



# Registration Supplement



## CASBO Annual Conference & California School Business Expo

April 4-7, 2023 | Long Beach Convention Center



# 2023 Annual Conference & School Business Expo

Long Beach Convention Center will showcase our learning sessions, with the School Business Expo in Exhibit Halls A&B. Professional Council lunches, social events, and Hospitality Suites will be held - *for registered attendees only* - at the Hyatt Regency Long Beach, adjacent to the convention center.

## General Session

**Wednesday, April 5, 2023, 3:45 p.m.- 5:15 p.m.**

Grand Ballroom, Long Beach Convention Center

## Keynote

Mike Rayburn is a two-time TED Talk Presenter, an innovative entrepreneur and Hall of Fame speaker who uses world-class guitar and comedy to teach change and innovation to corporations world-wide. He has headlined Carnegie Hall and Las Vegas. Rayburn is a regular on Sirius/XM and morning radio nationwide. He has performed with The Beach Boys and John Oates. Rayburn's keynote is called "The What If." You will learn three simple tools to harness your unrealized potential, create and lead change, and become a virtuoso performer. Join us for thought leadership, amazing music and to laugh – a lot!

*Sponsor:*

**amazon business**

## General Session

**Thursday, April 6, 2023, 10:30 a.m. - 12:00 p.m.**

Grand Ballroom, Long Beach Convention Center

Watch for additional keynote details in February!



**Session dates/times are confirmed. Final, confirmed presenter list will be available onsite. Content is designed for learners to cross-pollinate across departments and disciplines. CASBO highly encourages attendance between disciplines to improve a comprehensive understanding of school business.**

# Breakout Sessions

**Wednesday, April 5 | 8:00 a.m. - 9:00 a.m.**

## **ACA Won't Go Away: Are you at Risk for Being Fined?**

ACA is here to stay, which requires management and upholding compliance. Avoid fines for reporting missteps. Hear case studies from others who've experienced infractions and fines. Learn why to complete reporting early. Know how to fix errors before penalty letters start.

**Presenter: Geoff Hinton**, Regional Manager, American Fidelity

## **Become Your District's Spreadsheet and Excel Hero**

Still learning spreadsheets, like Excel? Afraid to tackle a project? Build confidence and gain tips to create and implement a data system that bring out your superpowers. Monitor, test, and detect potential issues to increase data integrity. Sharpen your skills to be your best spreadsheet self.

**Presenter: Christopher Raymundo**, District Fiscal Advisor, Contra Costa COE

## **Capitol Asset Accounting**

Define how to account for capital assets from acquisition to the year-end closing process. Learn how to report Capital Assets of Governmental Activities. Learn how to track works in progress and to differentiate between routine repairs and capital assets.

**Presenter: Heather Rubio**, Principal, Christy White & Associates

## **Communication and De-Escalation**

Consider an effective, universal communication system (The Wolfson Formula) that helps professionals maintain their own behavior in stressful and critical situations, gain compliance from difficult people, and achieve cooperation where they might not have been able to do so otherwise without the training. The formula has been tested and used effectively for over ten years in many situations, including: public interactions, crisis, etc.

**Presenter: John Wilson**, Northern California Projects Director, Knowledge Saves Lives

## **Creating Harmony Between Departments**

Common workplace challenges occur between departments finding staff are often at odds. Methods of communicating, priorities and personality types are different. Polarity creates tension, stress, and an undesirable work environment. Human Resources and Fiscal departments will explore reasons for conflict and solutions to create harmony and a better culture for all stakeholders.

**Presenters: Barbara Corrick**, Retired HR, Risk Management, Leaves and Benefits Administration and **La Faye McFarland Platter**, Ed.D., Executive Leadership Coach, E4 Power

## **Developing Capacity Within District Special Education Programs**

Special education programs have increasingly become more nuanced and difficult to navigate for districts and families. Prone to legal considerations and budget concerns, the ability to develop greater capacity and streamlined processes for staff can greatly increase the effectiveness of a district's special education program.

**Presenter: Jennifer Baldassari**, Partner, Lozano Smith

## **Environmental Sustainability Programs that Make A Difference**

School partners at all levels can play a key role to advance sustainability. Explore how to effectively combine multiple sustainability projects into a broader initiative that supports district goals. Gain tangible recommendations to navigating the technical components of sustainability solutions. Examples will include electric bus procurement and charging infrastructure, outdoor classrooms and related funding.

**Presenters: Casino Fajardo**, Director of Facilities, Maintenance Operations and Transportation, Los Gatos-Saratoga Jt. Union HSD and **Tim Zearley**, Associate Superintendent, Business Services, Merced City Schools

## **Essential IT Strategies**

Collaboration is essential between IT (tech), human resources, finance payroll, and administrative/business services. Take a rapid review of key areas to consider, such as: document management automation; data analysis, reporting and data visualization; and device replenishment, deployment and support.

**Presenter: Eric Luong**, Software Applications Manager, Orange County DOE

## **Financial Services - Meet & Greet**

All attendees working in finance are welcome to join this informal meet-and-greet.

**Presenter: Whitney Hardison**, External Business Coordinator, Sutter CSS

## **Indoor Air Quality**

Assess, meet compliance, and plan for the future of your school district's indoor air quality projects. Keep students and staff in safe, clean, and healthy environments while preventing the spread of harmful fumes, airborne microbes or viral materials. Apply a layered approach to exceed standards.

**Presenter: Doug Williams**, Director, MOT, Merced City SD

## **Leading Transportation**

Let's face it, not everyone in transportation has a management career goal. Maybe someone noticed your 'leadership gene' when you were a school bus driver or garage manager. Take the lead by identifying immediate needs, getting to know your staff and becoming a student of 'the business' of school business.

**Presenter: Christian Lepe**, Director of Transportation, Mt. Diablo USD

# Breakout Sessions

**Wednesday, April 5 | 8:00 a.m. - 9:00 a.m.**

## **New Buyer Basics**

Explore an introduction to purchasing concepts for entry-level purchasing clerks, technicians, buyers, and similar roles. The purchasing team is an integral part of the business department. Learn about various compliance requirements for bidding, contracting, fixed assets, and more. Understand the importance of providing exceptional customer service to all stakeholders for the common goal of supporting student success.

**Presenter: Tiana Barton**, Director, Business Support Services, Del Mar USD

## **Operational Efficiency in the Kitchen**

Learn how to set up your child nutrition program leaders for success with efficiencies in the kitchen. Explore new and innovative methods that reduce stress, minimize staff absence and increase morale within the team.

**Presenter: Crystal Eatherton**, Director, Child Nutrition, Placer Union HSD

## **Pension Leaders Update: Fiscal Outlook for STRS/PERS**

CBOs are asked, "will our district pay for CalPERS and CalSTRS and how? Schools face a year of no specifically directed State General Fund assistance in off-setting cost increases. Revisiting the challenges of balancing out-year budgets. Explore the complex work of pensions, retirement and school budgets.

**Presenters: Marcie Frost**, CEO, CalPERS; **Kevin Gordon**, President, Capitol Advisors Group, LLC; **Cassandra Lichnock**, CEO, CalSTRS and **Rob Mangewala**, CBO, Napa Valley USD

## **Reflecting on 2022: GO Bonds and Politics Moving Forward**

Hear aspects from the political, legal and financial. Discuss results of the 2022 GO Bonds Election cycle. Consider the set up for local GO bond issuance for 2023 and planning for GO bond elections for 2024.

**Presenter: John R. Baracy**, Managing Director, Raymond James & Associates, Inc.

## **Retirement: The New Beginning**

Peers and mentors will assist those who have retirement on their minds. Hear tips and suggestions on financial guides, travel information, social security, CalPERS and other popular needs to prepare the transition into retirement.

**Presenter: Rich Buse**, Retired, Carpe Diem Consulting for Education Business Services

## **Timecards: It Doesn't Have to be So Hard**

District-level processes impact student output and outcomes. With staffing shortages, timesheets have grown in demand and volume. With recurring monthly deadlines, change management is key to success in implementing new technology. Learn how to streamline business forms for greater efficiency and transparency.

**Presenter: Nickie Hoff**, Assistant Director, Business Services, Riverside USD

## **Why Your Employer-Sponsored Plan May Be Broken**

Discuss changes that can be made to employer-sponsored plans to make help retain top-employees and save Districts money. This will be a panel discussion with third-party administrators and Certified Financial Planners about the extensive capabilities of plans.

**Presenters: Kelsey McCarthy**, Strategic Relationship Manager, CA, Equitable and (TBD)

**Wednesday, April 5 | 9:15 a.m. - 10:15 a.m.**

## **Are Your Business Payments Safe?**

Check processing has risks and exposes accounts payable to fraud risk. With internal and external threats on the rise, accounting teams must mitigate risk, safeguard, sensitive bank information, and ensure the integrity of the accounting system. Assess how electronic payment solutions, such as virtual cards and ACH transactions, provide greater protections to manage the risk of payment fraud.

**Presenter: Sierre Lindgren**, Fraud Team, Paymerang

## **Bringing Data Together Across Departments**

One of the greatest frustrations for CBOs and HR leaders is the inability to connect critical data elements together in one view. LEAs have become reliant on spreadsheets to analyze necessary HR, business, and student information with hand-entry taking significant staff time and adding a high potential for error. Consider options to reconcile data.

**Presenter: Robert Bruce**, Administrator, West Contra Cost Ed. Fund

## **California's Newly Emerging Political Landscape**

California's political backdrop has impacts on policy and finance. What is to come in 2023 with the largest legislative turnover since the inception of term limits? Election-year politics and post-COVID policy struggles shape K-12 legislation and budgets. Explore new investments, declining enrollment and new laws that will shape our schools.

**Presenters: Rich De Nava**, Assistant Superintendent, Business Services, San Bernardino CSS; **Elizabeth Esquivel**, Asst. Executive Director, Governmental Relations, CASBO; **Kevin Gordon**, President, Capitol Advisors Group, LLC; **Jack O'Connell**, Partner, Capitol Advisors Group, LLC and **Barrett Snider**, Partner, Capitol Advisors Group, LLC

## Wednesday, April 5 | 9:15 a.m. - 10:15 a.m.

### CalPERS Hot Topics

Identify current issues facing schools in 2023. Focus and discuss concerns pertaining to schools as employers.

**Presenter:** *CalPERS Staff (TBD)*

### Charter School Financial Oversight

Gain new knowledge to ensure compliance with the oversight process of charter school finance. Assess financial data and improve fiscal solvency.

**Presenter:** *Debi Deal, CCAP Treasurer, Bright Lake*

### Connecting and Collaborating in Conflict

It is essential to work cooperatively with others, even when relationships are steeped in conflict. Challenges are when you are not the direct supervisor or must work with those who have opposing views. Determine how to gain influence without having direct authority. Define how to connect, build relationships, maintain trust, and work with challenging colleagues.

**Presenter:** *Kimberly Vallee, Administrative Operations Manager, Sonoma COE*

### Developer Fee Alphabet Soup: ADUs, CFD, SGRs

Review the basics of developer fees: what are they, how to increase fees and collection best practices. Mitigate impacts from new construction to meet a district's unique needs. Identify enrollment and community situations that may affect the fee nexus study.

**Presenter:** *Karina Samaniego, Shareholder, Dannis Woliver Kelley*

### Enrollment Impact on District Resources

Analyzing historical trends and estimating future enrollment is difficult. Understanding and communicating various enrollment category patterns is vital to build your plan for finance, staffing, and student performance. Walk through methods districts are using to design enrollment projections and research their changing student population.

**Presenter:** *Eric Eggan, Senior Analytics Advisor, Frontline Education*

### Female Leaders: Inspire, Influence and Succeed

Gain tips to earn respect, better navigate politics and bounce back after setbacks. Design support systems for strong, influential leadership. Embrace your role while expanding your skills in effectiveness. Fully embrace a leadership mindset.

**Presenter:** *Lisa Gonzales, Ed.D., CBO, Mt. Diablo USD*

### Financially Sustainable Meals

It is possible to design financially sustainable menus without sacrificing taste or variety. While battling supply chain issues, product shortages and staffing issues, schools might shift their focus on fast and easy, heat and serve meals. Discover resources and methods to manage the cost of meals without compromising quality for your students.

**Presenter:** *Crystal Eatherton, Director of Child Nutrition, Placer Union HSD*

### How CBOs Can Support Improved Achievement and Address Learning Loss

The 3-year ADA average creates a potential fiscal cliff unless trends can be reversed. How can LEAs restore confidence and trust with our communities? Discuss approaches to communicate the importance of attendance with all students. Take a proactive approach to rebuild attendance habits and increase ADA.

**Presenter:** *Erica Peterson, National Education Manager, School Innovations & Achievement*

### Plan for Bond Election Success

The last 2-3 years have been exceptionally challenging for school districts as they've had to navigate through the pandemic, a divisive political climate, declining enrollment and now a looming recession yet the need for facilities funding remains as an imperative part of student success. Look at the lessons learned from the recent November 2022 bond election cycle and how to best prepare for 2024 as the next opportunity to pass a bond and continue to fund facilities.

**Presenter:** *Erica Gonzalez, Managing Director, STIFEL*

### Protecting the Contract Price and Avoid Paying Twice

Manage change orders and follow easy steps during construction to limit the district's liability to the contract price. Determine when and how to apply conditional and unconditional waivers and releases, withholding for stop payment notices, and when to allow joint check agreements.

**Presenter:** *Deidree Sakai, Shareholder, Dannis Woliver Kelley*

### Restoring Confidence in School Safety

After shootings, natural disasters, and COVID, the question of school safety continues to surface. Consider strategies to help restore student, staff, and parent faith in school safety. Explore methods to restore trust by building effective risk communications campaigns. Utilize behavioral economics in staff and parent engagement activities. Collaborate to ensure endorsement for risk activities.

**Presenters:** *Donna Gingera, Principal, Hour-Zero School Emergency Program and Judy Miller, Director, Risk Management & Environmental Safety, Perris Union HSD*

# Breakout Sessions

**Wednesday, April 5 | 9:15 a.m. - 10:15 a.m.**

## **Safe and Sound: Legal Guidance on School Security**

Providing safe school environments is a top priority for districts. Learn best practices, legal considerations and real-life examples of facility security with online monitoring of student threats, law enforcement access to surveillance systems and records, and other topics of both physical and cyber security.

**Presenter:** *Attorney (TBD), F3 Law*

## **Software Procurement Simplified for Educational Technology**

Districts face technology issues of order lead time, classroom and administrative software solution needs, and staff time constraints. Plan to streamline software procurement to focus on product implementation and student learning needs.

**Presenter:** *Leeann Errotabere, Director of Purchasing, Clovis USD*

## **The ABC's of Career Technology Education**

Assess the importance and benefits of Career Technical Education in classrooms and districts. Determine why CTE is important from a business perspective. Explain why CTE benefits businesses and communities. Debunk typical myths.

**Presenter:** *Elena Hernandez, Program Manager, Colton Redlands Yucaipa ROP*

## **Working After Retirement**

Have you considered ideas to work after retirement? Consider the do's and don'ts of contracts with counties and school districts that hire temporary support. Define contract language including time, costs, insurance, taxes, travel expenses, etc.

**Presenter:** *Rich Buse, Retired, Carpe Diem, Consulting for Educational Business Services*

**Wednesday, April 5 | 10:30 a.m. - 11:30 a.m.**

## **Charter School Financial Analysis – Deep Dive**

Take a deeper look into financial analysis. Identify helpful tools, forms, documents and applicable materials to support success in the charter financial arena.

**Presenter:** *Debi Deal, CCAP Treasurer, Bright Lake*

## **Contract Termination: Going Where No One Wants to Go**

Learn factors, alternatives, parties, costs, actions, and instruments used in contract termination. Define the issues and determine if they are curable. Create a contract termination checklist and review termination scenarios. Become better prepared to address future situations.

**Presenter:** *Neil Groom, Director, Contracts and Purchasing, Orange USD*

## **Curb Appeal: Instilling Pride Through School Appearance**

Attractive facilities instill pride and motivate staff and students to do their best work. Beautiful schools inspire support and favor bond measures. Learn how to garner support for curb-appeal projects. Lead facilities, maintenance, and grounds staff to be contributors of this success. Collect helpful input from school staff, conduct walk-through visits, and establish timelines that optimize efficiency and success.

**Presenter:** *Peter Parenti, Vice President, Strategy, TRiGroup, Inc.*

## **Cyber Security: How to Stay Safe Online in Retirement**

Prevent phishing and identity theft. Implement virus protection, use of VPNs, and practices to maintaining online privacy. Handle data breaches of your information and avoid targets scams to retirees to stay safe online.

**Presenter:** *Guiselle Carreon, Retired from San Diego COE*

## **Difficult Conversations for Successful Outcomes**

Navigating difficult conversations is a crucial part of advancing your career path and supporting your team members. This session is designed as a guidebook with tricks, tools and techniques to support proactive resolution for conflicts, toxic behavior, and difficult or uncomfortable conversations.

**Presenter:** *Lynne Lees, Communications Manager, KYA*

## **Enrollment Marketing, Get More Students**

Most districts are facing declining enrollment and have no coordinated marketing effort to attract students. Explore audiences from inter-district permits, students from private schools and home school families. Assess enrollment marketing examples. What did they try, what worked, what lessons did they learn, and what is the plan moving forward?

**Presenter:** *Keith Butler, Ed.D., CBO, Torrance USD*

## **How to Collaborate with the IT Department**

IT Departments can be misunderstood with a reputation of pushback. Understand why IT seems to start at "no." What makes IT tick? Outline effective ways to communication needs, break through and move IT from "No" to "Yes."

**Presenter:** *Robert Sidford, Director, Technology and Innovation, Mt. Diablo USD*

## **Leading Diversity, Equity & Inclusion without Guilt, Blame and Division**

You've heard it before, if you're not uncomfortable, you're not growing. Prepare to dive into an unconventional, objective examination of what DEI has meant in the past. Consider ideas for leaders now and in the future. Challenge preconceptions and discover your best self. Unleash the power of a guilt-free approach that moves beyond tolerance to create a culture of variegated excellence.

**Presenter:** *Shawn S. Cabey, Assistant Superintendent, Administrative Services, Westside Union SD*

**Wednesday, April 5 | 10:30 a.m. - 11:30 a.m.**

### **Planning a Multi-Campus Site**

Walk through the strategies and process of planning a multi-school facility. Highlight the value and lessons learned during the community outreach and design process. Consider the alignment of educational goals, facilities impact, challenges and opportunities gained to pull it all off.

**Presenters:** *Casino Fajardo, Director of Facilities, Maintenance Operations and Transportation, Los Gatos-Saratoga Jt. Union HSD; David Miranda, Executive Director, Long Beach USD – Facilities Development & Planning and Kate Mraw, Director K-12, LPA Design Studios*

### **Prioritizing Student Mental Health and Safety**

In a world heavily influenced by social media, trends, and shock value, student mental health has increasingly become more of a concern. Districts face risks with bullying, retaliation protection, and vandalism. Examine tools and resources that protect and prevent your district from experiencing escalated emergencies and enhance a healthy school climate for students.

**Presenter:** *Emily Fenner, CatapultK12*

### **Protect Your Data from Bad Actors**

Investigate what to look for when bad actors are gaining access to information, personally or through your district. Consider common access points that we may not consider on public Wi-Fi. Enforce passwords updates and add extra security features to personal accounts.

**Presenter:** *Carl Fong, D.B.A., CGEIT, CISM, CCTO, Chief Technology Officer, Orange County DOE*

### **Reducing Energy Spend and Increasing General Fund**

Learn new legislation allocating funding for energy projects. Explore what components are included in an energy project and learn from different districts.

**Presenter:** *Jennifer Butler, Facility Solutions Specialist, Energy Services, SitelogIQ*

### **Risk Management: The Unsung Hero in the Universe of Financial Madness**

Expenditure villains are lurking around every corner, it can often feel like you need extraordinary powers in order to perform heroic actions. Heroes are made by the path they choose, not the powers they are graced with. Successfully navigate the universe filled with endless risk management decisions that can ultimately define your fate.

**Presenter:** *Eric Preston, Vice President, Loss Control, Keenan*

### **SACS Web System**

Description: TBD

Description: TBD

**Presenter:** *Christine Davis, Education Fiscal Services Administrator, Financial Accountability and Information Services, California Department of Education*

### **Special Education Accountants Unite**

Accounting for Special Education is a niche skill set with a knowledge base, training requirements, and allocation differences. Identify general topics, extraordinary costs, grant funding and reporting. Consider data's impact on funding. Expand your network of others serving in this field.

**Presenter:** *Calli Coleman, SELPA Accountant, Shasta County SELPA*

### **Successfully Navigating Inflation, Escalation and Supply Chain Constraints**

Unpredictable costs. Fluctuating materials availability. Labor shortages. These, plus transportation, logistics and other supply chain-related challenges, pose massive and potential risks for any district embarking on a construction project. Come learn what has been driving these ongoing issues, what it will take for them to subside and how your district can best protect itself and your upcoming projects from being adversely impacted.

**Presenter:** *Brad Fannin, Project Director, Blach Construction*

### **Supply Chain Assistance Funds, Kitchen Infrastructure and Training Funds**

Review allowable uses of the Supply Chain Assistance Funds that address challenges due to supply chain disruptions in school meals programs. Consider the Kitchen Infrastructure and Training (KIT) funding allocation for LEAs to purchase equipment, upgrade kitchen infrastructure and offer food service staff training.

**Presenter:** *Marley Nelms, MPA, RDN, SNS, Director of Nutrition Services, San Dieguito Union HSD*

### **Up Your Game to Prepare and Conduct Classified Employee Evaluations**

Gain a greater understanding about the purpose, benefits, and legal ramifications of the performance evaluation process for classified employees. Discussed approaches, best practices and pitfalls. Watch examples of effective performance evaluations and those that "need improvement."

**Presenters:** *Cynthia Carrillo, Executive Director, Human Resources, Santa Paulo USD and Debra Marquez, Director of Human Resources, California University of Science and Medicine*

### **What Does Ed Code Really Mean?**

Decipher through Education Code, Government Code, and Labor Code. Identify which codes to refer to in certain situations. Identify which codes apply to school employers and which do not. Improve future payroll processing.

**Presenters:** *Tracy Neufeld, Payroll Manager, Clovis USD and Stephanie Villarreal, Principal Systems Specialist, Los Angeles COE*

# Breakout Sessions

**Wednesday, April 5 | 11:45 a.m. - 1:00 p.m.**

## Professional Council Luncheons

**Additional cost, advance registration required**

### Human Resources & Retiree

#### Retirement planning is an important task for HR Teams in Organizations

Broadly speaking, retirement planning is a process through which districts and county offices offer necessary options to their employees to retire financially secure, so that they can live comfortably in your golden years. I'm hoping we can work together and co-present the value and ideas for those interested in additional information for themselves and others.

**Presenters:** *Cynthia Carrillo*, Executive Director, HR, Santa Paula USD and *Rich Buse*, Retired, Carpe Diem, Consulting for Educational Business Services

### Maintenance & Operations

#### Attendance Improvement and ADA Funding Results

Learn about attendance improvement and ADA Funding results. Explore a partnership with the Mayo Clinic. Hear about district relationships with some of the largest schools in the country.

**Presenters:** *Art McDade*, President, ZionLabs; *Deena Morgan*, Vice President Partner Relations, R-Zero and *Frank Presco*, Director, Partner Relations, R-Zero

### Risk Management

#### The Good, Bad and Ugly: Liability Lessons Learned

Recent settlements and lawsuits affecting school districts will be highlighted. Apply lessons learned to prevent similar ones from occurring. Keep district funds in the classroom and not in the claims.

**Presenters:** *Stephan Birgel*, Chief Claims Officer, Property & Liability Program, Alliance of Schools for Cooperative Insurance Programs (ASCIP) and *Reshan Cooray*, Executive Director, Property & Casualty Programs, Alliance of Schools for Cooperative Insurance Programs (ACSIP)

**Wednesday, April 5 | 1:15 p.m. - 2:15 p.m.**

## Account Code Introduction

New employees in accounting and those promoted may not hold a clear understanding of the account code structure. Gain a basic understanding of how to expense properly. This foundational introduction applies to anyone that enters requisitions, processes timesheets, or works in fiscal services.

**Presenter:** *Kay Pugh*, Special Education Financial Analyst, San Diego COE

## Employment Law: With Great Power, Comes Great Responsibility

Gain a general overview of CA employment practices liability, tailored to the education system. Learn labor law compliance, with emphasis on labor code and federal/state mandates that many find ambiguous. Topics include Leaves of Absence/Return to Work, Reasonable Accommodation, Wage/Hour Litigation and Union Considerations.

**Presenter:** *Megan Souza*, Managing, Partner, Employment Law, Michael Sullivan & Associates

## Everyday Leaders

Leaders should not be defined by their title, their office or their salary. Everyone can be a leader. How can managers and directors lift-up those around them to lead together? Explore methods that show empathy, compassion and team building.

**Presenters:** *Tracy Dreher*, Purchasing Manager, Livermore Valley USD and *Anne Wells*, Payroll Supervisor, Livermore Valley USD

## Facilities Master Planning Wins Resources

Description: TBD

Description: TBD

**Presenter:** *David Randolph*, CEO, Facilities Master Planning

## Get Audit Ready

Are your retirement plans audit ready? Now is the time to review documents and determine if they meet current IRS requirements. Gain insight on common mistakes, corrections, and best practices to avoid sanctions from an IRS Plan Audit.

**Presenter:** *Darin Ditmar*, TPA Relationship Specialist, SchoolsFirst Plan Administration

## Have you maximized your revenue? What don't you know about your unduplicated pupil counts and related grants?

Too often, money is "left on the table". Learn how to maximize your Revenue with a special attention to Unduplicated Pupil Counts. With the influx is unduplicated students and declining enrollment, it is critical to understand all of the funding options related to pupil counts.

**Presenter:** *Khary M. Knowles*, Arch., M.Ed., Managing Vice President, EH&A/MGT

## Wednesday, April 5 | 1:15 p.m. - 2:15 p.m.

### How to Survive Your Annual Audit

The annual audit is a source of stress. Findings can have serious consequences. Prepare for, navigate, and understand the annual audit process. Learn tips and tricks to avoid audit findings, as well as how to maximize the value received from their annual audit.

**Presenter:** *Jeff Nigro, Partner, Nigro & Nigro, PC*

### Leveraging the LCAP to Strengthen Facilities, M&O, and Transportation (FMOT)

Highlight key strategies for FMOT leaders to participate in the process of setting LCAP goals. Create measurable objectives and establish milestones for progress. Gain positive attention in order to increase resources for these departments.

**Presenter:** *Peter Parenti, Vice President, Strategy, TRiGroup, Inc.*

### Navigate Special Diets

Requests and requirements for special diets are steadily increasing. Discuss issues and decisions from health concerns, liability and food item availability. Establish processes for forms and paperwork to determine student's need and/or parent's want/preference.

**Presenter:** *Juan Valencia, Nutrition Services Director, Romoland SD*

### Pay or Else: Ransomware Realities

Gain insights and hard lessons learned from two cyber ransomware attacks. Compare and contrast the similarities of breaches. Explore what went right and what went wrong. Address recovery and restoration. How can we improve and prepare?

**Presenter:** *Martin Ronquillo, Director of Cyber Risk, ASCIP*

### Payroll Best Practices

Explore basics of payroll processing. Learn techniques to keep payroll operations running efficiently and in compliance.

**Presenters:** *Mike Stribling, Administrator, Payroll Services, Riverside COE and Lena Young-Gallardo, Director, District Financial Services, San Bernardino CSS*

### Planning and Budgeting for Technology Replacement Cycle

Technology does not last forever. Through age, use and abuse, technological obsolescence or change in how technology is used, all tech will need to be replaced. Prepare for and uncover the secrets of the multi-year technology replacement cycle. Define crucial elements and outline benefits to students, teachers, schools and the district.

**Presenter:** *Thomas Tan, Ed.D., Executive Director, Technology Services, Huntington Beach City SD*

### Purchasing Rapid Rounds

Discuss purchasing hot topics in at rapid, roundtables. Rotate through guided discussions with your peers on relevant topics, facilitated by members of the Purchasing Professional Council. This is a great opportunity to network and share ideas on how to manage common issues.

**Presenters:** *Tiana Barton, Director of Business Support Services, Del Mar Union SD; Sharon Clay, Director, Purchasing & Logistics, Cajon Valley Union SD, and Tony Crapo, Director, Purchasing Support Services, Sequoia Union HSD*

### Revitalize Employee Recruitment and Retention

Consider how the burden of student loan debt impacts both the district and staff. Describe student loan forgiveness programs that help improve morale, recruitment and retention. Identify retirement education and options available under CalSTRS, CalPERS as well as supplemental retirement accounts. Realize district benefits from increased retirement plan participation and payroll tax savings.

**Presenters:** *Eric Lopez, Agency Business Consultant, The Horace Mann Companies and Tim Mazza, Senior Agency Consultant, The Horace Mann Companies*

### Student-Centered Charter School Oversight

Public schools, including charters, exist to provide a quality educational experience for students. Charter authorizers, whether district or county level, have the responsibility to provide charter school oversight. Gain insight, tools and strategies that ensure quality oversight.

**Presenter:** *Jeffrey Hunt, Director of Charter Schools, Fresno CSS*

### The Fiscal Side of Facilities: Making it Work Well for Both Departments

Fiscal and facilities are both responsible for project budgets, expenditures, and specific information about high dollar, high profile projects. Diagnose different ways that each department views that data and consider ways to collaborate in a coordinated way.

**Presenter:** *Cherie Chenoweth, Coordinator, Facilities Accounting Compliance, San Juan USD*

### The Value of Good Data in Special Education

Accurate Special Education data reporting has become crucial. Discuss how your district's programs can impact your data and compliance. Describe how data and compliance reporting impact funding. Explore how changes to funding can impact future programs, and how inaccurate data reporting can result in reduced funding or CDE review.

**Presenter:** *Calli Coleman, SELPA Accountant, Shasta County SELPA*

### Workers Compensation Post-COVID

How has COVID changed the landscape of workers compensation for schools? Join the conversation and learn why it is more important than ever how workers comp claims are managed.

**Presenters:** *Rebecca Littlejohn, Risk Management Officer, Oakland USD and Judy Miller, Director of Risk Management & Environmental Safety, Perris Union HSD*

# Breakout Sessions

**Wednesday, April 5 | 2:30 p.m. - 3:30 p.m.**

## **Associated Student Body Auditing and Accounting in an E-Commerce World**

Gain a refresher of associated student body (ASB) best practices from the perspectives of both district management and the auditor. Discuss internal controls when integrating electronic-based payment platforms. Identify nuances and considerations when reporting ASB as a governmental fund, after GASB 84 implementation.

**Presenter: Charles Raibley**, Audit Senior Manager, Crowe LLP

## **Bringing School Facilities into the 21st Century**

Updated school facilities could maximize diversity and equity in underserved districts. Explore challenges to identify environmental issues and develop strategic solutions when upgrading, modernizing, or constructing school facilities that provide the most effective learning environment and that attracts and increases economic and racial diversity and equity.

**Presenters: Sarine A. Abrahamian**, Partner, Orbach Huff & Henderson LLP and **Tempestt L. Garland**, Attorney, Orbach Huff & Henderson LLP

## **CalSTRS Employer Audits & More**

Review common audit findings and what can be done to prevent them. Identify current issues, areas of focus and concerns pertaining to school employers.

**Presenter: CalSTRS Representative**

## **Charter Fiscal Oversight and Petition Review Post AB 1505**

This presentation will review several best practices that remain meaningful as well as highlighting some key differences and new challenges to charter oversight as a result of legislative change.

**Presenter: Indra Ciccarelli**, Director II, Charter School Office, Los Angeles COE

## **Facility Funding: History and What is Next**

Funding for school facilities is broken. Schools face challenges to keep up with growing needs and costs. Will the newly earmarked State General Funds get things rolling? Understand the history of school construction funding in California. Define the importance of planning, the LCAP role and how to advocate for buildings.

**Presenter: Sara Slater**, Assistant Fiscal Services Director of Facilities Planning and Development, Long Beach USD

## **Local School Wellness Policy: What is My Part?**

Discuss a LSWP and identify the key takeaways for school administrators. Review factors that constitute compliance and plan a successful triennial assessment.

**Presenter: Crystal Eatherton**, Director of Child Nutrition, Placer Union HSD

## **M&O: What Everyone Should Know**

While working in a school, all departments collaborate with the M&O department. Discover routine compliance codes that govern facilities. Overcome obstacles that limit understanding. Work to improve relationships across and within maintenance and operations for positive staff and student outcomes.

**Presenters: Matthew Belasco**, Director M&O and Transportation, Pittsburg USD and **Joel Munoz**, Director, M&O, Pixley USD

## **Money for Mentors in Career Technical Education**

Since 2009, CTE TEACH, a California Dept. of Education sponsored new teacher mentor program, has successfully supported over 8,000 new Career Technical Education (CTE) teachers transitioning from industry to the classroom. Learn about free resources and how to earn funds to support a new CTE teacher mentor program.

**Presenter: Melissa Dix**, Director, Education Services, Colton-Redlands Yucaipa ROP/CTE TEACH

## **Move That Bus: From Application to Certification in 60 Days**

School bus driver shortage is a real concern. Compounding the problem is the lengthy onboarding process. Identify ways to expedite the hiring process and fill those vacancies quickly. Transportation Directors, Managers, and Supervisors will gain tips to collaborate with Human Resources that will overcome time-wasting roadblocks when onboarding drivers.

**Presenter: Carlos Chicas**, Executive Director, MOT, Capistrano USD

## **Preparing for the 2023-24 LCAP**

By April of 2023, your 2022 dashboard should have been analyzed, educational partners engaged, and you should be preparing for the first public hearing. Assess a checklist of things not to forget. Did you carryover the necessary supplemental and concentration grant funds? Goals for consistently low-performing student groups and/or schools? Ensure the LCAP is ready for approval and implementation.

**Presenter: Brianna Garcia**, Vice President, School Services of California, Inc.

## **Presenting to the Board**

The school's board must ensure fiscal health and accountability for progression toward district goals. Reports and presentations are a vital component to build a well-informed board. Gain insight into what board members need and want to hear. Gather tips to design a visually appealing, objective report that anticipates and encourages questions.

**Presenters: Terilyn Finders**, Director of Communications, F3 Law Next Level Client Services and **Sandra Lyon**, Former Superintendent, Consultant, F3 Law Next Level Client Services

**Wednesday, April 5 | 2:30 p.m. - 3:30 p.m.**

**Progressive Discipline and Interventions: Put the Human Back into Human Resources**

Combine workplace psychology with existing personnel tools to produce a more humanistic approach to behavior change with misguided employees. Establish a solid evidentiary basis for dismissal and required at appeal hearings for classified and certificated employees. Help managers address disciplinary problems to reduce adversarial aspects of the supervisor/subordinate relationship.

**Presenters:** *Darren C. Kameya, Partner, Lozano Smith and Dana Lui, Associate, Lozano Smith*

**Purchasing Principles for Non-Purchasing People**

Explore essential purchasing principles applicable across all school business departments. Insights will especially assist small districts that may not have purchasing departments.

**Presenter:** *Tony Crapo, Director, Purchasing & Support Services, Sequoia Union HSD*

**Resilient Schools: Maximize Inflation Reduction Act Funding for Your District**

The federal climate bill, the IRA, increases funding for clean energy and climate initiatives to empower communities that accelerate infrastructure investments, especially in low-income & disadvantaged communities. How can schools take advantage of federal tax incentives to become more resilient, sustainable and efficient while planning for weather and power considerations.

**Presenter:** *Margaret Miller, Director of Government and Regulatory Affairs, ENGIE*

**Rebooting Risk Management**

Join the conversation with a panel of seasoned Risk Managers who will discuss the basics we forgot during COVID. Discuss new emerging risks we should be watching, and available Risk Management strategies and resources that you might not know about.

**Presenters:** *Jennifer McCain, Senior Risk Services Consultant, Alliance of Schools for Cooperative Insurance Program (ASCIP) and Erin Tarkhanian, Environment Health and Safety Specialist, Redwood Empire Schools' Insurance Group (RESIG)*

**Reflection and Reconnection: Making Mindfulness Matter**

Mindfulness matters more now than ever - for ourselves and our communities. During uncertain times, mind and body can go into fight or flight. Develop greater tolerance to uncertainty and make better decisions. Discuss research and ways to employ mindfulness to increase wellness within our "hurry up" world. Leave with tools to build trusting relationships and communicate your decisions more effectively.

**Presenter:** *Linda Gail Walker, Executive Director for Innovation and Impact, Meteor Education*

**Superheroes for Technology Strategic Sourcing**

Many districts suffer from the lack of staff with technology procurement skills and the resources to drive strategic sourcing. Understand the importance of a contract team to manage the risk and compliance of contracts. Enable districts to deploy technology with peace of mind.

**Presenter:** *Melissa Deets, Senior Manager, Education Business Development & Capture, CDW-Education LLC*

**Transforming Your Organization to Meet the New Workplace Realities: Lessons Learned**

A workplace value proposition represents the organizational culture, benefits and interactions employees experience. It's "why we come to the workplace." Chances are your workplace value proposition has changed in the last year or two whether you have adapted your culture or not. Employees are expecting different things: more flexibility, a focus on wellbeing, ways to deal with negativity, and equity to name a few. Join us for this panel discussion with CBOs and HR Professionals.

**Presenter:** *Lois Gormley, Associate Superintendent, Administrative Services, Orange County DOE*



# Breakout Sessions

**Thursday, April 6 | 8:00 a.m. - 9:00 a.m.**

## **Building a Firm Foundation for a Successful Capital Facilities Funding Program**

In today's environment, transparency is key. Successfully provide your Board and community with accurate information and reports on your Capital Facility Programs to build a solid foundation. Review rules and regulations governing your facility programs.

**Presenters:** *Michael Dodge*, Senior Vice President, KeyAnalytics and *Patty Paulsen*, Senior Vice President, KeyAnalytics

## **Creating Harmony Between Departments**

Common workplace challenges occur between departments finding staff are often at odds. Methods of communicating, priorities and personality types are different. Polarity creates tension, stress, and an undesirable work environment. Human Resources and Fiscal departments will explore reasons for conflict and solutions to create harmony and a better culture for all stakeholders.

**Presenter:** *La Faye McFarland Platter*, Ed.D., Executive Leadership Coach, E4 Power

## **Fiscal Leadership: Survive and Thrive**

Share advice and tips for new fiscal leaders. Advance in your new role and contribute to your district. Discuss fiscal tools, worksheets and documents to support your financial processes, increased responsibilities and duties.

**Presenter:** *Rosalee Hormuth*, Administrator, Family Support Services, Orange County DOE

## **Hot Topics in School Finance**

Flexibility and perseverance are necessary to accommodate the ever-changing requirements for educating and maintaining safe school sites for children and staff. Reflect on the top issues that permeate across the state and the late-breaking topics that may appear as part of the 2023-24 proposed budget, including prognostications on the May Revision.

**Presenters:** *John Gray*, President and CEO, School Services of California, Inc. and *Matt Phillips*, Director, Management Consulting Services, School Services of California, Inc.

## **How to Survive Your Annual Audit**

The annual audit is a source of stress. Findings can have serious consequences. Prepare for, navigate, and understand the annual audit process. Learn tips and tricks to avoid audit findings, as well as how to maximize the value received from their annual audit.

**Presenters:** *Shilo Gorospe*, CPA, Partner, Eide Bailly, LLC and *Jeff Nigro*, Partner, Nigro & Nigro, PC

## **Just Get Along: Change Your Perspective, Change Your Life**

Every aspect of your work performance and experience is personal. If you want to change your life or work, you have to modify your perspective. Our environment is full of cognitive disruptors that can cause frustration and zap the joy from our life. Discuss how to reshape your perspective and change your life for the better.

**Presenter:** *Laura Josh*, MBA, General Manager, California Schools VEBA

## **Leveraging Data Driven Decision Making**

Learn how school staff utilize technology software to build data dashboards that support decision making around budgets, staffing, enrollment, student achievement, and more. Software, such as Tableau, allows users to design visually pleasing data dashboards that allow for quick and easy data analysis.

**Presenter:** *Peter Abboud*, Director, Data & Assessment Services, Napa Valley USD

## **Maintenance of Effort (MOE): The Forest & The Trees**

Maintenance of Effort requirements have become trickier to meet in the aftermath of the pandemic. Business personnel must communicate more with Special Education Leadership to locate exemptions.

**Presenter:** *Calli Coleman*, SELPA Accountant, Shasta County SELPA

## **Mastering the Art of Employee Leaves (Part I)**

In this informative workshop, we'll immerse you in the technical aspects and systematic nuances of employee leaves, with extensive coverage of both the Family Medical Leave Act and California Family Rights Act. We'll convey information that's essential to successful payroll processing, and whether you are new to payroll or an experienced payroll professional, you'll leave more knowledgeable than ever before.

**Presenter:** *Aaron V. O'Donnell*, Partner, Atkinson, Andelson, Loya, Ruud & Romo

## **Navigating Pupil Transportation Funding**

Analyze recent legislation, Home-to-School Pupil Transportation Funding. Identify Local Education Agency eligibility to receive related pupil transportation expenses. Prepare to track your agencies related transportation expenses to assure you receive your maximum reimbursement.

**Presenters:** *Timothy Purvis*, CEO/Principal, Pupil Transportation Information (PTI) and *Mike Rea*, Consultant, Pupil Transportation Information (PTI)

## **Operator to Operator: The Real Numbers behind Buying and Operating Electric Buses**

Learning the truth about the total cost of ownership. Gain insight into the real numbers behind the manufactured provided mileage data, receive content and data from a long-term operator who will share expertise and operational data.

**Presenter:** *Bobbie Hartman*, Senior Director of Marketing and Sales Support, FirstStudent

## Thursday, April 6 | 8:00 a.m. - 9:00 a.m.

### Policy & Politics of School Nutrition

One of the few bright spots of the pandemic has been the realization at the State and Federal level that nutrition and universal meal programs are linked to the intellectual and physical well-being of our children. Consider lessons learned and discuss the policy and fiscal reform needed to ensure students have the healthy nutrition they need in preparation for learning and high achievement.

**Presenters:** *Kim Frinzell*, Director, Nutrition Services Division, California Department of Education and **Lee Angela Reid**, Partner, Capitol Advisors Group, LLC

### Procurement - What Keeps You Up at Night?

Procurement is the hub of the wheel for all operational parts of the organization. From playgrounds to classrooms, these teams gain the goods/services needed. Best practices in bid issuing, compliance and insurance requirements must be met and tracked throughout the contract's life. Consider ways to cover all bases and prevent future issues. Prequalification, insurance submittals and tracking the bid process is easier when eProcurement is used.

**Presenters:** *Tammy Rimes*, Former Purchasing Agent, NCPP Association and **Janice Unger**, Capitol Projects, Procurements, Former East Side Union HSD

### Public Records Act Primer

Schools are confronted with demands for public records production, often involving statewide and burdensome requests. Additionally, the definition of what is considered a public record has expanded to staff's personal email accounts, texts and more. These growing requests require extensive time and organization with extensive involvement of IT staff.

**Presenter:** *Harold Freiman*, Partner, Lozano Smith

### Responsive Charter School Authorizing: Moving Beyond a Transactional Approach

This session will take a deep dive into the impact of "collaborative relationships" between charter schools and the charter school authorizers to obtain better results.

**Presenter:** *Corey Loomis*, Director of the Charter Schools Unit, Riverside COE

### Run, Hide, Fight

Experience situational awareness skills and prepare lifesaving response options for an emergency. Gain confidence by discussing scenarios. Self-assess reaction and responses to potential situations.

**Presenters:** *Rich Howard*, Supervisor, Knowledge Saves Lives, Inc. and **Paul Llenez**, CEO, Knowledge Saves Lives, Inc.

### The Brown Act for District Staff

The Brown Act is not just for board members. As meeting agendas become longer, Brown Act issues abound. Considering the relevance of technology, websites, email and texts is essential for every school district employee who works with the governing board.

**Presenter:** *William Tunick*, Shareholder, Dannis Woliver Kelley

### The Novice Negotiator

Don't fear negotiating. Prepare what to expect and how to approach a discussion. Understand and identify the challenge. Hear insights on what has worked and what hasn't. Accept your role in being an effective member of a negotiations team.

**Presenter:** *Cynthia Carrillo*, Executive Director, HR, Santa Paula USD

### Universal Transitional Kindergarten: Successful Strategies for Integration

This workshop will explore state program limitations and strategies for the integration of Universal Transitional Kindergarten into your District.

**Presenters:** *Kristen Coates*, CBO, Twin Rivers USD and **Kate Vega**, Education Funding Specialist, DLR Group

## Thursday, April 6 | 12:15 p.m. - 1:30 p.m.

### Professional Council Luncheons

**Additional cost, advance registration required**

#### CBO

**Title:** Information Coming Soon

**Presenter:** TBD

#### Purchasing

**Leadership 101**

**Presenters:** *Marci McFadden*, Chief of Communications & Engagement, Monterey Peninsula USD and **Brett McFadden**, Deputy Superintendent, Monterey County Office of Education

# Breakout Sessions

**Thursday, April 6 | 2:00 p.m. - 3:00 p.m.**

## **A Journey to Net Zero Energy Use**

The California Green Buildings Standards Code (CALGreen) was established to meet state initiatives and address environmental threats. Identify important changes since January 2023 to promote reduction in carbon fuels with the ultimate goal of achieving Net Zero facilities. Overview changes and review a case study of a current net zero project.

**Presenter: Richard Musto**, *Managing Director, LPA, Inc.*

## **Board Elections and the California Voting Rights Act: How to Protect Your District**

How to Protect Your District - Under the California Voting Rights Act (CVRA), school districts that elect their Board at-large are vulnerable to potentially costly legal challenge. Understand risks and explore an effective, efficient transition to establish trustee voting areas in a school district.

**Presenters: Rob Murray**, *Director of Demographics and Planning, King Consulting* and **Mariana Solomon**, *Associate Superintendent, Business Services, San Bruno Park SD*

## **Cyber Risk and Your District**

The risk environment and cyberthreat landscape are continually evolving. Be prepared for and adapt to changing conditions. Define types of risks that districts face daily. Mitigate the risk of a cyberattack.

**Presenters: Bryson Moore**, *Representative, Ed Technology Funds* and **Tim Walsh**, *Manager, Cybersecurity, Tyler Technologies*

## **Electric School Bus (ESB) and Infrastructure Funding**

Assess the benefits of an electric school bus and receive information on incentivized supportive infrastructure solutions. Identify timelines, contacts and confidence to secure ESB funding.

**Presenter: Michelle Hanson**, *Lead Project Manager, CALSTART*

## **Facility Funding: History and What is Next**

Funding for school facilities is broken. Schools face challenges to keep up with growing needs and costs. Will the newly earmarked State General Funds get things rolling? Understand the history of school construction funding in California. Define the importance of planning, the LCAP role and how to advocate for buildings.

**Presenters: Joanne Branch**, *Facility & Procurement Specialist, COLBI* and **Sara Slater**, *Assistant Fiscal Services Director of Facilities, Planning and Development, Long Beach USD*

## **From Dependent to Independent Charter School**

The Journey of Leadership Military Academy (LMA): this session will discuss the challenges and successes of a small charter school deemed necessary in the community as they transition from a dependent charter school model to an independent one. This session will further outline challenges in personnel, fiscal, and facilities at a small charter school while the staff remain dedicated to the kids in the community they serve.

**Presenter: Santos Campos**, *Executive Director, Leadership Military Academy*

## **Mastering the Art of Employee Leaves (Part II)**

Immerse in technical aspects and systematic nuances of employee leaves, the Family Medical Leave Act and California Family Rights Act. This is essential to successful payroll processing whether you are new or an experienced payroll professional.

**Presenter: Aaron V. O'Donnell**, *Partner, Atkinson, Andelson, Loya, Ruud & Romo*

## **Preparing for E-RATE and/or ECF Audits**

Each year, E-rate entities are faced with multiple audits and/or heightened reviews including overall program compliance, improper payments, and vendor selections and items that could result in the recovery of the funding received. Learn various types of USAC audits and how to organize documentation to draft more efficient responses.

**Presenter: Beverly Sutherland**, *CEO & President, ED Technology Funds, Inc.*

## **Purchasing Department to the Rescue: Agreements and Insurance Proactive Protections**

Why are agreements/contracts important? Identify insurance types, endorsements, protections, when applicable, and what to look for on certificates and policies. Consider risky products and services, such as chemical Safety Data Sheets, etc.

**Presenter: Derrick Hoffman**, *Director of Purchasing, Simi Valley USD*

## **Sexual Misconduct in Schools: It's Still Happening**

Despite mandated reporting laws and resources devoted to this issue, sexual misconduct in schools continues to happen. Reflect lessons learned through litigation and how to prevent sexual misconduct at your school. Discuss real life scenarios to help your district protect its students.

**Presenter: Doug Ross**, *JPA Manager, Keenan*

## **Simplify Purchasing with Amazon Business to Advance the Learning Mission**

Share tools and resources to simplify procurement processes.

**Presenters: Doug Hassett**, *Senior Customer Advisor, California, Amazon Business for Education* and **Heidi Axcell**, *Senior Customer Advisor, California, Amazon Business for Education*

**Thursday, April 6 | 2:00 p.m. - 3:00 p.m.**

### **Student Body Accounting & Auditing**

Gain a refresher of associated body best practices for accounting and auditing. Hear perspectives of both district management and the auditor regarding the impact on ASB internal controls, which can occur by integrating e-payment platforms. Identify nuances of reporting financial activity of an ASB as a governmental fund, post-GASB 84.

**Presenters:** *Jennifer Ara, CPA, Audit Partner, Crowe LLP; Jeff Jensen, CPA, Audit Partner, Crowe LLP and Charles Raibley, CPA, Audit Senior Manager, Crowe LLP*

### **Teacher-Staff Housing: Making it a Reality in Your District**

The lack of affordable housing has led districts to explore building teacher-staff housing. The funding, construction and operation of these projects are complex and challenging. Hear about the nation's first Go-bond financed teacher-staff housing apartment complex. Learn how they overcame the financial, legal, operational and political hurdles to make this project a reality.

**Presenter:** *Dale Scott, President, Dale Scott & Company*

### **Trust Prefunding for OPEB/Pension During Uncertain Times**

Districts will face fiscal challenges in the coming years (reserve caps, rising STRS/PERS costs, the "fiscal cliff," and declining enrollment). Explore how setting up a trust to pre-fund OPEB and/or pension liabilities can help better prepare your budget now and in the future. Discover how to set up a trust, and how to fund it (including the one-time discretionary block grant in the 2022-23 FY Budget) and other important tools that may aid you in the process (including early retirement plans).

**Presenters:** *Rachel Sanders, Senior Manager, Consulting, PARS and Grant Schimelpfening, Assistant Superintendent, Administrative Services, Lindsay USD*

### **Understanding and Managing Classified Employee Leaves**

Gain knowledge of classified employee leaves and the challenges of managing leaves. Learn about the different types of leaves and how they may overlap to create an extended leave. Learn to track properly and design communication between payroll and human resources.

**Presenters:** *Cynthia Carrillo, Executive Director, Human Resources, Santa Paula USD and Edd C. Bond, Assistant Superintendent, Human Resources and Employee Development, Santa Paula USD*

### **Universal Transitional Kindergarten: Successful Strategies for Integration**

Explore state program limitations and strategies for the integration of Universal Transitional Kindergarten into your District.

**Presenter:** *Kate Vega, Education Funding Specialist, DLR Group*

**Thursday, April 6 | 4:15 p.m. - 5:15 p.m.**

### **Applying a Risk Management Lens to Common School District Fraud**

Description: This session will focus on how a risk management perspective can help prevent fraud. The presentation will include case studies and useful takeaways that can be put into action quickly.

**Presenters:** *Lori Raineri, CEO, Government Financial Services Joint Powers Authority and Keith Weaver, Director of Sales, Government Financial Services Joint Powers Authority*

### **Building Smarter: Leveraging Innovation for Maximum Bond Impact**

School construction is a complex undertaking. Leveraging innovation can streamline your construction project, save time and money, and reduce onsite disruption – all of which will positively impact your bond program. Showcase several effective and efficient techniques for a variety of new construction, building upgrades and overall campus modernization/transformation projects.

**Presenter:** *Amber Emery, Project Director, Blach Construction*

### **Charter School Authorizing and Oversight**

Gain understanding of California's charter school system, authorizing and oversight. Learn the basics of financial oversight, best practices, and areas of risk. Be equipped with networking, resources, and ongoing support for authorizing.

**Presenter:** *Tom Hutton, Executive Director, California Charter Authorizing Professionals*

### **Combat Inflation in Your Bond and Facilities Program**

Inflation and rising construction costs have become an issue. The cost to upgrade and maintain facilities is higher than ever before. Describe options to prepare for rising costs, such as accelerating bond issuances and projects, issuing taxable bonds, and improving budgeting practices.

**Presenter:** *Chris Hiatt, Director, Keygent LLC*

### **Creating Thriving District/Labor Relations**

Are you having challenges working with your labor organizations, or need ideas on how to continue a good relationship? In this session you'll hear real examples of challenges and successes in working with labor organizations, learn practical tips on fostering productive relations, and hear insider perspectives from a former union site rep who now serves as Assistant Superintendent of H.R., and from a former teacher's association president who eventually served as CBO for the same district.

**Presenters:** *Ross Perry, Assistant Superintendent, HR, San Gabriel USD and William Wong, Account Executive, ABM Building Solutions LLC*

# Breakout Sessions

**Thursday, April 6 | 4:15 p.m. - 5:15 p.m.**

## **Custodial Service Standards**

Creating a custodial cleaning plan and staffing formula can be challenging. There are multiple variables to measure, different expectations to uphold, and no real clear-cut standard for how custodians should perform and at what level. Although it seems like an undertaking, creating a staffing work plan should never be as difficult to outline. In this session we will be comparing dated custodial staffing formulas to a new version that will help establish balanced cleaning service levels.

**Presenters:** *Tony Almeida*, Manager, Custodial Services, Elk Grove USD; *Paulo Azevedo*, Director of MOT, Menifee Union ESD; **Crystal Sandoval**, Area Supervisor for Custodial Services, Elk Grove USD and **Perry Shimanoff**, President, Management & Communication Consultants

## **Funding Streams to Support a 21st Century Learning Environment**

As CA School Districts strive to meet the needs of today and plan a better tomorrow, leaders are typically left with the challenge of “how do I fund this”. In these unprecedented times District’s are receiving an influx of funds through federal and state programs and can leverage these dollars to modernize learning environments. Receive an update on the Inflation Reduction Act where panelists will discuss how to prioritize and implement projects that qualify for federal/state funds and grants.

**Presenter:** *Ivy Carsten*, Regional Client Coordinator, Schneider Electric

## **Labor Negotiations Preparation Best Practices**

Understanding and communicating your district’s financial condition is essential for successful negotiations. Know the salary and benefit history for your district and surrounding districts. Use this data to present high-level, easy-to-understand graphics regarding salaries, benefits, and staffing level comparisons among a peer group of districts. Create powerful communications and build trust during negotiations.

**Presenter:** *Vince Christakos*, Strategic Account Advisor, VIP Leadership Services, LLC

## **Making Cents of Your District Energy Costs**

Energy costs are a major expense for California school districts. In this session, participants will hear from seasoned energy professionals and active school staff members regarding energy challenges, opportunities, and upcoming changes that will have a direct impact on district energy costs.

**Presenter:** *David Burdick*, Executive Vice President, TerraVerde Energy and *Phil Villagomez*, Vice President, TerraVerde Energy

## **Pay or Else: Ransomware Realities**

Gain insights and hard lessons learned from two cyber ransomware attacks. Compare and contrast the similarities of breaches. Explore what went right and what went wrong. Address recovery and restoration. How can we improve and prepare?

**Presenter:** *Reshan Cooray*, JPA Manager, Alliance of Schools for Cooperative Insurance Programs (ASCIP)

## **Take Control of Position Control: A Budget Lens**

Can districts be 100% confident that all positions are part of their operating budget? Gain tools of where to look and how to analyze budgets. Learn to identify potential savings while gaining confidence in financial data management and reporting.

**Presenter:** *Andrea Arnold*, Coordinator of Business Services, West Contra Costa USD

## **The Art of Collective Bargaining: A Newcomer’s Guide to Strategic Negotiations**

Tackle your fears of collective bargaining. As you gain experience at the bargaining table, you discover the procedural basics. To best represent your district, learn how to think like a negotiator and develop bargaining intuition.

**Presenters:** *Darren Kameya*, Partner, Lozano Smith and *Desiree Serrano*, Partner, Lozano Smith

## **What you Need to Know about Cooperatives and Cooperative Contracts**

Ever wondered how cooperative agencies and contracts work? Attend this session and learn how to analyze and develop a cooperative procurement program within your organization. We will cover the importance of compliance with local regulations and how to apply cooperative purchasing as an effective tool in your procurement function.

**Presenters:** *Claudia Leon*, Director of Procurement, 1Government Procurement Alliance (1GPA) and *Rebecca Seifert*, Procurement Specialist, 1Government Procurement Alliance (1GPA)

# Breakout Sessions

**Friday, April 7, 2023 | 8:30 a.m. - 11:30 a.m.**

## **Session and Closing Forum**

More info to come.

Join Professional Councils in your discipline to identify education and priority resources needed.



# Registration Information

Register for 2023 Annual Conference online at [casbo.org](https://casbo.org) > Annual Conference

	<b>Early-bird registration</b> On or before January 25, 2023	<b>Online registration</b> January 26-March 13, 2023	<b>Onsite registration</b>
<b>Members Employee, Associate*</b>	\$875 full conference \$530 one-day	\$975 full conference \$530 one-day	\$1,275
<b>Non-Members</b>	\$1,175 full conference \$630 one-day	\$1,275 full conference \$630 one-day	\$1,275
<b>Retiree Members non-working, non-consultant</b>	\$200 full conference		\$1,275
<b>Professional Council lunches</b>	\$68 per person		Not available

\* Must be a paid member at the time of registration – join/renew at [casbo.org](https://casbo.org) > Informed + Involved > Membership

## Registration includes:

- Education sessions and General Sessions
- California School Business Expo and Grand Opening Reception
- Networking and social events

## Important Dates

Wednesday, January 25	Early Bird registration deadline
Monday, March 13	Online registration deadline
Wednesday, March 15	Cancellation deadline

## After March 13, only onsite registration is available.

\$1,275 for full conference attendance for members, non-members and retired members.

## You are not registered until paid. Submit echeck or credit card online.

This is a professional work conference. We do not offer a spouse/guest program or childcare.

## Tax Deduction

An income tax deduction may be allowed for education expenses (registration fees, travel, meals and lodging) to maintain and improve your professional skills. Check with your personal tax advisor.

# Schedule of Events



## CASBO Annual Conference & California School Business Expo

April 4-7, 2023 | Long Beach Convention Center

<b>Tuesday, April 4, 2023</b>	6:30 a.m. - 12:00 p.m. 2:00 p.m. - 4:30 p.m. 6:00 p.m. - 9:00 p.m.	Associate Member Committee Scholarship Golf Tournament Board of Directors Meeting President's Leadership Recognition Dinner – <i>by invitation</i>
<b>Wednesday, April 5, 2023</b>	8:00 a.m. - 9:00 a.m. 8:00 a.m. - 9:00 a.m. 9:15 a.m. - 10:15 a.m. 10:30 a.m. - 11:30 a.m. 11:30 a.m. - 1:00 p.m.  1:15 p.m. - 2:15 p.m. 2:30 p.m. - 3:30 p.m. 3:45 p.m. - 5:15 p.m. 5:30 p.m. - 7:30 p.m. 8:00 p.m. - 11:00 p.m.	First-time Attendee and New CASBO Member Breakfast Educational Sessions Educational Sessions Educational Sessions Lunch on Your Own or Professional Council Lunches (\$) <ul style="list-style-type: none"> <li>– Human Resources/Retiree Professional Council Lunch</li> <li>– Maintenance &amp; Operations Professional Council Lunch</li> <li>– Risk Management Professional Council Lunch</li> </ul> Educational Sessions Educational Sessions General Session Grand Opening Reception – California School Business Expo Networking & Social Event
<b>Thursday, April 6, 2023</b>	7:45 a.m. - 8:45 a.m. 8:00 a.m. - 9:00 a.m. 9:00 a.m. - 12:15 p.m. 9:15 a.m. - 10:15 a.m. 10:30 a.m. - 12:00 p.m. 12:15 p.m. - 1:30 p.m. 12:15 p.m. - 1:45 p.m.  1:30 p.m. - 4:15 p.m. 2:00 p.m. - 3:00 p.m. 3:00 p.m. - 4:00 p.m. 4:15 p.m. - 5:15 p.m. 5:30 p.m. - 7:30 p.m. 7:30 p.m. - 8:30 p.m. 8:00 p.m. - 11:00 p.m.	Partner Breakfast – <i>by invitation</i> Educational Sessions California School Business Expo Dedicated Expo Hour General Session Expo Closed for Lunch Lunch on Your Own or Professional Council Lunches (\$) <ul style="list-style-type: none"> <li>– CBO Professional Council Lunch</li> <li>– Purchasing Professional Council Lunch</li> </ul> California School Business Expo Educational Sessions Dedicated Expo Hour Educational Sessions Associate Member-Hosted Hospitality Suites New Professionals Mixer Networking & Social Event
<b>Friday, April 7, 2023</b>	8:00 a.m. - 9:00 a.m. 9:00 a.m. - 10:00 a.m. 10:15 a.m. - 11:30 a.m.	Women in Leadership Breakfast Educational Sessions Closing Session



**HEROES FOR CHANGE**

CASBO Annual Conference &  
California School Business Expo