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CASBO CON



26

March 31 - April 2

San Diego Convention Center

#CASBOcon



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Welcome to CASBO Con 26

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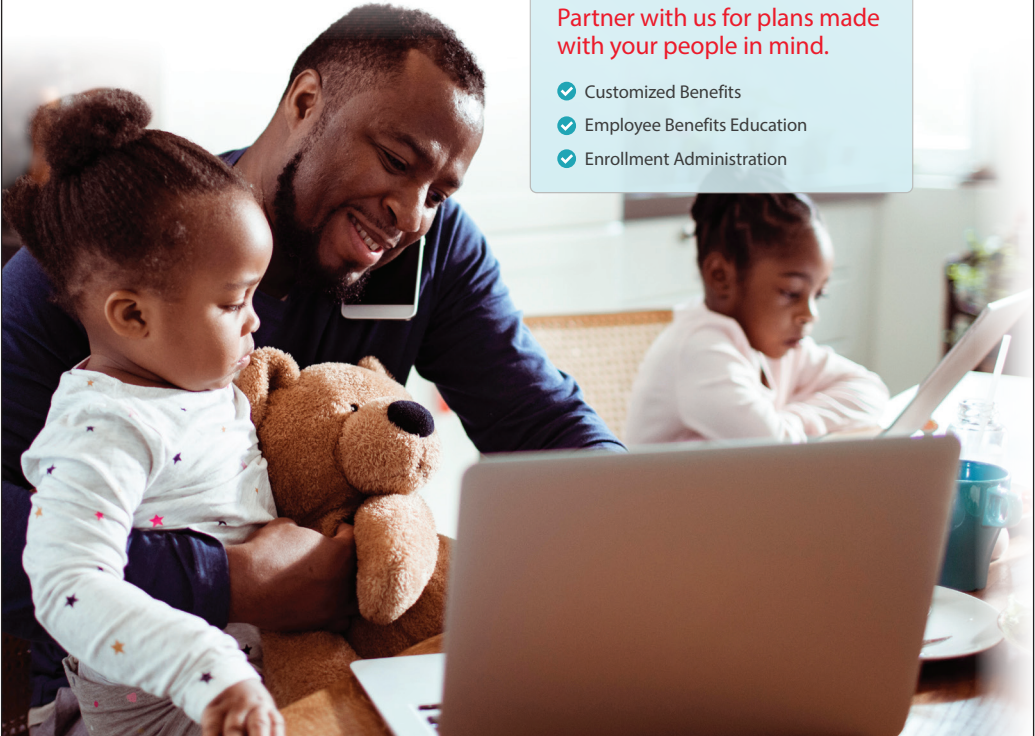
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Welcome to CASBO Con 26 in San Diego! I'm thankful you're here in one of the true jewels of the United States, and I hope that the experiences and knowledge you'll take home are as stimulating and beautiful as the seascape sunsets we're about to enjoy together.

CASBO Con is your opportunity to make you a better you. As a school business professional, you work tirelessly throughout the year, grinding to find solutions to the difficult problems we face every day. Just being here proves that you and your organization find value in your continued success.

“
**Being here proves
that you and your
organization find
value in your
continued success.**”

As iron sharpens iron, take time to listen to industry experts and learn how to become more efficient and powerful in what you do when you return home. And reach out to someone new, either to teach or as a student of the game. This is where the true power of CASBO lies for me, your personal network.



AARON HEINZ
CASBO President

Deputy Superintendent,
Administrative Services
Colusa County Office of Education

My mantra this past year has been about the power of mentoring, becoming a great teacher AND a great learner. Don't stop at making yourself better, take the time to pull someone else up, too. Your effort in paying your success forward helps education as a whole; as they say, "a rising tide lifts all boats."

I commend you on your journey thus far, and I'm excited for your future. Thank you for being here at CASBO Con 26, now let your Eye of the Tiger roar!

WELCOME TO CASBO CON 26



TATIA DAVENPORT

CASBO CEO

Welcome to CASBO Con — where school business isn't the "back office," it's the backbone.

“ You're part of something bigger than your role or title. ”

Whether this is your first CASBO Con or one of many, you belong here. If you're new to the profession, someone saw potential in you and chose to invest in your growth, but that investment didn't happen by accident. You earned it. You showed up, stood out and proved you were worth developing. You didn't just get sent here, you said "yes" to the responsibility that comes with being seen as someone capable of more.

And if you're a seasoned leader, you know this work is never simple, never static and never finished. Public education demands that we keep learning, adapting and leading forward.

Over the next few days, you'll gain practical tools, fresh strategies and insight you can take back to your district immediately. But just as important, you'll meet others who understand the unique challenges and quiet pride of serving schools through business operations. You'll find people who speak your language, share your pace and understand what it means to solve problems most never see.

This conference is designed to sharpen your skills, expand your perspective and remind you that you're part of something bigger than your role or title.

Public education doesn't improve by accident. It improves because professionals like you keep showing up, ready to get better.

Thank you for being here!


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We give back to the communities we serve by providing college scholarships to graduating high school seniors through Stifel's annual Fabric of Society essay competition and by supporting school-related foundations and functions with charitable contributions.

* Source: LSEG, negotiated transactions ranked by number of issues for 2025 as of January 7, 2026

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STIFEL

On behalf of CASBO's Associate Member Committee, I'm delighted to welcome you to CASBO Con 26 in beautiful San Diego! This conference is more than an annual gathering, it's a dynamic opportunity to learn, connect and explore ideas and solutions that support excellence in school business.

As you attend sessions and engage with colleagues from across California, we encourage you to take full advantage of everything the annual conference has to offer. Be sure to visit the California School Business Expo where our associate members are showcasing valuable resources, innovative solutions and trusted services designed to support your district's success.

Our associate members are proud partners in your work and are available throughout the conference to share their expertise and answer questions. Whether your goal is to gain new insights, strengthen professional relationships or bring back fresh ideas to your district, CASBO Con 26 is designed to inspire and empower you. Be sure to take advantage of all it has to offer.

Thank you for being part of this experience, we're glad you're here. Enjoy the conference!



CHRIS CUEVAS
Associate Member Committee Chair

Vice President, Regional Director
American Fidelity

“Our associate members are proud partners in your work and are available throughout the conference to share their expertise and answer questions.”

WELCOME TO CASBO CON 26



KAY PUGH

San Diego/Imperial Section State Director

Special Education Financial Analyst
San Diego County Office of Education

Welcome to CASBO Con 26!

As the San Diego/Imperial County Section's State Director, I'm excited to welcome you to CASBO's annual conference here in beautiful San Diego, a place where, much like CASBO itself, friendliness feels casual and genuine. It's wonderful to see so many of you showing up this year ready to learn, connect and grow.

Our section is fortunate to have dedicated school business professionals who volunteer at every level of this incredible organization. And you have come at exactly the right time. CASBO is about meeting you where you are and supporting you throughout your career.

This conference is the perfect time to reflect on your professional journey and challenge yourself to be "more." Take a moment to imagine how you might grow your skills, confidence and career, and know that it is possible. You may not realize it yet, but you are a valued resource with much to offer.

Throughout the conference, you'll find opportunities to step outside your comfort zone, and I encourage you to take that risk. We're grateful you chose to be here and hope you leave renewed, confident and ready to grow.

Once again, welcome to San Diego.

“
We look forward to finding opportunities over the next few days to take a risk and learn something new. Might that something be from you?” ”



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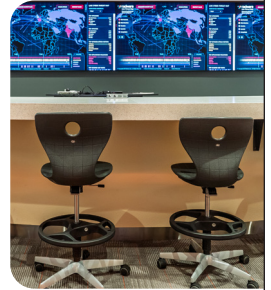
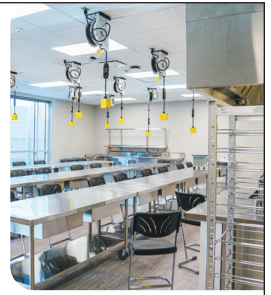
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WHITNEY HARDISON
Volunteer Task Force Chair

External Business Coordinator
Sutter County Superintendent of Schools

On behalf of the Volunteer Task Force, welcome to sunny San Diego for CASBO Con 26!

This is your opportunity to connect with colleagues from across California, sharpen your focus and cultivate strategies that strengthen the local educational agencies you serve. The work you do truly matters, and this conference is designed to inspire, inform and energize you as you continue that important mission.

San Diego is where innovation meets the coastline, making it an ideal setting for bold thinking and meaningful connection. We hope this conference becomes more than a series of sessions, and instead sparks new ideas, relationships and perspectives that continue well beyond these days together.

While you're here, we encourage you to step outside the conference halls to enjoy the sunshine, breathe in the fresh sea air and sample the spectacular local food scene. A walk along the harbor or a visit to the Gaslamp Quarter might be just the reset you didn't know you needed!

“

San Diego is where innovation meets the coastline, making it an ideal setting for bold thinking and meaningful connection. ”

Thank you for being part of this exceptional event and for the vital work you do on behalf of students across our state. Enjoy the conference.

We're so glad you're here!



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CON 27

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Our experts are also on display.

Kyle McKibbin (Keenan), Eric Tennison (Keenan) & Judy Miller (Perris Union HSD) will co-lead a session on Tuesday, March 31 at 1:30pm titled "Return to Work Why & How?"

Megan Mavis (Michael Sullivan & Associates) & Kyle McKibbin will co-lead a session on Wednesday, April 1 at 2:00pm titled "Contract Risk Management & Best Practices"

Visit us at booth 1111 to learn from industry experts and gain valuable insights into safeguarding your district's future.



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STEPHEN M.R. COVEY
First General Session

Tuesday, March 31, 2026
Ballroom 20 D
3:45 - 5:15 pm

Stephen M. R. Covey is a *New York Times* and #1 *Wall Street Journal* bestselling author of *The Speed of Trust* and *Trust & Inspire*. He is the former CEO of Covey Leadership Center, which, under his stewardship, became the largest leadership development company in the world. Stephen personally led the strategy that propelled his father's book, Dr. Stephen R. Covey's *The 7 Habits of Highly Effective People*, to become one of the two most influential business books of the 20th Century, according to *CEO Magazine*.

As president and CEO of Covey Leadership Center, Stephen nearly doubled revenues while increasing profits by 12 times. During that period, the company expanded throughout the world into over 40 countries, greatly increasing the value of the brand and enterprise. The company was valued at \$2.4 million when Stephen was named CEO, and, within three years, he had grown shareholder value to \$160 million in a merger he orchestrated with Franklin Quest to form FranklinCovey.

Stephen co-founded CoveyLink, a consulting practice, which focuses on enabling leaders and organizations to increase and leverage trust to achieve superior performance.

Stephen recently merged CoveyLink with FranklinCovey, forming the Global Speed of Trust Practice, where Stephen serves as global practice leader.

A MISSION TO SUPPORT EDUCATORS

F3 Law has a passion for education, and our mission is simple—to support educators in achieving their mission. We do this by offering distinctive legal services and keeping educators informed on every issue they face, so they can focus on achieving positive student outcomes.

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As a national education law firm with 11 offices, including six in California, we bring a broad perspective and seamless collaboration to wherever you are.



DR. IVAN JOSEPH
Second General Session

Wednesday, April 1, 2026
Ballroom 20 ABC
10:45 - 11:45 am

Ivan is an internationally renowned speaker, bestselling author, award-winning performance coach, in-demand consultant, prominent educator and accomplished leader. His TEDx talk, “The Skill of Self-Confidence,” has over 29 million views and was named by Forbes as one of the 10 Best TED Talks for Graduates on the Meaning of Life. Dr. Joseph holds a PhD in Psychology and has served as Vice President, Director of Athletics and faculty at four North American

universities. During his 25-year career in academia, Ivan led cultural transformation, inspired people to believe in themselves and created cohesive teams.

While serving as a professor and coach at Graceland University, Ivan developed the soccer program from the ground up, leading both the men’s and women’s teams to #1 national rankings. He also guided the men’s team to the first national championship in Graceland’s history—in just five years. For this accomplishment, he was chosen by the National Association of Intercollegiate Athletics to be named National Coach of the Year. Ivan spent a decade as Director of Athletics at Toronto Metropolitan University, where he helped lead his department—and the university—to national prominence. Among his many accomplishments at TMU, Ivan spearheaded the landmark \$100M renovation of the historic Maple Leaf Gardens. Under his leadership, TMU teams won the first provincial and national championships in the university’s history.

Ivan has coached World Champions and Olympians. His research and leadership have focused on understanding how self-confidence and cohesion drive performance. Ivan now uses these skills to lead high-performing businesses, organization and individuals from around the world.

A background image showing a group of four business professionals in a meeting. They are gathered around a table with laptops and coffee cups. One man in the center is raising his hand, and another woman to his right is also raising her hand, suggesting a collaborative or celebratory moment. The setting is a bright, modern office with a large plant in the background.

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Ross Hartmann is the founder and CEO of Kiingo AI, an applied AI consultancy that makes AI usable, useful, and used. He works with leadership teams to build people-first AI literacy, set practical roadmaps, and implement automations that amplify what people do best.

Since 2023, Ross has briefed more than 1,500 executives through Vistage, where his sessions are consistently top rated. He also designs AI programs for CASBO, helping leaders adopt AI responsibly with attention to data security.

Previously, Ross held hands-on engineering and architecture roles at ProMAX Systems and LifeScore Music, shipping production systems across storage automation, media management, and real-time generative music. He is the author of *The Structure of Story*, reflecting his commitment to accessible, repeatable frameworks.



ROSS HARTMANN
Third General Session

Thursday April 2, 2026
Ballroom 20 ABC
9:00 - 11:00 am

See page 78 for closing session description.

CALIFORNIA SCHOOL BUSINESS EXPO

Grand Opening Reception

Tuesday, March 31 | 5:00 - 7:00 pm

Exhibit Hall H & G

Use the drink ticket provided in your conference bag to enjoy a complimentary beverage. Attendee badges are required to enter and no guests are permitted.

Expo Hours

Wednesday, April 1 | 9:00 am - 4:00 pm

(closed for lunch 12:30 pm - 2:00 pm)

Exhibit Hall H & G

11:30 am – 12:30 pm

Dedicated Hour – No Sessions

3:00 – 4:00 pm

Dedicated Hour – No Sessions



CASBO CON 26 AFTER HOURS

Mix & Mingle Networking Reception

Wednesday, April 1 | 5:30 - 8:00 pm

Manchester Grand Hyatt, Harbor Foyer & Ballroom

Unwind and connect with industry leaders in CASBO Con 26 Mix & Mingle, where curated refreshments and conversation await all in one space. Experience a relaxed atmosphere perfect for networking, recharging, and discovering new opportunities.



Casino Night

presented by:




Wednesday, April 1 | 8:00 - 11:00 pm

Manchester Grand Hyatt

Relax and unwind while growing your social network during Casino Night on Wednesday, April 1 in the Harbor Ballroom at the Manchester Grand Hyatt.

Festivities include live music by Kick's Band, dancing, casino table game play, and prize drawing.

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CASBO CON 26



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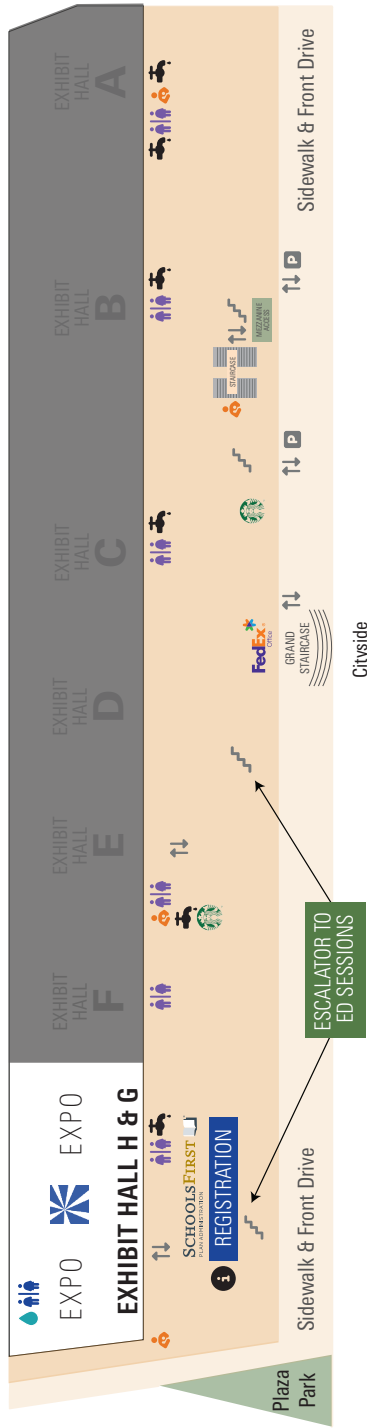
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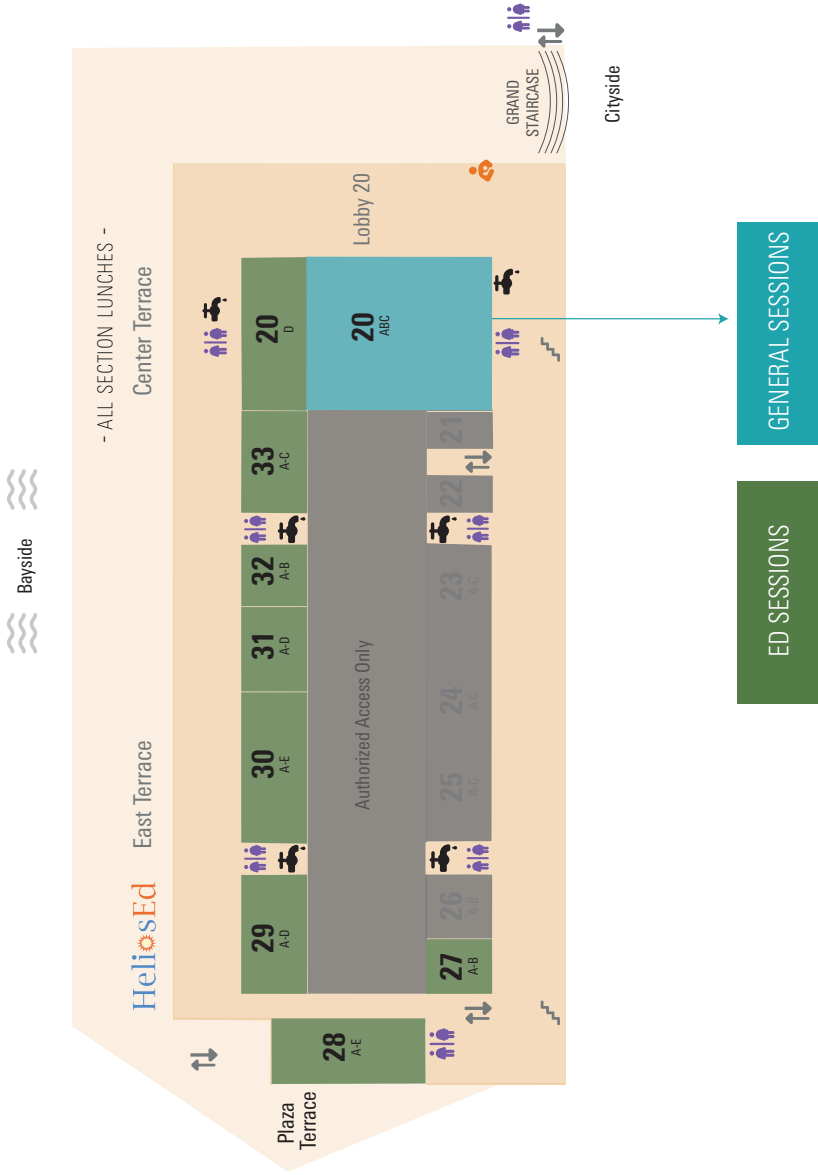
STREET LEVEL

E. Harbor Drive / Exposition Way



W. Harbor Drive / Convention Way

UPPER LEVEL



ATTENDEE TIPS

Make the most of your CASBO Con 26 experience by following these tips.

- **Use CASBO2Go & Conference Guide**

Download our mobile app to get conference updates plus create your schedule, view session descriptions, and find exhibitors who meet your specific business needs.

- **Visit our Info/Tech Help Desk**

Your go-to spot for help navigating the event and using our mobile app. Located in the lobby near registration, staff are on hand to provide information and assistance.

- **Earn CEUs**

Up to 12.75 CEUs can be earned towards CBO CASBO recertification. Track CEUs by keeping "My Schedule" in the app up-to-date - CEUs will be uploaded to your CASBO Profile after the event.

- **Wear Your Badge**

Your attendee badge is your all-access pass to enter all conference events and activities. Please wear it at all times to expedite entry to sessions and activities.

- **Win Cash & Prizes at CASBO Island**

Stop by the CASBO Membership Booth for free branded gear. See page 20 for California School Business Expo hours and details.

- **Join the #CASBOCon Conversation**

Follow CASBO on Facebook, Instagram and LinkedIn to connect with attendees on social media and include the hashtag #CASBOCon in posts to join the online conversation.

- **Bites Onsite & Beyond**

The convention center serves up favorites like Annie's Pretzel, Mrs. Fields Cookies, Starbucks, and grab-and-go coffee carts. Looking to explore? Head across the street and dive into the vibrant local dining scene that makes sunny San Diego a true foodie destination.

- **Share Your Experiences with Us**

Use the session evaluations and feedback opportunities to let us know how we can improve. We value your opinion and use feedback to shape future events.

- **Lost & Found**

Items left behind will be retrievable at the Registration Desk in the Lobby at the hours below. Starting Monday, April 6, contact CASBO at (916) 447-3783 or info@casbo.org for help with lost items.

Tuesday, March 31	6:30 am - 5:00 pm
Wednesday, April 1	7:30 am - 5:00 pm
Thursday, April 2	7:30 am - 9:00 am





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SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Accounting

8:30 - 9:30 AM

Room 30 AB

Staffing Aligned, Dollars Defined: A Roadmap for Accuracy and Efficiency

Align staffing, budget, and payroll data to improve accuracy and efficiency. Implement position control systems and automation to streamline processes and strengthen accountability. Apply metrics and change management strategies to measure impact and gain cross-department buy-in. Create a roadmap with actionable steps that frees staff time and enhances fiscal stewardship.

Presenters: Dorothy Reconose, Milpitas USD; Charen Yu, Palo Alto USD

11:00 AM - 12:00 PM

Room 29 BCD

Audit and Accounting Hot Topics

Examine the latest federal and state compliance changes affecting school district audits. Strengthen internal controls with best practices and expert guidance. Explore how emerging AI tools can enhance financial oversight. Apply insights to improve audit readiness, accuracy, and operational efficiency.

Presenters: Jen Aras, Crowe LLP; Whitney Hardison, Sutter CSS; Charles J. Raibley, Crowe LLP

1:30 - 3:00 PM (90 minutes)

Room 30 AB

GASB and State Audit Guide Update

Review the latest GASB developments affecting school district audits. Analyze updates from the State Audit Guide for FY 2025 - 26. Identify common audit challenges and apply strategies to prepare effectively. Implement best practices to strengthen compliance and audit readiness.

Presenters: Jeff Jensen, Crowe LLP; Jeff Nigro, Nigro & Nigro; Taylor Ulrich, CLA

Charter Authorization & Oversight

9:45 - 10:45 AM

Room 32 A

Charter Authorizers and Auditors: Requirements Today and on the Horizon

Examine the responsibilities of districts that authorize charter schools, emphasizing effective oversight and accountability. Monitor school performance and financial health while maintaining transparency and communication with charter schools. Analyze the implications of AB 84 and other emerging legislation on approvals, renewals, and closures. Implement strategies to strengthen oversight and ensure compliance with evolving requirements.

Presenters: Marcy Kearney, Christy White, Inc.; Christy White Brook, Christy White, Inc.

1:30 - 3:00 PM (90 minutes)

Room 33 B

Transforming Charter Oversight with Data and AI

Streamline charter oversight by leveraging data and AI to simplify documentation and compliance tracking. Analyze information efficiently using dynamic dashboards that support initial evaluations. Craft compelling oversight narratives and apply insights to improve decision-making. Implement strategies that enhance clarity, compliance, and operational efficiency.

Presenters: Kristin Armatis, San Diego COE; Jennifer Ferrer Fernandez, San Diego COE

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASBO2Go for updates.

Chief Business Officials

8:30 - 9:30 AM

Ballroom 20 D

AI Enhanced Negotiations: Smarter Strategies for Better Outcomes

Blend negotiation best practices with powerful AI tools to achieve stronger bargaining outcomes. Explore strategies for preparation, goal clarity, and relationship-building while leveraging AI for data analysis, scenario modeling, and risk assessment. Apply practical examples to draft proposals, summarize agreements, and enhance decision-making. Implement AI-driven tactics to become faster, sharper, and more persuasive leaders.

Presenters: Lydia Butler, Litix; Kandace Page, El Dorado Union HSD; Robert Whittenberg, El Dorado Union HSD

8:30 - 9:30 AM

Room 29 BCD

The Million-Dollar Attendance Pattern Hidden in Your Data

Identify the predictable three-phase pattern behind chronic absenteeism and its hidden revenue impact. Analyze data from 1.3 million students to uncover when interventions fail and why. Explore one LEA's approach that reduced chronic absenteeism from 13.8% to 11%. Apply tools and strategies to recover revenue and return students to regular attendance.

Presenters: Erik Elorriaga, SchoolStatus; Michael Hall, Sulphur Springs Union SD; Joshua Randall, Sulphur Springs Union SD; Brenda Tapp, SchoolStatus

9:45 - 10:45 AM

Ballroom 20 D

Capitol Advocacy: Updates from Your CASBO Governmental Relations Team

Learn about CASBO's budget and legislative advocacy efforts. Understand how conversations in Sacramento will affect your local educational agency. Gain insights into how you can provide input and advocate to support CASBO's work.

Presenters: Mishaal Gill, CASBO; Sara Pietrowski, CASBO

11:00 AM - 12:00 PM

Ballroom 20 D

Stump the School Lawyers!

Tackle real-world legal challenges in school business through an interactive, game-based format. Explore hot topics such as procurement, contracts, and technology while applying key legal principles. Collaborate with peers to gain practical strategies and tools for confidently navigating complex legal issues in daily district operations.

Presenters: Keith Butler, Torrance USD; Jessica Ehrlich, F3 Law; Gretchen Shipley, F3 Law; James Traber, F3 Law



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Bid Spec Library

Found 280 bids

Project	Agency	Project Title	Invitation # / Due Date	Stage	Type	Format
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4010002	4010002	4010002	4010002	Planning	RFQ	Electronic
4010003	4010003	4010003	4010003	Planning	RFQ	Electronic
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Department*

Approvals



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SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASBO2Go for updates.

Chief Business Officials

11:00 AM - 12:00 PM
Room 30 AB
LCFF Raise the Base

Examine how major investments through the Local Control Funding Formula (LCFF) are impacting district Revenue per ADA compared to the statewide median. Analyze data trends and statewide comparisons to better understand equity funding through supplemental, concentration, and equity multiplier grants. Engage in an open, solution-focused discussion about what is working and what may need recalibration. Contribute your voice to the conversation shaping the future of public-school funding.

Presenters: Michael Johnston, Clovis USD; Jacqueline McHaney, Buckeye Union ESD; David Roth, Buckeye Union ESD

11:00 AM - 12:00 PM
Room 28 CDE
From Vision to Impact: Making the LCAP Work for Small Schools

Turn the LCAP from a compliance chore into a strategic engine for continuous improvement. With a focus on the needs of small districts, learn how to streamline the process, align goals with budgets, choose meaningful metrics, and authentically engage communities. Through hands-on review of sample LCAPs, participants will spot misalignments, reshape goals, and design a right-sized accountability cycle that reflects their district's capacity and story.

Presenters: Nicole Newman, Wheatland Union HSD; George Sziraki, Small School Districts Association

1:30 - 3:00 PM (90 minutes)
Ballroom 20 D
Follow the Data: Leveraging Information for Funding, Accountability & Student Privacy

Data does more than just inform reports-it shapes funding, accountability, and policy decisions. Examine how student and operational data affect revenue, compliance, and strategic planning. Review current legal requirements on student data, privacy, and social media. Explore new FCMAT-CSIS AI-powered tools that help analyze information and offer guidance on improving staff practices.

Presenters: Maggie Bunten, San Bernardino CSS; Dana Henderson, FCMAT; Greg Scull, FCMAT; Gretchen Shipley, Fagen Friedman & Fulfrost LLP

Child Nutrition

9:45 - 10:45 AM
Room 30 E
Meals That Matter: How Scratch Cooking Became a Competitive Advantage

Transform school meal programs through scratch cooking and innovative kitchen solutions. Connect fresh, appealing meals to student engagement and enrollment marketing. Apply strategies to maintain a sustainable cafeteria fund. Implement approaches that position nutrition services as a districtwide asset and differentiator.

Presenters: Alicia Mendez, Centinela Valley Union HSD; Daniel Urrutia, Centinela Valley Union HSD

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Child Nutrition

11:00 AM - 12:00 PM

Room 32 B

Investing in Farm to School: Healthier Meals & Healthier Budgets

Discover how Farm to School programs can improve student health and academic outcomes while increasing meal participation and stabilizing nutrition program revenue. Learn how to leverage funding sources such as ELOP, CDFG grants, KIT, and LCAP to launch or expand Farm to School initiatives. Engage in interactive discussions and peer exchange to align programs with district goals and maximize available resources. Leave equipped with practical strategies to make Farm to School financially sustainable and impactful for both students and school budgets.

Presenters: Cassidy Boardman, Upland USD, Jennifer Huang, CA Department of Food and Agriculture; Tracey Kimura, CDFG Office of Farm to Fork; Eric Span, Sweetwater Union HSD

1:30 - 2:30 PM (60 minutes)

Room 31 C

Beyond Meals: Fund 13 Supporting Other School Funding

Elevate school nutrition programs as district assets through strategic marketing. Increase participation across meal programs to strengthen revenue, protect the general fund, and ensure equitable access. Learn from low-cost campaigns, branding, and communication strategies successfully utilized by LEAs. Implement practical ideas that link nutrition marketing directly to district business outcomes.

Presenters: Kristin Hilleman, CA School Nutrition Association/Capistrano USD; Suzanne Morales, Placentia Yorba Linda Unified; Dave Palmer, Dunk Tank Marketing

Facilities

8:30 - 9:30 AM

Room 33 B

Building Trust, Building Schools: The Role of Engagement in School Facility Planning

Strengthen school facility projects through strategic engagement. Learn from a district's real-life experience how early, authentic involvement builds public trust and supports successful outcomes. Identify common pitfalls, navigate CEQA requirements, and apply practical strategies to ensure projects stay on schedule, on budget, and well-supported by the community.

Presenters: Julian Capata, Massetti Consulting; Esmi McKay, Santa Monica-Malibu USD; Emily Fan Michaelson, PlaceWorks; Carey Upton, Santa Monica-Malibu USD

9:45 - 10:45 AM

Room 31 AB

Public Works Project Closeout Made Simple: Notices, Retention & Compliance

Demystify the project closeout process by confidently managing Notices of Completion and retention requirements. Strengthen compliance by applying essential legal and financial best practices that reduce risk and prevent costly errors. Streamline coordination between Purchasing and Facilities using practical, real-world tools that improve documentation and workflow efficiency.

Presenters: Leeann Errotabere, COLBI; Elizabeth McClanahan, Mt. Diablo USD; Tom Silva, Chula Vista ESD / Tom Silva Consulting



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SCHEDULE | TUESDAY, MARCH 31

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Facilities

11:00 AM - 12:00 PM

Room 30 E

Simplifying OPSC State Compliance Reporting and Independent Audits

Demystify OPSC compliance reporting and independent audits with clear, practical strategies. Identify common pitfalls and apply lessons from experienced professionals. Implement tools to streamline processes, strengthen reporting accuracy, and enhance confidence. Ensure compliance efforts are efficient, reliable, and effective.

Presenters: Tarana Alam, KeyAnalytics; Julie Strauss, HMC Architects

1:30 - 3:00 PM (90 minutes)

Room 30 E

Navigating CEQA and Title 5 Reviews for New and Existing School Projects

Understand CEQA and Title 5 requirements for new and existing school construction projects. Review environmental findings, site hazards, and safety considerations under CCR and Education Code. Apply insights from CDE, district, legal, and environmental perspectives. Implement strategies to avoid pitfalls and ensure compliant, safe project planning.

Presenters: John Gordon, CA Department of Education; Barbara Heyman, Terraphase Engineering, Inc.; Karina Samaniego, Dannis Woliver Kelley

Financial Services

8:30 - 9:30 AM

Room 28 CDE

Maximizing Every Dollar: Strategic Budgeting for Small School Districts

Strengthen budget planning in small districts by aligning multiyear projections with LCAP priorities and emerging fiscal realities. Apply strategies to avoid structural deficits, maximize LCFF and supplemental funds, and navigate the post-one-time funding cliff. Use collaborative budgeting approaches that connect business services with instructional goals to stretch every dollar.

Presenter: Maureen Fitzgerald, Cold Spring SD

9:45 - 10:45 AM

Room 29 BCD

Art of the Projection: Best Practices for Future Fiscal Directors

Demystify multi-year projections (MYP) with practical strategies and collaborative insights. Explore how diverse roles contribute to accurate, strategic fiscal planning. Apply key assumptions, tools, and resources to strengthen projections. Implement best practices that prepare emerging leaders for effective fiscal leadership.

Presenters: Karine Fickes, Vacaville USD; Patrick McGee, Lake Elsinore USD

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASBO2Go for updates.

Financial Services

9:45 - 10:45 AM

Room 30 AB

Financing Solutions and Tax Certificate Compliance for School Districts

Understand key tax rules for tax-exempt bonds and ensure compliance with strategic oversight. Review limitations on nongovernmental use, expenditure timelines, and investment restrictions affecting bond status. Apply practical strategies to sign tax certificates confidently, mitigate risks, and safeguard districts' tax-exempt financing.

Presenters: Graham Beck, Nixon Peabody LLP; Jackie Benson, Jurupa USD; Rachel Chang-Kwei, Fieldman, Rolapp & Associates, Inc.; Joel Swearingen, Nixon Peabody LLP

9:45 - 10:45 AM

Room 32 B

Navigating Transition: How Payroll & Finance Teams Can Succeed During System Implementation

Plan and execute a seamless system transition while maintaining payroll and operations. Apply strategies for realistic timelines, stakeholder communication, and balancing project work with daily tasks. Implement staffing solutions, data cleanup, and parallel testing to ensure accuracy. Support teams through change, foster engagement, and celebrate milestones for a successful implementation.

Presenters: Siddhant Bhatta, Inglewood USD; Octavio Castelo, Los Angeles COE; Marilu De Arcos, Wiseburn USD; Raphael Guzman, Inglewood USD

1:30 - 3:00 PM (90 minutes)

Room 28 CDE

Building Small District Fiscal Resilience in the Age of AI

Leverage AI tools to strengthen fiscal planning amid declining enrollment, unstable revenues, and expiring one-time funds. Discover practical ways to automate routine business tasks and generate clearer, data-driven budget insights. Examine equity and privacy considerations that guide responsible AI use in small districts. Collaborate on an AI-supported budget scenario to apply these strategies directly.

Presenter: Christian Jackson, Edapt

1:30 - 3:00 PM (90 minutes)

Room 32 B

Bridging Business & Technology: Building Sustainable Refresh Cycles and Transparent Network Services

Align business and technology priorities to design sustainable refresh cycles and transparent network services. Explore subscription-based network/data services models that enhance cost predictability, efficiency, and long-term planning. Apply strategies that balance fiscal responsibility with evolving technology demands. Ensure students and staff have access to secure, reliable tools that support effective learning.


Presenters: Jason Borgen, Santa Cruz COE; Melissa Lopez, Santa Cruz COE




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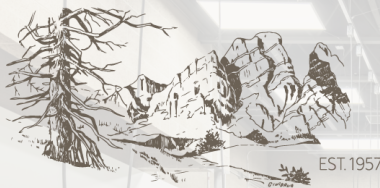
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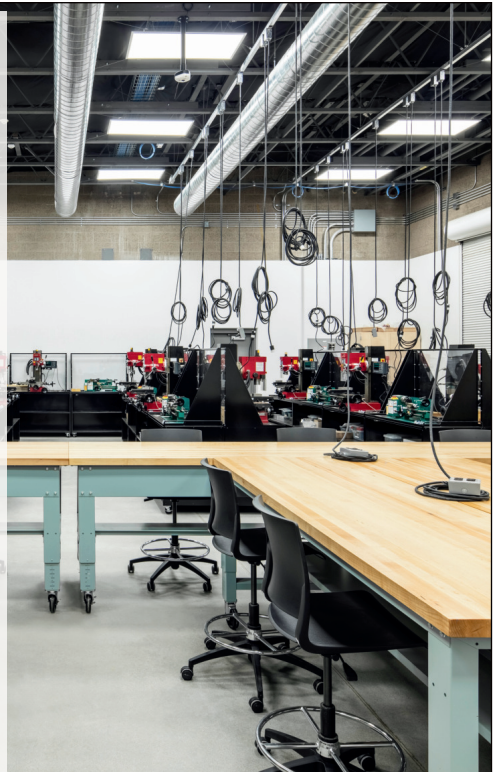
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SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Financial Services

1:30 - 2:30 PM (60 minutes)

Room 29 BCD

Fiscal Fitness in Lean Times

Adapt to tighter financial environments by restructuring staffing and operations. Explore strategies for long-term sustainability, efficiency, and flexibility under stress. Apply change management techniques for business office teams and district leadership. Learn from varied perspectives to strengthen fiscal resilience.

Presenters: Tony Carrillo, Jr., Palm Springs USD; Nickie Hoff, Riverside USD; Jeff Young, San Bernardino CSS - BAS

Human Resources

8:30 - 9:30 AM

Room 30 C

Conducting Workplace Investigations - Part 1

Initiate timely, fair investigations when potential violations arise. Document details, listen carefully, and determine next steps in collaboration with HR. Apply legal, policy, and safety standards to ensure accountability and protect rights. Implement practices that maintain a safe, respectful, and compliant work environment.

Presenters: Cynthia L. Carrillo, Lompoc USD; Salvador Holguin, Atkinson, Andelson, Loya, Ruud & Romo

9:45 - 10:45 AM

Room 30 C

Conducting Workplace Investigations - Part 2

View full description under 8:30 – 9:30 AM.

Presenters: Cynthia L. Carrillo, Lompoc USD; Salvador Holguin, Atkinson, Andelson, Loya, Ruud & Romo

11:00 AM - 12:00 PM

Room 30 C

Transforming HR Onboarding, Extra Duty, Leaves, and Timesheets

Streamline management of extra duty, leaves, and timesheets to save time and reduce stress. Examine internal controls and technology solutions that improve fiscal oversight and transparency. Apply strategies from Jurupa and Azusa USD for paperless processes, efficient payroll, and accurate reporting. Implement best practices for budgeting, tracking, onboarding, and reporting across your district.

Presenters: Jackie Benson, Jurupa USD; Jorge Ronquillo, Azusa USD

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Lead + Advance

9:45 - 10:45 AM

Room 27 AB

Beyond Automation: How AI and Airtable Are Transforming School Business Operations

Streamline school business operations using AI-powered agents and Airtable automation. Build custom workflows that reduce manual effort and accelerate processes. Apply strategies for service requests, LCAP development, and goal-aligned responses. Implement lessons and tools from real-world examples that free staff to focus on high-impact work.

Presenters: Jason Hill, Redlands USD; Kristine Hubbard, Redlands USD; Matt Russo, Redlands USD

9:45 - 10:45 AM

Room 29 A

Executive Assistant (EA) Roundtable

Meet up in-person with fellow EAs for a roundtable discussion with a focus on cultivating an effective working environment between the CBO and EA..

Moderators: Illa Mistry, Santa Clara USD and Mark Schiel, Santa Clara USD

11:00 AM - 12:00 PM

Room 30 D

Telling Your Story: The Power of Personal Narrative in School Business

Elevate your impact by utilizing storytelling to lead, connect, and inspire in school business. Explore techniques to make complex ideas memorable and foster emotional connections with education partners. Apply personal narratives to budget discussions, trust-building, and career advancement. Implement strategies that position you as a confident, authentic, and influential leader.

Presenter: Katie M. Hylton, San Bernardino CSS

1:30 - 3:00 PM (90 minutes)

Room 27 AB

Beyond Productivity Hacks: Using AI to Reclaim Time for Leadership

Leverage AI to automate emails, reports, and routine tasks, freeing time for leadership. Apply tools to streamline workflows and reduce busywork. Focus on strategy, decision-making, and team engagement. Implement practical AI strategies that enhance effectiveness and leadership impact.

Presenter: Joe Ayala, Santa Clara USD

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Maintenance & Operations

9:45 - 10:45 AM

Room 33 B

Focused on the Finish Line: Fearless Planning for Summer School Construction

Anticipate challenges and align stakeholders early to ensure summer school construction success. Apply proven strategies for budgeting, procurement, work sequencing, and accountability under compressed timelines. Explore real-world examples and practical tools to streamline projects. Implement proactive planning to deliver modernized campuses ready for the first day of school.

Presenters: Graham Clark, Fremont Union HSD; Amber Emery, Blach Construction Company; Ryan Holman, TBK Construction Management; Aaron Jobson, Quattrochi Kwok Architects

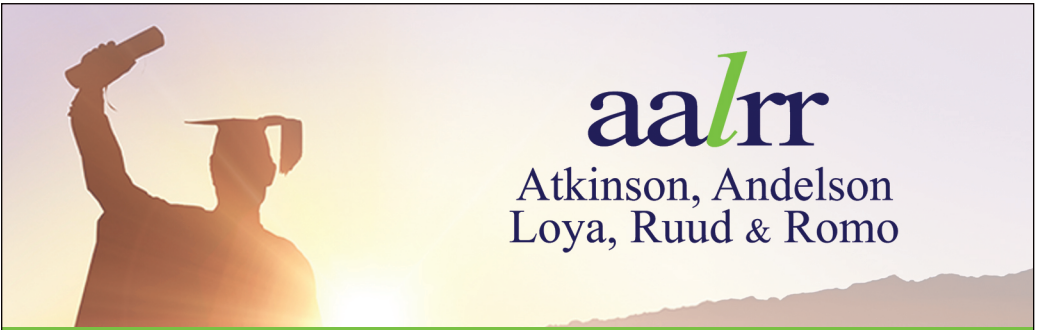
11:00 AM - 12:00 PM

Room 33 C

Leading Without Fear: Turning Difficult Conversations into Stronger M&O Teams

Conquer difficult conversations to strengthen M&O teams and build trust. Apply strategies for preparation, clear communication, and constructive conflict resolution. Explore real-world examples that improve team culture and departmental effectiveness. Implement approaches that turn challenging discussions into opportunities for connection and growth.

Presenters: Henry Cervantes, Foothill-De Anza CCD; Adam Florez, Santa Clara USD; Matt Sidlauskas, East Side Union HSD; Van Nguyen, Milpitas USD



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Maintenance & Operations

1:30 - 2:45 PM (75 minutes)

Room 32 A

Enhancing Maintenance & Operations with AI

Explore how AI streamlines M&O through smarter planning and data-driven insight. Discover practical ways to use AI to forecast labor needs, identify performance trends, and optimize resources. Apply emerging tools that boost efficiency and elevate service delivery across departments.

Presenters: Isma'il al-Shabazz, San Ramon Valley USD; Paulo Azevedo, Menifee Union SD; Edrai Hernandez, Alvord USD; Benjamin Trotter, Pittsburg USD

Payroll

8:30 - 9:30 AM

Room 27 AB

Class Action Readiness: Navigating Wage and Hour

Explore why class action wage-and-hour lawsuits are rapidly increasing for districts and county offices of education and what that means for your organization. Understand how uncovered claims can lead to costly legal defense and multi-million-dollar financial exposure. Learn how to strengthen recordkeeping, update policies, and improve oversight across dispersed worksites. Gain practical strategies you can apply immediately to reduce risk and protect your district.

Presenters: Amy W. Estrada, Atkinson, Andelson, Loya, Ruud & Romo; Brian D. Martin, Atkinson, Andelson, Loya, Ruud & Romo

9:45 - 10:45 AM

Room 32 B

Navigating Transition: How Payroll & Finance Teams Can Succeed During System Implementation

Plan and execute a seamless system transition while maintaining payroll and operations. Apply strategies for realistic timelines, stakeholder communication, and balancing project work with daily tasks. Implement staffing solutions, data cleanup, and parallel testing to ensure accuracy. Support teams through change, foster engagement, and celebrate milestones for a successful implementation.

Presenters: Siddhant Bhatta, Inglewood USD; Octavio Castelo, Los Angeles COE; Marilu De Arcos, Wiseburn USD; Raphael Guzman, Inglewood USD

11:00 AM - 12:00 PM

Room 33 A

'I wouldn't do that if I were you....' Payroll Best Practices

Explore best practices for managing critical payroll processes to minimize organizational risk. Review essential procedures, including infrequent but high-impact tasks. Apply strategies to ensure payroll operations remain accurate, compliant, and efficient.

Presenters: Mike Stribling, Riverside COE; Lena Young-Gallardo, San Bernardino CSS

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Purchasing

8:30 - 9:30 AM

Room 31 AB

Procurement Transformation: Changing the Old Playbook to Achieve Strategic Results

Implement strategies that leverage technology, tools, and policies to improve procurement outcomes. Streamline approvals, optimize purchasing card use, and enhance service quality. Apply best practices to increase efficiency while maintaining effectiveness. Transform traditional purchasing processes into strategic, results-driven operations.

Presenters: Matthew Friedman, Los Angeles USD;
Dana M.J. Greer, Los Angeles USD

9:45 - 10:45 AM

Room 28 CDE

Cutting Edge 2026: Purchasing Legal Updates & Hot Topics

Learn about recent legislation and legal updates that may impact district procurements and contracts in 2026. Review new statutory authorities, emerging trends, and current purchasing hot topics. Apply practical guidance that connects legal fundamentals to real-world district impact to keep your district on the cutting edge, not the bleeding edge.

Presenter: Tyree Dorward, Best Best & Krieger LLP

11:00 AM - 12:00 PM

Room 27 AB

Purchasing Principles for Non-Purchasing People

Explore essential purchasing principles in a fun and engaging game show format, applicable to all school business departments. Insights will especially assist small districts that may not have purchasing departments.

Presenter: Tony Crapo, Sequoia Union HSD

1:30 - 3:00 PM (90 minutes)

Room 31 AB

Deal or No Deal? Navigating Vendor Contracts with Confidence.

Explore how seasoned purchasing professionals identify required clauses and determine when to use district versus vendor agreements. Gain practical strategies for negotiating agreements, including navigating proposed changes related to insurance, indemnity, liability limits, and dispute resolution. Learn effective methods for reviewing redlined documents and overcoming formatting challenges when amending contract language. Adopt proven best practices to manage contracts with confidence and safeguard district interests.

Presenter: Deidree Sakai, Dannis Woliver Kelley

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SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Risk Management

8:30 - 9:30 AM

Room 33 C

Safety Calling: Rethinking Crisis Communication in a Phone-Free Era

Examine challenges and opportunities in crisis communication under the California phone-free law. Analyze how districts adapt to ensure student safety and staff readiness without personal devices. Explore practical strategies and operational solutions from early adopters. Implement approaches that maintain instructional focus while fostering safe, trusted school environments.

Presenters: Donna Gingera, Hour Zero School Safety Programs; Aaron Masson, Hour Zero School Safety Programs

9:45 - 10:45 AM

Room 33 A

Strengthening District Safeguards for CSA Prevention

Design a districtwide strategy that embeds CSA safeguards into policies, processes, and HR protocols. Implement staff training that builds awareness, accountability, and risk reduction beyond basic compliance. Refine vendor oversight and performance benchmarks to ensure continuous protection. Develop student-focused programs that empower reporting and reinforce professional boundaries.

Presenters: Heidi Cisneros, Alliance of Schools for Cooperative Ins. Programs (ASCIP); Sara Nazir, Santa Ana, USD

11:00 AM - 12:00 PM

Room 31 C

Effective School Safety and Emergency Management Programs

Build strong safety and emergency management programs with the right team and collaborative structures. Establish intra- and interagency partnerships to lay a solid foundation. Apply operational frameworks to ensure programs are realistic and sustainable. Implement strategies that strengthen preparedness, protect students, and support long-term program success.

Presenter: Stephen B. Bayne, Irvine USD

1:30 - 3:00 PM (90 minutes)

Room 33 C

Return to Work (RTW) Why & How?

Engage in an interactive discussion on building an effective Return to Work (RTW) program that supports employees and strengthens LEA operations. Explore implementation strategies, partnership development, and communication techniques that promote recovery and retention. Review practical tools, sample forms, and processes to align temporary assignments with employee restrictions and organizational needs.

Presenters: Kyle McKibbin, Keenan; Judy C. Miller, Retired Director of Risk Management; Eric Tennison, Keenan

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

Solutions Central is a selection of sessions offered by CASBO Partners. For a complete list of Solutions Central sessions, visit the event app.

8:30 - 9:30 AM

Room 31 C

Leading Beyond the Poster: Bringing Organizational Values to Life

Transform organizational values from words on a poster into lived leadership practices. Examine strategies that cultivate heart-centered leaders who model integrity, inspire shared vision, and challenge the status quo. Apply practical tools to lead with authenticity, strengthen team culture, and align daily actions with organizational purpose.

Presenter: Darin Ditmar, SchoolsFirst Plan Administration and Diana Valdez, SchoolsFirst Plan Administration

8:30 - 9:30 AM

Room 30 E

Navigating the 2026 Bond Landscape: Fiscal, Legal, and Economic Forces

Assess challenges facing LEAs as the 2026 bond election approaches. Analyze economic, fiscal, and political factors affecting GO bond issuance and election outcomes. Examine the impact of AB 218 claims and strategies for financing large settlements through bonds. Apply insights to plan and execute effective bond programs.

Presenters: Jennifer Gibb, VPCS | Van Pelt; Erica Gonzalez, Stifel; Carlos Villafuerte, Stradling Yocca Carlson & Rauth; Ami Shackelford, San Diego USD

9:45 - 10:45 AM

Room 30 D

Maximizing Prop 2 and Federal Incentives Against the Clock

Leverage Proposition 2 and federal incentives to maximize funding and energy savings. Analyze district case studies that secured \$40+ million in savings through strategic action. Apply project structuring strategies to capture funding before it expires. Implement approaches that turn volatile energy and fiscal conditions into long-term budget relief and infrastructure modernization.

Presenters: Amanda Bonivert, Petaluma City Schools; Amber Fritsch, Climatec; Kevin Gordon, Capitol Advisors Group; Tom Pace, San Bernardino City USD

11:00 AM - 12:00 PM

Room 29 A

Pension Maximization Strategies & Planning for Retirement at Every Stage

Analyze key considerations for CALSTRS and CALPERS participants, including differences for those hired before and after 2013.

Explore strategies to maximize pensions for superintendents and district staff. Apply best practices to assess the broader impact on district financial planning.

Presenters: Franklin Chelebian, Equitable; Kelsey McCarthy, Equitable

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SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

Solutions Central is a selection of sessions offered by CASBO Partners. For a complete list of Solutions Central sessions, visit the event app.

1:30 - 2:30 PM (60 minutes)

Room 30 D

Recovering Expenses: Right-Sizing School Facility Use Fees to Support M&O and Compliance

Align facility fees with true costs to support maintenance, operations, and compliance under the Civic Center Act. Apply best practices for tracking services and establishing board policies. Ensure facilities remain sustainable, accessible, and equitable for both educational and community use.

Presenters: Carlos Chicas, Capistrano Unified; Cheryl Galloway, Facilitron; Ted Norman, San Marcos USD; Mariana Solomon, San Bruno Park SD

1:30 - 2:30 PM (60 minutes)

Room 30 C

Crunch Less, Communicate More: Transforming Financials with Data & Analytics

Translate financial data into clear, compelling narratives that resonate with stakeholders. Leverage modern analytics tools to simplify budgeting, strengthen forecasting, and clarify complex numbers. Design powerful visuals to engage audiences and communicate your district's financial story with confidence and impact.

Presenters: Saad Bawany, Frontline Education; Susana Lopez, Moreno Valley USD; Grant Schimelpfening, Lindsay USD

Special Education

8:30 - 9:30 AM

Room 33 A

Beyond the Bottom Line: Inclusive Preschool as a Smart Investment

Implement an inclusive PreK model that aligns student outcomes, family belonging, and fiscal sustainability. Explore braided funding, embedded instruction, and collaborative special education services to turn compliance challenges into innovation opportunities. Apply strategies to anticipate obstacles, measure outcomes, and reduce long-term costs. Leverage inclusive PreK to boost readiness, social-emotional growth, and equitable access for all students.

Presenters: Sherrie Castellanos, Paso Robles Joint USD; Anjanette Pelletier, MS, LEP, School Services of California, Inc.; Heather Wahlberg, Paso Robles Joint USD

11:00 AM - 12:00 PM

Room 32 A

Maximize Funding for Students with Disabilities with High Quality Data

Identify key federal and state data sources used to fund students with disabilities. Validate and ensure reliability of data for Individuals with Disabilities Education Act (IDEA) local entitlements, proportionate share, Comprehensive Coordinated Early Intervening Services (CCEIS), and low-incidence programs. Apply strategies to optimize funding allocations and support accurate, data-driven decision-making. Implement best practices that maximize resources for students with disabilities.

Presenter: Brandi Jauregui, CA Department of Education

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Special Education

1:30 - 3:00 PM (90 minutes)

Room 33 A

Advanced Special Ed Maintenance of Effort Strategies

Analyze exemptions and their allowable uses to protect your MOE. Review the PCRA, understand its financial impact, and apply strategies to avoid duplicating costs. Explore approaches for LEAs struggling to pass tests and methods to manage rising MOE requirements. Implement practical tactics to maintain a healthy, compliant MOE.

Presenters: Mark Curtis, San Diego COE; Kay A. Pugh, Retired Special Education Financial Analyst; Janet Queneau, Whittier Union HSD/Whittier Area Cooperative SELPA

Technology + Data

8:30 - 9:30 AM

Room 32 A

Controlling the Uncontrollable: School District Oversight in the Agentic AI Era

Examine the challenges of agentic AI in district operations, where autonomous systems execute complex workflows with limited transparency. Identify liability risks, establish accountability checkpoints, and design verifiable processes. Apply practical frameworks to maintain human oversight, ensure trust, and safeguard decision-making as AI evolves from assistant to autonomous agent.

Presenter: Nick Clair, Lozano Smith

11:00 AM - 12:00 PM

Room 33 B

Real-Time Budget Dashboards: Helping Leaders Maximize Resources for Students

Transform budget oversight by providing leaders with real-time dashboards for spending, encumbrances, and balances. Analyze how simple tools can increase transparency, build trust, and strengthen accountability. Apply strategies to maintain current data and train leaders for effective use. Implement dashboards that empower decision-making and maximize resources for student success.

Presenters: Jose Guzman, Kings Canyon Joint USD; Joel Rabin, Inform 2 Inspire; William C. Young, Glendale USD

1:30 - 3:00 PM (90 minutes)

Room 32 B

Bridging Business & Technology: Building Sustainable Refresh Cycles and Transparent Network Services

Align business and technology priorities to design sustainable refresh cycles and transparent network services. Explore subscription-based network/data services models that enhance cost predictability, efficiency, and long-term planning. Apply strategies that balance fiscal responsibility with evolving technology demands. Ensure students and staff have access to secure, reliable tools that support effective learning.

Presenters: Jason Borgen, Santa Cruz COE; Melissa Lopez, Santa Cruz COE

SCHEDULE | TUESDAY, MARCH 31

Schedule as of 2/27/26. Check CASB02Go for updates.

Transportation

8:30 - 9:30 AM

Room 28 AB

AI at the Wheel: Driving Smarter Transportation Management

Leverage AI to simplify KPI tracking, reporting, and data analysis for transportation operations. Generate HR documents, board-ready summaries, and professional communications efficiently. Streamline daily tasks, including scheduling, emails, and parent interactions. Apply practical strategies to make transportation management more effective, efficient, and manageable.

Presenter: Richard Jimenez, Placentia-Yorba Linda USD

9:45 - 10:45 AM

Room 28 AB

From Shortages to Solutions: Driving Change in Student Transportation

Address driver shortages, rising costs, and compliance mandates while innovating transportation services. Explore strategies for implementing technologies like ZPass and Zonar, introducing EV buses, and managing fleets effectively. Apply lessons from real-world district experiences to improve safety, efficiency, and driver engagement. Implement practical solutions that stabilize operations and drive sustainable change.

Presenter: Sarah E. Lemke, Pajaro Valley USD

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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Accounting

8:00 - 9:00 AM

Room 31 AB

Lessons in Integrity: Fraud Prevention Through Real-World Case Studies

Analyze real-world fraud cases to identify vulnerabilities in financial oversight and internal controls. Explore how schemes are executed, detected, and investigated, and assess legal and financial consequences. Apply best practices for fraud detection, whistleblower protection, and transparency. Implement practical tools and strategies to strengthen prevention protocols in your district.

Presenters: Ana Rodriguez, CLA; Taylor Ulrich, CLA

Charter Authorization & Oversight

8:00 - 9:00 AM

Room 30 E

Charter Renewal Reboot: Post-AB 1505 Trends, Strategies and Lessons Learned

Navigate trends, challenges, and legal issues in charter renewals since AB 1505. Explore statewide patterns from SY24-25 and SY25-26 and anticipate future renewal pressures. Apply practical strategies to navigate the complex renewal process effectively. Implement solutions to manage increasing volumes of petitions and ensure compliance under current law.

Presenters: Erin Hamor, Lozano Smith; Richard Gonzalez, Los Angeles USD; Edward J. Sklar, Lozano Smith; Diedre Walsh, San Diego USD



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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Chief Business Officials

8:00 - 9:00 AM

Room 27 AB

CBO Facilities Playbook: How to Lead your Construction Projects from Start to Finish

Guide construction projects from concept to completion with a practical facilities playbook. Align master plans with district priorities, explore delivery methods, and unlock funding while protecting bond ratings. Apply strategies to accelerate schedules, avoid costly mistakes, and build trust with boards, staff, and the community throughout every milestone.

Presenters: Raphael Guzman, Inglewood USD; Jordan A. Miles, Inglewood USD; Amin Salari, Fonder-Salari, Inc.; Reid Shannon, Dannis Woliver Kelley

9:15 - 10:15 AM

Ballroom 20 D

Pure Politics: Impact on Schools

Examine how political shifts shape K-12 funding and policy in California. Analyze the impact of leadership transitions, elections, and national trends on budgets, programs, and curriculum debates. Anticipate fiscal challenges, emerging controversies, and opportunities to protect investments while guiding districts through a dynamic education landscape.

Presenters: Kevin Gordon, Capitol Advisors Group; Jack O'Connell, Capitol Advisors Group, LLC; Sara Pietrowski, CASBO; Barrett Snider, Capitol Advisors Group

9:15 - 10:15 AM

Room 27 AB

Winning Back Days: Fiscal-Savvy Attendance Improvements

Turn attendance gains into fiscal stability by converting lost instructional days into ADA and protecting LCFF revenue. Learn field-tested strategies combining MTSS prevention, fast-tracked support for students with serious attendance issues, without overburdening staff, and attendance recovery options. Map your district's attendance gaps, calculate fiscal impact, and build a year-long action plan for measurable improvement.

Presenters: Don English, San Bernardino CSS; Erica Peterson, CA Assn. of Supervisors of Child Welfare & Attendance

2:00 - 3:00 PM

Room 30 AB

CBOs on the Frontlines: Funding, Forecasting & the Fight for Stability

Explore the financial, operational, and legal pressures shaping California school districts. Hear from CBOs and legal experts on managing funding delays, declining enrollment, and rising costs. Navigate collective bargaining, litigation risks, and legislative challenges with strategies that sustain district stability and fiscal resilience.

Presenters: Amanda Bonivert, Petaluma City Schools; Rafael Gaeta, Rio School District; David Soldani, Atkinson, Andelson, Loya, Ruud & Romo

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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Chief Business Officials

2:00 - 3:00 PM

Ballroom 20 D

The Utopia Project: Perfect Collaboration for Position Control

Achieve utopia in position control by fostering collaboration between Fiscal Services (budget), Human Resources and Payroll. Examine how cross-departmental teams can address overlapping systems and processes. Apply strategies to prevent misunderstandings and improve coordination other department teams. Implement practices that enhance teamwork, efficiency, and accuracy in managing positions.

Presenters: Vincent J. Christakos, San Diego/Imperial Valley Section - Retiree Member; LaFaye M. Platter, LaFaye Platter

4:00 - 5:00 PM

Ballroom 20 ABC

School Finance Hot Topics

Learn the latest on current trends in the areas of Proposition 98, collective bargaining, special education, attendance recovery, and more in this annual hot-topics session.

Presenters: Brianna Garcia, School Services of California Inc; John Gray, School Services of California Inc.; Patti Herrera, School Services of California Inc.; Matt Phillips, School Services of California, Inc.

Child Nutrition

8:00 - 9:00 AM

Room 32 A

Navigating the New Nutrition Landscape for School Foodservice Success

Adapt school foodservice programs to the evolving nutrition landscape and 2025-2030 Dietary Guidelines. Examine the impact of ultra-processed foods, policy changes, and public expectations on menus and procurement. Apply strategies that balance nutrition, cost, and student satisfaction while enhancing program reputation and participation.

Presenters: Maria Frye, Dairy Council of CA; Tim White, El Dorado Union HSD

9:15 - 10:15 AM

Room 31 C

New School Food Economy: Driving ROI with Fresh Meals and Values-Aligned Leadership

Leverage California's \$6 billion investment to strengthen financial sustainability and student nutrition. Explore strategies for rising participation, resilient supply chains, and operational efficiencies. Apply lessons from innovative district leaders to transform meal programs. Implement approaches that drive health, learning, and long-term fiscal impact.

Presenters: Michael Jochnor, Morgan Hill USD; Adam Kesselman, OKThink and ReDirected; Ryan Pinkerton, San Luis Coastal USD; Erin Primer, San Luis Coastal USD

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Facilities

9:15 - 10:15 AM

Room 30 E

Hot, New Legal Topics in 2026!

Examine emerging legal trends affecting facilities, student issues, and employment in 2026. Navigate complex rules for funding, construction, and district operations while identifying potential risks. Apply practical strategies to ensure compliance, anticipate challenges, and make informed decisions. Implement actionable takeaways to strengthen operations, maintain community trust, and stay ahead of legal change.

Presenters: Meredith Johnson, Dannis Woliver Kelley; Chelsea Olson-Murphy, Lozano Smith; Cynthia Smith, Fagen Friedman & Fulfrost LLP

9:15 - 10:15 AM

Room 28 CDE

Proposition 2 Made Simple: Unlocking New Funding for Small Districts

Navigate Proposition 2 to secure funding for small districts' modernization, repair, and safety projects. Learn eligibility, compliance, and grant strategies to maximize opportunities, including hardship provisions and special programs. Apply lessons from real case studies to streamline applications, avoid pitfalls, and stretch resources for long-term facility success.

Presenter: Khary Knowles, COLBI

2:00 - 3:00 PM

Room 30 E

Facilities + Fiscal = Better Results for Schools

Navigate the unique priorities and pressures of Facilities and Fiscal teams to turn tension into collaboration. Examine real-world examples and interactive strategies to build respect, strengthen communication, and align goals. Apply practical approaches to foster trust, bridge gaps, and deliver more efficient, student-centered outcomes. Share experiences and gain tools to cultivate stronger cross-department partnerships.

Presenters: Kristi Blandford, Dry Creek Joint ESD; Cherie Chenoweth, CTC Consulting Services; Nicole Perrine, Natomas USD

4:00 - 5:00 PM

Room 30 E

Understanding the Lease-Leaseback Delivery Method

Explore how the Lease-Leaseback (LLB) method delivers flexibility and value for K-12 construction. Examine its legal framework, compliance requirements, and practical management across districts, counsel, and contractors. Gain clarity on qualifications-based selection, subcontractor procurement, and risk management to implement LLB confidently and transparently.

Presenters: Tova Corman, San Marcos USD; Gil Fullen, Balfour Beatty; Phil Henderson, Orbach Huff & Henderson; Lori Rubenstein, Simi Valley USD

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*Top 5 underwriter for California K-12 financings based on number of negotiated issues through December 31, 2025, according to S&P Muni Deal Query.

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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Financial Services

8:00 - 9:00 AM

Room 29 BCD

**District Insights & Auditor Perspectives:
Practical Internal Controls**

Strengthen fiscal integrity and operational efficiency through effective internal controls in school business operations. Identify common risk areas and apply practical strategies from district leaders and auditors to improve oversight without added bureaucracy. Gain tools to evaluate practices, reinforce safeguards, and clearly communicate the purpose of internal controls to staff and administrators.

Presenters: Kristi Blandford, Dry Creek Joint ESD; Andrew Park, Eide Bailly, LLP; Jeannette Sanchez, Upland USD

2:00 - 3:00 PM

Room 30 E

Facilities + Fiscal = Better Results for Schools

Navigate the unique priorities and pressures of Facilities and Fiscal teams to turn tension into collaboration. Examine real-world examples and interactive strategies to build respect, strengthen communication, and align goals. Apply practical approaches to foster trust, bridge gaps, and deliver more efficient, student-centered outcomes. Share experiences and gain tools to cultivate stronger cross-department partnerships.

Presenters: Kristi Blandford, Dry Creek Joint ESD; Cherie Chenoweth, CTC Consulting Services; Nicole Perrine, Natomas USD

2:00 - 3:00 PM

Room 29 BCD

**Braiding Funds & Billing: How Districts Maximize
Medi-Cal, CYBHI, and Grants to Grow Student
Wellness**

Uncover how districts blend CYBHI, Medi-Cal billing (LEA-BOP and SMAA), and grants to expand student wellness. Examine how two California districts turned compliance into innovation through coordinated fiscal strategy. Gain replicable tools, funding models, and reinvestment approaches that strengthen behavioral health supports and financial sustainability.

Presenters: Myleen Cerdinio, Chula Vista ESD; Laura Dyson, Palm Springs USD; Patti McIntyre, Leader Services; Laura Meusel, Palm Springs USD

4:00 - 5:00 PM

Ballroom 20 ABC

School Finance Hot Topics

Learn the latest on current trends in the areas of Proposition 98, collective bargaining, special education, attendance recovery, and more in this annual hot-topics session.

Presenters: Brianna Garcia, School Services of California Inc; John Gray, School Services of California Inc.; Patti Herrera, School Services of California Inc.; Matt Phillips, School Services of California, Inc.

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Human Resources

9:15 - 10:15 AM

Room 30 E

Hot, New Legal Topics in 2026!

Examine emerging legal trends affecting facilities, student issues, and employment in 2026. Navigate complex rules for funding, construction, and district operations while identifying potential risks. Apply practical strategies to ensure compliance, anticipate challenges, and make informed decisions. Implement actionable takeaways to strengthen operations, maintain community trust, and stay ahead of legal change.

Presenters: Meredith Johnson, Dannis Woliver Kelley; Chelsea Olson-Murphy, Lozano Smith; Cynthia Smith, Fagen Friedman & Fulfroost LLP

8:00 - 9:00 AM

Room 30 AB

Employee Leaves: Legal Updates, Compliance Strategies, and Best Practices - Part 1

Clarify FMLA, CFRA, workers' compensation, and other leave types, including eligibility, duration, and designation. Review recent legal updates and learn practices that prevent leave abuse. Manage intermittent and pregnancy-related leaves with confidence and align policies with the medical reemployment list. Implement practical tools to strengthen compliance and streamline leave administration.

Presenters: Angela Okamura, Lozano Smith; Kara Walton, Lozano Smith

9:15 - 10:15 AM

Room 30 AB

Employee Leaves: Legal Updates, Compliance Strategies, and Best Practices - Part 2

View full description under 8:00 – 9:00 AM.

Presenters: Angela Okamura, Lozano Smith; Kara Walton, Lozano Smith

4:00 - 5:00 PM

Room 32 B

Beyond Roles: Creating Collaborative Labor-Management Partnerships

Build trust and collaboration between labor and management teams to drive lasting school improvement. Explore real-world examples of districts that transformed transactional interactions into authentic partnerships. Apply strategies for inclusive decision-making, ongoing dialogue, and systems that foster organizational trust. Implement practices that strengthen school culture, increase staff engagement, and enhance student outcomes.

Presenters: Gustavo Morales, CDE Foundation; Jessica Saavedra, San Lorenzo USD



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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Lead + Advance

7:45 - 9:00 AM

Ballroom 20 D

Women in Leadership: Perception in the Workplace

Everyone's welcome at the CASBO Women in Leadership gathering! Networking and coffee service begin at 7:45 am, followed by education.

Examine how workplace perception influences leadership presence and career advancement. Explore concepts of readiness, assumptions, and interpretation that shape how leaders are viewed. Apply intentional perspective shifts to strengthen influence, credibility, and sustained professional growth.

Presenters: Kristen Burk, Orange County DOE and Gina Lance, Orange County DOE

Thank you to our CASBO Women in Leadership session sponsors: Frontline Education and STIFEL.

8:00 - 9:00 AM

Room 28 CDE

Leading from Every Seat: Building Influence Without a Title

Strengthen communication, confidence, and influence regardless of job title or role. Explore frameworks for building trust, navigating upward relationships, and demonstrating leadership qualities. Apply practical tools to lead effectively from any position. Implement strategies that create meaningful impact for teams, schools, and students.

Presenter: Amanda Fernandez, Clarksville, Feather River, and Lake View Charter Schools

9:15 - 10:15 AM

Room 32 A

Beyond Spreadsheets: AI as Your Thought Partner

Reimagine AI as a strategic partner for problem-solving, planning, and communication. Analyze data and approach complex challenges with new clarity. Apply AI-driven insights to streamline decisions and enhance leadership. Implement practical examples to save time, gain perspective, and lead confidently.

Presenter: Kelly Buttery, Lake Tahoe USD

9:15 - 10:15 AM

Room 29 BCD

Managing People & Politics

Navigate organizational and community politics to support effective educational leadership. Explore constructive and destructive dynamics, manage power struggles, and influence outcomes. Apply strategies to reduce uncertainty, foster collaboration, and resolve conflicts. Develop skills to maintain focus on positive results for schools and communities.

Presenter: Ron Carruth, CA High School Coalition + Retired Superintendent; Robert Whittenberg, El Dorado Union HSD

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Lead + Advance

2:00 - 3:00 PM

Room 30 D

From Budgets to Belonging: Collaborative Strategies for Fiscal Leadership, Governance & Student Success

Integrate fiscal responsibility with governance priorities and student needs through cross-role collaboration. Explore lessons from county fiscal services, school boards, and community engagement to overcome constraints and build trust. Apply strategies to enhance transparency, strengthen board-business office collaboration, and connect with families. Implement practical approaches that support student success and district-wide engagement.

Presenters: Cherina Betters, San Bernardino CSS; Don English, San Bernardino CSS; Jesus M. Holguin, San Bernardino CSS; Marcelino Serna, San Bernardino CSS

2:00 - 3:00 PM

Room 30 C

Weaving a Culture of Personal Connection Back into Your Team

Rebuild team connections and workplace culture to strengthen engagement and belonging. Explore strategies that foster trust, cohesiveness, and meaningful relationships among employees. Apply practical ideas to bridge generational expectations and enhance connection to work and coworkers. Implement approaches that create a supportive, collaborative, and identity-affirming environment.

Presenter: Kathy Espinoza, Kathy Espinoza Speaks

2:00 - 3:00 PM

Room 27 AB

Promotion by Leadership

Demonstrate leadership to accelerate career advancement and promotion opportunities. Learn to build a compelling resume and refine interview techniques. Explore real-world examples of leadership in action. Apply strategies to showcase impact, influence, and readiness for the next role.

Presenters: Aaron Heinz, Colusa COE; Matt Phillips, School Services of California, Inc.

4:00 - 5:00 PM

Room 28 CDE

Streamlining Success: Centralizing Alignment and Coherence to Elevate Student Success

Break down silos and align resources to create a cohesive strategy for student success. Explore practical tools to gain organization-wide visibility of grants and initiatives. Apply processes that foster collaboration, avoid duplication, and leverage resources strategically. Implement strategies that transform fragmented efforts into unified, impactful approaches for student achievement.

Presenters: Gabriela B. Delgado, San Diego COE; Allison Wood, San Diego COE

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Maintenance & Operations

9:15 - 10:15 AM

Room 33 A

Driving Future Success: Capital Planning and Forecasting

Optimize budgets and prioritize projects through effective capital planning and forecasting. Analyze staffing, funding, and resource constraints to make strategic decisions. Apply tools to prevent financial crises and balance reactive and proactive work. Implement approaches that position districts for long-term operational and fiscal success.

Presenters: Adam Florez, Santa Clara USD; Matt Pace, FMX

Payroll

8:00 - 9:00 AM

Room 30 AB

Employee Leaves: Legal Updates, Compliance Strategies, and Best Practices - Part 1

Clarify FMLA, CFRA, workers' compensation, and other leave types, including eligibility, duration, and designation. Review recent legal updates and learn practices that prevent leave abuse. Manage intermittent and pregnancy-related leaves with confidence and align policies with the medical reemployment list. Implement practical tools to strengthen compliance and streamline leave administration.

Presenters: Angela Okamura, Lozano Smith; Kara Walton, Lozano Smith

9:15 - 10:15 AM

Room 30 AB

Employee Leaves: Legal Updates, Compliance Strategies, and Best Practices - Part 2

View full description under 8:00 – 9:00 AM

Presenters: Angela Okamura, Lozano Smith; Kara Walton, Lozano Smith

9:15 - 10:15 AM

Room 30 C

CalSTRS Audit Update: Transforming Audits into Strategic Assets

Explore how audits can advance the shared goal of providing teachers with a secure retirement. Participate in a discussion with the CalSTRS team about the audit process and how it can provide strategic value.

Presenters: Brian Carlson, CalSTRS; Chris Wall, CalSTRS

2:00 - 3:00 PM

Room 32 A

CalPERS Hot Topics

Learn direct from CalPERS about common errors in school payroll reporting, retired annuitants, the employer certification process, resources for reportable special compensation, and audit prep.

Presenter: Brad Hanson, CalPERS

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Payroll

4:00 - 5:00 PM

Room 32 A

CalSTRS Employer Services Update

Gain insights on employer reporting responsibilities within the Secure Employer Website, including: employment maintenance, employer reporting requests, and contribution reporting.

Presenters: Nicholas Dani, CalSTRS; Katrina Gacic, CalSTRS; Upasana Sides, CalSTRS

Purchasing

8:00 - 9:00 AM

Room 30 C

Measure What Matters: Vendor Scorecards to Drive Performance, Create Accountability & Promote Collaboration

Build effective vendor scorecards and select meaningful KPIs to guide performance. Analyze data to generate actionable insights that drive accountability and strengthen relationships. Apply practical strategies to improve efficiency, collaboration, and continuous improvement. Implement a roadmap for using scorecards to enhance outcomes across your supplier network.

Presenters: Raj Kapoor, Los Angeles USD; Tiffanie Ledford-Yang, Los Angeles USD

9:15 - 10:15 AM

Room 31 AB

Bids vs. RFPs: Choosing the Right Path in K-12 Procurement

Clarify the differences between bids and RFPs in K-12 procurement to ensure compliance and efficiency. Compare each method's purpose, evaluation criteria, and negotiation flexibility. Identify typical use cases and understand Public Contract Code thresholds. Apply best practices to choose the right procurement path for your district's needs.

Presenters: Leeann Errotabere, COLBI; Susan Harautuneian, Madera USD; Kim Nguyen, Long Beach USD

2:00 - 3:00 PM

Room 28 CDE

Purchasing Rapid Rounds

Engage in fast-paced, roundtable discussions focused on today's most pressing Purchasing topics. Exchange insights and real-world solutions with peers as you rotate through guided conversations facilitated by Purchasing Professional Council leaders. Explore practical strategies for navigating Public Works vs. Maintenance distinctions, communicating and enforcing purchasing procedures, and managing increased inventory thresholds. Connect with colleagues, expand your network, and leave with ideas you can immediately apply to your organization.

Presenters: Sharon Clay, Cajon Valley Union SD; Tony Crapo, Sequoia Union HSD; Kevin Lesko, Vista USD



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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Purchasing

4:00 - 5:00 PM

Room 31 C

The Future of Purchasing: Trends, Technology, and Transformation

Explore emerging trends transforming purchasing professionals into strategic leadership influencers. Examine advances in technology, compliance, sustainability, and supply chain resilience that redefine the profession. Discover ways to drive innovation, savings, and community impact beyond transactional tasks. Gain practical tools to position purchasing as a catalyst for organizational growth and transformation.

Presenters: Carmen Ochoa, Perris Union HSD; Maria Moreno, Bonita USD

Risk Management

8:00 - 9:00 AM

Room 33 B

Cyber Trends: Protecting Schools, Staff, and Students in a Digital Age

Identify top cyber threats affecting schools, from phishing and ransomware to AI misuse. Analyze real incidents and lessons from IT and business leaders to understand operational, financial, and legal impacts. Apply practical strategies to reduce risk, strengthen protections, and build staff awareness that safeguards students, employees, and district resources.

Presenter: Martin Ronquillo, ASCIP

2:00 - 3:00 PM

Room 33 C

Contract Risk Management & Best Practices

Identify and manage risks in school contracts for events, facilities, and construction. Analyze indemnity, hold-harmless, and waiver clauses, and verify insurance coverage and limits. Apply a five-step pre-signature review to ensure enforceable agreements and proper authority. Implement best practices for high-risk scenarios, including transportation and volunteer activities, to protect the district.

Presenters: Megan Mavis, Michael Sullivan & Associates LLP; Kyle McKibbin, Keenan

4:00 - 5:00 PM

Room 33 A

Risk Management: Recent Verdicts & Settlements

Examine recent real-world general liability verdicts and settlements. Enhance understanding of emerging trends, legal precedents, and best practices. Arm yourself with the knowledge needed to navigate the complexities of legal outcomes and insurance coverage, ensuring your agency is well-prepared to face future challenges.

Presenters: Stephan Birgel, Alliance of Schools for Cooperative Insurance Programs; Reshan Cooray, Alliance of Schools for Cooperative Insurance Programs

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

Solutions Central is a selection of sessions offered by CASBO Partners. For a complete list of Solutions Central sessions, visit the event app.

8:00 - 9:00 AM

Room 29 A

Roundtable: Empowering Finance Leaders in Facilities Management

Connect with your fellow fiscal services and facilities peers to discuss common challenges, experiences and best practices in a facilitated roundtable focused on leveraging facilities data to drive financial outcomes.

Moderator: Natalie Descoteaux, Brightly; Kyle White, Brightly

8:00 - 9:00 AM

Room 33 A

ACA 2026 Exposed: Key Changes, Higher Penalties, and What It Means for You

Analyze key ACA changes for 2026, including the new affordability threshold and higher IRS penalties. Examine the 'subsidy cliff' and its impact on premiums and employer benefit strategies. Apply best practices for ACA reporting, electronic filing, and distribution of 1094/1095 Forms. Implement strategies to maintain compliance and minimize financial risk.

Presenter: Monica Schermier Pritz, American Fidelity

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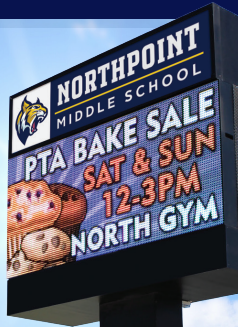
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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

Solutions Central is a selection of sessions offered by CASBO Partners. For a complete list of Solutions Central sessions, visit the event app.

8:00 - 9:00 AM

Room 30 D

From Reactive to Proactive: Smarter Year-End Procurement Planning in California K-12

End-of-year procurement doesn't have to mean last-minute purchases, documentation gaps, or audit stress. Learn from experienced school business leaders how they plan ahead for fiscal closeout—balancing compliance, speed, and value. Real-world tactics, tools, and workflows will be shared that help manage year-end funds responsibly while supporting district-wide needs. Return to the office with practical strategies to apply immediately during end-of-year planning and beyond.

Presenters: Heidi Axcell, Amazon Business; Doug Hassett, Amazon Business

9:15 - 9:40 AM (25 minutes)

Room 30 D

Future-Proofing Schools: Microgrid Resiliency in Malibu's Wildfire Zone

Implement microgrid infrastructure to enhance campus energy resiliency in wildfire-prone areas. Analyze lessons from past fires and PSPS events to inform planning and deployment. Apply strategies for integrating solar, storage, and QuickConnect backup systems. Design scalable, future-ready campuses that maintain power during planned and unplanned outages.

Presenters: Marc D. Starkey, Schneider Electric; Carey Upton, Santa Monica-Malibu USD

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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

Solutions Central is a selection of sessions offered by CASBO Partners. For a complete list of Solutions Central sessions, visit the event app.

9:15-10:15 AM

Room 33 B

**You've Passed Your Bond – Now What?!
Ready...Set...Issue!**

Launch your post-GO Bond roadmap with clarity and confidence. Examine the steps leading to bond issuance, including sizing, timing, and rating strategy. Learn how districts, bond counsel, municipal advisors, and underwriters collaborate to lower borrowing costs. Apply insights that position your projects for timely delivery and fiscal stewardship.

Presenters: John Baracy, Baird; Gerardo Cruz, Santa Monica-Malibu USD; Malcolm J. Simmons, Americas Public Finance: Local Governments-West; Jeff Pickett, Isom Advisors

2:00 - 3:00 PM

Room 28 AB

Winning Strategies for Operating Your Retirement Programs

Optimize retirement programs through strong collaboration with Third Party Administrators and vendors. Learn from experts how coordinated operations and effective employee education drive successful retirement outcomes. Apply strategies to oversee plans, enhance employee readiness, and ensure seamless administration across county offices, community colleges, and school districts.

Presenters: David Creech, Corebridge Financial; Jamie Dial, Kings COE; Ryan Phillips, U.S. OMNI & TSACG Compliance Services

2:00 - 3:00 PM

Room 31 C

Purchasing Playbook: Insights I Wish Someone Had Told Me on Day One

Learn hard-earned lessons and practical strategies from seasoned purchasing professionals while participating in interactive exercises that turn insights into actionable practices. Explore purchasing best practices, mentor staff effectively, and make strategic procurement decisions. Walk away with strategies that enhance efficiency, collaboration, and impact within your district.

Presenters: Dawn Bray, Hemet USD; Brad Minami, Elk Grove USD; Lale Stefkova, FoundationCCC

4:00 - 5:00 PM

Room 30 D

Strategic FF&E Lifecycle Planning for K-12 School Districts

Develop long-term strategies for managing Furniture, Fixtures, and Equipment (FF&E) to balance cost and quality in schools. Implement proactive procurement, maintenance, and funding approaches that reduce lifetime expenses. Align FF&E planning with bonds and multiyear fiscal plans to enhance educational outcomes and ensure predictable, sustainable budgets.

Presenters: Todd Cutler, Lake Tahoe USD; Gina La Bier, Meteor Education; Steve Murley, University of Iowa; Victoria Veneziano, Meteor Education

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Solutions Central

4:00 - 5:00 PM

Room 28 AB

Discover YOUR Creative Style

Experience an interactive creativity assessment developed by the Crayola team that reveals your unique style and how it shapes collaboration, innovation, and problem-solving. Participate in hands-on activities that explore the Think, Perceive, and Engage dimensions of creativity. Strengthen teamwork, self-awareness, and leadership skills to inspire more innovative decision-making in your district or organization.

Presenters: Tim Mazza, Horace Mann; James Wells, Crayola

Special Education

8:00 - 9:00 AM

Room 32 B

Leveraging CALPADS Data to Support Fiscal Departments

Streamline CALPADS reporting to support accurate fiscal calculations. Apply proactive data management techniques to ensure timely and reliable reporting. Bridge collaboration between special education and fiscal departments. Implement strategies that enhance compliance, accuracy, and operational efficiency.

Presenters: Heather DiFede, High Quality IEPs/East County SELPA; Maria Prince, San Diego COE

9:15 - 10:15 AM

Room 33 C

Addressing Escalated Behavior Without Undue Reliance on Paraprofessional Support

Develop strategies to manage escalated classroom behaviors while reducing reliance on paraprofessionals. Explore how resource allocation, staffing models, and professional development impact operational efficiency and inclusion. Apply trauma-informed and positive behavioral approaches to create safer, sustainable learning environments that support both students and district budgets.

Presenters: Sarah Garcia, Lozano Smith; Joseph Geever, Lucia Mar USD

SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASB02Go for updates.

Special Education

2:00 - 3:00 PM

Room 33 A

Money Matters: Special Ed Edition

Understand the fundamentals of special education funding and SELPA allocation plans. Explore innovative strategies for building and managing special education budgets. Apply practical approaches to navigate financial uncertainty with confidence. Implement tools that optimize resources and support student needs effectively.

Presenter: AnnaMarie King, El Dorado COE

Technology + Data

9:15 - 10:15 AM

Room 32 B

Failing Forward: Pain Points and Payoffs of Building a New Portal

Examine how one SELPA turned challenges into breakthroughs while building a new LEA support portal. Learn from real world experiences integrating systems, fiscal, and program data to strengthen support for students with disabilities. Discover how setbacks inspired smarter workflows, automated validations, and stronger collaboration between departments. Acquire practical strategies to leverage data, bridge silos, and enhance accountability and outcomes.

Presenters: Katia Borschov, El Dorado COE; Jeffrey Illingworth, El Dorado COE

2:00 - 3:00 PM

Room 32 B

District Technology Transformation: Driving Change and Impact

Lead district-wide technology initiatives that balance fiscal responsibility with educational outcomes. Examine one district's transformation journey to uncover strategies for collaboration, change management, and stakeholder engagement. Apply tools and frameworks to align initiatives with priorities, overcome resistance, and elevate IT as a strategic partner for long-term impact.

Presenter: Chris Hagle, Ceres USD

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SCHEDULE | WEDNESDAY, APRIL 1

Schedule as of 2/27/26. Check CASBO2Go for updates.

Transportation

8:00 - 9:00 AM

Room 31 C

Driving Safety, Compliance, and Confidence in Student Transportation

Examine strategies to enhance safety, accountability, and risk management in student transportation. Clarify insurance coverage needs and implement proactive risk mitigation. Navigate SB 88 compliance and strengthen operational accountability at all levels. Apply lessons from real-world cases to build resilient, reliable, and safer transportation programs for students and communities.

Presenters: Megan Carey, EverDriven; Carlos Chicas, Capistrano Unified; Reshan Cooray, ASCIP; LaFaye M. Platter, LaFaye Platter

2:00 - 3:00 PM

Room 33 B

The Path to Financing Electrification with Porterville USD

Explore strategies to finance and deploy electric bus charging infrastructure. Analyze financing models including incentives, utility programs, and charging-as-a-service. Learn how a district has navigated costs, interconnection, and timing challenges. Implement approaches that align infrastructure planning with budgets and long-term fleet goals.

Presenters: Ibraheem Ameer, CALSTART; Brad Rohrbach, Porterville USD; Taylor Sayward, The Mobility House; Nate Smith-Ide, ForeFront Power



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SCHEDULE | THURSDAY, APRIL 2

Schedule as of 2/27/26. Check CASBO2Go for updates.

CLOSING SESSION

9:00am – 11:00 AM

Ballroom 20 ABC

**Leading at the Intersection of Human
Judgement & AI**

Ross Hartmann, Kiingo AI

**Are you shaping how AI is used in your work,
or simply reacting to it?**

Ross Hartmann of Kiingo AI, alongside school business practitioners, explores what it means to lead at the intersection of human judgment and AI. Grounded in a people-first framework and built around real challenges surfaced by CASBO Con participants, this experience centers on practical starting points — not hype or complexity.

Go forward with clarity on where AI complements your work and where human judgment must guide it. Confidently stride into Monday fueled by real-world use cases, a curated AI prompt library and a clear starting point for accelerating your work.

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