d’oeuvres and more than ample refreshments! We will be at Benders, have easy listening music for your entertainment and will up tempo it for dancing if you are so inclined!
This year’s theme is “Elevate to Greatness”. Vendors will design booths on how they think their business will look in the future. Be creative of how your booth is set up, decorated and even have some futuristic games some CASBO Members may play. Members will be voting for the vendor booth that is the most innovative, creative and showing their Elevate to Greatness vision. The recipient of the 2019 Vendor Cup and will be announced at the Friday General Session with an opportunity to do a quick plug about your company

Please plan on joining us and our special sponsors for an evening of fun!

Sponsored by: American Fidelity Assurance, COLOTRUST, PublicSchoolWORKS, SchoolDude and Virco
“Elevate to Greatness”

PROGRAM AGENDA

Thursday, April 18, 2019

Registration & Breakfast ................................................................. 7:30 A.M. – 8:15 A.M.

First General Session ................................................................. 8:15 A.M. – 9:45 A.M.

  Opening remarks by CASBO President Sandy Mutchler
  Welcome to all Business disciplines and their Respective Affiliate Groups

  National Anthem by Westminster Public Schools

  Welcome from the Colorado Commissioner of Education .................. Katy Anthes, Ph.D.

Keynote Presentation

“Ethical Leadership”

Colonel Athens, Keynote Speaker

Colonel Athens is the Director of the U.S. Naval Academy’s Vice Admiral James B. Stockdale Center for Ethical Leadership and a member of the Academy’s Senior Leadership Team.

Colonel Athens retired from the Marine Corps in July 2008 with over 30 years of combined active duty and reserve service. As a Marine Officer, he commanded units in the 3rd and 4th Marine Aircraft Wings, served with the U.S. Space Command and instructed at Marine Aviation Weapons and Tactics Squadron 1, the Marine Corps’ equivalent of the Navy’s Top Gun School. Additionally, he was a White House Fellow under President Ronald Reagan; the Special Assistant to the NASA Administrator following the Space Shuttle Challenger accident; the Executive Director of OCF, a worldwide non-profit organization helping military personnel integrate their faith and profession; the Commandant of the United States Merchant Marine Academy; and the Naval Academy’s first Distinguished Military Professor of Leadership.

Vendor Exhibits – Exhibit Hall ......................................................... 9:45 A.M. – 11:15 A.M.

All Registered Conference Attendees Welcome!
Coffee Break in the Exhibit Hall at 9:45 A.M.

**Speaker(s):** Dan Satriana, Vice President and General Counsel, University of Northern Colorado

**Moderator(s):** Gina Lanier, CASBO Board

**Description:** Misclassification of exempt employees and independent contractors is a continuing and ever-present concern. Potential claims for unpaid overtime and associated penalties and attorneys’ fees are substantial. In this session, tips for avoiding these pitfalls will be presented to augment risk management strategies.

2019-102 Energy Performance Contracting (EPC)

**Speaker(s):** Shannon Oliver, Adams 12 Five Star Schools; Mirka della Cava and Taylor Lewis, Colorado Energy Office

**Moderator(s):** Suzi DeYoung, CASBO Board

**Description:** Energy performance contracting is a proven tool for financing public facility improvements from utility cost savings. Finding capital improvement funding for public facilities can be challenging and EPC is a time-tested tool for alleviating those concerns. Colorado's EPC program is ranked #6 nationally in total investments and in source energy saved. Learn how your school district can benefit from EPC.


**Speaker(s):** Katie Hagan, Research Faculty Fellow, Edunomics, Georgetown University

**Moderator(s):** Bill Sutter, CASBO Board

**Description:** For Colorado, financial transparency is nothing new. However, in less than a year, every other state will publish per-pupil spending by school, likely igniting a new wave of media coverage, academic study, and stakeholder engagement on the issue. In this session, participants will learn about how other states are using school by school spending data to improve school systems and engage communities through creative data visualizations and trainings. The session will also include findings from new messaging research related to education finance that participants can directly apply in their districts.


**Speaker(s):** TBD

**Moderator(s):** Kris Garnhart and Terry Davis, CASBO Board

**Description:** Things school districts have been doing and are looking at doing to enhance safety and security at schools. New processes, procedures, and products that can make schools safer.
2019-105 Where Do We Grow From Here? Demographic and Economic Trends Impacting Colorado

Speaker(s): Elizabeth Garner, State Demographer
Moderator(s): Dan Hueneke, CASBO Board

Description: There are demographic and economic shifts taking place in the United States and Colorado impacting the future of Colorado’s economy, labor force, migrants, and children. This session will present the shifts and the how they are forecast to shape the future of Colorado.

2019-106 GASB Financial Reporting model changes

Speaker(s): Paul J. Backes, C.P.A., C.G.M.A.
Moderator(s): Shae Martinez, CASBO Board

Description: What will your financial statements look like in the future? In September 2018 GASB issued a preliminary views documents on potential financial reporting model improvements. Public Hearing will be held in March 2019 to assist in determining whether to proceed with changes to the current model established with Statement 34. The results of this process could have a significant effect on school districts audited financial statement.

Member/Vendor Luncheon ................................................................. 12:30 P.M. - 1:30 P.M.
Recognition of Past Presidents and Directors
Annual Business Meeting
Election of 2019-2020 CASBO Board

Breakout Sessions ................................................................. 1:45 P.M. - 3:00 P.M.

2019-201 Small District/Charter School Think Tank Round Table

Moderator: Terry Buswell and Gina Lanier, CASBO Board

Description: Meet with your peers and discuss the issues that you care about or need more information. One feeder topic will be: BOCES – Services and How to Use Them. Whatever issues or problems you are facing most likely someone else already has.
2019-202 Business/Finance Think Tank Round Table

Moderator: Dan Huenneke and Bill Sutter, CASBO Board

Description: Meet with your peers and discuss the issues that you care about or need more information. One feeder topic will be: Internal Auditing without Internal Auditors. Whatever issues or problems you are facing most likely someone else already has.

2019-203 Operations/Maintenance (CSPMA) Think Tank Round Table

Moderator: Don Ciancio & Terry Davis, CASBO Board

Description: Meet with your peers and discuss the issues that you care about or need more information. Some feeder topics will be: 1.) Someone else already has worked with labor shortages, skilled staffing issue and finding quality contractors for both large and small projects. 2.) It seems like there are fewer skilled tradespeople to do both maintenance and construction work. What have you seen or experienced in your District? 3.) Does your school District have any Career Technical Education programs and if so what are they and how have they impacted facilities? Whatever issues or problems you are facing most likely someone else already has.

2019-204 Food Service/Purchasing Think Tank Round Table

Moderator: Monica Deines-Henderson and Ron McCulley, CASBO Board

Description: Meet with your peers and discuss the issues that you care about or need more information. One feeder topic will be: Procurement with procurement ethics and buy America. Whatever issues or problems you are facing most likely someone else already has.

2019-205 Risk Management/ Legal Think Tank Round Table

Moderator: Dan Satriana & Sandy Nees, CASBO Board

Description: Meet with your peers and discuss the issues that you care about or need more information. Whatever issues or problems you are facing most likely someone else already has.

Break ................................................................. 3:00 P.M. – 3:15 P.M.
Best Practices Sessions ........................................................................................................ 3:15 P.M. – 4:30 P.M.

2019-301  Contract Review 101

Speaker(s): Craig Hein, General Counsel, CSDSIP Risk Control Staff
Moderator(s): Terry Buswell, CASBO Board

Description: CSDSIP Risk Control staff will go over the basics of reviewing contracts as well as common pitfalls to avoid.

2019-302  The difference between Prime and Government Funds

Speaker(s): Cory Gebel, CFA, Portfolio Manager, Public Trust Advisors
Moderator(s): Bert Huszcza, CASBO Board

Description: Having an investment policy is an essential component to every district’s financial health. In this session we will explore the difference between these funds and why they are important factors that go into creating an investment plan.

2019-303  Structuring Benefits for the Realities of Today’s Health Care

Speaker(s): Che Yi, Chief Administrative Officer, American Fidelity Assurance
Moderator(s): Terry Davis, CASBO Board

Description: Health and welfare benefit plans are both an important employee retention tool and a drain on already strained budgets. As employers seek to attract and retain qualified and skilled employees, pressure to rein in future spending will only mount. Effective managers of health and welfare benefit plans can achieve balance between these competing demands using strategies that are both competitive and cost-effective. Participants will leave with best practices and the knowledge they need to implement them.

2019-304  3 Keys to Becoming Data Driven.

Speaker(s): Brian Mee, Senior Analytics Advisors and Tony Jerisha, Client Services Director, Forecast5 Analytics
Moderator(s): Bill Sutter, CASBO Board

Description: School districts create, submit, and store a wealth of data every day. Whether a required federal mandate like the “Every Student Succeeds Act” or simply a local program participation report, data is everywhere—it’s what districts decide to do with that data that makes a difference. This session will focus on how business leaders can implement strategies to become data driven for decision support, operational efficiencies, and community engagement.
2019-305 Uniform Guidance Changes (UGG)

Speaker(s): Paul J. Backes, C.P.A., C.G.M.A.
Moderator(s): Shae Martinez, CASBO Board

Description: The Office of Management and Budget (OMB) has made changes in Uniform Guidance that will impact allowable expenditures for federal grants. This will likely require changes to district’s allowable costs, procurement, and other aspects of federal grant management. These changes will be effective for fiscal year ended June 30, 2019.

2019-306 Fixed Asset Inventory: If and when disaster strikes, will you be prepared?

Speaker(s): Tim Michener, National Accounts Director, Asset Services
Moderator(s): Sandy Mutchler, CASBO Board

Description: We are all susceptible to disasters and preparing for these events enables a smoother recovery. Ensuring your district has an accurate accounting of fixed assets is a critical aspect in disaster recovery. This session describes best practices for planning and performing a physical fixed asset/major movable equipment inventory. It will identify the importance of having regular inventories performed, as well as what assets should be included in the inventory. It will also identify where inventories need to be completed, as well as best times to perform an inventory. We will also discuss best practices for the actual execution of an inventory and maintaining district assets post-inventory.

Vendor Exhibits– Exhibit Hall ................................................................. 4:30 P.M. – 6:00 P.M.

All Conference Attendees and Associate Business Members Welcome!
Food Stations and Refreshments Provided

Refreshment tickets are provided at CASBO’s Platinum, Gold, and Silver Sponsor Booths

Past President’s Reception (by Invitation Only) .................................................... 6:00 P.M. – 7:30 P.M.
Casino Night and Entertainment .................................................................7:00 P.M. – 10:00 P.M.
"Elevate to Greatness"

PROGRAM AGENDA

Friday, April 19, 2019

Registration & Breakfast ................................................................. 7:45 A.M. – 8:30 A.M.

Student Performance ................................................................. 8:15 A.M. – 8:45 A.M.
by Westminster Public Schools

Second General Session ............................................................. 8:45 A.M. – 10:30 A.M.

Opening remarks by CASBO Vice-President Terry Davis

- Installation of CASBO Board
- Student Scholarship Presentation
- Service to the Profession Award
- Vendor of the Year Award

Oath of Office
Sponsored by COLOTRUST
Sponsored by American Fidelity Assurance
Selected by CASBO Membership Votes

Keynote Presentation

"Be a Leader You Would Follow"

Corey Ciocchetti, Keynote Speaker

We must only look up to behold yet another pitch for leadership training. Yet, we rarely witness effective leaders plying their craft. Why? These trainings tend to focus on buzzwords and abstract theories but ignore the core aspect of leadership – values and character. A low character person can obtain a PhD in Management yet struggle to lead effectively. Few people want to be led by someone who talks eloquently about “strategic resource positioning” but who lacks courage, compassion, fairness, honesty, and loyalty. We need more “good” leaders!

Contrary to popular wisdom, Corey believes values and character can be taught. For instance, where did you learn to lie or cheat? On the more virtuous end, where did you learn to be kind and thoughtful? From the influential people in your life, of course.

Corey’s keynote speech on leadership begins with a critical question: Do you have the values and character to make you the type of leader that you would follow? If you would resist being led by someone like yourself, then others will surely opt out. The rest of Corey’s powerful speech is devoted to the five-character traits of an effective leader.

We come to find out that no one is born a leader. This means that you and your people can learn to lead more effectively, without any buzzwords or theories! All it takes is the drive to become a more virtuous person. Ethical people become the best leaders.
PERA Update .............................................................................................................. 10:30 A.M. – 11:00 A.M.
Speaker(s): Ron Baker, Executive Director, Colorado PERA.

Break ...................................................................................................................... 11:00 A.M. – 11:15 A.M.

Breakout Sessions .................................................................................................. 11:15 A.M. – 12:30 P.M.

2019-401 Commissioning and the Efforts Associated with It.

Speaker(s): TBD

Moderator(s): Kris Garnhart & Don Ciancio, CASBO Board

Description: Commissioning and Retro Commissioning. What is now required under the new energy code, the costs for commissioning, and the benefits that commissioning provides.

2019-402 Colorado School Credit Landscape & Pension Update.

Speaker(s): Grayson Nichols, Vice President – Senior Analyst, Public Finance Group, Moody’s Investors Service

Moderator(s): Dan Huenneke, CASBO Board

Description: This session will explain a rating agency’s role during a debt issuance transaction as well as explain what Moody’s ratings mean and which methodologies are used specifically for Colorado school districts. The session will also include an overview of general credit trends for school districts, explain why we make adjustments to pension liabilities, and provide an update to our analysis on PERA’s School Division following the reform passed in the 2018 legislative session.


Speaker(s): Laura Jeffries, SPHR, SHRM-SCP, Director of Human Resources, Donor Alliance

Moderator(s): Dan Satriana, CASBO Board

Description: Onboarding new employees enables them to acquire the necessary knowledge, skills and behaviors to become effective members of your organization. Doing so leads to many positive outcomes including increased job satisfaction, performance and commitment to the organization. This session will provide valuable insight about how to maximize the effectiveness of onboarding.
2019-404  The Benefits of Building a Collaborative Relationship Between HR and Finance.

Speaker(s): Shae Martinez, CFO, Mapleton Public Schools and Damon Brown, Assistant Superintendent of Human Resources St. Vrain Valley Schools

Moderator(s):  Sandy Mutchler, CASBO Board

Description  Leaders in HR and Finance control the major sources of capital in school districts; financial and human. Both have unique vantage points and while collaboration can sometimes seem counterintuitive, when they align their perspectives in the support of student achievement, this unlikely alliance can become a power engine of transformation and growth. Leaders from two different districts from both HR and Finance will share, best practices, ideas, lessons learned etc. Participants in this session are encouraged to share their experiences as well.

2019-405  Use efficiency measures to gauge your Transportation and Nutrition Departments.

Speaker(s): Lyza Shaw, Business Operations Supervisor and Susan Miller, Transportation Supervisor CDE

Moderator(s): Monica Dienes-Henderson, CASBO Board

Description: Learn about the Key Performance Indicators on Nutrition and Transportation. In addition, Transportation departments will be faced with new federal CDL requirements that go into effect in February 2020. Learn about the new regulations, vehicle requirements, seat belts, and more.


Speaker(s): Ron Sprinz, Director of Finance and Brett Ridgway, Chief Business Officer, District 49

Moderator(s):  Brett Parsons, CASBO Board

Description: Overview of District 49’s Student Based Budget (SBB) process. Learn about the in’s and out’s of Student Based Budgeting from a District that has expansively used this method in their budget process.
Town Meeting with the CASBO Board ........................................ 12:30 P.M. – 1:00 P.M.
Moderator: Dan Huenneke, CASBO Board

An informal meeting to answer questions and gather input for future conferences. Tell us what you liked, what you didn’t like, what you would like to see, and find out how you can become involved.

A light lunch will be provided

Two attendees will receive a free registration to the 2019 Fall Conference in Vail, Colorado by a raffle drawing at the conclusion of this session (must be present to win).

CASBO Conference Adjourned ..................................................... 1:00 P.M.
COLORADO ASSOCIATION OF SCHOOL BUSINESS OFFICIALS  
66th Annual CASBO Conference & Exhibits  
Westminster Westin Hotel  
April 17-19, 2019

CONFERENCE REGISTRATION is on line only, please go to:  
www.ColoradoASBO.org

We accept credit cards, p-cards or checks

➔ CONFERENCE REGISTRATION DETAILS: Membership paid up to March 31 or later is required to attend this conference. Conference registration fee includes Wednesday Welcome Reception & Vendor Hospitality, Thursday and Friday breakfasts, Thursday lunch, Thursday evening activities, and admittance to all conference presentations.

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<th>GUEST REGISTRATION(s)</th>
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<td>Guest cannot be eligible for CASBO membership</td>
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➔ LUNCHEON CHOICES: A PLATED LUNCH FOR ALL ATTENDEES WHICH BE SERVED.  
ALL SPECIAL DIETS WILL BE ACCOMMODATED ON SITE

➔ ROOM RESERVATIONS: You can reserve your room at the Westminster Westin on line at www.ColoradoASBO.org or by calling the Hotel directly at 1-888-627-8448 or 303-410-5000. Attendees, Exhibitors and Sponsors will receive a special rate of $155 (Standard Room) per night (other rooms/rates available). Room blocks and special rates under CASBO will be held until March 27, 2019 -you must refer to the “CASBO Room Block" when making your reservations.

➔ REGISTRATION DEADLINE: April 12, 2019  
Registration is on line only, please go to:  
www.ColoradoASBO.org

We accept credit cards, p-cards or checks

If paying by check; Print and Mail your On-Line Registration form and check by April 2, 2019.

Return/Payable to: Colorado ASBO  
Attn: Bert Huszcza, Executive Director  
4627 W 105th Way  
Westminster, Colorado 80031

Cancellation Policy: Full refund if cancellation is received prior to April 2, 2019.  
Sorry, no refunds will be given after April 2nd

Questions? Please email Bert Huszcza at ColoradoASBO@msn.com  
CASBO  4627 W. 105th Way, Westminster, CO 80031 (720) 427-6560 (phone)
66th ANNUAL CONFERENCE & EXHIBITS
MEMBER INFORMATION PACKET

“Elevate to Greatness”

66th ANNUAL CONFERENCE
April 17-19, 2019

Program Agenda and Registration Information Enclosed

Register by April 12, 2019