Colorado Association of School Business Officials

“Together Towards Tomorrow”

67th Annual CASBO Conference & Exhibits Member Information Packet

April 15 - 17, 2020
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, Food Service or Risk Management.
67th Annual CASBO Conference & Exhibits
“Together Towards Tomorrow”

PROGRAM AGENDA

Wednesday, April 15, 2020

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): 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.

Seminar
2. Performance Improvement Plans ......................................................... 8:30 A.M. – 2:30 P.M.
   
   Presented by: Dan Satriana, UNC General Counsel, University of Northern Colorado
   
   Moderator(s): Gina Lanier and Samantha Gallagher, CASBO Board
   
   Description: This class will provide practical assistance on how to recognize when performance improvement plans (PIPs) are necessary, how to prepare an effective, clear and concise PIP, to provide engaged follow-up that will achieve the goal of the PIP, and, if the goals of the PIP are not achieved, to create robust written communication to support further discipline that minimizes the risk of employment claims.

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

Break ............................................................................................................... 2:30 P.M. - 2:45 P.M.
**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.

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**2020 Colorado Legislative Update …………………………………………………………… 2:45 P.M. – 3:30 P.M.**

**Speaker(s):** Dr. Lisa Escárcega, Executive Director, CASE

**Moderator(s):** Tony Whiteley, CASBO Board

Lisa will give us an update on the 2020 Legislative Session, the political landscape for public education, education reform efforts and much, much more.

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

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**School Finance Update ………………………………………………………………………… 3:45 P.M. – 4:45 P.M.**

**Speaker(s):** Jennifer Okes, Executive Director of School Finance, Colorado Department of Education

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

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.

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**Colorado ASBO’s 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*

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**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 “Together Towards Tomorrow”. 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 Together Towards Tomorrow vision. The recipient of the 2020 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*
Together Towards Tomorrow

PROGRAM AGENDA

Thursday, April 16, 2020

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 Terry Davis
Welcome to all Business disciplines and their Respective Affiliate Groups

National Anthem by Evenstar from Niwot HS under the direction of Laura Waters

Keynote Presentation

“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”!

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.
2020-101 The Art & Science of Successful Bond Ballot Measures

**Speaker(s):** Paul Hanley, Managing Director, Beyond Your Base and Jeff Chamberlin, President, RLH Engineering, Inc.

**Moderator(s):** Sandy Mutchler, CASBO Board

**Description:** Building public support for public projects—while at the same time creating long-term trust with your taxpayers—is both an art and a science. If you’re considering placing an MLO or bond measure on the ballot, it’s time to update your pre-referendum and campaign play book. Topics covered will include essential pre-referendum homework, timelines and budgets, voter analyses, public opinion research tools and strategies, and more. Paul Hanley and Jeff Chamberlin have decades of experience with successful tax-related referenda and will draw from a variety of recent and relevant case studies.

2020-102 Energy Conservation / Performance Contracting

**Speaker(s):** Hal Corin, Energy Manager Jeffco Schools and Shannon Olivier, Manager of Energy and Sustainability, Adams 12 Five Star School District

**Moderator(s):** Don Ciancio, CASBO Board

**Description:** This session will focus on approach to conservation strategy, understanding how your building operates, and how separate activities or end-uses specifically drive utility costs and likewise utility cost savings. We will review expected impacts and benefits to certain energy conservation measures. This will advise capital planning for maintenance replacements as well as the approach for future renovation and new builds. Another focus will be on Energy Performance Contracting (EPC) and will include how to interpret what is being proposed, how to select the best 3rd party partner for your EPC, and how to educate the stakeholders in your organization in order to gain buy-in on what is often considered a complicated approach to energy project financing. Special attention will be paid to lessons learned and pitfalls to avoid in similar projects.

2020-103 Self-Discipline: A Recipe for Productivity

**Speaker(s):** Laurence Vanden Boom, Plante Moran

**Moderator(s):** Kris Garnhart, CASBO Board

**Description:** Nowadays, it is difficult for the average person to focus on what is truly important and urgent because the channels through which we receive information display items as equally important. Regardless of the content of a text, IM, or email, the notification is the same and the notification itself signals importance and urgency. Don’t become a victim to technology by believing the artificial urgency it creates. This session will focus on how to identify what is TRULY a priority and control how you use technology to support those priorities, not detract from them.
Grant Seeking and Management 101: A Primer for Grant Seekers and Grant Managers

Speaker(s): Hilary Sontag, Director of Competitive Grants & Strategic Partnerships, St Vrain Valley Public Schools

Moderator(s): Tony Whiteley, CASBO Board

Description: Effective grant seeking, and grant management practices are two sides of the same coin: strong grant seeking practices maximize revenue for your organization, while strong grant management practices ensure accountability to your Grantmakers and future grants. This session will emphasize how to identify programs that will attract grant funding; best practices to cultivate strong relationships with foundation, government and corporate grant makers; how to create effective in-take and start-up practices to maximize the effectiveness of new grants; and how to work with grant managers and provide supports that ensure good grant management.

Take Control of Your Calendar

Speaker(s): Aaron Oberg, Budget Director, Aurora Public Schools

Moderator(s): 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.

Staffing, Recognition and Retention

Speaker(s): Shannon Solomon, Nutrition Services Director, Aurora Public Schools

Moderator(s): Brett Parsons, CASBO Board

Description: This class is a dynamic high-energy interactive tool that will provide innovative ideas and approaches that will enhance any organization. You will not only learn how to hire great staff, the power of recognition and its influence on staff retention. As we are all well aware, the number one resource in any organization is its people (Human Resources). This breakout session will take you on a brief journey of leadership tools, tips and reminders of how to more confidently approach Staffing and Retention issues in any organization.

Member/Vendor Luncheon ……………………………………………………………………………………………… 12:30 P.M. - 1:30 P.M.
Recognition of Past Presidents and Directors
Annual Business Meeting
Election of 2020-2021 CASBO Board
Breakout Sessions ........................................................................................................... 1:45 P.M. - 3:00 P.M.

2020-201 Colorado Department of Education Think Tank Round Table

Moderator: Brett Parsons, CASBO Board
Description: Meet with CDE and your peers and discuss the issues that you care about or need more information. One feeder topic will be: ______________________. Whatever issues or problems you are facing most likely someone else already has.

2020-202 Business/Finance Think Tank Round Table

Moderator: Suzi DeYoung and Shae Martinez, CASBO Board
Description: Meet with your peers and discuss the issues that you care about or need more information. One feeder topic will be: budgeting for declining enrollment. Whatever issues or problems you are facing most likely someone else already has.

2020-203 Operations/Maintenance (CSPMA) Think Tank Round Table

Moderator: Don Ciancio & Kris Garnhart, CASBO Board
Description: Meet with your peers and discuss the issues that you care about or need more information. One feeder topic will be: How do you keep up with your Tech specs in an ever-changing industry? Whatever issues or problems you are facing most likely someone else already has.

2020-204 Food Service/Purchasing/Transportation 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. Some feeder topics will be: What are you doing to listen to your workforce to enhance engagement, share your tips for managing contract usage by your District and Stop-arm adherence- best practices to get drivers to adhere to the law. Whatever issues or problems you are facing most likely someone else already has.

2020-205 Risk Management/ Legal Think Tank Round Table

Moderator: Dan Satriana & 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: How are you managing ADA/FMLA leaves and working with employees' supervisors to ensure consistent communication about those leaves? Whatever issues or problems you are facing most likely someone else already has.

Break ..................................................................................................................................... 3:00 P.M. – 3:15 P.M.
2020-301  Cyber Deception & Data Protection

**Speaker(s):** Mary Lee Gibson, Risk Control Supervisor and Audrey Mauser, Risk Programs Manager, CSDSIP  
**Moderator(s):** Sandy Mutchler, CASBO Board

**Description:** Every day from the workplace to the school, reliance on internet accessibility increases. Any school with electronic records is open to cyber breaches. School staff is the first line of defense on the preventing cyber-attacks. This training is designed to help school staff prevent cyber breaches.

2020-302  Does your school district have an effective Investment Policy Statement in place?

**Speaker(s):** Dylana Gross, Brent Turner, and Ben Mendenhall, COLOTRUST  
**Moderator(s):** Tony Whiteley, CASBO Board

**Description:** The COLOTRUST team will discuss the importance of having investment policies in place, and best practices when adopting new policies as well as amending current ones.

2020-303  Health Insurance best practices

**Speaker(s):** TBD, American Fidelity Assurance  
**Moderator(s):** Samantha Gallagher, CASBO Board

**Description:** American Fidelity will provide a session that goes over best practices around supplemental insurance for employees and ways employers can ensure satisfaction with additional benefits they have access to.

2020-304  3 Keys to Becoming Data Driven

**Speaker(s):** Melissa Higdon, Senior Analytics Advisor, 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.
2020-305  Cooperative Purchasing and Best Practices

**Speaker(s):** Michelle Phelps, Omnia Partners  
**Moderator(s):** Gina Lanier CASBO Board

**Description:** An overview of cooperative purchasing and best practices.

2020-306 ______________________, USI Insurance Services

**Speaker(s):**

**Moderator(s):** Brett Parsons, CASBO Board

**Description:**

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

All Conference Attendees and Associate Business Members Welcome!  
Prize Drawings begin at 5 P.M.  
Food Stations and Refreshments Provided

Refreshment tickets are provided at Colorado ASBO’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.
"Together Towards Tomorrow"

PROGRAM AGENDA

Friday, April 17, 2020

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

Student Performance ................................................................. 8:15 A.M. – 8:45 A.M.
by 5130 from Erie HS under the direction of Thalia Bard

Second General Session ................................................................. 8:45 A.M. – 10:30 A.M.
Opening remarks by CASBO Vice-President Suzi DeYoung

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<td>Installation of CASBO Board</td>
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<td>Student Scholarship Presentation</td>
<td>Sponsored by COLOTRUST</td>
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<td>Service to the Profession Award</td>
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<td>Selected by CASBO Membership Votes</td>
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Keynote Presentation

“Turning Negative Heat into Positive Energy!”

Dr. John Draper, Keynote Speaker

John Draper has energized audiences of educators, school leaders and community members in over 45 states. His presentations are marked by thoughtful analysis, engaging narrative and a refreshing passion for the mission of public schools. He makes research fun!

As the CEO of the Educational Research Service in Washington, DC, Dr. Draper spawned conversations among school leaders nationwide on engaging staff and communities in active support of our schools. His presentations are known for getting to the root of the research and translating it into focused, proactive leadership practices. He is now a nation-wide consultant working with the National School Public Relations Association to expand support for public schools. NSPRA is a membership organization dedicated to helping educational leaders build community support for schools and school districts.

Change is hard—but organizations that don’t change are doomed to obsolescence. The challenge is for school leaders to design change so that staff members embrace and support it. There are 3 fundamental change elements to start right or get back on track quickly. Dr. Draper shares a simple but powerful template for leading effective change without losing your job!

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

Breakout Sessions ................................................................. 11:15 A.M. – 12:30 P.M.
2020-401 District Budgeting

Speaker(s):  Aaron Oberg, Budget Director, Aurora Public Schools

Moderator(s): 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.

2020-402 K-12 and Community College Partnerships for Greater Student Success

Speaker(s):  Kathryn Regjo, Ed.D., Vice President and Campus Dean of Colorado Mountain College - Edwards Campus

Moderator(s): Sandy Mutchler, CASBO Board

Description: With an increasing focus on dual enrollment and college access, K-12 institutions and community colleges have put an emphasis on working together to provide the best experience for students. There are ways to effectively collaborate in sharing resources to provide various programs for your students. This session will provide insight into programs that can support the local community, how they are funded and what role you play in the partnership.

2020-403 Maximizing Foodservice Budgets- Save BIG with cooperative purchasing models

Speaker(s): Panelists: Jeremy West; Rockies Purchasing Systems Consultant, Jill Kidd; Pueblo District 60 and Tammie Rempe; Nutrition Consultant for BOCES

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

Description: The struggle is real- food and supply expenses are on the rise and labor costs have escalated leaving many districts struggling to financially support their foodservice operation. Come hear from a panel of experts about maximizing purchasing power and reducing expenses by driving savings in the food service supply chain through cooperative purchasing models.
2020-404 Advocacy for your District

Speaker(s): Diane Doney, Assistant Superintendent of Business Services/CFO, Littleton Public Schools

Moderator(s): Samantha Gallagher CASBO Board

Description: Discussions will surround navigating the Colorado legislative process and ideas on how best to advocate for your District.

2020-405 GASB Update - 2020

Speaker(s): Chris Telli and Karmyn Jeffries, BKD

Moderator(s): Tony Whiteley, CASBO Board

Description: GASB’s standard-setting activity has slowed to a more manageable level after several very busy years. This presentation will summarize GASB-issued standards along with implementation suggestions as well as update you on outstanding proposals, projects and research.

2020-406 Stretching and Protecting your Capital Construction Dollars

Speaker(s): Scott Stevens, P.E., Executive Director of Construction, Bond Program, Boulder Valley School District, Justin Petrone, CPA, Director of Accounting and Finance, Boulder Valley School District.

Moderator(s): Bill Sutter, CASBO Board

Description: Contracting and payment application review and processing tips to help make the most of your construction funds

Town Meeting with the CASBO Board ............................................. 12:30 P.M. – 1:00 P.M.
Moderator: Gina Lanier, 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 2020 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
67th Annual CASBO Conference & Exhibits
Westminster Westin Hotel
April 15-17, 2020

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.

ACTIVE MEMBERSHIP  (For School District Employees only)
MEMBERSHIP DUES (if due before March 31 or sooner)  $ 80.00
Conference Registration Fee  ................. $ 320.00
Total  $ 400.00

ASSOCIATE MEMBERSHIP  (For Businesses & Vendors only)
2020 MEMBERSHIP DUES (required to attend conference)  $ 180.00
Conference Registration Fee  .................. $ 430.00
Total  $ 610.00

GUEST REGISTRATION(s)  (includes all meals and social functions)
Guest cannot be eligible for CASBO membership ..............  $ 60.00

PRE-CONFERENCE:  (Wednesday morning)
Separate Registration is required .......... Includes a Box Lunch
Active Members: registered for conference  Attending the Workshop or Seminar  $ 75.00
Active Members: If not registered for the Conference …for the Workshop or Seminar  $ 100.00
Associate Members attending for either the Workshop or Seminar  $ 200.00

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 online 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 $159 (Standard Room) per night (other rooms/rates available). Room blocks and special rates under CASBO will be held until March 25, 2020 -you must refer to the “CASBO Room Block” when making your reservations.

REGISTRATION DEADLINE: April 15, 2020  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 3, 2020.

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, 2020. Sorry, no refunds will be given after April 3rd

Questions? Please email Bert Huszcza at ColoradoASBO@msn.com
CASBO 4627 W. 105th Way, Westminster, CO 80031 (720) 427-6560 (phone)
67TH ANNUAL CASBO CONFERENCE & EXHIBITS
MEMBER INFORMATION PACKET

“Together Towards Tomorrow”

67th ANNUAL CONFERENCE
April 15-17, 2020

Program Agenda and Registration Information Enclosed

Register by April 15, 2020