

# Colorado Association of School Business Officials

*“Embracing Change and Transformation”*



**68TH ANNUAL CASBO CONFERENCE & EXHIBITS  
MEMBER INFORMATION PACKET**

**May 19 - 21, 2021**

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.

# 68th Annual CASBO Conference & Exhibits

## *"Embracing Change and Transformation"*

### PROGRAM AGENDA

**Wednesday, May 19, 2021**

**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.**

Annual Conference Commences:

**2021 Colorado Legislative Update ..... 2:45 P.M. – 3:30 P.M.**

**Speaker(s): Bret Miles**, Executive Director, CASE  
**Moderator(s): Tony Whiteley**, CASBO Board



Bret will give us an update on the 2021 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.**

**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.

**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**



**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 **“Embracing Change and Transformation”**. 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 Embracing Change and Transformation vision. The recipient of the 2021 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:**

# “Embracing Change and Transformation”

## PROGRAM AGENDA

Thursday, May 20, 2021

**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 Suzi DeYoung  
Welcome to all Business disciplines and their Respective Affiliate Groups*

*National Anthem by*

### 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!

**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.**



**2021-101 The Art & Science of Successful Bond Ballot Measures**

**Speaker(s):** Jeff Chamberlin, President, RLH Engineering, Inc. and Shannon Bingham, President, Western Demographics, Inc.

**Moderator(s):** Samantha Gallagher, CASBO Board

**Description:** Defining the optimum funding proposal to place on the ballot requires assembling the right team, doing your homework, and using the right tools and strategies to effectively engage key stakeholders and your community as a whole. Jeff Chamberlin and Shannon Bingham have decades of experience in working with school districts to look forward to identify their capital facility and operating needs and helping them develop proposals that have a fighting chance of success at the polls. They will be sharing important lessons learned from recent and relevant case studies throughout Colorado.



**2021-102 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):** Kris Garnhart, 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.



**2021-103 CDE Nutrition and Transportation updates.**

**Speaker(s):** Lyza Shaw, MS: Business Operations Supervisor School Nutrition Unit and Susan Miller: Transportation Supervisor School Transportation Unit, Colorado Department of Education

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

**Description:** Join CDE's Transportation and Nutrition representatives for updates to both programs and get your burning questions answered



**2021-104 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.



**2021-105 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.



**2021-106 Staffing, Recognition and Retention**

**Speaker(s):** Shannon Solomon, Nutrition Services Director and Kerry Hawley, Staffing, Marketing and Recognition Specialist, 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 2021-2022 CASBO Board



**2021-201 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: grants management processes – what is working, what is not working, and what changes would be beneficial.** Whatever issues or problems you are facing most likely someone else already has.



**2021-202 Business/Finance Think Tank Round Table**

**Moderator:** Suzi DeYoung and Samantha Gallagher, 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.



**2021-203 Operations/Maintenance (CSPMA) Think Tank Round Table**

**Moderator:** Terry Davis & 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.



**2021-204 Food Service/Purchasing/Transportation Think Tank Round Table**

**Moderator:** Monica Deines-Henderson and Shannon C Solomon, CASBO Board

**Description:** Meet with your peers and discuss the issues that you care about or need more information. **Some feeder topics will be: Best Practices managing Regulations, Resources, and Relationships in your departments and district.** Whatever issues or problems you are facing most likely someone else already has.



**2021-205 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.



**2021-301 12 Leadership Habits We Learned During COVID But Should Never Forget!**

**Speaker(s):** John Hutchison, CPA, MBA, SFO, Olathe Public Schools

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

**Description:** The onset of the COVID-19 pandemic over a year ago caused all of us to pivot and develop new skills and implement new strategies to manage the chaos. When the chaos subsides, certain habits we have developed should remain in our leadership toolbox. Come learn more about 12 habits that moved to the forefront during the pandemic and should remain in place long after.



**2021-302 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.



**2021-303 Talking about my generation, how to design and deliver benefits for all generations of employees**

**Speaker(s):** Bryce Burget & Kacey Booth, 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.



**2021-304 Using Data to Prepare for Negotiations**

**Speaker(s):** Scot Ecker, Senior Analytics Advisor, Forecast5 Analytics

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

**Description:** Salaries and benefits are the largest expense in a district’s budget, and therefore it's essential that any increases to these areas be analyzed accurately. The two criteria in considering raising salaries are comparability to other districts and ability to pay. In this workshop, we'll provide you with a clear process and tools to make solid salary proposals. Prior preparation about a district’s ability to pay will be presented, and we'll provide you with information about how to quickly get comparable information.



**2021-305 Cooperative Purchasing and Best Practices**

**Speaker(s):** Ryan Elliott, Regional Manager and Doug Looney, V. P., Omnia Partners  
**Moderator(s):** Gina Lanier CASBO Board

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



**2021-306 Enterprise Risk Management for Schools**

**Speaker(s):** John Flocco, SVP, USI Insurance Services  
**Moderator(s):** Brett Parsons, CASBO Board

**Description:** What are the best practices for Enterprise Risk Management in Schools? In today’s regulatory, litigation and reputational risk environment, in addition to standard insurance protections, schools should implement some form of enterprise risk management program to monitor and mitigate key risks for which there are no insurance protections. Topics will include: What is ERM?, risk transfer versus risk mitigation, identification of key risks, risk ownership and responsibilities along with examples of how to implement an ERM program.

**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.**

# *“Embracing Change and Transformation”*

## PROGRAM AGENDA

**Friday, May 21, 2021**

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

**Student Performance ..... 8:15 A.M. – 8:45 A.M.**  
by

**Second General Session ..... 8:45 A.M. – 10:30 A.M.**  
*Opening remarks by CASBO Vice-President Gina Lanier*

Installation of CASBO Board	Oath of Office
Student Scholarship Presentation	Sponsored by COLOTRUST
Service to the Profession Award	Sponsored by American Fidelity
Vendor of the Year Award	Selected by CASBO Membership Votes

### **Keynote Presentation**

## **“CELEBRATE! The Secret to Winning in the New Abnormal”**

**Scott Freidman, Keynote Speaker**



During this crazy time, it is easy to be stressed out, anxious, and fearful. Or we can look at this time as an opportunity to reflect, reimagine, and reinvent ourselves and our careers. It really is up to us every day to choose our attitude.

Discover how by turning on your “GPS”- Gratitude, Play, and Surprise – you will gain control over your emotions, your well-being, and your life.

Learn the tools and skills to help you and your organization create a happier, healthier, more connected workplace. In this entertaining, interactive, content-rich session, you will learn how to create a culture of innovation and celebration leading to more innovative, authentic, responsive employees. Let’s celebrate what’s good in life and set ourselves up for a healthy more positive, productive future.

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



**2021-401 Worker's Compensation through the Employer's Lens**

**Speaker(s):** Jeanette O'Dell, Risk Manager

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

**Description:** Jeannette will discuss compensable claims and how to handle.



**2021-402 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):** Tony Whitely, 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.



**2021-403 Being a Courageous daring Leader is NOT easy, but it is ESSENTIAL!**

**Panelist(s):** Brett Parsons, Budget Director, Poudre School District ; Kim Kilgore nutritional Services Director, Cherry Creek Schools; Megan Lonergan, Aurora Public Schools, Director of Employee Relations and Jeremy West, Operations Director, Urban Food Alliance

**Moderator(s):** Shannon Solomon, CASBO Board

**Description:** Change is a part of life, in this time of pandemic and revolution of the way School Support Business looks: flexibility, transparency and honesty is more crucial than ever. Daily pivoting and change sometimes create frustrations and other emotions that must be addressed and called out for what it is: natural human emotion. What do you do with human emotions at work??? It maybe the elephant in the room but if not addressed can become the Angry Tiger ready to attack in your organization if you do not bring light to it. This panel of Courageous Leaders will discuss their stories/successes along with their skills they utilize for training, communications, culture building and planning for the future.

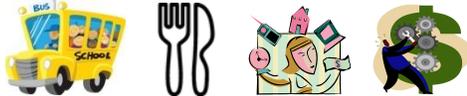


**2021-404 Panel on single audit and federal funds**

**Speaker(s):** Alison Slife, CliftonLarsonAllen, \_\_\_\_\_, KPMG and Mimi Livermore, Finance Director, Adams 12 Five Star School District.

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

**Description:**



**2021-405 GASB Update - 2021**

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

**Moderator(s):** Samantha Gallaher, 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.



**2021-406 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:** Samantha Gallagher, 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 2021 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**  
**68th Annual CASBO Conference & Exhibits**  
**Westminster Westin Hotel**  
**May 19-21, 2021**

**CONFERENCE REGISTRATION is on line only, please go to:**  
[www.ColoradoASBO.org](http://www.ColoradoASBO.org)

**We accept credit cards, p-cards or checks**

➔ **CONFERENCE REGISTRATION DETAILS:** Membership paid up to April 30 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.

<b><u>ACTIVE MEMBERSHIP</u></b> (For School District Employees only)	
MEMBERSHIP DUES (if due before April 30 or sooner)	\$ 80.00
Conference Registration Fee .....	<u>\$ 320.00</u>
<i>Total</i>	<u>\$ 400.00</u>

<b><u>ASSOCIATE MEMBERSHIP</u></b> (For Businesses & Vendors only)	
2021 MEMBERSHIP DUES (required to attend conference)	\$ 180.00
Conference Registration Fee .....	<u>\$ 430.00</u>
<i>Total</i>	<u>\$ 610.00</u>

<b><u>GUEST REGISTRATION(s)</u></b> (includes all meals and social functions)	
Guest cannot be eligible for CASBO membership .....	\$ 60.00

<b><u>PRE- CONFERENCE:</u></b> (Wednesday morning)	
<b>Separate Registration is required..... Includes a Box Lunch</b>	
Active Members: registered for conference Attending the <u>Workshop or Seminar</u>	\$ 75.00
Active Members: If not registered for the Conference ...for the <u>Workshop or Seminar</u>	\$ 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](http://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 \$169 (Standard Room) per night (other rooms/rates available). Room blocks and special rates under CASBO will be held until April 21, 2021 -you must refer to the **"CASBO Room Block"** when making your reservations.

➔ **REGISTRATION DEADLINE: May 15, 2021** Registration is on line only, please go to:  
[www.ColoradoASBO.org](http://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 May 3, 2021.**

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

**Cancellation Policy: Full refund if cancellation is received prior to May 3, 2021.**  
**Sorry, no refunds will be given after May 3<sup>rd</sup>**



Colorado Association of School Business Officials  
c/o Bert E. Huszcza  
4627 West 105<sup>th</sup> Way  
Westminster, CO 80031

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**68TH ANNUAL CASBO CONFERENCE & EXHIBITS  
MEMBER INFORMATION PACKET**



*“Embracing Change and Transformation”*

***68th ANNUAL CONFERENCE***

***May 19-21, 2021***

Program Agenda and Registration Information Enclosed

Register by May 15, 2021