



The Association of School Business Officials of New York

School Business Management Workshop

November 6-9, 2018 • Desmond Albany

High intensity professional development across five strands involving the School District and BOCES Business Office.
BOCES • District Clerk • District Treasurer • Payroll/Personnel • SBO Fiscal

Preliminary Program

Join us for the 2018 SBMW 2

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ASBO
NEW YORK

The Association of School Business Officials of New York

School Business Management Workshop

November 6-9, 2018 | Albany, NY

The Desmond Hotel

660 Albany Shaker Road, Albany, NY 12211



Preliminary Program

Join us for the 2018 SBMW!

Registrations are now being accepted for the School Business Management Workshop to be held at The Desmond in Albany, November 6-9, 2018. SBMW will address the needs of school district and BOCES business offices throughout New York State.

**BOCES • District Clerk • District Treasurer •
Payroll / Personnel • School Business Officials Fiscal**

All strands of the workshop will be offered at The Desmond Hotel Albany. Once again, we are using a format to accommodate the five strands. You may see in the schedule that your strand does not have a session at every time slot. This format will allow you to join other strands' sessions that may be of interest to you or take a break. If you have any questions about this format, please contact ASBO. Registered attendees should check in at ASBO registration upon arrival at the The Desmond. If you are arriving Wednesday morning, please plan to check in early so you are ready for your first session (see schedule). Districts and BOCES are encouraged to send multiple representatives and register early.

Materials

A link to download materials will be emailed to all attendees the week prior to the conference.

Continuing Education Credits

CPE (for CPAs): You may earn CPE Credits for some sessions during SBMW. The sessions that have credits available will be indicated with the topic area. To receive CPE credits, you need a CPA license and you must fill out a CPE form before leaving the conference.

CTLE (for SDBLs): All sessions (with the exception of cracker barrels, Q&A, and networking sessions) will be awarded CTLE. 60 minute session = 1 hour, 90 minute session = 1.5 hours. To receive CTLE credits, you must fill out the CTLE forms before leaving the conference.

Schedule and credits are subject to change.

Please check www.asbonewyork.org for the most up-to-date information.

Register online at www.asbonewyork.org/event/sbmw18

REGISTRATION COST: \$199 MEMBER / \$249 NON-MEMBER

Schedule At-a-Glance

Tuesday, November 6, 2018

	BOCES	District Clerk	District Treasurer	Payroll/ Personnel	SBO Fiscal
5:00 PM - 7:00 PM	Registration				

Wednesday, November 7, 2018

	BOCES	District Clerk	District Treasurer	Payroll/ Personnel	SBO Fiscal
7:00 AM	Registration				
7:00 AM - 8:30 AM	Breakfast				

8:00 AM - 9:30 AM Keynote Address



IF YOU BROUGHT A MOUSE TO SCHOOL: LEADERSHIP MATTERS

8:00 AM - 9:30 AM

Explore how leadership lessons learned at the world's leading theme park can help you build a more engaging school for students, parents, and your community.

Mark D. Mambretti, is the Director of Curriculum, Instruction and Personnel of The East Aurora Union Free School District.

9:30 AM - 4:00 PM	Exhibit Hours				
9:45 AM - 10:45 AM SESSION 1	<i>WinCap-Aid Projections</i>	<i>The Budget Vote & School Board Elections</i>	<i>NYSED Facilities Planning</i>	<i>Simplify The New Hire Process</i>	<i>NYSED Facilities Planning</i>
11:00 AM - 12:30 PM SESSION 2	<i>Recruiting & Attracting Talent While Eliminating Paper in the HR Office</i> <small>(11:00 AM - 12:00 PM)</small>	<i>District Clerk 101</i>	<i>Enhancing Your Reserve Plan</i>		<i>Enhancing Your Reserve Plan</i>
12:00 PM - 1:30 PM	Lunch				
1:30 PM - 3:00 PM SESSION 3	<i>BOCES Calendar, Reporting, Portal Review</i> <small>(1:30 - 2:30 PM)</small>	<i>FMLA: Family Medical Leave Act</i>	<i>Capital Project Accounting for Treasurers</i>	<i>Employer Reporting</i>	<i>Using Long Range Financial Planning in the Decision-Making Process</i>
3:15 PM - 4:45 PM SESSION 4	<i>Better School District PR</i>	<i>Meet & Greet</i>		<i>ERS: Life After Gold, Silver, and Bronze Levels</i>	<i>School Level Financial Reporting</i>

Schedule At-a-Glance

Thursday, November 8, 2018

	BOCES	District Clerk	District Treasurer	Payroll/ Personnel	SBO Fiscal
7:30 AM - 9:00 AM	Breakfast				
9:00 AM - 3:30 PM	Exhibit Hours				
8:30 AM - 10:00 AM SESSION 5	<i>Essential Leadership Qualities of the District Leader</i>	<i>District Clerk Legal Matters</i>	<i>Federal & School Lunch Funds (9:00 -10:00 AM)</i>	<i>Tips & Tricks 5A WinCap 5B NVision (9:00 -10:00 AM)</i>	
10:30 AM - 12:00 PM SESSION 6		<i>Cultural Responsiveness</i>	<i>Workflow in the District Office</i>		<i>Legal Update</i>
11:30 AM - 1:00 PM	Lunch				
1:00 PM - 2:00 PM SESSION 7	<i>Use and Review of National Purchasing Cooperatives/ Contracts</i>			<i>Building a Positive Workplace Culture Through Communications</i>	<i>Navigating ADA Compliance Requirements for District Websites</i>
2:15 PM - 3:15 PM SESSION 8	<i>BOCES Leases 101: Processes and Procedures for Approval</i>	<i>Records Management</i>	<i>Understanding the Investment Options and Tips on How to Prepare an Effective Cash Flow Projection</i>	<i>A Roadmap for Workers' Compensation</i>	<i>Understanding Investment Options and Tips on How to Prepare an Effective Cash Flow Projection</i>
3:30 PM - 4:30 PM SESSION 9		<i>District Clerk Calendar Development</i>	<i>Extra-classroom Update & Leveraging Technology</i>	<i>Navigational Tools When Working with Civil Service Rules and Salary Credits for Teachers</i>	<i>#MeToo and You - A Roadmap for School Administrators to Handle Harassment & Discrimination Claims in the Hollywood Era</i>
6:30 PM - 8:30 PM	Evening Event Around the World				



Schedule At-a-Glance

Friday, November 9, 2018

	BOCES	District Clerk	District Treasurer	Payroll/ Personnel	SBO Fiscal
7:30 AM - 8:30 AM	Breakfast				
8:00 AM - 9:00 AM SESSION 10	New BOCES Services: How Many New CoSers Have Been Approved in the Last Year?	It's a Wrap! Follow Up/Q&A	Q&A	What to Expect From an OSC Audit	Tax Cap and Capital Project Planning
9:15 AM - 10:45 AM SESSION 11	BOCES Insurance: Hot Topic Claim Scenarios "What Would You Do?"	FOIL and Open Meetings Law	OSC Audit Reports and Internal Banking Controls	Shoptalk: The Language of Payroll and Personnel (9:15 - 10:15 AM)	The Role of a Business Official in Preparing for a Safety/Security Crisis
11:00 AM - 12:30 PM SESSION 12	The Challenges of Your Component Schools	Resolutions Update	Simplified Leadership		An Update of Recent Negotiation Trends, Strategies, and Case Law



Did you know ASBO makes it easy to register multiple people from your district?

Visit www.asbonewyork.org/event/sbmw18 to register now!

Session Details by Strand

BOCES STRAND

1: WinCap - Aid Projections

1 CPE 1 CTLE (Special Knowledge)

Technical training on use of WinCap for BOCES aid claim/projection process, including tips and discussion.

Presented by: John Miller, Director of Business, Southern Westchester BOCES and Sheri Kershner, Manager of Business Services, Onondaga-Cortland-Madison BOCES

2: Recruiting & Attracting Talent While Eliminating Paper in the HR Office

1 CTLE

Can you really enhance your recruitment practices and reduce the piles of paperwork that come through your human resources office? The answer is YES! Learn more about how Sullivan County BOCES administrators automated and streamlined the hiring process, expanded its application pool, and enhanced its applicant tracking systems. Don't miss this opportunity to enhance your own HR operational efficiencies.

Presented by: Susan Schmidt, Deputy Superintendent, Sullivan County BOCES; Jennifer DeFrank, Director of Human Resources, Sullivan County BOCES and Justin Metcalf, Regional Account Executive, TalentEd

3: BOCES Calendar, Reporting, Portal Review

1 CTLE

Discussion of BOCES calendar and collection of reports utilizing the NYSED Business Portal.

Presented by: Lisa Ryan, Assistant Superintendent for Finance and Operations, Monroe I BOCES and Althea Johnson, Associate in School Business Management, New York State Education Department

4: Better School District PR

1.5 CTLE

A planned, professional two-way communications program won't eliminate all of the difficult situations that abound in public education – but it can help you navigate them more skillfully so you don't get mired in controversy or lose the confidence of your community. This session will focus on how to communicate in a strategic, proactive manner. Strategies for developing and delivering your communication plan will be explored.

Presented by: Adrienne Leon, APR, Communications Program Manager, Capital Region BOCES

5: Essential Leadership Qualities of the District Leader

1.5 CTLE

The SBO, as a district level administrator, balances fiduciary responsibilities with a supportive role to building level leaders. What are the essential skills required for success in a role that might seem as though it has dueling allegiances? How can the operational side of a school district serve their school leaders, faculty, and staff?

Presented by: Dr. Deborah Shea, Program Coordinator/Assistant Professor, Educational Leadership Programs, The College of Saint Rose and Christopher Abdo, Assistant Superintendent for Support Services, Burnt Hills-Ballston Lake CSD

7: Use and Review of National Purchasing Cooperatives/Contracts

1 CTLE

This session will be a review of what your agency needs to do in order to use National Cooperative contracts; identifying and researching areas where the use of a cooperative makes sense; understand your agency's needs and how cooperatives might be able to fill them. Completing your file for audit purposes will also be covered.

Presented by: Karen Storm, Purchasing Agent, Albany County

8: BOCES Leases 101: Processes and Procedures for Approval

1 CPE 1 CTLE (Special Knowledge)

Review of the timeline and process for BOCES lease agreements, TQ project submission and approval will be discussed. Rental within school districts vs. privately owned buildings. Form A and the new online SA-116 form will be discussed.

Presented by: Mary T. Mosher, Associate in School Business Management, New York State Education Department

10: New BOCES Services – How Many New CoSers Have Been Approved in the Last Year?

1 CTLE

Join NYSED staff and BOCES colleagues to learn more about new CoSer offerings that have recently been approved by the NYS Education Department. You will gain a better understanding of new services that can benefit your school district, have an opportunity to ask questions about what is aidable and what is not, and you will learn more about the process for CoSer approval. Don't miss this chance to get a firsthand overview of new cost-efficient services that will help your district enhance opportunities for students, increase operational efficiencies and reduce costs.

Presented by: Susan Schmidt, Deputy Superintendent, Sullivan County BOCES and Althea Johnson, Associate in School Business Management, New York State Education Department

Session Details by Strand

11: BOCES Insurance - Hot Topic Claim Scenarios – “What Would You Do?”

1.5 CPE 1.5 CTLE (Special Knowledge)

Come and see the top two school insurance companies present on and compare their most intriguing and teachable claim experiences! Utica National and NYSIR representatives will be present to share their most tell-tale examples of real claims tied to large losses or the potential for such. Both will illustrate issues schools/BOCES should be aware of, can learn from, and offer suggestions on how claim issues might be avoided. Attendees will participate in analyzing claims and rate the best claim stories & advice.

Presented by: Paul Weinstein, Vice President and Director of NYSIR Marketing and Subscriber Support, NYSIR; Russell Phillips, Regional Manager, NYSIR and Mike Centrone, Educational Institutions Specialist, Utica National Insurance Group

12: The Challenges of your Component Schools

1.5 CTLE

You may think you are fully aware of the challenges faced by your component districts, but are you really? Come hear a panel of School Business Officials share insight on what they feel it's important for BOCES officials to understand about issues they face. This will increase awareness and may help spark local dialogue on ideas for working together to help address issues.

Presented by: Amy Kukenberger, Business Administrator, Cooperstown Central School; Timothy Hilker, Assistant Superintendent for Business, Saratoga Springs City Schools and Jack Mitchell, Director of Finance and Operations, Valley Stream UFSD #24

DISTRICT CLERK STRAND

1: The Budget Vote and School Board Elections

1 CTLE

District Budget Vote! The Annual Meeting! The “Big Day”! There is nothing like feeling prepared. This session will help you stay on track during your budget vote and board member elections.

Presented by: Ryan P. Mullahy, Partner, Girvin & Ferlazzo, P.C. and Kristine Amodeo Lanchantin, Partner, Girvin & Ferlazzo, P.C.

2: District Clerk 101

1.5 CTLE

Are you a new District Clerk who is now thinking, “What did I get myself into?” Don't worry! Presenters from the District Clerk Committee will give a comprehensive overview of the District Clerk's role and responsibilities. Resources will be provided to assist new clerks in performing their duties. Seasoned clerks are welcome to attend to support new clerks, help answer questions, or possibly catch a new bit of information as well.

Presented by: Deb Custodi, District Clerk, Amherst CSD and the Steering Committee

3: FMLA: Family Medical Leave Act

1 CTLE

The FMLA! How to avoid the common (and not so common) pitfalls that may expose your district to legal liability. This presentation will walk you through what you need to know to ensure that your district is complying with the FMLA and its many regulations. Topics to be covered include a general overview of the law, including rights and responsibilities of both school districts and employees; notice and eligibility requirements; the role of the school board; and how to avoid creating liability for your district under the FMLA.

Presented by: Ryan P. Mullahy, Partner, Girvin & Ferlazzo, P.C.; and Patrick Fitzgerald, Partner, Girvin & Ferlazzo, P.C.

4: Meet & Greet

A great opportunity to network with other District Clerks. During this session, clerks will be guided through several questions and topics in order to familiarize themselves with their responsibilities and to promote discussion with other clerks. Get ready for insight, information, and making friends, too!

Presented by: Mindy Potts, District Clerk, Ichabod Crane CSD, and the Steering Committee

5: District Clerk Legal Matters

1.5 CTLE

Kate Reid will share with clerks what they need to know about the latest legal matters. Is your website ADA compliant? How does the Open Meetings Law pertain to your emails? And more! You will be sure to learn how these legal matters effect you.

Presented by: Kate I. Reid, Associate, School Districts Practice Group, Bond Schoeneck & King, Attorneys

Session Details by Strand

6: Cultural Responsiveness

1.5 CTLE

This presentation will focus on cultural responsiveness within a school district setting. We will briefly discuss ways to become more aware of our own hidden bias and ways to interact with families/students from different cultural and racial backgrounds.

Presented by: Grace Maylin, Retired Teacher, Amherst CSD

8: Records Management

1 CTLE

We have all inherited files from our predecessor (electronic and hard copy) and fear disposing of them! The NYS Archives can help with strategies for taming those wild files both old and new. Get a handle on managing your files in order to maintain your sanity.

Presented by: Maria McCashion, Regional Advisory Officer, New York State Archives

9: District Clerk Calendar Development

1 CTLE

Don't miss a deadline! This session will review what should be on your District Clerk calendar. Whether you are a BOCES, Big City, or Central/Union Free School District Clerk, this session is for you! Please bring YOUR calendar so you can contribute to this interactive session.

Presented by: District Clerk Strand Committee

10: It's a Wrap! Follow Up/Q&A

What more do you need to know?? Here you will receive handouts discussed throughout the workshop and be able to ask those burning questions that haven't already been answered.

Presented by: District Clerk Strand Committee

11: FOIL and Open Meetings Law

1.5 CTLE

Always entertaining in his responses, Bob Freeman from the Committee on Open Government will take your questions on open meetings and FOIL requests. This session provides an opportunity for attendees to learn more about an agency's responsibilities in relation to the Freedom of Information Law and Open Meetings Law. Bring your questions, concerns, and unusual situations to discuss and receive feedback from the Committee on Open Government.

Presented by: Robert Freeman, Executive Director, NYS Committee on Open Government

12: Resolutions Update

1.5 CTLE

Need a resolution solution? Come to this session to learn all you need to know about resolutions.

Presented by: Jeffery D. Honeywell, Esq., Managing Shareholder, Honeywell Law Firm

DISTRICT TREASURER STRAND

1: NYSED Facilities Planning

1 CTLE 1 CPE (Special Knowledge)

This session will provide an update from Facilities Planning. Information related to project review procedures, fire safety system enhancements, maximum cost allowance and building aid guidance, SMART Schools Bond Act, Emergency Response Plans, and other recent developments will be discussed.

Presented by: Rosanne Groff, Coordinator, School Facilities Services, NYS Education Department and Bruce Jesiolowski, Supervisor, School Business Management, NYS Education Department

2: Enhancing Your Reserve Plan

1.5 CTLE 1.5 CPE (Special Knowledge)

New requirements have come out for school districts to report reserve balances on the Property Tax Report Card each year. School district auditors discuss key aspects of reserves and how the district can develop and enhance their reserve plan. The session will focus on different components of your plan and how the plan should be communicated to the board and community.

Presented by: Tom Zuber, Partner, Raymond F. Wager, CPA, P.C. a division of Mengel, Metzger, Barr & Co. LLP and Mike DeBadts, Senior Manager, Mengel, Metzger, Barr & Co. LLP

3: Capital Project Accounting for Treasurers

1.5 CTLE 1.5 CPE (Special Knowledge)

This presentation will focus upon the various aspects of accounting for capital projects including setting up the projects and budget codes in the capital fund, separating additions and alterations within a single project, completion of the SA-139 form, understanding the SA-4 and SA-130 forms, filing of project documents, and preparation of the Final Cost Report.

Presented by: Mike Shusda, Accounting Services, Fiscal Advisors & Marketing, Inc. and Joseph J. Eberle, Accounting Services, Fiscal Advisors & Marketing, Inc.

Session Details by Strand

5: Federal and School Lunch Funds

1 CTLE 1 CPE (Accounting)

This session will cover the accounting for the Federal and School Lunch funds, the necessary forms that are required to be filed, how to complete them, and a timeline by which items should be completed.

Presented by: Timothy Doyle, Partner, CPA, The Bonadio Group and Kyle Fitsik, CPA, Senior Accountant, The Bonadio Group

6: Workflow in the District Office

1.5 CTLE

Hear a panel of SBOs and Treasurers discuss their best practices for workflow in the office. This session will include those from city, suburban, and rural schools, and will be moderated by Andrew Van Alstyne, ASBO's Deputy Director of Education and Research. Come prepared with questions, as this session will be interactive.

Presented by: Timothy Hilker, Assistant Superintendent for Business, Saratoga Springs City Schools; Lucille Murphy, District Treasurer, Saratoga Springs City Schools; Kimberly Hibbard, Business Official/Treasurer, Sauquoit Valley CSD; Alicia D. Koster, School Business Administrator, South Orangetown CSD and Laura Zarcone, District Treasurer/Supervisor of Fiscal Services, South Orangetown CSD

8: Understanding Investment Options and Tips on How to Prepare an Effective Cash Flow Projection

1 CTLE 1 CPE (Accounting)

Interest rates are finally on the rise! This session will cover what every Treasurer and SBO needs to know about investing in NYS and how to prepare and monitor a cash flow projection to maximize interest earnings for your district.

Presented by: Sarah Morrison, Senior State Aid Planner, Questar III BOCES; Lyn Derway, Regional Director, Marketing, NYCLASS and Joel Friedman, Regional Director, Marketing, NYCLASS

9: Extra-classroom Update & Leveraging Technology

1 CTLE 1 CPE (Auditing)

The session will review ways in which technology can be used to leverage extra-classroom activities (ECAF). Additionally a review of new regulations, news and audit findings that have an impact on ECAF will be discussed.

Presented by: Michael Wolff, Internal Audit Specialist, Michael Wolff Advisory Services

10: Q&A

This session is an opportunity to discuss and ask questions of your colleagues. The committee members will facilitate the meeting, however it is meant to be an open discussion of questions and best practices that have come about as a result of earlier sessions or topics of interest.

Presented by: District Treasurer Strand Committee

11: OCS Audit Reports and Internal Banking Controls

1.5 CTLE 1.5 CPE (Auditing)

Review of OSC reports and Internal Controls over banking transactions.

Presented by: Don Hoffman, CPA, Partner, Cullen & Danowski LLP

12: Simplified Leadership

1.5 CTLE

Trust is the building block for every relationship, especially professional relationships and interactions. These are important soft skills that produce great results. Candid and sincere feedback is central to driving results and unlocking the potential of any team. Giving and receiving feedback is not always easy and it's tempting to avoid tough conversations. This session focuses on successful methods and best practices to help anyone get a little better.

Presented by: Rajesh "RC" Chainani, Director, NYLAF; and Adam Moldavan, Associate Vice President, Relationship Manager, NYLAF

PAYROLL/PERSONNEL STRAND

1: Simplify the New Hire Process

1 CTLE

Learn what information is needed from the new hire process to the payment process. Check list for new hires, Janus discussion, NY State new hire report and benefit overview.

Presented by: Payroll/Personnel Strand Committee

3: Employer Reporting

1.5 CTLE 1.5 CPE (Special Knowledge)

This session will cover TRS membership, reportable positions, and information to help process TRS reports.

Presented by: Emily Biers, Information Representative 1, NYSTRS

4: ERS: Life After Gold, Silver, and Bronze Levels

1.5 CTLE

This session will cover Retirement Online and other ERS Updates.

Presented by: Andrea Goldberger, Deputy Comptroller, NYSLRS

Session Details by Strand

5A: WinCap Tips & Tricks

1 CTLE

Split up into two user groups NVision or Wincap. Each group will cover tips and tricks for entering and processing data.

Presented by: Katherine Goodyear, Financial Services Manager, Mid Hudson Regional Information Center

5B: NVision Tips & Tricks

1 CTLE

Split up into two user groups NVision or Wincap. Each group will cover tips and tricks for entering and processing data.

Presented by: Ann Campilii Lutz, Financial Services Specialist II, Mid Hudson Regional Information Center

7: Building a Positive Workplace Culture Through Communication

1 CTLE

This presentation will support participants in learning strategies that can be used to improve workplace communication and relationships. Positive workplace culture has been found to have a great impact on health and well-being.

Presented by: Philip Rainer, Chief Financial Officer, Capital Counseling

8: A Roadmap for Workers' Compensation

1 CTLE 1 CPE (Special Knowledge)

Learn about the timeline for reporting injuries, forms required to be filed, and procedures for injuries on the job.

Presented by: Erin Jordan, CEO, NCAComp, Inc.

9: Navigational Tools When Working with Civil Service Rules and Salary Credits for Teachers

1 CTLE 1 CPE (Special Knowledge)

This presentation will help navigate civil service rules for hiring, job changes, and postings. The second half will go over salary credits for teachers going from bachelors to masters and up.

Presented by: Dr. Angela Maloney, Superintendent, Brunswick Central School District

10: What to Expect From an OSC Audit

1 CTLE 1 CPE (Auditing)

This session will familiarize you with the entire audit process from its early stages to final report. Learn what the auditors are looking for, the professional standards they follow, and your role in the process.

Presented by: Jay Phillips, Associate Examiner of Municipal Arts, Office of the State Comptroller

11: Shoptalk: The Language of Payroll and Personnel

1 CTLE 1 CPE (Special Knowledge)

Overview of different payment methods and how they tie into retirement reporting. Learn about 409a, 457, 529, 403b, IRC 125, and more.

Presented by: Payroll/Personnel Strand Committee

SBO FISCAL STRAND

1: NYSED Facilities Planning

1 CTLE 1 CPE (Special Knowledge)

This session will provide an update from Facilities Planning. Information related to project review procedures, fire safety system enhancements, maximum cost allowance and building aid guidance, SMART Schools Bond Act, and other recent developments will be discussed.

Presented by: Rosanne Groff, Coordinator, School Facilities Services, NYS Education Department and Bruce Jesiolowski, Supervisor, School Business Management, NYS Education Department

2: Enhancing Your Reserve Plan

1.5 CTLE 1.5 CPE (Special Knowledge)

New requirements have come out for school districts to report reserve balances on the Property Tax Report Card each year. School district auditors discuss key aspects of reserves and how the district can develop and enhance their reserve plan. The session will focus on different components of your plan and how the plan should be communicated to the board and community.

Presented by: Tom Zuber, Partner, Raymond F. Wager, CPA, P.C. a division of Mengel, Metzger, Barr & Co. LLP and Mike DeBadts, Senior Manager, Mengel, Metzger, Barr & Co. LLP

3: Using Long Range Financial Planning in the Decision-Making Process

1.5 CTLE 1.5 CPE (Special Knowledge)

Please join us to hear how business officials are using long range financial plans to make critical decisions about budgeting, operations, use of fund balance and reserves and capital project planning. Acting business officials will share their experiences in developing a budget forecast and then creating multiple scenarios to explain how current decisions can impact the future. Come learn how to automate this process, save time and produce high quality charts and graphs to explain how the district's finances work.

Presented by: Michael Vespi, Senior Analytics Advisor, Forecast5 Analytics; Kimberly Vile, Business Administrator, Cortland Enlarged City School District and Matthew Stevens, Assistant Superintendent for Business, Fairport CSD

Session Details by Strand

4: School Level Financial Reporting

1.5 CTLE 1.5 CPE (Special Knowledge)

Review the new reporting process for School Level Budgeting and hear an update on the ESSA reporting requirement.

Presented by: Deborah Cunningham, Director of Education and Research, ASBO New York and Brady Regan, Deputy Director of Government Relations and School Services, ASBO New York

6: Legal Update

1.5 CTLE 1.5 CPE (Special Knowledge)

Learn about recent legal developments that impact your work, including decisions of the courts and the Commissioner of Education, changes in statutes and regulations, and guidance from state and federal agencies.

Presented by: Kathy A. Ahearn, Esq., Partner, Guercio & Guercio, LLP

7: Navigating ADA Compliance Requirements for District Websites

1 CTLE

Public websites, email campaigns and online portals to assess education materials are key factors for schools in the digital age. Section 504 and the ADA generally require that school districts provide qualified individuals with disabilities equal access to their programs, services, or activities, unless doing so would fundamentally alter the nature of the program. The OCR has taken the position that this equal access requirement extends to school districts' websites (and beyond). This means thinking past obvious accommodations such as wheelchair ramps and braille signage and making information accessible to anyone who can access them — so as to include students, parents, faculty, staff, and any member of the public. Come and learn some of the many considerations and standards to provide accessibility for all and steps to take to try to prevent accessibility lawsuits against a district.

Presented by: Tracie Lopardi, Attorney, Harris Beach PLLC and Jason Zuba, District Website Auditor, Lancaster CSD

8: Understanding Investment Options and Tips on How to Prepare an Effective Cash Flow Projection

1 CTLE 1 CPE (Accounting)

Interest rates are finally on the rise! This session will cover what every Treasurer and SBO needs to know about investing in NYS and how to prepare and monitor cash flow projection to maximize interest earnings for your district.

Presented by: Sarah Morrison, Senior State Aid Planner, Questar III BOCES; Lyn Derway, Regional Director, Marketing, NYCLASS and Joel Friedman, Regional Director, Marketing, NYCLASS

9: #MeToo and You – A Roadmap for School Administrators to Handle Harassment & Discrimination Claims in the Hollywood Era

1 CTLE

A step by step presentation of how to appropriately respond to harassment claims, initiate and conduct an investigation, and resolve the matter with the objective of limiting liability for the school district, as well as eliminating harassment within the workplace. Eradicating discrimination and maintaining accountability for all employees should be the ultimate objective for all school administrators.

Presented by: Tracie Lopardi, Attorney, Harris Beach PLLC and Amanda Jackson, Attorney, Harris Beach PLLC

10: Tax Cap and Capital Project Planning

1 CTLE 1 CPE (Accounting)

Since the inception of the Tax Cap, capital exclusions have become an important part of the the calculation to manage. This session will cover long-range planning of capital projects with an emphasis of controlling the impact on the tax levy cap in future years.

Presented by: Mike Shusda, Accounting Services, Fiscal Advisors & Marketing, Inc. and Joseph J. Eberle, Accounting Services, Fiscal Advisors & Marketing, Inc.

11: The Role of a Business Official in Preparing for a Safety/Security Crisis

1.5 CTLE

What is the SBO's role in preparing for a safety and security crisis? School Business Official will play a key role in how well prepared a school and the community is in the event of a safety or security crisis. Looking at it from the insurance/risk side, security equipment, working with local authorities, and communicating your investment to the community will all be addressed during this session from our panel of experts.

Presented by: Richie Perna, VP Business Development, IntraLogic Solutions; David Perry, Ph.D, Assistant Superintendent of Human Resources, Safe Schools, and IT, South Colonie CSD and Bob Blaisdell, ALCM, CPSI, Senior Risk Control Specialist, NYSIR

12: An Update of Recent Negotiation Trends, Strategies, and Case Law

1 CTLE

An update of recent negotiation trends, strategies, and case law.

Presented by: Dominic D'Imperio, Director of Employer Relations and Legal Services, Jefferson Lewis BOCES

Meals and Evening Events

Meals are pre-arranged with the hotel in advance for your convenience. ASBO does not upcharge any meal costs. Prices include gratuities. *Tickets must be purchased in advance.* All arranged meals must be pre-ordered by end of business on October 30, 2018 (or until meals are full). There will be no refunds for unused meal tickets.

Buffet Breakfasts - \$24 each *Wednesday, 7:00-8:30 AM, Thursday, 7:30-9:00 AM, Friday, 7:30-8:30 AM*

- **Wednesday** Diced Fruit, Oatmeal with Raisins and Brown Sugar, Scrambled Eggs with Chives, Hardwood Smoked Bacon, O'Brien Breakfast Potatoes, Pastries, Assorted Greek Yogurt, Juices, Coffee, Tea and Decaf
- **Thursday** Diced Fruit, Oatmeal with Raisins and Brown Sugar, Scrambled Eggs with Chives, Breakfast Sausage, Sweet Potato Hash, Pastries, Breakfast Bars, Juices, Coffee, Tea and Decaf
- **Friday** Diced Fruit, Oatmeal with Raisins and Brown Sugar, Scrambled Eggs with Chives, Ham, Potato Lyonnaise, Pastries, Assorted Greek Yogurt, Juices, Coffee, Tea and Decaf

Buffet Lunches - \$30 each *Wednesday, 12:00-1:30 PM, Thursday, 11:30 AM- 1:00 PM*

- **Wednesday** Tossed Garden Salad with Dried Fruit served with Apple Cider Vinaigrette and Pumpkin Seeds, Butternut Squash Bisque, Warm Dinner Rolls and Whipped Butter, Char-grilled Chicken Breast finished with Herbed Olive Oil, Cheese Filled Tortellini tossed with a Roasted Root Vegetables in a light Cheddar Béchamel, Roasted Shallot Mashed Potatoes, Apple Demi-Glace Gravy, Desmond Bread pudding with English Custard, Assorted Seasonal Pies, Coffee, Tea, Decaf, and Assorted Iced Teas
- **Thursday** Tossed Garden Salad with Assorted Dressings, Italian Wedding Soup, Warm Dinner Rolls and Whipped Butter, Chicken Parmesan, Penne Pasta Tossed with Tomato Vodka Cream Sauce, Oven Roasted Potatoes, Green Bean Almondine, Desmond Bread Pudding with English Custard, Italian Pastries, Coffee, Tea, Decaf, and Assorted Iced Teas

Thursday Evening Around the World - \$45 *6:30 - 8:30 PM*

Stationed Buffet Dinner Tasting: Take your taste buds on a tour of foods from around the world, with stations including favorites from the US, Mexico, Italy, China, and France! Sponsored by **Utica National Insurance Group, The Omni Group, Haylor, Freyer & Coon, Inc,** and **Mutual Inc.**

Please note, the ticketed price is to cover food for attendees. Wine & beer tastings are made possible through the generous support of our sponsors.

Cancellation Policy

All cancellations of conference registrations and meals must be made in writing and received in the ASBO office by October 23 for a full refund minus a \$50.00 administration fee. Cancellations received October 24 or after WILL NOT be refunded. Payment will be required on any outstanding invoices. Those who register, but do not attend, will be billed and expected to pay the full amount. Cancellations may be emailed to debbie@asbonewyork.org.

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By registering for the 2018 School Business Management Workshop, you give ASBO the right to publish and distribute photos and/or videos taken of you during the conference, at the conference center, travel to and from off-site conference events, and during these events.

Hotel Accommodations

Housing

ASBO has secured room blocks at the following hotels for the 2018 School Business Management Workshop. Reservations for housing should be made directly by the individual with the hotel of choice. Please note that there is a three night minimum reservation required for The Desmond (Headquarters Hotel) and a two night minimum at the Hampton and Homewood Suites. Reservations for The Desmond can only be made on-line at the website shown below. Bookings for all other hotels may be called in using the group codes shown or made on-line where websites are listed.

Make method of payment known at time of booking. A credit card is required at most hotels to guarantee the reservation. Purchase orders will cover room charge. Guests will be responsible for incidentals. Tax Exempt forms must be sent to hotel prior to arrival per instructions at each property.

Desmond Hotel & Conference Center

headquarters hotel – 3 night minimum
660 Albany Shaker Road, Albany, NY 12211

Reserve online

Single: \$147 / Double: \$157

Room block to close Oct. 22, 2018

Taxes not included

Friday night rooms available for SBO Academy participants also attending SBMW.

Valid purchase orders, checks (received at least 14 days prior to arrival) and major credit cards are accepted.

Credit card is required to complete reservation, but will not be charged upon receipt of check/PO. Make Checks or POs payable to The Desmond Hotel and Conference Center.

Homewood Suites

2 night minimum
216 Wolf Road, Albany, NY 12205

Reserve online

King Studio: \$154 / 2 Queens Studio: \$164 /

2 Queens One Bedroom: \$164

Group Code: NAS

Room block to close Oct. 7, 2018

Taxes not included

Purchase orders accepted, must be received via fax 518-435-9064 or email to shanel.dixon@hilton.com 48 hours prior to check-in. Send tax exempt forms via fax 518-435-9064 or email to shanel.dixon@hilton.com 48 hours prior to check-in.

Hampton Inn Albany – Wolf Road

2 night minimum
10 Ulenski Drive, Albany, NY 12205

Reserve online or by phone: 518-438-2822

Single: \$139 / Double \$149 / Triple \$144

Group Code: SBO

Room block to close Oct. 7, 2018

Taxes not included

Purchase orders accepted, must be received by the hotel 14 days prior to check-in, fax to 518-438-2931.

Make tax exempt status known at time of booking, fax form to 518-438-2931 or present at time of check-in.

Staybridge Suites

39 Wolf Road, Albany, NY 12205

Reserve online or by phone: 518-438-3300

King One Bedroom/King Studio/

Two Queens One Bedroom: \$154

Group Code: BMW

Room block to close Oct. 7, 2018

Taxes not included

Purchase orders accepted, must be received by check-in. Checks due two weeks prior to check-in. Tax exempt forms accepted before or at time of check-in.

Sponsors and Exhibitors



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Add to your registration or register separately...



PRE-CONFERENCE WORKSHOP

CAPITAL PROJECTS PLANNING

Conception to Completion

CAPITAL PROJECTS PLANNING: CONCEPTION TO COMPLETION

Tuesday, November 6, 2018, 11:00 a.m. - 6:30 p.m. This presentation will cover all aspects of planning and successfully completing a capital project, from the Letter of Intent through the Final Cost Report. The panel will include an architect, construction manager, legal counsel, bond counsel, municipal financial advisor, and retired school business official. Documents will be provided that will guide the attendees through projects at their own districts.

CPE: 7 | CTLE: 6

Speakers

- Michael Shusda, *Accounting Services, Fiscal Advisors & Marketing, Inc.*
- Garry Herbert, *LeChase Construction*
- Theodore A. Trespasz, Jr., *Trespasz & Marquardt, LLP*
- Joseph G. Shields, *Ferrara Fiorenza PC*
- Christine Crowley, *CIPMA, Vice-President, Fiscal Advisors & Marketing, Inc.*
- Jim King, *King + King Architects*

Agenda

10:30 - 11:00 am	Registration
11:00 am - 6:30 pm	Program
1:00 - 1:45 pm	Lunch
4:00 - 4:15 pm	Afternoon Break

Cost

\$175 for members | \$225 for non-members

*Register online for
SBMW & Pre-Con:
asbonewyork.org/events*



Association of School Business Officials
453 New Karner Road
Albany, NY 12205

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