



25th
ANNUAL
FALL
CONFERENCE

September 29 to
October 1, 2021

Vail Marriott
Vail, Colorado

(888) 525-1787

Program Agenda and
Registration
Information Enclosed

Register by
September 21, 2021



“Conquering Silos”
Colorado Association
of
School Business Officials

TO: CASBO Membership

FROM: Gina Lanier, 2021 CASBO President,
Bert Huszcza, CASBO Executive Director
& the CASBO Board of Directors

DATE: July 1, 2021

SUBJECT: Annual CASBO Fall Conference



CASBO will be holding its 25th Annual Fall Conference at the Vail Marriott, September 29 to October 1, 2021. The activities will begin on Wednesday September 29th with two optional full day pre-conference workshop: "School District Accounting" and "Mary & The PIPS". The official kickoff for the conference will be the "Welcome Hospitality Reception" by our Associate Partners where you can interact with our active and associate membership in a casual setting.

The value of the 25th Annual CASBO Fall Conference can't be beat! This conference has 10 hours of direct professional development in sessions targeted at improving your effectiveness within your job, as well as numerous opportunities to network with your peers from across the state who are dealing with the same fiscal and operational challenges. Be a hero and discover a great new idea from another CASBO member to bring back to your district that saves money, improves a process or adds a needed service to your organization.

School District budgets are tight, yet professional learning opportunities are important now more than ever. Consider the following ideas to help bring down the costs:

- **Share a room.** The hotel rates in 2021 are an extremely good value. You'll be so busy attending sessions, breakouts, and social activities that you'll hardly be in your room anyway! Check out page 2/3 for booking information. We now have two and three bed-room condos at reasonable rates.
- **Need to attend to district matters?** Marriott Rewards members they will receive free Wi-Fi in the lobby and guest rooms. In addition, free Wi-Fi will be available in the conference meeting rooms to all.
- **Be creative on possible funding sources.** Consider possible sponsors within your District or vendors.
- **Use the Park-n-Ride and Carpool to Vail.** There are many locations to meet and share a ride with your colleagues. If you live in the Denver metro area, you can also drive up for the day and save on lodging costs.

To register for the 25th Annual Fall Conference, just complete the registration form on-line at www.ColoradoASBO.org

Sincerely,

A blue cursive signature of Gina Lanier.

Gina Lanier
CASBO President

A blue cursive signature of Bert Huszcza.

Bert Huszcza
CASBO Executive Director

CASBO 25th Annual Fall Conference

September 29 to October 1, 2021

HEADQUARTERS HOTEL INFORMATION

**Hotel Deadline:
September 7th**

Vail Marriott
Vail, Colorado

Use this on-line CASBO Conference Group link:

<https://book.passkey.com/go/CASBO2021>

for these discounted rates

Hotel Room Rates (**based on availability**)

The Vail Marriott -- Hotel Room (Bedding Varies, Private Bath)	\$154.00
--------------------------------------------------------------------------	----------

Room reservations need to be made on-line with the Vail Marriott. **Special Room Rates are good until room block is full or the September 7th deadline date. This is hard cutoff**.... Once the block is filled or the deadline passes, any available rooms will be at the current going rate. You must present your District's tax- exempt certificate at time of check-in/out and pay by District check or District credit card for sales tax exemption.

Valet parking is available at \$15/night at the Vail Marriott or there is **Complimentary Parking in Lionshead Village** (a short 5-6-minute walk).

Directions to the Complimentary Parking in Lionshead Village: Take the Vail exit, on the round-about take the first quarter turn right onto South Frontage Road West, follow this towards the Vail Marriot, look for the blue parking structure signs for Lionshead Village.

There is a free in-town bus that stops in front of the parking structure and their next stop is the Marriot. Exit the structure on the mountain side at ground level for the bus stop.

If you want to walk there is a walking path. The access for the path is off the Frontage Road. Cross the street from the parking structure follow the path past the Starbucks, go left (towards the mountain) and the path will lead you to the back door of the Marriot.

These group rates, **based upon availability**, will be honored three days before and three days after the conference dates..... from Sunday, September 26th thru Sunday October 3rd

**Make your reservations TODAY
They will fill up fast!**

THANK YOU FOR SUPPORTING CASBO!

SESSION TRACKS

(The following session track icons will be used to identify the different discipline areas of interest)



Financial:

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:

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.



Operations:

Focuses on the latest in school district operations.



Technical:

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



General:

Other topics to help attendees grow as a School Business Official



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“Conquering Silos”

WEDNESDAY, September 29, 2021

8:00 am to 12 noon Early Registration Grand Ballroom Registration Desk

Pre-Conference Workshops Separate registration is required, and lunch will be provided

8:30 am – 5:00 pm School District Accounting

Presented by Karin Slater, SFO, CASBO Instructor

Moderator: Ron McCulley CASBO Board

Description: 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.

**8:30 am – 5:00 pm Mary & The PIPS
(Performance Improvement Plans)**

Presented by: Mary Cooper, CFO, Englewood Public Schools & Megan Lonergan, Aurora Public Schools

Moderator: Gina Lanier & Samantha Gallagher CASBO Board

Description: The Performance Improvement Plan (PIP) session will be an interactive so please bring your laptops! We will provide an approach to navigating the end to end process of creating a PIP. The goal is to provide each attendee the tools needed to prepare and execute a successful PIP with predetermined outcomes. This session will include the management perspective, as well as a voice from Legal and Human Resources.

12 noon – 12:30 pm **For registered Pre-Conference Workshop Attendees only** Lunch

1:30 pm – 2:30 pm CASBO Board Meeting



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THURSDAY, September 30, 2021

8:00 am – 8:30 am..... Registration and Breakfast

8:30 am – 10:15 am General Session
Gina Lanier, CASBO 2021 President presiding

8:35 am Money Matters Project
Presented by Tracie Rainey, Executive Director, Colorado School Finance Project

8:45 am – 10:15 am Keynote

“Creating a Great Work Culture Using the Intelligence of Fun”

Craig Zablocki, Keynote Speaker

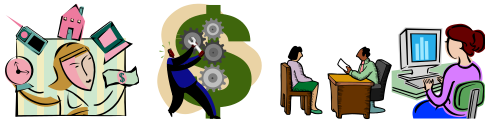


People have different ideas about what fun is. Yet, all organizations know, that feeling part of a team is fun. A state of openness and connection is fun, whether you are an introvert or extrovert, a corporate CEO or an HR Manager. Everyone loves the “Aha” moments when solutions to a problem come into view. The Intelligence of Fun unlocks the keys to seeing Business solutions to problems as fun – being solution-minded and not problem-focused.

The point is that working within a culture of playfulness, is proven to increase productivity, motivation, creativity, new learning, and staff engagement. It affects everything ... from the bottom line up.

This program is guaranteed to leave participants laughing.... while unleashing Craig’s secret of “taking your task seriously... and yourselves lightly”! Expect a highly interactive, non-power-pointed tailor program, with on-point, relevant take-aways, break-through personal shifts, and tons of spontaneous laughter.

This keynote is guaranteed to leave participants laughing.... while unleashing Craig’s secret of “taking your task seriously... and yourselves lightly”!



2021-401 Strategic Budgeting 101 - Aligning Scarce Resources to District Priorities

Speaker(s): Mary Cooper, Executive Director of Budget and Finance, Englewood Schools & Bill Sutter, CFO, Boulder Valley School District

Moderator: Bill Sutter & Mary Cooper, CASBO Board

Description: Annual budget decisions are often influenced by the latest pressure point or political influence, whether staff compensation, special services, increasing student learning or operational supports. Shifting to a strategic planning and strategic budgeting process can help align resources with the greatest needs of the district with increased transparency and understanding. This session will explore some methods of strategic budgeting and communication tools to help in the process as well as a group discussion of challenges and ideas for success.

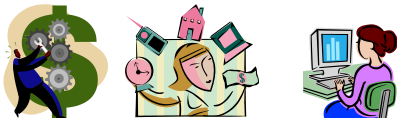


2021-402 GASB 87 How to implement by June 30, 2022

Speaker(s): John Paul LeChevallier and Dylan Garrison of CliftonLarsonAllen, LLP

Moderator: Mimi Livermore, CASBO Board

Description: Ready to Implement GASB 87 by June 30, 2022? Develop a broad recognition of the standard, identify disclosure requirements, determine effective approaches for implementation and learn the steps for calculating and preparing the journal entries for implementation.

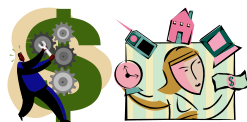


2021-403 CDE data request best practices

Speaker(s): Adam Williams, Aurora Public Schools

Moderator: Gina Lanier, CASBO Board

Description: - Tips and tricks to complete CDE data requests

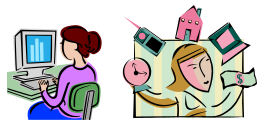


2021-404 Breaking down the silos.

Speaker(s): Panel...multiple districts

Moderator: Shannon Solomon, CASBO Board

Description: Silo: an isolated grouping, department, etc. that functions apart from others especially in a way seen as hindering communication and cooperation. In this panel break out session, you will hear how 4 experts have worked to overcome silos in their districts and departments. When an entire district works together, utilizing individual and department strengths, success becomes not only expedient but sustainable.



2021-405 Cyber Deception & Data Protection

Speaker(s): TBD

Moderator: Suzi DeYoung, CASBO Board

Description:

11:30 am – 12:30 pm..... Buffet Luncheon

12:45 pm – 2:00 pm. Breakout Sessions (*Choose One*)

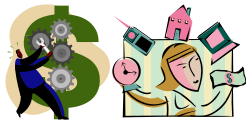


2021-501 District Budgeting

Speaker(s): Aaron Oberg, Aurora Public Schools

Moderator: Gina Lanier, CASBO Board

Description: Tools Built for You: Bring a laptop for an interactive presentation of excel tools for your district budgeting process. Work through an assumption tool for school finance, SOT and mill levy override revenues. Create an entire high-level budget during the conference. [helpful to Rural and Small Rural School Districts; though, larger districts may find the revenue tools useful].

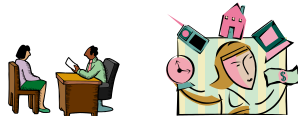


2021-502 FMLA and the Healthy Families and Workplaces, what it means for your District

Speaker(s): Craig Hein, CSDSIP

Moderator: Brett Parsons, CASBO Board

Description: Get up-to-date information on how to actively manage new personnel leave regulations for all District staff. What the Healthy Families and Work Place act means for accruing leave for part-time, full-time, and substitute positions. Make sure you have your bases and employees covered and learn how this new mandate interacts with current and pending FMLA laws and regulations.

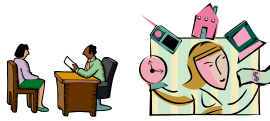


2021-503 Taking Your Leadership to the Next Level!

Speaker(s): Michael J Lynch, Westminster Public Schools

Moderator: Tatyana Glushko, CASBO Board

Description: Come join this interactive session designed to help each participant develop their own Keystone Habits of Leadership and take your career to the next level. You'll also receive a tool from Gallup called Now Discover Your Strengths, where you can find out your top five signature themes-- based upon proven and up to date research. A follow up training at our next conference will allow participants to report back on the progress of their own leadership development and share challenges and successes while leveraging your strengths.



2021-504 Talent Management

Speaker(s): Mary Cooper, Englewood Schools and Patricia Morris, Denver Public Schools

Moderator: Samantha Gallagher, CASBO Board

Description: Retaining and attaining personnel has been more difficult than ever over the past 16 months. This session will address key talking points outlining the benefits of attaining personnel. We will also address key conversations to have with existing team members to ensure the ability to retain them for many years to come. This will include monitoring positive performance in a manner to identify key goals and outcomes to ensure success for both the employee and the employer. Building a strong, reliable team is key to any organizational success and we will provide you with tips and tricks on how to implement key strategies to attain, maintain and retain key personnel



2021-505 Counting At-risk kids/funding/ Nutrition Services & Transportation, etc.

Speaker(s): Shannon Solomon, Aurora Public Schools

Moderator: Tony Whiteley, CASBO Board

Description: With the recent paradigm shift to how free lunches are provided to students, many families will forego completing free/reduced lunch applications, which can affect your district's at-risk count. In addition, learn about the recent changes to how at-risk students are counted in the Total Program Formula, as well as potential impacts to Nutrition Services and Transportation as a result.

2:00 pm – 2: 15 pm Break

2:15 pm – 3:30 pm Breakout Sessions (*Choose One*)



2021- 601 ASBO SFO

Speaker(s): Bill Sutter, Boulder Valley Schools

Moderator: Gina Lanier, CASBO Board

Description:



2021-602 Speed of Trust

Speaker(s): Brianda Esquivel & Shannon Solomon, Aurora Public Schools

Moderator: Shannon Solomon, CASBO Board

Description: Based on the Covey book "The Speed of Trust" we will take you through a high-level overview of the costs of not operating your department, organization or district with TRUST. We will identify the key takeaways and tools of this awesome leadership book.



2021-603 Smart Sheet Demo

Speaker(s): Justin Petrone & Samantha Gallagher, Durango Public Schools

Moderator: Samantha Gallagher, CASBO Board

Description: Demo of smartsheet application. Uses include project management, work order tracking and school/department budgeting.



2021-604 Succession Planning

Speaker(s): Terry Schueler, Retired CFO, St. Vrain Valley Schools

Moderator: Tony Whiteley, CASBO Board

Description: Join in a discussion about how to cultivate the next generation of school business officials. We'll talk about identifying, attracting, and retaining employees, succession planning, and effective training to help your future leaders succeed in their upcoming roles.



2021-605 Legislative Process/Advocacy

Speaker(s): Brett Johnson, CFO Aurora Public Schools, Tracie Rainey, Executive Director CSFP, Diane Doney, Retired CFO

Moderator: Brett Parsons, CASBO Board

Description: Interested in learning more about the legislative process in Colorado and how it affects public schools? Want to know more about the best ways to engage your legislators and stakeholders about the issues important to your district? Join us for this panel discussion with industry experts to learn more.

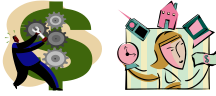
3:30 pm – 3:45 pm Refreshment Break



2021-701 Small District/Charter School Think Tank Round Table

Moderator: Brett Parsons and Samantha Gallagher, 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.



2021-702 Business/Finance Think Tank Round Table

Moderator: Suzi DeYoung and Bill Sutter, 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.



2021-703 Operations/Maintenance Think Tank Round Table

Moderator: Gina Lanier, 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.



2021-704 Food Service/Purchasing/Transportation Think Tank Round Table

Moderator: Shannon Solomon, 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.



2021-705 Risk Management/ Legal Think Tank Round Table

Moderator: Tony Whiteley, 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.

7:00 pm – 10:30 pm Retirement Celebration
Grand Ballroom

Honoring: Bert Huszcza, Executive Director &
Ron McCulley, Associate Director

Don't miss this evening's activities...



Refreshments, Fun and Festivities!!

Hors d'oeuvres and Libations served

Entertainment Provided by

John Stone Band
Nashville, TN





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September 29 to October 1, 2021
Vail, Colorado

“Conquering Silos”

FRIDAY, October 1, 2021

8:00 am – 9:00 am Registration

8:00 am – 9:00 am Full Breakfast

9:00 am – 10:30 am Breakout Sessions (*Choose One*)

2021-801 Equity Based Budgeting

Speaker(s): TBD, Allovue

Moderator: Samantha Gallagher, CASBO Board

Description: How does a district define equity? What rules should dollars follow to uphold that definition? What trade-offs must be considered?



2021-802 Taking Control of Your Calendar

Speaker(s): Aaron Oberg, Aurora Public Schools

Moderator: Gina Lanier, CASBO Board

Description: Important Dates and Tasks: Finance manages ABCs every day: Accounting, Budgeting, Computer systems (and everything else). Don’t delay: prepare each month for the annual budget (semi-annual!?!) and annual audit while also completing daily tasks. Sample calendar and workpapers provided for an interactive presentation. [helpful to Rural and Small Rural school districts with, generally, one staff member].



2021-803 Excel, most loved formulas

Speaker(s): Tony Whiteley, St. Vrain Valley Schools

Moderator: Tony Whiteley, CASBO Board

Description: Microsoft Excel is considered an industry standard piece of software for computing and data analysis. Advance your skill set by learning Excel formulas and functions, charts, and advanced formatting to become proficient in financial data analysis.



2021-804 Recognition and Accountability

Speaker(s): Robert Doran & Shannon Solomon, Aurora Public Schools

Moderator: Shannon Solomon, CASBO Board

Description: Recognition and Accountability: Diving into the 5 Languages of Appreciation in the workplace- Book by Gary Chapman and Paul White. Taking the time to understand that everyone wants to be valued and appreciated being deliberate in the process.



2021-805 Purchasing rules refresher & Best Practices

Speaker(s): Traci Burtnett, CPPO. Staci Crum, Director of Financial Operations and DeeDee Case, Manager of Strategic Sourcing, Denver Public Schools

Moderator: Mary Cooper, CASBO Board

Description: Brush up on your Colorado school district purchasing rules in this refresher course intended to help ensure that you don't run afoul of the myriad purchasing compliance rules and laws out there. This is a great session for those who may be new to governmental purchasing, or for experienced business office personnel who may not have reviewed the rules in a while.

10:30 am – 11:00 am Hotel Checkout Break

11:00 am – 12:15 pm Breakout Sessions (*Choose One*)



2021-901 ESSER

Speaker(s): Meghan Deutsch, Adams 12 Five Star Schools & Amy Beruan, Aurora Public Schools

Moderator: Gina Lanier, CASBO Board

Description: Part I: Supporting the development of time and effort reporting by receiving guidance on rules and regulations along with access to samples and templates.
Part II: Discuss how ESSER funds are being used in peer districts along with suggestions to implement successful programs.



2021-902 Facility Oversight - Data Driven Decisions

Speaker(s): Oscar Rangel, Business Development, Midstate Energy LLC

Moderator: Samantha Gallagher, CASBO Board

Description: Today's Building operations are complex, placing pressure on facility managers and building operators. There are countless variables to track in multiple systems- each requiring its own training and expertise, leading to wasted resources and duplication of efforts. Facility managers get overwhelmed trying to keep up, knowing who is responsible for tracking peak electrical demand, building schedules, maintenance programs, costs, and other systems stats. This can get dissonance and a burden for those trying to efficiently manage building operations.

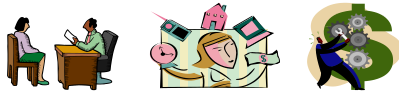


2021-903 Financial Data Integrity: How, When & Why?

Speaker(s): Sandi Nees, Westminster Public Schools and Scott Ecker, Forecast5 Analytics

Moderator: Sandi Nees, CASBO Board

Description: Achieving and maintaining financial data integrity can save your organization the time, effort, and money it would cost to make a big decision based on incorrect or incomplete data. After all, data-driven decisions can only be as strong as the data they're based on. If the integrity of your schools' data has been compromised in any way, the negative impact could be long-lasting and far-reaching

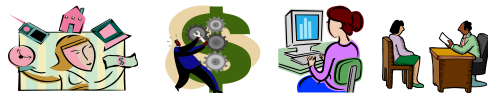


2021-904 Incorporating Cognitive Diversity and Psychological Safety as a Leader

Speaker(s): Melisa Sandoval, Westminster Public Schools

Moderator: Tatyana Glushko, CASBO Board

Description: Learn about the power of cognitive diversity and psychological safety in the workplace! By understanding four specific thinking and behavioral attributes, leaders can leverage individual differences, such as cognitive preferences and behavioral tendencies as a source of strength. In this session, attendees will learn to appreciate differences and flex to support team members' needs. Attendees will leave with concrete strategies to present information, communicate, and provide feedback in ways that reach various types of thinkers on their teams.



2021-905 P-Card Solutions & Processes

Speaker(s): Mimi Livermore, Adams 12 Five Star Schools

Moderator: Tony Whiteley, CASBO Board

Description: Come learn about using Purchasing Cards to expend your resources as efficiently as possible. Learn to negotiate beneficial terms with your p-card provider, implement safe p-card processes, and engage with your p-card holders for better training and oversight

12:15 pm – 12:45 pm..... **Town Hall Meeting**

Moderator: Samantha Gallagher, CASBO Board

An informal meeting with your CASBO Board will be held to answer your questions and gather input for future conferences. Tell them what you liked, what you didn't like, what you would like to see, and find out how you can become more involved. Light refreshments and snacks will be available.

Two attendees will receive a free registration to the 2022 Spring Conference. These complimentary registrations will be given away by a raffle drawing at the conclusion of this session (must be present to win).

12:45 pm..... Conference Adjourned

COLORADO ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
25th Annual Fall Conference
Vail Marriott
Vail, Colorado

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CONFERENCE REGISTRATION PRICING

CONFERENCE REGISTRATION: Includes Thursday morning breakfast, Thursday luncheon, Thursday Evening Fun Night, Friday breakfast, breaks, and admittance to all conference sessions

<input type="checkbox"/>	ACTIVE MEMBERS (School Districts)	
	Member Registration	\$320
	Non-Member Registration	\$450
	MEMBERSHIP DUES Activation/Renewal	\$ 80
	(Activates or Renews Membership for a period of twelve months from 1 st of the month after date of receipt)	
<input type="checkbox"/>	ASSOCIATE MEMBERS (Business/Vendors)	
	Member Registration	\$450
	Non-Member Registration	\$675
	MEMBERSHIP DUES Activation/Renewal	\$180
	(Activates or Renews Membership for a period of twelve months from 1 st of the month after date of receipt)	
<input type="checkbox"/>	<u>School District Accounting (Wednesday)</u>	
	Member Registration	\$ 99
	Non-Member Registration	\$150
<input type="checkbox"/>	<u>Performance Improvement Plans (Wednesday)</u>	
	Member Registration	\$ 99
	Non-Member Registration	\$150

→REGISTRATION DEADLINE: September 21, 2021

Registration is only on-line, please go to:
www.ColoradoASBO.org

We accept credit cards, p-cards, purchase orders or checks

If paying by check: **Print your On-Line Registration Form and Mail** with payment by **September 21, 2021**

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

Cancellation Policy: Full refund if cancellation is received prior to September 21, 2021

Sorry, no refunds will be given after September 21, 2021



Colorado Association of School Business Officials
4627 West 105th Way
Westminster, CO 80031

NONPROFIT ORG
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Or Current Occupant

**25TH ANNUAL FALL CASBO CONFERENCE
MEMBER INFORMATION PACKET**



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Register by September 21, 2021