Join us in Palm Springs!

CASBO Palm Springs

MARCH 29 – APRIL 1, 2020

Learn. Inspire. Lead.

Annual Conference & California School Business Expo
As educators, we often encourage students to be lifelong learners. Now’s the time to apply that sage advice to ourselves! After all, school business is constantly changing, and the best way to stay apprised and at our best is to continue our own learning.

You can do that, and more, at the CASBO 2020 Annual Conference & California School Business Expo, March 29- April 1 in Palm Springs. This is where you’ll find hundreds of ways to learn alongside colleagues, identify how to inspire your team post-conference and dive deep into how to lead your local education agency into a bright future.

CASBO 2020 features presentations from a carefully curated list of keynote speakers, nearly 175 professional learning sessions, and dozens of opportunities to connect with peers and thought leaders in school business.

Thanks to a lifelong learning-focused program, you’ll hear from recognized education experts, soak up best practices developed by your school business colleagues and even have some time left over to attend creative networking events.

And you can do it all in the way that best suits you, from attending topical workshops and professional growth seminars to visiting partner-hosted events and networking mixers.

Plus, you won’t want to miss the California School Business Expo where more than 350 vendors will be on hand to share innovative education solutions and show you how they can improve the efficiency of your organization. As the largest school business expo of its kind, you can be sure you’ll find the product, service or program you’ve been looking for.

It’s all happening in Palm Springs, where you’ll be inspired by sunny weather, lots of outdoor activities, mid-century modern architecture and a renowned art scene.

Join us in Palm Springs in 2020. Register today and commit to lifelong learning at the premier event for school business leaders!

A Message From CASBO’s President

One thing’s for sure in the ever-changing business of schools – we must commit to being lifelong learners in order to succeed and thrive.

After all, budgets change. Mandates change. Needs change. Our students change. All requiring us to do three things: Learn. Inspire. Lead.

Fortunately, those are the three areas the CASBO 2020 Annual Conference & California School Business Expo in Palm Springs will target.

You’ll learn alongside your school business colleagues during approximately 175 workshops led by the brightest minds and biggest thinkers in education.

You’ll be inspired, and inspire others, as you attend general sessions with thought-provoking keynote speakers and share the amazing ways you are transforming your schools as you network.

And you’ll lead – your peers and the next generation of school business leaders – as you model what lifelong learning looks like and develop new ideas for guiding your local education agency into a bright future.

These are just three of the hundreds of reasons why you need to be at CASBO 2020.

There are also the face-to-face connections, the chance to visit our more than 350 exhibitors in the expo hall, the opportunity to get advice on the next steps for your career and the fun social events.

Don’t put off registering for the annual event that targets the triad of efforts school business leaders must hone in on.

I look forward to seeing you in Palm Springs!

Molly Schlange
President
For Employee Members and Associate Members*

If registered on or before January 15, 2020: $810 – 3 Day
If registered after January 15, 2020: $910 – 3 Day
Single-day registration: $530 – 1 Day

*Non-associate and associate members who are 2020 exhibitors are eligible to attend any non-ticketed conference event at no additional cost. Non-associate members who are NOT 2020 exhibitors and who are eligible to purchase a CASBO associate membership may NOT attend conference in any capacity. For more information about associate membership, please visit casbo.org > Join > Associate

For Career Builder Members

If registered on or before January 15, 2020: $1,030 – 3 Day
If registered after January 15, 2020: $1,180 – 3 Day
Single-day registration: $580 – 1 Day

For Retiree Members

If registered on or before March 13, 2020: $200

For Non-Members

All registrations: $1,180 – 3 Day
Single-day registration: $630 – 1 Day

Registration Package Includes
- Attendance at all general sessions
- Approximately 175 workshop sessions
- Monday evening California School Business Expo Grand Opening Reception
- Monday night networking & social event
- Tuesday evening associate member-hosted hospitality suites
- Tuesday night Gala Cabaret & Casino

Ticketed Items
- Professional Council Luncheons: $60 each
- Third General Session Luncheon: FREE* with full early-bird registration

*If you do not register during the early-bird period, you must purchase a separate ticket for the Third General Session Luncheon.

Tickets for Professional Council Luncheons and the Third General Session Luncheon may be purchased separately. We strongly recommend that you obtain your tickets in advance as onsite purchase of tickets for these events is limited and based on availability.

Important Dates

January 15, 2020: Early-bird registration deadline
March 13, 2020: Registration deadline
March 13, 2020: Cancellation deadline

After March 13, 2020, only onsite registration is available and includes increased fees as follows:

- $1,180 for full conference attendance for members, non-members and retired members.
- $200 for full conference attendance for non-member and non-associate members.
- $1,030 for full conference attendance for non-member, associate member and non-associate members.
- $910 for full conference attendance for non-member, associate member and non-associate members.
- $810 for full conference attendance for non-member, associate member and non-associate members.
- $580 for single-day registration.

Onsite Registration

If you miss both the January 15 early-bird registration deadline and the regular March 13 registration deadline, you may still attend.

Register onsite at the Palm Springs Convention Center, but remember that increased fees will apply, and space may be limited.

Onsite registration must be accompanied by payment via any of the methods described below.

Please Read – Important Information and Helpful Hints for Registering

Guests
- You may register a guest at no additional charge if eligible.
- Ineligible guests include anyone (even a spouse of a member) who is eligible to purchase a CASBO membership.

Confirmations
- For any registrations other than late/onsite registrations, CASBO will send you an email confirming registration fees and any additional ticketed items purchased. Later, we’ll send your unique attendee QR code required for check-in.
- NEW THIS YEAR: You will receive hotel reservation information in your registration confirmation email (CASBO members and non-members); or from our exhibit manager, Laura Bohannon (CASBO exhibitors).
- You must bring your printed confirmation email with you or have it available on your mobile device when you check in at registration.

Payment Methods and Returns/Refusals
- All invoices are due and payable 30 days from date of registration. CASBO accepts the following forms of payment: checks; money orders; and Visa, MasterCard, Discover and American Express credit cards. We regret that we are unable to accept cash payments of any kind.
- You must make your check or money order payable to CASBO and mail it to CASBO’s office (faxed copies will not be accepted). If payment is returned for insufficient funds, CASBO will charge you a $25 fee.
- CASBO will not process registration on credit cards declined by the bank, and you will be notified of the problem.
- Purchase orders (PO’s) must reference your invoice number(s) and be emailed to purchaseorders@casbo.org. If an invoice number is not available, you must provide registrant first and last name(s), along with the event name and date. CASBO will not recognize or accept a PO as a request for registration; the registrant (or registrant’s agent) is responsible for completing registration for this event.

Registration Changes
- Cancellations: Requests must be in writing and will require a $150 fee for each cancellation. To waive the cancellation fee, a registrant may transfer his or her registration to another individual. Submit your cancellation or transfer request to cancel@casbo.org no later than 5:00 p.m. on March 13, 2020, to avoid triggering the no-show clause (below). If you cancel or transfer after this date, the no-show clause will apply.
- No-Shows: Full registration fees will be charged for any registrant who does not show up on the Annual Conference start date, and who has not requested a registration change as set forth above. If the registration fee has already been paid, CASBO will not refund the fee. If the registration fee is due and payable, CASBO will enforce full payment.
- CASBO reserves the right to cancel Annual Conference in case of a catastrophic natural occurrence, such as earthquake, flood, fire, etc. If CASBO cancels Annual Conference due to such an event occurring in nature, it will refund previously paid registration fees to registrants or, in the case of unpaid registration fees, will not enforce full payment.

Returning in 2020! ExpressPass* Self-Service Check-In For Pre-Registered Attendees

Skip the long lines this year! Visit our self-service kiosk to check into conference and print your badge & event tickets automatically!

If you have any questions or concerns about online registration, please call us at (916) 447-3783.

PLEASE NOTE: This year, Annual Conference will be held Sunday through Wednesday, not Wednesday through Saturday, as in years past.

Attendees must be paid members prior to registration to enjoy member discounts. Before you register, join or renew on our website at casbo.org > Join.
Hotel Reservation Information

CASBO has contracted with certain hotels that will provide conference attendees with a discount rate. CASBO member and non-member registrants and CASBO exhibitors will be able to reserve hotel rooms as follows:

- CASBO member and non-member registrants will receive hotel information in their registration confirmation emails. This hotel information will include hotel reservation links to the contracted hotels.
- CASBO exhibitors will receive hotel information directly from Laura Bohannon, our exhibit manager, after booth reservation and payment are made. This hotel information will include hotel reservation links to the contracted hotels.

If you require hotel accommodations, please contact a hotel provided in your specific communication by calling the hotel directly at the number listed therein or by clicking on the link provided.

When reserving your room, ask for the CASBO discount room rate; and be sure to note the reservation deadlines provided.

In some cases, certain nights may already be sold out (especially the first night of your stay). During your search, if the date range you select returns a “no lodging available” result, try adjusting your dates on either end of your range.

If you are unable to get the lodgings you want at a CASBO-contracted hotel, there are others available in the area. For alternate accommodations, please consult your travel agent or use an online search engine such as hotels.com or kayak.com.

WATCH FOR UPDATES!
CASBO will provide ongoing conference updates. Check your inbox and our website at casbo.org.

Welcome, First-Time Attendees

We’re Glad You’re Joining Us in Palm Springs!

Again this year, we’ve created a special meeting spot just for our conference first-timers: the Epicenter, located at the Palm Springs Convention Center.

Come and check out the CASBO 2020 Annual Conference & California School Business Expo and meet other newbies. Stop by for a chance to network and meet staff members and volunteers who are eager to answer questions and provide guidance for navigating your first conference.

Pop by the Epicenter first thing in the morning to meet up and chat with other first-time attendees and some regulars before heading to morning workshops or the general sessions. Our staff and volunteers want to help you navigate conference as easily as possible; we’ll frequent this lounge throughout the day to answer your questions and help you map out your day!

Who Should Attend Annual Conference?

Chief business officials
Department directors
Auditors and controllers
Risk managers and safety officers
Accountants and budget managers
Printing managers and staff
School board members
District attorneys and negotiators
Maintenance and operations staff
Community college staff
Confidential employees
Personnel officers and staff
Lobbyist and public information staff
Webmasters and web designers

Superintendents
Department supervisors
Purchasing and procurement agents and staff
Police chiefs and security personnel
Special education staff
Nutritionists and food service staff
Business clerical staff
Facility planners and engineers
Transportation officials
Charter school staff
School principals and ASB advisors
MIS and technology staff
Payroll professionals
Anyone involved in school business!

WANT A MEMBER DISCOUNT?
Remember to join or renew before registering. Visit our website at casbo.org > Join.

Professional Development Opportunities

CASBO Offers an Abundance of Opportunities

California School Business Expo
This year’s expo will take place at the Palm Springs Convention Center. Our Grand Opening Reception on Monday, March 30, 2020, will include approximately 350 exhibitors who will offer the latest products, services and information in their respective specialties and areas, as well as a variety of food and beverages, all compliments of the exhibiting companies.

Professional networking opportunities will be expanded on the exhibit floor on Monday, March 30, from 5:30 p.m. – 7:30 p.m., and again on Tuesday, March 31, from 10:00 a.m. – 4:00 p.m. The expo will be closed for lunch from 12:15 p.m. – 1:30 p.m. We will have designated expo hours again this year on Tuesday, March 31, from 1:45 p.m. – 3:45 p.m., during which time no workshops will be in session.

Career-Focus Lunch
RETURNING FOR A FOURTH YEAR!
Back by popular demand is our career-focus lunch. Join us at the Renaissance Palm Springs Hotel on Tuesday, March 31, and make plans to grow your career with an informative lunch session that also provides a great way to network with your colleagues at conference this year! As this booklet goes to press, we’re still developing the topics, so be sure to watch your inbox and check our website for updates.

Continuing Education Units/Certification Renewal
All sessions at Annual Conference qualify for continuing education units (CEUs), which are expressed in measurements of one (1) unit per hour of instruction. (Workshops count as 0.75 hour; general sessions count as 1.5 hours.) Annual Conference CEUs may be used to renew a CASBO certification. To verify CEUs received per each session attended, please submit with your renewal application the self-certification verification form (available at casbo.org > Resources > Forms/Applications).

General Sessions
Our general session speakers were carefully chosen to offer CASBO members a blend of current trends, inspiration and motivation to help you in your daily lives, both in and out of the office. Please refer to pages 14-16 for complete descriptions of the general sessions, which will take place at the Palm Springs Convention Center. The First and Second General Sessions begin at 9:15 a.m. on Monday, March 30, and Tuesday, March 31, respectively. This year, CASBO continues its tradition of the Third General Session Luncheon, featuring a panel discussion on “The Future of California’s Education Economy – The 2020 CASBO Economic Summit.” This is a ticketed function that is included in the price of your early-bird registration. Attendees who do not register prior to the early-bird deadline must purchase a separate ticket.

Professional Council Workshops
Each year, CASBO solicits proposals for new and innovative workshops from our members with the goal of adding value to conference and providing attendees with additional opportunities in key subject areas. Enhancing attendees’ professional skills is the key initiative behind expanding the depth and breadth of the wonderful programs planned by our professional councils. This year, they have assembled hundreds of educational sessions spanning all 15 of our school business disciplines. All registration packages include attendance at your choice of sessions being held at the Palm Springs Convention Center. Complete workshop descriptions begin on page 19.

Partner-Presented School Business Workshops
BACK BY POPULAR DEMAND!
CASBO has 36 year-round partners who play a critical role within our network, building strong, lasting business partnerships with California’s K-14 decision makers. These companies are committed to providing “best practices” solutions to the challenges you face in school business, and they are once again stepping forward to serve as your “thought leaders” at conference this year and share valuable information to enhance your professional development. Look for workshop descriptions under the category “School Business” which appear later in this registration booklet.

Professional Council Lunches
This year, CASBO’s professional council members have planned several lunch sessions to be held at the Renaissance Palm Springs. These lunch sessions will cover many school business disciplines, including chief business officials, child nutrition, human resources, payroll, purchasing, retiree and risk management.

Professional Council Workshops
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Targeted Education Sessions
RETURNING FOR A FOURTH YEAR!
Instead of the usual last-day afternoon workshops, we’re again offering you two exciting “mini” general sessions. As this booklet goes to press, we’re still developing the topics, so be sure to watch your inbox and check our website for updates.

Tax Deduction and Expenses
An income tax deduction may be allowed for education expenses (including registration fees, travel, meals and lodging) undertaken to maintain and improve your professional skills. (Treas. Reg. 1.162-5, supra.) Check with your personal tax advisor for confirmation.

PLEASE NOTE:
This year, Annual Conference will be held Sunday through Wednesday, not Wednesday through Saturday, as in years past.

CASBO 2020 Annual Conference & California School Business Expo
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Details</th>
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| SUNDAY, MARCH 29, 2020 | 6:30 a.m. - 12:00 p.m. Associate Member Committee Scholarship  
2:30 p.m. - 4:30 p.m. Board of Directors Meeting  
6:00 p.m. - 9:00 p.m. President’s Leadership Recognition Dinner – by invitation only |
| MONDAY, MARCH 30, 2020 | 8:00 a.m. - 9:00 a.m. Professional Council Workshops  
9:15 a.m. - 10:45 a.m. First General Session – Presentation of Sky Joyner Award  
11:00 a.m. - 12:00 p.m. Professional Council Workshops  
12:15 p.m. - 1:30 p.m. Lunch on Your Own or Professional Council Lunches – ticket required  
1:45 p.m. - 5:15 p.m. Professional Council Workshops  
5:30 p.m. - 7:30 p.m. Grand Opening Reception – California School Business Expo*  
8:00 p.m. - 11:00 p.m. Networking & Social Event* |
| TUESDAY, MARCH 31, 2020 | 8:00 a.m. - 9:00 a.m. Professional Council Workshops  
9:15 a.m. - 10:45 a.m. Second General Session  
10:00 a.m. - 12:00 p.m. California School Business Expo  
12:15 p.m. - 1:30 p.m. Lunch on Your Own or Professional Council Lunches – ticket required  
1:45 p.m. - 3:45 p.m. Designated Expo Time – no workshops in session  
4:00 p.m. - 5:00 p.m. Professional Council Workshops  
5:30 p.m. - 7:30 p.m. Associate Member-Hosted Hospitality Suites*  
8:00 p.m. - 12:00 a.m. Gala Cabaret & Casino Night* |
| WEDNESDAY, APRIL 1, 2020 | 8:00 a.m. - 11:30 a.m. Professional Council Workshops  
12:00 p.m. - 2:00 p.m. Third General Session Luncheon – ticket required  
2:15 p.m. - 3:15 p.m. Targeted Education Session  
2:15 p.m. - 3:15 p.m. Targeted Education Session |

*Please note: Attendees must be 21 years of age or older to participate in these events.
Annual Conference Committee and Volunteers

The CASBO 2020 Annual Conference & California School Business Expo is member-driven and directed. Every workshop, general session, networking activity and event has been coordinated and collaborated on by our member leaders.

The 2020 Annual Conference Committee, in collaboration with our professional councils and associate members, is responsible for creating and coordinating the approximately 175 workshops presented at conference. These member leaders strive to develop workshops that are member-focused, timely and relevant for school business officials. Work begins more than a year in advance of conference to secure outstanding presenters, develop programs and manage logistics.

The 2020 Annual Conference Volunteer Task Force provides the driving motivation and focus for member services and networking events at conference. These member leaders recruit volunteers to assist at registration and the expo, provide support services to workshop presenters, coordinate student entertainment, assist with general sessions and foster conference attendees a variety of social networking opportunities. Our volunteers support the member focus and spend countless hours behind the scenes making arrangements for a successful conference.

Annual Conference Committee

CHAIR
Leeann Errotabere, Clovis USD

ASSISTANT CHAIR
Chris Davis, Arvin Union SD

IMMEDIATE PAST CHAIR
Nita Lorenzen, Retired

ACCOUNTING PROFESSIONAL COUNCIL CHAIR
Jennifer Miller, Moreno Valley USD

CBO PROFESSIONAL COUNCIL CHAIR
Diane Deshler, Lafayette SD

CHILD NUTRITION PROFESSIONAL COUNCIL CHAIR
Andrew Soliz, San Mateo-Foster City SD

FACILITIES PROFESSIONAL COUNCIL CHAIR
Sara Slater, Long Beach USD

FINANCIAL SERVICES PROFESSIONAL COUNCIL CHAIR
Ana Machado, Escondido USD

HUMAN RESOURCES PROFESSIONAL COUNCIL CHAIR
Debra Marquez, California University of Science & Medicine

MAINTENANCE & OPERATIONS PROFESSIONAL COUNCIL CHAIR
Armando Orozco, Twin Rivers USD

PAYROLL PROFESSIONAL COUNCIL CHAIR
Mike Stribling, Riverside COE

PURCHASING PROFESSIONAL COUNCIL CHAIR
Genevieve Gilmore, Ventura USD

RETIREE PROFESSIONAL COUNCIL CHAIR
LaFaye Platter, Ed.D., Retired

RISK MANAGEMENT PROFESSIONAL COUNCIL CHAIR
Kurt Walling, Shasta-Trinity Schools Insurance Group

TECHNOLOGY PROFESSIONAL COUNCIL CHAIR
DeWayne Cossey, Vista USD

TRANSPORTATION PROFESSIONAL COUNCIL CHAIR
Pamela McDonald, Orange USD

ASSOCIATE MEMBER COMMITTEE REPRESENTATIVE
Lisa Ryker, WLC Architects, Inc.

CASBO CEO & EXECUTIVE DIRECTOR
Molly McGee Hewitt, CAE

CASBO STAFF
Lori Smith

Networking Opportunities

Annual Conference Volunteer Task Force

CHAIR
Renee Hendrick, Orange County DOE

ASSISTANT CHAIR
Sharon Hernandez, Orange County DOE

TASK FORCE MEMBERS
Rebecca Aboyta, Palm Springs USD
Patricia Bannuelos, Orange County DOE
Kelly Burks, Vacaville USD
Jayne Christakos, San Bernardino City USD
Elvia Galicia, Los Alamitos USD
Katie Hyton, San Bernardino County Supt. of Schools
Susana Lopez, Alvord USD
Matt Phillips, School Services of California, Inc.

CASBO PRESIDENT 2019-20
Molly Schlange, University Preparatory School

CASBO CEO & EXECUTIVE DIRECTOR
Molly McGee Hewitt, CAE

CASBO STAFF
Lori Smith

Conference Networking*

CASBO continues its tradition of offering conference attendees outstanding social and networking opportunities, along with quality professional development. The CASBO 2020 Annual Conference & California School Business Expo and our social events provide multiple opportunities to network with your colleagues and meet our CASBO partners and associate members!

Expo Grand Opening Reception
Join your colleagues and friends as we celebrate the grand opening of our California School Business Expo on Monday, March 30, from 5:30 p.m. — 7:30 p.m. in the Palm Springs Convention Center. Visit our vendors, enjoy our reception, and enter to win a variety of great prizes and gifts. (Please note: badges are required in the exhibit hall.)

Networking & Social Event
Join us for a night of dancing and socializing on Monday, March 30, from 8:00 p.m. — 11:00 p.m. at the Renaissance Palm Springs Hotel. The evening’s entertainment includes arcade games, as well as a DJ-led karaoke session. Come cheer on your section colleagues, play some games and dance the night away with your friends!

Associate Member-Hosted Hospitality Suites
On Tuesday, March 31, from 5:30 p.m. — 7:30 p.m., join us at the Hilton Palm Springs Hotel in the associate member-hosted hospitality suites, a longtime CASBO tradition sponsored by our partners and associate members. Visit a variety of suites where food, beverages and entertainment await.

Gala Cabaret & Casino Night
Join us immediately following the hospitality suites on Tuesday evening for our crowd-pleasing Gala Cabaret & Casino Night. This nighttime extravaganza takes place in the California Ballroom of the Renaissance Palm Springs Hotel. CASBO members and guests can enjoy gaming tables and dancing from 8:00 p.m. — 12:00 a.m.

*Please note: Attendees must be 21 years of age or older to participate in these events.
General Session Speakers

First General Session
Monday, March 30, 2020

Jeffrey D. McCausland, Ph.D., is the founder and chief executive officer of Diamond6 Leadership & Strategy, LLC. Since 2000, both domestic and internationally, Dr. McCausland has conducted numerous executive leadership development workshops and consulted for leaders in public education, U.S. government institutions, non-profit organizations and corporations.

Dr. McCausland is a visiting professor of international security at Dickinson College, in Carlisle, Pennsylvania; serves as a senior fellow at the Stockdale Center for Ethical Leadership at the U.S. Naval Academy in Annapolis, Maryland, and the Carnegie Council for Ethics in International Affairs in New York, New York; and is also an adjunct fellow at both CSIS and RAND Corporation in Washington, D.C.

A retired U.S. Army colonel and former dean of academics at the U.S. Army War College in Carlisle, Pennsylvania, he also served as a visiting professor of international law and diplomacy at the Penn State Dickinson School of Law and Graduate School of International Affairs in Carlisle, Pennsylvania.

During his military career Dr. McCausland served in a variety of command and staff positions both in the U.S. and Europe during the Kosovo crisis and Operations Desert Shield and Storm.

Dr. McCausland has both published and lectured broadly on military affairs, European security issues, the Gulf War, and leadership throughout the U.S. and more than 30 countries. He has been a national security consultant for CBS Television and Radio since 2003. Consequently, he has been a frequent commentator on ongoing conflicts, as well as other stories that focus on national security. He has also appeared on or in, and been interviewed by, news stations and publications such as MSNBC, CSPAN, CNN, the CBS Evening News, The New York Times, The Wall Street Journal and The Boston Globe.

Dr. McCausland is a graduate of the U.S. Military Academy at West Point, New York; the U.S. Army Airborne and Ranger Schools, at Ft. Benning, Georgia; and the Command and General Staff College at Ft. Leavenworth, Kansas. He holds both a master’s and doctorate of philosophy degrees from the Fletcher School of Law and Diplomacy at Tufts University in Boston, Massachusetts; and has received the awards of Distinguished Visiting Professor of Research and Minerva Chairholder from the U.S. Army War College (2010-2015); and the Class of 1961 Chair of Leadership from the U.S. Naval Academy (2002-2004).

Second General Session
Tuesday, March 31, 2020

Kelly Swanson is an award-winning storyteller, comedian, motivational speaker and creator of “Prides Hollow,” where her wacky cast of southern characters have charmed audiences from coast to coast for over 20 years.

Ms. Swanson was a featured entertainer for Holland America Cruise Lines and has been called “one of North Carolina’s funniest women” by Our State Magazine. She speaks in over 70 venues a year, leaving a trail of happy customers and fans.

With wacky wit, powerful stories and a message you can take back to work and use on Monday, Ms. Swanson creates unforgettable, hilarious and inspiring motivational keynote programs that help you master the art and business of story to have more impact and influence in your life and in your work … because if you can change your story, you can change your life. If you can change your story, you can change your business. If you can change your story, you can change your world!

Ms. Swanson holds a bachelor’s degree in English from Appalachian State University, in Boone, North Carolina; and has won awards from the Film Advisory Board of Hollywood and the National Association of Parenting Publications. Her work has been featured extensively in both online and print publications; and she is the author of “Who Hijacked My Fairy Tale,” “The Land of If Only,” “The Gutsy Girls Pocket Guide to Public Speaking,” and “You. Your Story. Make An Impact.”
NOW IN ITS SIXTH YEAR!
Third General Session Luncheon
Wednesday, April 1, 2020

The Future of California’s Educational Economy – The 2020 CASBO Economic Summit
In an effort to prepare for and embrace change in our industry that will occur as a result of our state’s economy, returning this year is our noted CASBO Economic Summit, a panel session covering “The Future of California’s Educational Economy.”

Created to provide members with essential information on the current and future economic, demographic and workforce factors that affect California’s public schools, this year’s summit again will feature a panel of renowned economists, as well as demographic and workforce experts, who will offer their forecasts for the coming year.

Not offered to school business officials anywhere else in California, this data-driven and expert-directed program provides you with key information on housing trends, the state and national economic forecast, and demographic information on population trends and changes in the workplace. It’s a “must attend” for all CASBO members.

Plan more effectively for your future and that of your local education agency – join us for our 2020 Economic Summit in Palm Springs and get a first glimpse of our 2020-21 forecast AND find out how accurate last year’s predictions turned out to be!

Panel Members
Kevin Gordon, President and Partner, Capitol Advisors Group, LLC
Robert Kleinhenz, Ph.D., Economist & Executive Director of Research, Beacon Economics, LLC
Fiona Ma, CPA, California State Treasurer
Molly McGee Hewitt, CAE, CEO & Executive Director, CASBO
Robert Miyashiro, Vice President, School Services of California, Inc.
Betty T. Yee, California State Controller

This is a partial list of sponsors as of the date of registration booklet publication. Additional sponsorships are available for this and other CASBO events. For details, please contact Tricia Meister, Partnerships & Sponsorships Manager, at (916) 504-2253 or tmeister@casbo.org.
2020 exhibitor representatives are eligible to attend any non-ticketed conference event. Plus, if you join us as an associate member, you'll receive a substantial discount on your booth fees! Not yet an exhibitor? Don’t delay – our expo typically sells out well in advance of conference. Visit casbo.org/AC2020 today!
Monday Workshops

CBO

SESSION ID: CB013
LOCATION: Moscone C
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Trust at the Negotiations Table

"Full funding" of the Local Control Funding Formula was reached two years ahead of expectations, but the statewide sentiment, supported by data, is that funding for schools is still woefully inadequate. In spite of insufficient funding, there is still a responsibility to bargain with employees in an effort to attract and retain the brightest prospects. The future portends a slowdown in new revenues, and strong relationships with your bargaining partners will allow you to more effectively maximize your resources. In this workshop, we'll discuss the importance of these relationships and provide real-world examples for improving them.

SPEAKER: Tina Douglas, Associate Superintendent, Business Services, San Diego Unified HSD
SPEAKER: Robert A. Haley Ed.D., Superintendent, San Diego Unified HSD

SESSION ID: CB014
LOCATION: Moscone C
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: The Tipping Point of Cost Containment

After several years of increased revenues, many districts implemented successful programs and hired staff that provided great services to students. However, with the changes in economic conditions, declining enrollment and reduction in state funding, we have to revisit efficiencies, reductions and containment to avoid severe cuts in the next few years. In this interactive workshop, we'll discuss cost containment ideas and practices, with a focus on areas of concern and opportunities for districts to prepare for a soft landing by thinking about how to streamline operations and save money without sacrificing quality instruction.

SPEAKER: Tina Douglas, Associate Superintendent, Business Services, San Diego Unified HSD
SPEAKER: Ruben P. Frutos, Associate Superintendent, Business Services, Paramount USD

SESSION ID: CB015
LOCATION: Moscone C
TIME: Monday, 4:15 p.m. - 5:15 p.m.
TITLE: Everything They Don't Tell You When They Put You in Charge of District Risk Management

For many CBOs, responsibility for a district’s insurance coverage often falls under “other duties as assigned,” with little to no training or explanation about what that coverage entails or how to best manage it. While some districts do purchase their coverage directly from commercial insurance carriers, most participate in some kind of risk-sharing joint powers authority (JPRA) for coverage; however, they often don’t have a clear picture of what JPRA membership and coverage really entail. In this workshop, we’ll explore the basics behind both of these options and the differences between them, as well as how to tailor your insurance program to best suit your district’s needs and appetite for risk. We’ll also discuss program placements, renewals, broker relationships, and what role your district’s loss data and actuarial studies play in this process. You’ll hear from CBOs who have been there and done that at both the district and JPRA levels and learn what active participation in your JPRA is important for your organization and how it can provide you with the knowledge necessary to manage this important piece of district business.

SPEAKER: Phil Brown, CPA, Chief Excess Liability Fund
SPEAKER: David Flores, CBO, Shasta Unified HSD
SPEAKER: Jerry Johnson, Risk Manager, Contra Costa CBO

Charter Schools / Leadership / Special Education

SESSION ID: SE10
LOCATION: Smoketree D
TIME: Monday, 6:00 a.m. - 9:00 a.m.
TITLE: Special Education and Maintenance of Effort

Maintenance of effort (MOE) is a critical component of special education costs and budgeting. However, many special education directors and business support staff are not fully comfortable with the who, what, when, why and how of MOE monitoring and adjustment. In this workshop, we’ll provide you with a concise overview of MOE in language that is appropriate to both regular and special education staff. Additionally, we’ll share specific recommendations, activities and processes for documenting items that can affect MOE in both positive and negative directions. You'll walk away with a firm understanding of MOE and be able to apply strategies and tools upon returning to your district to ensure MOE is met and contained where possible.

SPEAKER: Debbie Fry, Associate Vice-President, School Services of California, Inc.
SPEAKER: Aquaintia Pelletier, Associate Superintendent, San Mateo County SELPA

Child Nutrition

SESSION ID: CN10
LOCATION: Moscone G
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Surviving the CASBO Annual Conference: Join the Child Nutrition Tribe

For the past two years, the leaders of the CASBO Child Nutrition Professional Council (PC) have held a question-and-answer session at the end of Annual Conference to allow attendees to get answers to any remaining questions they have. This year, we want to provide you with a preview of this year’s child nutrition workshops so you can get the most out of conference. In this workshop, we’ll introduce you to the child nutrition workshops being presented, as well as discuss your own burning topics within your district. Our hope is that you will leave with a great pre-conference overview, as well as the opportunity to get to know other PC members prior to the start of conference.

PRESIDER: Andrew Solt, Director of Child Nutrition Services, San Mateo-Foster City SD
SPEAKER: Stephanie Bruce, Director, Nutrition Services, Palm Springs USD
SPEAKER: Sepon Istyapang, SNS, Student Nutrition Manager, Irland USD
SPEAKER: Jennifer Marrone, Food & Nutrition Services Business Manager, San Diego USD
SPEAKER: Alicia Mendez, Director, Food Services, Centrella Valley Unified HSD
SPEAKER: Rachel Ols, Director of Child Nutrition Services, Live Oak SD
SPEAKER: Kari Pina, Director of Food Services, Whashington USD
SPEAKER: Robert Quanstrom, Director of Food Services, Val Verde USD

SESSION ID: CN11
LOCATION: Moscone G
TIME: Monday, 11:00 a.m. - 12:00 a.m.
TITLE: Hungry for Change: A Food Policy Discussion

Every year, legislative actions affect local education agencies’ funding levels and child-nutrition operational requirements, making awareness of current legislative priorities and policies, as well as the importance of your role at the state and local levels, paramount. In this workshop, we’ll discuss the key child-nutrition issues being considered in the 2020 legislative session and how CASBO is working to advocate for policies that improve our food systems.

PRESIDER: Andrew Solt, Director of Child Nutrition Services, San Mateo-Foster City SD
SPEAKER: Sara Bachez, Assistant Executive Director, Governmental Relations, CASBO
SPEAKER: Elizabeth Esquivel, Senior Director, Policy & Governance, Governmental Relations, CASBO
SPEAKER: Jamie Phillips, SNS, Director of Child Nutrition Services, Vista USD
Monday Workshops

Child Nutrition

SESSION ID: CN1J
LOCATION: Mesquite G
TIME: Monday, 12:15 p.m. - 1:30 p.m.
TITLE: Child Nutrition Professional Council Lunch – Connecting the Cafeteria to the Classroom: Multiplying the Message About Healthy Food Habits
How do we start to grow healthy food habits in students BEFORE they come through the meal line? By working as a team with school sites, the child nutrition department can help improve student interest in healthy foods by starting with early influences on student learning. Linking classrooms, cafeterias and other school sites - as well as recess, after-school programs and parent meetings - to the child nutrition department can increase students’ exposure to common messages about healthy food habits.

PRESIDER: Andrew Soliz, Director of Child Nutrition Services, San Mateo-Foster City SD

SPEAKER: Linda Liu, Director of Food and Nutrition Services, Pajaro Valley USD

SESSION ID: CN13
LOCATION: Mesquite G
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Let's Go Food Shopping: Procurement and Selection of Vendors
The procurement methodology required by federal regulations for the national school lunch program has now truly aligned with the way the California Department of Education interpreted the requirements. Since the amendment to the language in Public Contract Code Section 20111(c), school districts have grappled with how to modify their procurement documents and processes to meet state and federal guidelines and requirements. In this workshop, we’ll walk through real-life examples on how to determine the appropriate procurement process for specific items and supplies and how to develop an evaluation process to best meet district needs. This workshop will especially benefit districts that want to develop more comprehensive documentation for point-of-sale (POS) systems. We’ll also cover bidding a new system or getting price quotes to continue with a current system; developing minimal requirements for responsive and responsible bidders; cloud-based vs. district-based student information servers; length of contract and pricing; California Student Privacy Agreement; data breach insurance; awarding multiple software modules; vendor proprietary equipment; and additional add-ons after the bid is awarded. Attendees will leave with a better understanding about creating bidding and pricing procedures for their POS systems.

PRESIDER: Rachel Otis, Director of Child Nutrition Services, Live Oak SD (Diablo Delta Counties)

SPEAKER: Robert Quaumont, Director of Food Services, Val Verde USD

SITECAST: Did you know that CASBO offers an annual membership discount?
WANT A MEMBER DISCOUNT? Remember to join or renew before registering. Visit our website at casbo.org/join.

Facilities

SESSION ID: FAC10
LOCATION: Mesquite H
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: RFPs & RFQs: Are You Getting the Best Results?
In this “how to” workshop, we’ll discuss the thought process of developing a request for proposal/request for qualifications as viewed through the eyes of the respondent, and as well as the eyes of the raters who will review it before saying it is good to go. Attendees will be provided real-world examples that illustrate the thought behind the words.

PRESIDER: Sharon Clay, Director of Purchasing & Logistics, Cajon Valley Unified SD

SESSION ID: FAC11
LOCATION: Mesquite H
TIME: Monday, 11:00 a.m. - 12:00 p.m.
TITLE: Navigating Labor Market Issues in California School Construction: What You Need to Know About Skilled and Labor Workforces
In this workshop, we’ll conduct a comprehensive overview of labor issues in the school construction market, including a review of worker shortages, skilled and trained workforce requirements, apprenticeship and journeyman requests, and labor compliance. We’ll also discuss reporting and documentation for the various aspects of this issue, as well as best practices from the perspective of owners and contractors.

SPEAKER: Matt Gates, Senior Construction Manager, Erikson-Hall Construction Co.

SPEAKER: Scott Hammond, Director of Public Relations/Governmental Affairs, Erikson-Hall Construction Co.

SPEAKER: Carey Upton, CDO, Santa Monica-Malibu USD

SESSION ID: FAC15
LOCATION: Mesquite H
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Proposition 51 Audits: What’s Really in the Audit Guide?
How do we get through the new Proposition 51 audit guide? How else but a checklist? In this workshop, we’ll provide best practices to survive the new audit guide while exploring ways to set up your document retention for both bid evaluation and project management. New that we’ve had over two years to understand the process, we’ll also explain what we have learned, what feedback we are getting from people who have gone through an audit, and what the Office of Public School Construction has learned.

SPEAKER: Lottie Boggs, CEO, Coffs Technologies

SPEAKER: Tina Henton, CPA, Principal, Coffs Lassman Allan LLP

SPEAKER: Sara Slater, Assistant Director, Facilities Accounting, Long Beach USD

SPEAKER: Royce Townsend, Partner, Edds Realty LLP

Financial Services

SESSION ID: FIN10
LOCATION: Mesquite E
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Basic Internal Controls for Fiscal Directors
Whether you handle finances in a small or large district, you cannot have eyes everywhere or be in multiple places at the same time. How do you ensure your department is running smoothly, achieving its potential and minimizing fraud risk? There is a lot more to running a finance department than just numbers! Join us for this workshop in which we’ll present best practices for a practical approach to engaging your employees while maintaining a tight hold on your local education agency’s finances. We’ll show you how you can avoid financial department drama by empowering your employees and creating that safe space where dedication and communication are the drivers to fiscal department success.

SPEAKER: Ana Machado, Director, Fiscal Services, Escondido Union SD

SPEAKER: TBD
Monday Workshops

Financial Services

SESSION ID: FIN11
LOCATION: Mesquite E
TIME: Monday, 11:00 a.m. - 12:00 p.m.
TITLE: Past-Proposition 39: Offsetting General Fund Costs
State budget writers and policy experts are busy developing new avenues for public schools to continue leading the way in innovative-energy conservation and independence. The successor strategies to Proposition 39 funding are underway as multiple forms of funding options become available with the potential for significant school district general fund savings. In this workshop, we’ll explore innovative ways to address high-energy costs and discuss recent efforts to address dramatic rate increases. We’ll also provide solutions aimed at reducing energy use and generating energy at lower costs and review which issues of state- and utility-provided funding are allowed. The session will also feature a Q&A period to allow attendees to ask questions specific to their district or county.

PRESENTER: Ana Machado, Director, Fiscal Services, Escondido Union SD
SPEAKER: Michael Coleman, Superintendent, Fairfield USD
SPEAKER: Bruce Dickinson, Director of Education, SunPower
SPEAKER: Kevin Gardner, President and Partner, Capital Advisors Group, LLC
SPEAKER: Tom Jackson, Vice President, Climate

SESSION ID: FIN13
LOCATION: Mesquite E
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Fiscal Lens in Focus: The Other Funds
What about “The Other Governmental Funds?” What do we need to know about them? All local education agencies (LEAs) focus on the general fund most of the time, as it is the operating fund of the LEA. However, we seldom hear about other funds, which also have information needs; special regulations; reporting and compliance requirements; and contractual provisions, restrictions and/or limitations. In this workshop, we’ll discuss different types of funds used by LEAs, funding sources, allowable expenditures, and rules and regulations. We’ll also discuss how they correlate with the general fund and provide you with tips on how to avoid unnecessary expenses and pitfalls in audits. Recommended for new fiscal leaders who would like an overall understanding of all LEA funds that will enable them to ensure overall district fiscal solvency and demonstrate fiscal accountability.

PRESENTER: Jackie Benson, Director of Fiscal Services, Jurupa USD
SPEAKER: Kevin Brejnak, Administrator, Fiscal Intervention, Riverside CDE
SPEAKER: Joaquin Holguin, Fiscal Analyst II, Jurupa USD
SPEAKER: James Whittington, CPA (Executive Director, Riverside CDE

Human Resources

SESSION ID: HR10
LOCATION: Mesquite D
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Recruitment Strategies: Finding a Needle in a Haystack
In an extremely competitive job market where there is a growing shortage of qualified teachers and school employees, recruitment planning and strategy is necessary to successfully secure the best candidates. In this workshop, we’ll provide an overview of recruitment planning strategies and techniques help leaders, administrators and human resources professionals prepare for the competitive hiring and recruitment process. Recommended for leaders who are responsible for hiring, including hiring decisions, including supervisors, cabinet members, human resources staff, fiscal directors/budget officers, school site leaders and charter school officials.

PRESENTER: Marcus Wirovetz, Senior Director of Human Resources, Riverbank USD
SPEAKER: Sara Bachez, Assistant Executive Director, Governmental Relations, CTA
SPEAKER: Elizabeth Esquivel, Senior Director, Policy & Governance, Governmental Relations, CASBO

SESSION ID: HR11
LOCATION: Mesquite D
TIME: Monday, 11:00 a.m. - 12:00 p.m.
TITLE: CalSTRS & CalPERS 201: Hot Topics
California State Teachers’ Retirement System (CalSTRS) and California Public Employees’ Retirement System (CalPERS) issues can be complex and overwhelming. Districts are increasingly facing new questions regarding the ability to hire retirees, how to properly calculate schedules for hard-to-fill positions, and identifying best practices for getting potential retirement issues during negotiations. In this workshop, we’ll provide a deeper analysis of CalSTRS and CalPERS “hot topics” regularly confirmed by county officials of education and school districts with a focus on how to avoid common mistakes. We’ll also discuss hiring retirees, developing multiple salary schedules for hard-to-fill positions, retirement issues at the bargaining table, and school board members and retirement considerations. Recommended for anyone who leads a team and is responsible for hiring results in their business unit.

PRESENTER: Martin E. Mitchell, Director, Human Resources Operations, Oakland USD
SPEAKER: Jamie Castellani, Attorney, Leozano Smith

SESSION ID: HR12
LOCATION: Mesquite D
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Retaining Your Best Talent Through Financial Wellness
Teaching pays less than other professions that require the same level of education. Teachers are forced to save out-of-pocket spending, and lack of retirement understanding/readiness. In this workshop, we’ll address solutions districts can employ to increase educator retention as a method to combat administrator and teacher shortages, showing ways to positively address their financial challenges, such as student loan debt, not being pro-active, and lack of retirement understanding/readiness.

PRESENTER: Krista D’Agastina, Administrative Secretary, San Joaquin USD
SPEAKER: James Yale, Vice President, Horace Mann

SESSION ID: HR13
LOCATION: Mesquite D
TIME: Monday, 12:15 p.m. - 1:30 p.m.
TITLE: Joint HR & Retiree Professional Councils Lunch – 10 Ways to Use Emotional Intelligence for Self-Care
Emotions play a large part in everything we do. When our emotional quotient is low, we tend to make poor choices, often resulting in negative effects on our relationships, finances, ability to control weight and weight. In this joint human resources and retiree workshop, we’ll provide you with 10 simple ways to gain more control of your emotions, thoughts, actions and destiny.

PRESENTER: Debra L. Marquez, Human Resources Manager, California University of Science and Medicine
SPEAKER: A. Plain, Ph.D., Retired Deputy Superintendent, and Owner, LaFue Platte Powerful Innovation Solutions

SESSION ID: HR14
LOCATION: Mesquite D
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Stairway to Equity: Steps for Connecting Data to Improve Student Outcomes
Understanding where your undervisited student needs help can be a difficult task. Knowing how to help might feel impossible. Discovering the patterns in your data for successful students, and how this relates to your low-performing student groups, can be overwhelming without any direction. In this workshop, we’ll show you ways to link disparate data elements to gain actionable insights for improving student performance. We’ll also review how to use internal indicators to develop critical intervention that will support student success and provide you in the direction of other schools that are seeing success with their undervisited student groups. You’ll leave with an understanding of how data is integrated into superintendents, leaders of other LEAs, and future leaders of other LEAs that are seeing success with their undervisited student groups.

PRESENTER: Marcus Wirovetz, Senior Director of Human Resources, Riverbank USD
SPEAKER: Sara Bachez, Assistant Executive Director, Governmental Relations, CTA
SPEAKER: Elizabeth Esquivel, Senior Director, Policy & Governance, Governmental Relations, CASBO

Maintenance & Operations

SESSION ID: MO10
LOCATION: Mesquite F
TIME: Monday, 10:00 a.m. - 11:00 a.m.
TITLE: Customer Service 101: Skills to Enhance Your Custodial Department
In this interactive workshop, we’ll describe 15 skill sets that will not only enhance your custodial department, but also will motivate your cleaning staff. We’ll also help you develop practical and timely customer service goals.

PRESENTER: Perry Shimamoto, President, M2C

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Monday Workshops

Maintenance & Operations

SESSION ID: MO11
LOCATION: Mesquite F
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Hyphenological All There Is?

In this workshop, we’ll discuss how super-mixed residuals are the next evolution of on-site generation, as well as the effects of non-wiping reduction of asbestos trichophore.

SPEAKER: John P. Shanahan, President and CEO, Innovax, Inc.

SESSION ID: MO13
LOCATION: Mesquite F
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Flooring Care & Team Cleaning

Would you like to know how to do more with less time, less worry and fewer chemicals? In this workshop, we’ll explore flooring care and team-cleaning approaches to reduce labor time and increase longevity of flooring materials.

SPEAKER: Vickie Goudreau, Partner and Business Relations Officer, Innovation Commercial Flooring.

SPEAKER: Wayne Goudreau, Partner, Innovation Commercial Flooring, Inc.

Payroll

SESSION ID: PAY10
LOCATION: Mesquite B
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Payroll Compliance Series I: CAPEIRS – Reducing Risk With Increased Compliance

Reporting compensation to the California Public Employees’ Retirement System (CAPEIRS) is complicated. Employers sometimes do it incorrectly, leading to audits and audit findings. In this workshop, we’ll present valuable insights into the audit process and provide you with information you can use to perform your own self-assessment. We’ll also cover the most recent topics of employer reviews, including how employers are selected for a review and the areas at highest risk of non-compliance. You’ll leave with a better understanding of the types of compensation that are reportable to CAPEIRS, how employers are selected for audit, what CAPEIRS is looking for in employer audits, how audit findings can be avoided through proper reporting and how to evaluate the most common areas of risk.

PRESIDER: Mike Stribling, Administrator, Payroll Services, Riverside COE
SPEAKER: Representatives TBD: California Public Employees’ Retirement System.

SESSION ID: PAY11
LOCATION: Mesquite B
TIME: Monday, 9:00 a.m. - 10:00 a.m.
TITLE: Payroll Compliance Series II: Latest Updates From the State Social Security Administrator

California’s official Social Security Administrator (SSSA) says many school employers are not in compliance, incorrectly excluding certain employees from Social Security. In this workshop, we’ll review the rule that the SSSA has in ensuring Social Security and Medicare withholding compliance, as well as discuss Section 21B agreements and how they steer employers and employees toward meeting certain types of payroll taxes. We’ll also include whether employees and retirees contribute to Social Security and Medicare when an employer does not have a Section 21B agreement. We’ll also discuss areas of employer non-compliance and provide you with tips for coming into compliance.

PRESIDER: Lena Young-Gallardo, Senior Manager, District Financial Services, San Bernardino County Supt. of Schools.
SPEAKER: Representatives TBD: California Public Employees’ Retirement System.

SESSION ID: PAY12
LOCATION: Mesquite B
TIME: Monday, 12:15 p.m. - 1:30 p.m.
TITLE: Payroll Professional Council Lunch – Dealing With Difficult People and Behaviors

Payroll professionals come into contact with employees who exhibit different types of personalities and behaviors in a regular basis. In this workshop, we’ll share helpful tips and valuable insight about how to define and identify the behaviors of difficult people. We’ll also help you determine if you are a difficult person yourself!

PRESIDER: Mike Stribling, Administrator, Payroll Services, Riverside COE
SPEAKER: Jayne Christakos, Associate Superintendent, San Bernardino City USD.
SPEAKER: Vincent Christakos, Senior Account Advisor, Forecast5 Analytics, Inc.

SESSION ID: PAY13
LOCATION: Mesquite B
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Exploring the Mysteries of Payroll Wage & Hour Laws (Part I)

If you want to eliminate liability and exposure to lawsuits resulting from being out of compliance with payroll wages and hour laws, join us for this workshop and get the tools and knowledge necessary to effectively set up internal compliance-driven rules and regulations to mitigate unforeseen pay issues. We’ll explore various areas of the Fair Labor Standards Act, California Education Code, California Labor Code and California Government Code applicable to public school employers and reveal court decisions affecting district employers. Recommended for aspiring, new and experienced payroll professionals and those who have an interest in payroll law and compliance.

PRESIDER: Mike Stribling, Administrator, Payroll Services, Riverside COE
SPEAKER: Todd Robbins, Partner, Atkinson, Avendano, Loya, Rueda & Romo

SESSION ID: PAY14
LOCATION: Mesquite B
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Exploring the Mysteries of Payroll Wage & Hour Laws (Part II)

In this session, we’ll explore the latest audit findings from the California State Teachers’ Retirement System (CalSTRS) and the California Public Employees’ Retirement System (CalPERS). We’ll also share successful ways employers can avoid being selected for an audit and the types of payroll actions that trigger an audit.

PRESIDER: Mike Stribling, Administrator, Payroll Services, Riverside COE
SPEAKER: Todd Robbins, Partner, Atkinson, Avendano, Loya, Rueda & Romo

SESSION ID: PAY15
LOCATION: Mesquite B
TIME: Monday, 4:15 p.m. - 5:15 p.m.
TITLE: Payroll Compliance Series III: Avoiding CalSTRS Audits Through Proper Reporting of Compensation

Reporting compensation to the California State Teachers’ Retirement System (CalSTRS) is complicated. Employers often do it incorrectly and are selected for audit. In this workshop, we’ll review common non-compliance and provide employers with tips on how to accurately report different types of compensation to CalSTRS. We’ll also discuss how to capture and successfully report information to CalSTRS so that you can avoid audit findings.

PRESIDER/SPARKER: Lena Young-Gallardo, Senior Manager, District Financial Services, San Bernardino County Supt. of Schools.

Purchasing

SESSION ID: PUR10
LOCATION: Sunrocue C
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Contract Management: The Least Glamorous Part of the Procurement Process

Purchasing a contract is an exciting task for most people... managing a contract can take you well over the course of several years. That’s where the real value is gained in any contract. In this workshop, we’ll learn about the nuances and anticipate common problem or issues. We’ll provide you with an example of a vendor complaint form along with ideas to create your own version, and we’ll review ways to audit and monitor contract performance and unveil steps you can take to prepare for your next contract to make it even better.

PRESIDER: Leonat Erentabera, Director of Purchasing, Union USD.
SPEAKER: Tommy Rimes, Owner, Tammy Rimes Consulting

SESSION ID: PUR11
LOCATION: Sunrocue C
TIME: Monday, 11:30 a.m. - 12:30 p.m.
TITLE: Google Forms & Sheets: Streamlining Form Collection & Data Management

In this workshop, you’ll learn how one district took an overly cumbersome, paper-heavy, form submittal process and turned it into a fully automated paperless process using Google Forms. Sheets and readily available add-ons. We’ll also share ways you can use these same Google tools to help manage things such as informal contract registration, contract creation, vendor registration and many other types of everyday processes.

PRESIDER: Josh Roben, Purchasing and Accounts Supervisor, Alameda COE
SPEAKER: Tony Crape, Director of Purchasing & Support Services, Sequoia Union USD.

SESSION ID: PUR12
LOCATION: Sunrocue C
TIME: Monday, 12:15 p.m. - 1:30 p.m.
TITLE: Purchasing Professional Council Lunch – How to Give a Dazzling Performance: Become the MVP of Your Organization

Would you win an Oscar for your performance? If not, you may need to start tuning your own here! In this workshop, we’ll unveil creative ways to ask for the sales of you and your department and take a more active role in marketing your worth, expertise and contributions. Create your own brand and strive to be the most valuable player in your organization!

PRESIDER: Leonat Erentabera, Director of Purchasing, Union USD.
SPEAKER: Genevieve Gilmore, Director of Purchasing, Ventura USD.
SPEAKER: Tommy Rimes, Owner, Tammy Rimes Consulting.

WATCH FOR UPDATES! CASBO will provide ongoing conference updates. Check your inbox and our website at casbo.org.

Attendees must be paid members prior to registration to enjoy member discounts. Before you register, join or renew your membership at casbo.org. — CASBO
Monday Workshops

Purchasing

SESSION ID: PUR13
LOCATION: Smoketree C
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Cooperative Purchasing, California K-12 Style
In this workshop, we'll address all aspects of using cooperative contracts and help you create a cooperative purchasing strategy. You'll hear from your peers as they discuss the legal authority, school board involvement and political landscape of using this procurement tool. You’ll also learn how to analyze and evaluate the various cooperative organizations that are available to your district, while examining contractual requirements.

PRESIDER: Leanne Ernsterback, Director of Purchasing, Fresno USD
SPEAKER: Geiselle Carreiro, Retired Commercial Warrants & Accounts Payable Manager; and Consultant
du

SESSION ID: PUR14
LOCATION: Smoketree C
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Software Procurement: A Purchasing Perspective
When it comes to software, there's more than one way to purchase and dispense the goods. In this workshop, we'll highlight student data privacy concerns, collaborating with your information technology department and creating an effective workflow.

PRESIDER: TBD

Retiree

SESSION ID: RET10
LOCATION: Smoketree B
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Protecting Our Parents as They Age
There comes a time when our parents or loved ones begin slowing down and, quite often, become susceptible to the challenges of everyday life. Many district employees find that they are becoming primary caregivers. Pre-planning may help with this challenge. In this workshop, we’ll focus on key factors to consider when protecting our parents, including financial protection, scan and fraud protection, and physical protection. You’ll leave this session with some strategies to put in place and a better understanding of the health, safety and financial risks facing aging adults due to fraud, accidents and other areas where seniors are susceptible.

PRESIDER/SPEAKER: Tom Silva, Consultant, Tom Silva Consulting

SESSION ID: RET11
LOCATION: Smoketree B
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Trusts (Part I)
When a person passes away intestate, the legal ramifications for family are stressful, time-consuming and possibly costly. To avoid this, many people opt to set up a trust to communicate their wishes on how their loved ones aren’t left guessing and/or dealing with the courts. A living trust is a legal document that states who you want to manage and distribute your assets if you're unable to do so, as well as who receives them when you pass away. In this workshop, we’ll provide you with comprehensive, detailed and vital estate-planning information so you can make the best decisions for yourself and your family.

SPEAKER: Paula Clarkson, Partner, Mehbab Robinson, Jackson & Clarkson

SESSION ID: RET13
LOCATION: Smoketree B
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Seven Ways to Know You’re Working Too Much
Work addiction is a problem that affects the health and wealth of people and organizations. There are tell-tale signs that let us know when we need more work/life balance. Frequently, we work too much, we have trouble sleeping, develop an over-dependence on alcohol, sugar, caffeine and other substances; and incur stress-related health problems. In this workshop, we’ll focus on how to work hard while still maintaining a healthy lifestyle. You’ll leave with simple tips and tricks to be a top-notch employee and have to tell the story.

SPEAKER: Karen Johnson, Principal, Valley View High School, Moreno Valley USD

Risk Management

SESSION ID: RM10
LOCATION: Smoketree E
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Identifying and Correcting Hazards on Campus
Unsable conditions on school campuses not only pose a risk to injury to staff, students and the general public, they also can attach school districts to liability. Failure to correct identified hazards promptly can result in significant settlements and verdicts. It is vital that school districts have systems in place to identify, report, track and fix unsafe conditions. In this workshop, we’ll provide an overview of the types of processes that districts need to have in place and how departments need to work together to promptly correct hazards.

PRESIDER: Reshan Courey, Senior Director of Risk Services, Alliance of Schools for Cooperative Insurance Programs
SPEAKER: Armando Orozco, Director, Maintenance & Operations, Tustin Unified USD
SPEAKER: Sara Slater, Assistant Director, Facilities Accounting, Long Beach USD

SESSION ID: RM11
LOCATION: Smoketree E
TIME: Monday, 11:00 a.m. - 12:00 p.m.
TITLE: Workers’ Compensation: Controlling Costs Through Partnerships
Workers’ compensation is one of the most controllable insurance costs for an employer. However, it often costs up becoming an out-of-control, increasing expense. Keeping workers’ compensation costs under control is not easy—it requires knowledge, discipline and attention to the fundamentals. More importantly, cost control requires effective partnerships with and commitment from all levels of management and outside stakeholders. In this workshop, you’ll hear from an experienced school district risk manager and third-party administrator who will show you how partnering with insurance agencies and joint powers authorities can help your workers’ compensation program.

PRESIDER: Judy Miller, Director of Risk Management & Environmental Safety, Parrish Union USD

SPEAKER: Suzanne Trombide, Vice President, Property & Casualty, Keenan & Associates
Monday Workshops

Risk Management

SESSION ID: RM12
LOCATION: SmokeTree E
TIME: Monday, 4:15 p.m. - 5:15 p.m.
TITLE: The CSP: and Emergency Preparedness: What Does Workers’ Compensation Have to Do With It?
Every year students wrestle with their Comprehensive School Safety Plans (CSPs). Pulling data, describing procedures, rehabilitating objects and copying board policy are tasks that take a hit or two. The detail-intensive process draws on the time of risk management, human resources, technology, leadership and others. What if there were a way to simplify the process, one that embraced collaboration, promoted best practices and used technology effectively? In this workshop, we’ll show how Schools Insurance Authority and Hour-Zer Crisis Consulting Ltd. partnered to do just that. Join us to develop a better understanding of how you can leverage other organizations to make developing your CSP easier and less time-consuming.

SPEAKER: Donna Gisnpor, Principal, Hour-Zer Crisis Consulting Ltd.
SPEAKER: Erin Tarkhanian, Loss Prevention Coordinator, Redwood Empire Schools’ Insurance Group

School Business I

SESSION ID: SB10
LOCATION: Pueblo
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: Renewable Energy Foundations: Making Solar and Storage a Rate Reduction
This workshop will shed light on state and local general obligation (GO) bond process, from understanding business goals to gathering requirements to organizing methods and how renewable energy can affect your bottom line. We’ll provide an overview of power and gas deregulation in California, including current options districts have to shop for power and gas. We’ll also present a look towards the future and what it holds for further market deregulation.

SPEAKER: Betsy George, CPA, CMA, MBA, Assistant Superintendent, Business Services, Cucamonga SD
SPEAKER: Rick Jensen, Assistant Superintendent, Business Services, Cucamonga SD
SPEAKER: David Kopperud, Education Programs Consultant and State SARB Chairperson, California DOE
SPEAKER: Erica Petersen, National Education Manager, School Innovations & Achievement

SESSION ID: SB14
LOCATION: Pueblo
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Retirement Pathfinder
In this workshop, we’ll focus on three primary groups of employees: those who are not currently enrolled in or are no longer contributing to a retirement savings plan; those who are currently enrolled in or funding a retirement savings plan but do not know the effect of the funds on their retirement; and those who are nearing retirement and wanting to keep a retirement budget.

SPEAKER: David Crouch, District Vice President, AIS Retirement Services

SESSION ID: SB15
LOCATION: Pueblo
TIME: Monday, 4:15 p.m. - 5:15 p.m.
TITLE: School Safety Lessons Learned From the Sandy Hook Tragedy
In this interactive workshop, you’ll learn proactive best practices for handling incidents similar to the December 2012 Sandy Hook tragedy. As we share lessons learned from Sandy Hook, we’ll provide you with an understanding of the importance of safety-related partnerships and the critical need for clear and regularly updated safety information. You’ll learn how to improve your district’s present plan and response process in a way that addresses any gap in those times.

SPEAKER: Joseph Erardi, Ed.D., Retired Superintendent of Schools, Newtown Public School District

School Business II

SESSION ID: SB10
LOCATION: Mojave Learning Center
TIME: Monday, 4:15 p.m. - 5:00 p.m.
TITLE: Moving Beyond 2D: How to Tell Your Project’s Design Story Using Virtual Tools
In this workshop, we’ll take you beyond print into a virtual experience to see how tools such as Building Information Modeling, Virtual Reality and Augmented Reality provide a high level of stakeholder engagement.

SPEAKER: Bruce On, Principal, WCI Architects, Inc.

SESSION ID: SB11
LOCATION: Mojave Learning Center
TIME: Monday, 11:10 a.m. - 12:00 p.m.
TITLE: An Educator’s Guide to Power and Gas Choice in California
In this workshop, we’ll provide you with an overview of power and gas deregulation in California, including current options districts have to shop for power and gas. We’ll also present a look towards the future and what it holds for further market deregulation.

SPEAKER: Hambir Chavan, Sales Director, Direct Energy Business

SESSION ID: SB13
LOCATION: Mojave Learning Center
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: Fraud or Faux Pas: Common Missteps School Districts Make
To put it simply, fraud requires knowledge of the consequences of your actions. In order for fraud to occur, a person must have knowledge of the laws regarding their actions, whether or not they are intentionally defrauding the government. The distinction between an honest mistake and the commitment of fraud is one of intent. In this workshop, we’ll discuss the differences between the two and whether your mistake would be considered fraud or a faux pas.

SPEAKER: Heather Rubia, Principal, Christy White Associates

SESSION ID: SB15
LOCATION: Mojave Learning Center
TIME: Monday, 3:00 p.m. - 4:00 p.m.
TITLE: Trends in Strategic Sourcing
The majority of K-12 districts lack the procurement technology and resources to drive enterprise strategic sourcing initiatives. Despite these challenges, there is an opportunity for K-12 districts to partner with key suppliers to drive efficiencies, deliver savings, mitigate risk and build long-term value with key supplier partners. In this workshop, we’ll look at the local and national trends in strategic sourcing and will also provide ideas on where to start your sourcing efforts to maximize return.

SPEAKER: Chris Webb, Business Development Manager, CDM-Government LLC

SESSION ID: SB115
LOCATION: Mojave Learning Center
TIME: Monday, 4:15 p.m. - 5:15 p.m.
TITLE: Building Financial Wealth and Wellness
While retirement planning is important for everyone, female longevity is on average higher than male counterparts. A 65-year-old female has a 42% chance of living to 90; however a study by Wells Fargo found that only 43% of women are enrolled in their workplace retirement plan. In this workshop, we’ll discuss how women can better plan for their financial future and prepare for a fulfilling retirement. We’ll present retirement planning guidelines for the four major life stages: building assets, protecting assets, enjoying retirement and leaving a legacy. You’ll learn how you can take small, manageable steps to reach your financial goals and increase your financial wellness.

SPEAKER: Kelsey McCarthy, Assistant Agency Manager, Northern California Hawai‘i, AXA Advisors
SPEAKER: Evan Press, CFP®, RICP® Managing Partner, AXA Advisors

Technology

SESSION ID: TC10
LOCATION: SmokeTree A
TIME: Monday, 8:00 a.m. - 9:00 a.m.
TITLE: eSports: From Club to League
In this workshop, we’ll showcase one local education agency’s journey of efforts from starting a club to being part of a league. You’ll learn how to acquire the hardware, purchase games and licenses, find leaders, work with your school board, communicate with parents, and – most importantly – engage with your students.

SPEAKER: Eric Calabro, CTO, Riverside CDE

SESSION ID: TC11
LOCATION: SmokeTree A
TIME: Monday, 11:00 a.m. - 12:00 p.m.
TITLE: California Student Data Privacy Agreement
The California Student Data Privacy Agreement was created and vetted with representation from California school districts, providers, educators and educational legal advisors to be compliant with all California student data privacy laws. In this workshop, we’ll show you how to improve your local education agency compliant and ease the educational technology vetting process.

SPEAKER: Libbi Garrett, Resource Program Specialist, California Educational Technology Professionals Association

SESSION ID: TC13
LOCATION: SmokeTree A
TIME: Monday, 1:45 p.m. - 2:45 p.m.
TITLE: E-rate 2020: Are We Back to the Future?
2019 was the sunset year for many provisions of the Federal Communications Commission’s (FCC’s) E-rate Modernization Orders. What is the FCC planning to do? What happened with Category 2 – will it revert back to Priority 2? Will voice ever be funded again? Are dark fiber and self- provisioned broadband projects on the chopping block? Will the FCC give schools more choice in how they use their funding? In this workshop, E-rate insiders will discuss hot topics regarding the future of this most beloved (and sometimes hated) technology funding resource.

SPEAKER: Kathy Carroll, E-rate Consultant, CDM Consulting, Inc.

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TITLE: Are You on Board the Energy Bus?

SPEAKER: Tim Purvis

TIME: Monday, 8:00 a.m. - 9:00 a.m.

LOCATION: Smoketree A

SESSION ID: TLA89

DESCRIPTION: In this interactive workshop, you’ll learn how to turn negative energy into positive achievement. Recommended for department leaders or anyone looking to turn their organization’s energy into positive achievement.

Tuesday Workshops

TITLE: Work Smarter, Not Harder: Maximizing the Use of Google to Enhance Team Productivity

SPEAKER: Barrett Snider

TIME: Tuesday, 11:00 a.m. - 12:00 p.m.

LOCATION: Smoketree A

SESSION ID: CBO21

DESCRIPTION: In this workshop, we’ll provide you with practical examples of how you can enhance team productivity within your organization. You’ll leave with the ability to structure an effective system of shared files, effective communication platforms, and tips and tricks to make your life easier and save you time! Attendees are encouraged to bring their own devices to this interactive session.

SPEAKER: Tina Douglas, Associate Superintendent, Business Services, San Diego Unified

SPEAKER: Kevin Gordon, President and Partner, Capitol Advisors Group, LLC

SPEAKER: Yvonne Dennings, President, Orange County DOE

SPEAKER: Sara Bachez, Superintendent, San Diego Unified

SPEAKER: Terry Loftus, Assistant Superintendent, Integrated Technology Services, San Diego USD

SPEAKER: Joel Vanhoefer, Director of Information Technology, San Dieguito Union HSD

Tuesday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN15

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Transportation Challenges of a Fast-Growing School District

SPEAKER: Lakhy Singh

TIME: Monday, 3:00 p.m. - 4:00 p.m.

LOCATION: Mesquite A

SESSION ID: TRN14

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Social Media, Cybersecurity and Beyond: Current Legal Issues in School Safety

SPEAKER: Stephanie Kuykendall, District Business Advisor, Sutter County Supt. of Schools

TIME: Tuesday, 8:00 a.m. - 9:00 a.m.

LOCATION: Smoketree A

SESSION ID: CBO09

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN13

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN12

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN11

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN10

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN9

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN8

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN7

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN6

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN5

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.

Thursday Workshops

TITLE: Alternative Transportation: What You Need to Know

SPEAKER: Mia Tovar

TIME: Tuesday, 1:45 p.m. - 2:45 p.m.

LOCATION: Mesquite A

SESSION ID: TRN4

DESCRIPTION: In this workshop, we’ll discuss the integration of electric vehicles into school district white fleets in addition to the well-publicized yellow school bus fleets. We’ll explain the ease of integration, the grants available for the acquisition of vehicles and the infrastructure. We’ll also cover additional grants and support from public utilities and air districts, the slow- and fast-charging options and costs, and the role that Local Control Funding Formula credits can play in electric fleets.

SPEAKER: Matt Thomas, Director of Transportation, Anaheim Union HSD

SPEAKER: Matthew Essex, Director of Sales, Adramai, Inc.
Tuesday Workshops

CBO

SESSION ID: CN20
LOCATION: Mosquite G
TIME: Tuesday, 11:00 a.m. - 12:00 p.m.
TITLE: Improving Turfgrass Conditions on School District Athletic Fields

Facilities

SESSION ID: FA20
LOCATION: Mosquite G
TIME: Tuesday, 9:00 a.m. - 9:30 a.m.
TITLE: Improving Turfgrass Conditions on School District Athletic Fields

SESSION ID: FA21
LOCATION: Mosquite H
TIME: Tuesday, 11:00 a.m. - 12:00 p.m.
TITLE: CRM Multiple-Prime: Love It or Hate It and Why?

Financial Services

SESSION ID: FIN21
LOCATION: Mosquite E
TIME: Tuesday, 9:00 a.m. - 9:30 a.m.
TITLE: How to Prepare for an ASB Audit

California Business Expo 2020


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Tuesday Workshops

Financial Services

SESSION ID: FIN23
LOCATION: Mesquite D
TIME: Tuesday, 4:00 p.m. - 5:00 p.m.
TITLE: Attendance Accounting and Instructional Time
Are you taking attendance correctly? How does instructional time affect your attendance for apportionment and instructional time requirements for school districts, county offices of education and charter schools. Attendees will leave with a better understanding of the effects of attendance on their LEA's revenues.

PRESIDENT: Anna Machado, Director, Fiscal Services, Escondido Union SD
SPEAKER: Wendi McCaskill, Fiscal Consultant, School Fiscal Services Division, California Department of Education
SPEAKER: Hua Tran, Education Fiscal Services Assistant, California Department of Education

Human Resources

SESSION ID: HR22
LOCATION: Mesquite D
TIME: Tuesday, 9:00 a.m. - 10:00 a.m.
TITLE: Personnel 101: Techniques for the HR-Challenger
At times, the skills required of supervisors do not directly connect with employee management and are not always evident, in new supervisors. For those with specific training in employee management in contract-based systems is overwhelmed in favor of more pressing needs such as budgetary constraints. In this workshop, we’ll present methods and skills necessary to transform any supervisor into an effective employee manager with special focus on required evaluation and administration systems. We’ll also discuss how to manage probationary employees, and methods for use with substantiated personnel. Recommended for new supervisors who wish a practical understanding of the scope and sequence of employee management and experienced supervisors who want a welcome refresher.

PRESIDENT: Krista D’Agostino, Human Resources Officer, Oakland USD
SPEAKER: Diane Brannon, Chief Analyst, Fiscal Crisis & Management Assistance Team
SPEAKER: Shyleen Harte, Deputy Executive Officer, Fiscal Crisis & Management Assistance Team
SPEAKER: Suzanne Speck, Vice President, School Services of California, Inc.

SESSION ID: HR23
LOCATION: Mesquite D
TIME: Tuesday, 4:00 p.m. - 5:00 p.m.
TITLE: Increase Profit and Performance Through Strategic Leadership
Organizations need strong and capable leaders who can motivate, inspire and coach people to think strategically in order to ensure the organization’s long-term success. But they often spend their time on things that don’t add value or lack skill in areas that can result in leadership, resulting in under performing teams. Strategic leadership requires us to think, act and influence others in ways that promote vision, collaboration and engagement. Leaders can learn this skill and teach themselves accountable for the process. It can be a game changer for both their organizations and careers. In this workshop, we'll provide you with a strategic planning tool and guide for completion, allowing you to perform root cause analysis and uncover new strategies to increase your organization’s performance.

PRESIDENT/SPEAKER: Chris Davis, CBIO, Arvin USD
SPEAKER: Philip McDermott, Account Representative, Sierra School Enrollment Center

SESSION ID: M020
LOCATION: Mesquite F
TIME: Tuesday, 11:00 a.m. - 12:00 p.m.
TITLE: More to Consider Than Just the Cost of Equipment
Sometimes the lowest-priced equipment is not the best for the district. You also have to consider the type of workmanship and installation requirements related to furniture walls, locker gauge of steel, cafeteria tables, aluminum bleacher specifications, reducing workers’ compensation cases and more. What is the total cost of ownership? In this workshop, we'll discuss how quality products require less custodial and maintenance staff time and provide you with some best practices for choosing equipment so you can ensure longevity of products used at your district sites.

PRESIDENT/SPEAKER: Chris Davis, CBIO, Arvin USD
SPEAKER: Philip McDermott, Account Representative, Sierra School Enrollment Center

Payroll

SESSION ID: PAY20
LOCATION: Mesquite B
TIME: Tuesday, 8:00 a.m. - 9:00 a.m.
TITLE: Leading the Way Through the Payroll Maze: 10 Pitfalls to Avoid
In this workshop, we’ll focus on 10 essential areas where you should be prepared to avoid costly mistakes, including avoidance of common audit findings, eliminating common errors before they happen, and limiting your exposure to liability when things do happen. We’ll cover payroll processing, reporting of retirement contributions, payroll taxes and reporting of employee leave. We’ll leave with solutions for some of the common problem areas that plague internal payroll units. Recommended for anyone with an interest in payroll.

PRESIDENT/SPEAKER: Mike Stribling, Administrator, Payroll Services, Riverside USD
SPEAKER: Tracy Neufeld, Payroll Analyst, Davis USD
SPEAKER: Stephanie Villarreal, Principal Systems Specialist, Los Angeles COE
SPEAKER: Lena Young-Gallardo, Senior Manager, District Financial Services, San Bernardino County Supt. of Schools

SESSION ID: PAY21
LOCATION: Mesquite B
TIME: Tuesday, 11:00 a.m. - 12:00 p.m.
TITLE: More to Consider Than Just the Cost of Equipment
Sometimes the lowest-priced equipment is not the best for the district. You also have to consider the type of workmanship and installation requirements related to furniture walls, locker gauge of steel, cafeteria tables, aluminum bleacher specifications, reducing workers’ compensation cases and more. What is the total cost of ownership? In this workshop, we’ll discuss how quality products require less custodial and maintenance staff time and provide you with some best practices for choosing equipment so you can ensure longevity of products used at your district sites.

PRESIDENT/SPEAKER: Chris Davis, CBIO, Arvin USD
SPEAKER: Philip McDermott, Account Representative, Sierra School Enrollment Center

SESSION ID: PAY23
LOCATION: Mesquite B
TIME: Tuesday, 11:00 a.m. - 12:00 p.m.
TITLE: More to Consider Than Just the Cost of Equipment
Sometimes the lowest-priced equipment is not the best for the district. You also have to consider the type of workmanship and installation requirements related to furniture walls, locker gauge of steel, cafeteria tables, aluminum bleacher specifications, reducing workers’ compensation cases and more. What is the total cost of ownership? In this workshop, we’ll discuss how quality products require less custodial and maintenance staff time and provide you with some best practices for choosing equipment so you can ensure longevity of products used at your district sites.

PRESIDENT/SPEAKER: Chris Davis, CBIO, Arvin USD
SPEAKER: Philip McDermott, Account Representative, Sierra School Enrollment Center

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Tuesday Workshops

Purchasing

**SESSION ID: PUR20**
**LOCATION: Smoketree C**
**TIME: Tuesday, 8:00 a.m. - 9:00 a.m.**

CAL-CARD is one of the state’s negotiated commercial card services programs available to schools and publicly funded local agencies. In this workshop, we’ll provide you with best practices, case studies, and an overview of popular programs and recent enhancements to U.S. Bank’s Access® Online system. We’ll also share overall purchasing card best practices and how to best maximize the rebate of your card program.

**PRESIDER:** Leeann Errotabere, Director of Purchasing, Clovis USD
**SPEAKER:** Leslie Massey, Vice President, Public Sector & Higher Education, U.S. Bank

**SESSION ID: PUR21**
**LOCATION: Smoketree C**
**TIME: Tuesday, 11:00 a.m. - 12:00 p.m.**
** TITLE: Planning Your Dream Vacation**

Planning a vacation should be fun, but it can also become a stressful task. In this workshop, we’ll highlight the best way to get travel deals and prove you with packing and other little-known tips and tricks that will make planning your dream vacation less stressful.

**SPEAKER:** Guiselle Carreono, Retired Commercial Warrant & Accounts Payable Manager; and Consultant
**SPEAKER:** Tom Silva, Consultant, Tom Silva Consulting

Risk Management

**SESSION ID: RM20**
**LOCATION: Smoketree E**
**TIME: Tuesday, 8:00 a.m. - 9:00 a.m.**
** TITLE: Emergency Management in California and Lessons Learned From the Recent Wildfires (Part I)**

California has experienced an unprecedented number of local, state and federal disasters over the past three years that have affected schools, children and faculty throughout the state. This has resulted in unmanageable and devastating damage, destruction, student displacement, and staff and student anxiety loss of homes; yet the lessons learned by school districts with whom we have faced a disaster are not readily shared. In this workshop, we’ll focus on those lessons learned from previous disasters throughout California and provide you with valuable tips, techniques and procedures from those who have recently been through them.

**SPEAKER:** Jennifer McCain, Risk Manager, Schools Insurance Authority
**SPEAKER:** Kevin Baird, Ph.D., Director, School Facilities and Transportation Services Division, California DOE
**SPEAKER:** Lynne Olson, Program Manager, Emergency Functions Planning Unit, Planning and Preparedness Branch, California Governor’s Office of Emergency Services
**SPEAKER:** Erin Tarkhaniian, Loss Prevention Coordinator, Redwood Empire Schools’ Insurance Group

**SESSION ID: RM21**
**LOCATION: Smoketree E**
**TIME: Tuesday, 11:00 a.m. - 12:00 p.m.**
** TITLE: Emergency Management in California and Lessons Learned From the Recent Wildfires (Part II)**

This session is Part I of a previous workshop on lessons learned from California’s recent wildfires. In Part I, we’ll focus on the California Department of Education’s role in emergency preparedness and support for schools during and after disasters, as well as how schools can better prepare for the next big disaster.

**SPEAKER:** Jennifer McCain, Risk Manager, Schools Insurance Authority
**SPEAKER:** Juan Mireles, Director, School Facilities and Transportation Services Division, California DOE
**SPEAKER:** Lynne Olson, Program Manager, Emergency Functions Planning Unit, Planning and Preparedness Branch, California Governor’s Office of Emergency Services
**SPEAKER:** Erin Tarkhaniian, Loss Prevention Coordinator, Redwood Empire Schools’ Insurance Group

School Business I

**SESSION ID: SB10**
**LOCATION: Pueblo**
**TIME: Tuesday, 8:00 a.m. - 9:00 a.m.**
** TITLE: The Power of Leadership, Vision and Purpose**

Over the last year, Hemet Unified School District’s Information Technology department has established a new vision and role within the district. The department traditionally focused on service and support but recently added the vision or change leadership role. In this workshop, we’ll share how Hemet Unified’s new chief technology officer’s leadership, vision and purpose has catalyzed it. IT department into being a district leader. We’ll explain how they built buy-in and value from teachers, site administrators, district leadership and the IT team itself, effectively changing the culture and climate of the department, both internally and through its perception by outsiders. We’ll also discuss how they mixed the usage of data, collaboration and relationships to completely change the landscape and decisions around how technology and electronic devices are purchased, as well as the steps taken to best position the department to tackle digital wellness, educational technology, and STEAM business, technology, engineering, arts and mathematics.

**SPEAKER:** Ben Markley, CTO, Hemet USD

School Business II

**SESSION ID: SB20**
**LOCATION: Mojave Learning Center**
**TIME: Tuesday, 8:00 a.m. - 9:00 a.m.**
** TITLE: Human (Not Artificial) Intelligence: EdTech’s Immersion Neuroscience Device**

That which is measured gets done, right? How are you measuring student engagement? Come explore the EdTech disruptor which has revolutionized the way we capture engagement data for every student, in real time. You’ll see how this new tool is able to measure minute by minute what’s happening in the brain during a learning experience in order to measure a student’s engagement level and allow for immediate shifts in instruction. This will take your teaching and coaching to the next level!

**SPEAKER:** Kevin Baird, CSIT, Multi-Risk Education

**SESSION ID: SB21**
**LOCATION: Mojave Learning Center**
**TIME: Tuesday, 11:00 a.m. - 12:00 p.m.**
** TITLE: Partnering with Your Community Choice Agency**

Eighty percent of current P&G, Southern California Edison and San Diego Gas & Electric customers will have a community choice agency (CCA) by 2022. With this rapid growth, districts have the opportunity to explore new ways to manage their energy costs. Some districts already are partnering with their local CCA to save money, effectively implement solar, battery storage, electric vehicles and charging and microgrids. In this workshop, we’ll provide you with case examples and specific steps for engaging your CCA in developing energy programs that benefit your schools and local community.

**SPEAKER:** Rick Brown, Ph.D., President, Terrvalio Energy
**SPEAKER:** Larry Frise, Assistant Superintendent, Business Services, Lancaster SD
**SPEAKER:** Kathy Wells, Energy Projects Coordinator, Lancaster Chico Energy

Watch for updates! CASBO will provide ongoing conference updates. Check your inbox and our website at casbo.org.
School Business II

**Session ID:** SBI23  
**Location:** Mojave Learning Center  
**Time:** Tuesday, 4:00 p.m. - 5:00 p.m.  
**Title:** Leveraging STEM Today for Our Female Leaders Tomorrow  

The science technology/engineering/mathematics (STEM) gender gap exists not only in our classrooms, but also in our school districts. Some estimates suggest that while women make up 77% of the teaching profession, they account for just 33% of U.S. superintendents. In this workshop, we'll draw upon real-world experience of CBOs and district leaders who will discuss gender in the workplace and how their districts are leveraging creative STEM programs both in and out of the classroom to foster the next generation of female leaders.  

**Speaker:** TBD

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**Session ID:** TRN20  
**Location:** Mojave A  
**Time:** Tuesday, 8:00 a.m. - 9:00 a.m.  
**Title:** Planning for School Bus Fleet Electrification  

School bus fleet electrification is happening quickly in California. This is being driven by a variety of funding sources, including Proposition 73, the Hydro+Voucher Incentive Program, the Rural School Bus Pilot Project and other similar programs. In this workshop, we will provide you with an overview of advantages, funding sources and costs, and we will also cover the planning that’s required to prepare for fleet electrification, including infrastructure upgrades and changes in vehicle-operating profiles.

**Speaker:** Mike Sawyer, Director, Transportation, San Marcos USD  
**Co-Speaker:** Erik Bigelow, Senior Engineering Consultant, Center for Transportation and the Environment  
**Co-Speaker:** Brenton Johnson, Principal, Sage Energy Consulting

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**Session ID:** TRN21  
**Location:** Mojave A  
**Time:** Tuesday, 11:00 a.m. - 12:00 p.m.  
**Title:** Promoting Your Transportation Department  

When you continually promote your transportation department, everyone will remember what a great job you’ve done, and they’ll look at other departments when budget reductions are required. In this workshop, we’ll cover the ways you can promote your transportation department, both inside and outside of your district. You’ll hear from those who have done an excellent job promoting their departments, and get great ideas to try in your district.

**Speaker:** Pam McDonald, Director of Transportation, Orange USD  
**Co-Speaker:** Carlos Chicas, Director of Transportation, Capistrano USD  
**Co-Speaker:** Ellen Johnson, Retired Transportation Manager, Orange USD  
**Co-Speaker:** Matt Sanchez, Director of Transportation, El-Gros USD

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**Session ID:** TRN23  
**Location:** Mojave A  
**Time:** Tuesday, 4:00 p.m. - 5:00 p.m.  
**Title:** Bus Talk  

In this workshop on electric buses, we’ll discuss implementation, best practices, infrastructure it's and don'ts, energy management, grant opportunities, and alternative fuels. We’ll also discuss some of the common bus options among all districts and the benefits of each. You’ll get a better understanding on how to plan for the future in respect to both electric and other options.

**Speaker:** Pam McDonald, Director of Transportation, Orange USD  
**Co-Speaker:** Joe Angeli, School Bus Sales Manager, Creative Bus Sales  
**Co-Speaker:** Nate Baguie, Vice President of Sales, The Linet Electric Co.  
**Co-Speaker:** Brandon Bluhm, Director, New School Bus Sales, A-2 Bus Sales  
**Co-Speaker:** Todd Franssen, Sales Manager, New School Bus Sales, Bus West

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**Session ID:** ACT30  
**Location:** Mojave A  
**Time:** Wednesday, 8:00 a.m. - 9:00 a.m.  
**Title:** Crowdfunding Best Practices  

Crowdfunding is becoming a viable funding source, filling resource gaps and providing strategic acceleration for academic programs. However, because the practice can be misunderstood, it may result in unexpected liabilities without the proper safeguards in place. In this workshop, we’ll discuss what crowdfunding best practices in your schools, which crowdfunding sites to trust, and about upholding financial accountability and controlling materials, as well as the safety and security of those in your district.

**Presenter:** Jennifer Miller, Director of Budget & Finance, Moreno Valley USD  
**Co-Speaker:** Jack Danielson, Regional Executive, Horace Mann  
**Co-Speaker:** James Yela, Vice President, Horace Mann

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ATTENDANTS MUST BE PAID MEMBERS PRIOR TO REGISTRATION TO ENJOY MEMBER DISCOUNTS. BEFORE YOU REGISTER, JOIN OR REVIEW ON OUR WEBSITES AT CASBO.ORG > JOIN.
Wednesday Workshops

Child Nutrition

SESSION ID: CN1Q
LOCATION: Mosquito G
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: Keeping Survivor Island Green: How Districts Are Implementing AB 1826 Waste Requirements
Do you have waste concerns in your district? As of January 1, 2019, many city and county waste management companies are requiring school districts to comply with AB 1826 to divert organic waste from landfills. In this workshop, we’ll hear insights from large, medium and small school districts on how they are collaborating across operational disciplines to tackle the increase in environmental concerns coming from local waste management companies, staff, students and families. You’ll also learn how these districts are helping to support their communities’ desire to see waste in their schools, thus keeping Survivor Island green.

PRESDIER: Alisia Muñoz-Rojas, Student Nutrition Services Manager, San Lorenzo Valley USD

SPEAKER: Jennifer Marrone, Food & Nutrition Services Business Manager, San Diego USD

SPEAKER: Rachel Otis, Director of Child Nutrition Services, Live Oak SD (Santa Cruz County)

SESSION ID: CN1J
LOCATION: Mosquito G
TIME: Wednesday, 9:15 a.m. - 10:15 a.m.
TITLE: Earn Immunity With Financial Information and Interpretation
Financial understanding is fundamental to operating a successful child nutrition program. No one wants to encroach on the general fund, and knowing where to look can help prevent that. In this workshop, we’ll focus on beginner to intermediate tools that will help you survive by knowing how to manage your resources, including key performance indicators that help you analyze and understand your strengths and weaknesses. We’ll also discuss Standardized Account Code Structures, meal equivalents, and financial reports and ratios, showing you how to use the data and tools to evaluate your program and resources.

PRESDIER: Andrew Solza, Director of Child Nutrition Services, San Mateo-Foster City SD

SPEAKER: Sapon Istapanyan, SNS, Student Nutrition Manager, (San Mateo)

Facilities

SESSION ID: FAC8
LOCATION: Mosquito H
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: Facilities-Funding Overview: Why It Affects All Departments and How to Sustain a Healthy Program
Adaptingly funding facilities in California public schools is a complex and challenging task. In this workshop, we’ll provide you with a comprehensive summary of the different ways that facilities can be funded for both initial and operational expenses; how these sources are different/similar; and what district staff need to know in order to access those funds, including Multi-Room Community Facilities Districts, the Civic Center Act, block grants and routine restricted maintenance. We’ll also provide you with insights into developing a funding plan model and how various assembly bills can affect facilities funding.

SPEAKER: John Aceto, Administrator of Operations, San Barbarino City USD

SPEAKER: Thomas G. Duffy, Partner and CASB Legislative Director, Mundish, Warach & Hillier

SPEAKER: Casino Fajardo, Director of Construction and Modernization, Morgan Hill USD

SPEAKER: Philip J. Henderson, Attorney, Orbach-Hut Suenzer & Henderson

SPEAKER: Laura Moftett, Senior Consultant, School Facility Consultants

SPEAKER: Claire D’Connor, Vice President, O’Connor Construction Management, Inc.

SESSION ID: FAC31
LOCATION: Mosquito H
TIME: Wednesday, 9:15 a.m. - 10:15 a.m.
TITLE: Division of the State Architect: What District Administrators Need to Know
How do know if you have to submit an interpretation of regulations (IR)? When does the owner need to be present? In this workshop, we’ll discuss how to read an IR, as well as best practices for submitting one. We’ll also identify what your architecture needs to know and do before submitting an IR and provide you with information about exiting, plan check vs. complete plans, and other current issues of concern.

SPEAKER: Jeanne Branch, Facilities Planning Coordinator, San Diego CDE

SPEAKER: Río Davy, Principal, Davy Architecture

SPEAKER: Craig Rush, Regional Manager, San Diego Regional Office, California Division of the State Architect

Financial Services

SESSION ID: FIN30
LOCATION: Mosquito E
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: The California Public Records Act: Responding to Requests for Electronic Records
Districts are receiving California Public Records Act (CPRA) requests with increased frequency, and requesters have turned their focus to asking for emails and information contained in databases. In this workshop, we’ll provide an overview of the CPRA and the limits on requests, specifically in the area of electronic records. Attendees will have an opportunity to discuss some of the developing areas of the law, including requests for records maintained on private accounts and mobile devices, as well as learn about successful and innovative approaches taken by their colleagues to respond to requests. You’ll leave the workshop with an understanding of CPRA requirements, how to better respond when their district receives a request and how to minimize the burden these requests can impose.

PRESDIER: Ana Machado, Director, Fiscal Services, Escondido USD

SPEAKER: William Tonick, Attorney, Dannis Wholley Kelley
**Wednesday Workshops**

### Human Resources

**SESSION ID:** HR33  
**LOCATION:** Mesquite D  
**TIME:** Wednesday, 8:00 a.m. - 10:15 a.m.

**TITLE:** Conducting an Appropriate Workplace Investigation  
Most school administrators will at some time receive a formal or informal complaint concerning a member of their staff. In this workshop, we’ll present an outline of how to respond to workplace complaints from point of receipt to final decision-making, with the objective of limiting the district’s exposure to potential liability.

**PRESIDER:** Marcus Wirowek  
**SPEAKER:** Lena Young-Gallardo  
**SPEAKER:** Tracy Neufeld

### Payroll

**SESSION ID:** PAY30  
**LOCATION:** Mesquite D  
**TIME:** Wednesday, 8:00 a.m. - 9:00 a.m.

**TITLE:** Inspiring You to Recoup Wages From Overpaid Employees  
Sometimes, payroll professionals make mistakes and overpay employees. In this workshop, we’ll explain how to prevent these errors and provide you with tips for legally recovering overpaid wages, as well as connecting and communicating with an overpaid employee. We’ll review available options when the employee is not responding and present best practices for setting up repayment arrangements. Finally, we’ll discuss the tax implications when employees repay within the calendar year and when repayment obligations cross calendar years.

**PRESIDER:** Michael Stribling  
**SPEAKER:** Trace Neufeld  
**SPEAKER:** Lena Young-Gallardo

### Purchasing

**SESSION ID:** PUR30  
**LOCATION:** Smoketree C  
**TIME:** Wednesday, 8:00 a.m. - 9:00 a.m.

**TITLE:** Public Speaking Survival Tips  
Surveys show that the fear of public speaking is greater than the fear of death. For many people, public speaking is hard enough without the added pressures faced by school district administrators. You must present to elected officials, members of the public, fellow district employees – sometimes even in television or in front of large audiences. In this workshop, we’ll provide you with the foundational elements of effective public speaking and offer some useful strategies and survival tips.

**PRESIDER:** Jon Smollett  
**SPEAKER:** Susan Vann-Wagner  
**SPEAKER:** Tracy Neufeld

### Risk Management

**SESSION ID:** RM30  
**LOCATION:** Smoketree E  
**TIME:** Wednesday, 9:00 a.m. - 10:00 a.m.

**TITLE:** Contracts and Risk Management  
No two contracts are identical. Many people make the mistake of copying and pasting identical language or insurance language across all contracts, creating courtroom nightmares. Additionally, the insurance industry is rapidly changing with increasing claim values and lawsuits. While contracts present many challenges for school districts, using risk management techniques can help you avoid common pitfalls in this workshop, we’ll provide an overview of key insurance provisions and the importance of having favorable hold harmless and indemnification language. We’ll also outline how to analyze and risk manage a situation prior to entering into a contract and discuss insurance requirements, policies and certificates of insurance. Recommended for CEO’s, purchasing directors, risk managers, and anyone involved in vendor contracting, facilities use, construction, and consultants.

**PRESIDER:** Debbie Harris  
**SPEAKER:** LaFaye Platter  
**SPEAKER:** Tina Kannarr  
**SPEAKER:** Tracy Neufeld

### Wednesday Workshops

**SPEAKER:** Tina Kannarr  
**PRESIDER:** Anthony Warnecke  
**This session is Part II of a previous workshop on employee leaves.**

**TITLE:** Navigating Your Way Through the Complex World of Employee Leaves (Part II)  
The matrix of employee leaves is complicated, and failure to comply with the law can result in grievances and litigation. In this workshop, we’ll present legal aspects of employee leaves, as well as explain the different types of leaves and how they should be tracked and monitored. We’ll also review how employers typically have compliance issues and how to remain vigilant and compliant with the law. You’ll leave with best practices to better manage leaves at your district, with information that will be useful in the day-to-day operations of your payroll and/or human resources departments.

**PRESIDER:** Anthony Warnecke  
**SPEAKER:** Tina Kannarr  
**SPEAKER:** Lena Young-Gallardo

**TITLE:** The Many Paths to Proper Procurement  
There are many ways a school district can procure its equipment, materials and services, and there may be no “right” way. In this workshop, we’ll work through real-life examples on how to structure procurement methodologies and processes to benefit your district’s needs and timelines while still maintaining legal compliance. We’ll also review key aspects of the bidding process, covering various components such as notices to bidders, bid instructions and forms, bonds, general conditions, agreements, construction teams, completion and change orders, and disputes.

**PRESIDER:** Delia Diaz  
**SPEAKER:** Karina Sanamian  
**SPEAKER:** Lena Young-Gallardo  
**SPEAKER:** Tracy Neufeld

**TITLE:** Hiring Retirees for Interim Service  
Positions often become vacant without warning. Retirees can fill them in the interim until a permanent replacement is hired. In this workshop, we’ll present the pros and cons of hiring retirees for interim service, as well as ways to ensure the retiree is successful. We’ll also review how to find retirees for service and the legal reporting requirements for the California State Teachers’ Retirement System and the California Public Employees’ Retirement System.

**PRESIDER:** Martin T. Kezdeniz  
**SPEAKER:** Nicole Fiorenza  
**SPEAKER:** James J. McGinnis  
**SPEAKER:** Tracy Neufeld
Wednesday Workshops

Risk Management

SESSION ID: RM11
LOCATION: Smoketree E
TIME: Wednesday, 11:30 a.m. - 12:30 p.m.
TITLE: Adult Sexual Misconduct and Child Sexual Abuse Prevention in Schools
SPEAKER: Jennifer McCain, Senior Director of Risk Services, Alliance of Schools for Cooperative Insurance Programs

School Business II

SESSION ID: SBII30
LOCATION: Mojave Learning Center
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: ACA From A-to-Z: How Designing an ACA Workflow Can Save Your Sanity and Your Budget
SPEAKER: Chris Cuevas, Regional Manager, American Fidelity Assurance Company

SESSION ID: SBII31
LOCATION: Mojave Learning Center
TIME: Wednesday, 9:15 a.m. - 10:15 a.m.
TITLE: Managing Your Mello-Roos CFD Program
SPEAKER: Geoff Hinton, Regional Manager, American Fidelity Assurance Company

Technology

SESSION ID: TEC30
LOCATION: Sunkist A
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: The Future of K-12 Technology
SPEAKER: Lisa Owens, Director, Information Technology Services, San Mateo COE

SESSION ID: TEC31
LOCATION: Sunkist A
TIME: Wednesday, 9:15 a.m. - 10:15 a.m.
TITLE: E-rate Audits: Protecting Your A$$et$
SPEAKER: Lisa Owens, Director, Information Technology Services, San Mateo COE

Transportation

SESSION ID: TRN30
LOCATION: Mosquito A
TIME: Wednesday, 8:00 a.m. - 9:00 a.m.
TITLE: Cooperative Communication
SPEAKER: Matt Sanche, Director of Transportation, Palos Verdes Unified School District

SESSION ID: TRN31
LOCATION: Mosquito A
TIME: Wednesday, 9:15 a.m. - 10:15 a.m.
TITLE: How to Deal With Problem Employees
SPEAKER: Matt Sanche, Director of Transportation, Palos Verdes Unified School District

PLEASE NOTE: This year, Annual Conference will be held Sunday through Wednesday, not Wednesday through Saturday, as in years past.

CABSA 2020 Annual Conference & California School Business Expo