

Date and Time	Session Title	Presenter(s)	Session Description
May 15 9:00 - 10:30	Annual Business Meeting	Howie Barber, Margaret Driscoll, Cynthia Mahr, Jeff Riley, and Jay Sullivan	Executive Director Margaret Driscoll opens MASBO's first virtual conference. Treasurer Jay Sullivan summarizes MASBO's FY19 financials. President Cynthia Mahr highlights MASBO's FY20 year in review and celebrates many accomplishments, especially through the announcement of MASBO's annual awards. Commissioner Jeff Riley outlines the state of education in Massachusetts as well as the Department's plan during the COVID-19 pandemic. President-Elect Howie Barber provides insight regarding this year's Institute and the MASBO Board's foci for the FY21 school year.
May 18 10:30 - 11:45	Creation and Use of Revolving Accounts, Stabilization Accounts, and Special Funds	Mark Abrahams, Stephen Hemman, and Jay Sullivan	The panel will first review the creation of revolving accounts, stabilization accounts, special fund accounts, including OPEB. The panel will then provide the proper use these accounts.
May 18 1:00 - 1:45	Improving Retirement Savings for America's Public Educators	Brent Neese	How prepared are our nation's public educators for retirement? The National Tax-Deferred Savings Association's (NTSA) 2018 groundbreaking survey of more than 4,400 School Districts compiled data on 403(b) participation rates, contribution rates, account balances and overall retirement security of America's public educators. The survey includes information on 403(b) plan design elements that lead to better outcomes. Join us for an in-depth discussion to learn key findings from this first of its kind public benchmark and assessment of public education retirement security in America. Also, we will provide best practices on Participation Agreements, Vendor Selection and 403(b) Information Guides, which have been used in other states.
May 19 1:00 - 2:15	Municipal School Business Managers' Panel Discussion	Don Aicardi, Buckner Creel, and Miriam Goodman	Three experienced municipal school business officials will discuss what makes working for a municipal school district so unique, rewarding and challenging. All panel members will talk about key components of working with municipal leaders. How do you build relationships and trust? How often do you meet? Do you have any shared services? The group will also discuss accounting systems, transparency, budget development and Indirect Cost Agreements. Each panel member will highlight some opportunities or challenges they have been faced with in their town and how they network with neighboring colleagues.
May 19 2:30 - 3:15	The Review and Discussion of Regional School Districts' Regional Agreements	Mark Abrahams, Michelle Griffin, Stephen Hemman, Julie Kelley, and Chris Lynch	Review the mandated language of Regional Agreements, assessment language, amendment process, and breakout session to review check list for member's regional agreements (attendees are asked to bring their regional agreement to the session).
May 20 9:00 - 10:15	Jointly Communicating District Finance in Time of Radical Change	Tracy Novick	The passage of the Every Student Succeeds Act has required school-level spending reporting. The passage of the Students Opportunity Act has created even more public scrutiny around district spending. Enlist your school committee as allies in understanding and communicating to your community what the impacts of state legislation are on your district and municipal budgets.

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May 20 1:00 - 2:15	Regional School Districts - Process for Requesting a 1/12 Budget from DESE	Michelle Griffin, Chris Lynch, and Jay Sullivan	This section will describe the process for requesting a 1/12 budget from the Commissioner of Elementary and Secondary Education in the event that member towns of a regional school district are unable to hold town meetings prior to July 1, 2020. In order to expend general funds in FY2021, a regional school district must have an approved budget, and related assessments must be paid by the members. Under Chapter 56 of the Acts of 2020, if a member vote or votes are delayed beyond June 30, 2020 due to the COVID-19 outbreak, then the regional district must notify the Department of the lack of a budget, and the Commissioner, or his designee, shall certify an amount sufficient for the operation of the district in FY2021 commencing July 1, 2020.
May 21 10:30 - 11:45	The Regional School Districts' Excess and Deficiency Certification Filing Process	Mark Abrahams and Stephen Hemman	The panel will present the steps and process for filing the for E and D with the Division of Local Services of the Department of Revenue. The filing is done all on line and districts must use the forms provided by the Division of Local Services. There will be time for Q and A.
May 22 9:30 - 10:45	Guaranteed Performance-Based Solutions	Mark Buzzell, Michael J. Hedges, and Gary D. Suter	Whether you're operating a single building, school district, college campus, or an entire city, you come to work every day knowing you need to do more with less. More students, less space. More residents, fewer resources. More projects, less time. Your aging infrastructure can no longer be deferred, and you're under a mandate to achieve sustainability goals—but with limited or no capital funds, you're feeling stuck. A truly comprehensive Energy Services Company, or ESCO, can help you take a holistic view of your energy and infrastructure needs and create a strategic plan that helps you address these challenges. In both public and private sectors, ESCOs offer an innovative option through guaranteed performance-based solutions. These energy savings performance contracts (ESPCs) allow you to use the savings that will be generated by the project to fund infrastructure improvement programs.
May 26 10:30 - 11:30	Drilling Down DESE/DLS Data	Rob Hanna, Lisa Krzywicki, Rob O'Donnell, and Joe Scanlon	Learn how to utilize Edwin, DART and Per-Pupil numbers to compare between Districts of your choosing. In addition learn how to combine those results with information available in the DLS Municipal Databank on the same exact municipalities. What percentage of the municipal budget does Education account for? How much of the Education budget is derived from residential taxes? Is it possible to make a correlation between MCAS Scores and Tax Rates? (probably not but at least there are numbers to crunch!).
May 26 2:30 - 3:30	Financial Literacy for School Employees: Are you and your employees prepared for retirement? If not, what are the reasons and best practices?	Phil Hahn, Tamara Indianer, Gregg Libutti, and Michael Linehan	You and your school district employees need the right information to make the best choice regarding your retirement security. In an effort to improve the understanding of retirement planning options and improve participation rates in 403(b) plans, we have created a comprehensive retirement educational program that is available to you and your school district. This educational program is vendor-neutral and does not include any specific investment product recommendations, but does provide investment knowledge 101. Attendees of the program gain a greater awareness of what they will need to save to supplement their pension plan and how to take action. We will present the actual presentation that we can provide to your employees, which we are confident will be beneficial to you personally as well.

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May 27 9:00 - 10:15	Boosting Your Stress Resilience	Mary DeLai	Did you know that the best way to boost your stress resilience is by changing how you perceive stress? That is not an opinion; it is a research-based, evidence-supported truth. Our stress systems do not have eyes or ears – our stress response systems get their information from our perception of our world. We know that this current pandemic is stressful. That we cannot change. What we can change, however, is our response to the stress. And we do this by viewing stress as a challenge rather than a threat. There are many evidence-based tools and strategies that we can use to enhance our stress resilience, allowing us to survive and thrive in the face of challenge. These strategies help us to optimize our response to stress by accessing our own internal and external resources. In this positive psychology-inspired workshop, we share the science and the research behind stress resilience (which is positively correlated with overall health and quality of life) and provide a host of evidence-based practices proven to help us cope more effectively with stress.
May 27 2:30 - 3:45	Critical Issues for School Nutrition: Procurement Audits and Student Debt	Peter McLoughlin and Susan Murray	This session will review two critical issues for your school nutrition department; procurement and student debt. Peter McLoughlin of DESE will lead a discussion about procurement requirements and the auditing process. We will take a close look at the issue of student debt, which threatens public perception of your program and your school budget. We will examine the student meal charging policy requirement and hear from School nutrition directors on how they are working with their school business officials to comply with the requirement that the school general fund cover any meal debt at the end of the year.
May 28 10:30 - 11:30	What is a pCard and how will it be useful during the COVID-19 crisis?	Holly Wallace	Have you ever wondered what a pCard is? How is a pCard different from a credit card? How will it work in your district? Did you know MASBO sponsors a program that is free and provides a rebate? Attend this session to get these questions answered plus more!
May 28 2:30 - 3:30	Pathway to the ASBO Meritorious Budget Award	Brian Allen, Anna Bishop, Susan Harkin, Patrick Roach, and Leanne Wilcinski	How to build your district budget with the goals and strategies of achieving the ASBO Meritorious Budget Award.
May 29 9:00 - 10:30	Is outsourcing custodial and facility services right for your community?	Paul Anastasi and Ken Wertz	Outsourcing custodial services for public schools has become a hot button around many school committee tables. "Do more with less" is what the facilities departments continue to hear. The easy solution is to outsource custodial services. Easy, yeah right! This session will provide an overview of the pros and cons of outsource cleaning. Case studies showing some communities that have great successes along with some that have had horrible experiences. Easy couldn't be further from the truth when considering outsource cleaning. But, if properly planned and implemented, outsourcing can provide a tremendous budget savings for communities while still providing clean and safe schools.
June 1 10:30 - 11:30	How will transportation look on the return to school?	Colleen Cavanaugh, Drew Damien, and Sandy Gifford	Massachusetts schools will reopen, which means students need to safely arrive at and depart from school. MAPT will outline transportation considerations and challenges, as well as potential solutions, for both general and special education transportation during the COVID-19 pandemic.

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June 1 2:30 - 3:30	Management and Operations Goal Setting with Clarity and Fidelity	Tracy Novick and Dorothy Presser	While school business managers propose and are held accountable for their own goals, much of an entire strand of the superintendent's evaluation also falls under the business office. The setting of goals in relation to this strand, as well as business office goals, such that they relate to and support the larger district goals is the goal of this session.
June 2 10:30 - 11:15	Protecting Your District in the New Digital Online Educational Model	Bob Hamel, Suzanne Z. McLaughlin, and Mason Sock	Recently, as a result of the Pandemic Covid-19, the world has undergone numerous unanticipated and significant changes; not the least of which is education and its delivery to Pre-K through Grade 12 students. Digital security threats and malware, such as Denial-of-Service attacks and Ransomware, are still as prevalent as they were before the pandemic, but now the off-network connections by students and staff creates vulnerabilities in access to your network. Pre-pandemic, many Districts suffered significant "financial" attacks, but the future is prime for a greater number of these and various other threats. This session will address numerous ways to mitigate the risk of security breaches as your District continues in an online model.
June 2 1:00 - 1:45	SIMS and EPIMS Reporting for School Business Officials	Rob Hanna, Melissa Marino, and Rob O'Donnell	SIMS and EPIMS data has important implications for funding and data analysis that business managers need to understand. This presentation will address these issues, review common reporting errors, address recent changes to reporting rules, and walk-through some complicated reporting scenarios.
June 3 9:00 - 10:15	How to Use Excel's Advanced Features - Level I	Aziz Aghayev	Budgeting season takes time. Manual data entry is not only time consuming, but also prone to errors. With some Excel knowledge, we can speed up the process and increase accuracy. By writing a few formulas to automate various data tables we can save precious time that could be used on other important tasks. For example, we automated the district's salary sheet by writing simple formulas. This automation saved us two to three weeks of manual work and significantly reduced the chance of error.
June 3 2:30 - 3:30	Municipal Finance Overview for School Business Officials	Tony Roselli	General overview of City/Town finances and how they relate/integrate with the School Business Office. Will include mechanics involved in completing the tax recap, calculation of free cash, preparation of the annual balance sheet, bond rating discussion, Chapter 70, reconciliation needs between School and Town offices, net school spending and other related finance topics.
June 4 9:00 - 10:00	How to Use Excel's Advanced Features - Level II	Aziz Aghayev	We will build a dynamic salary worksheet that could be duplicated and used for different scenarios. It could be a tool to use for union negotiations, multi-year projections, and more. Please have a second screen to be able to do work while watching the session. Fast pace session.
June 4 2:30 - 3:45	Communication Best Practice Shared through Stories from the Road	Paul Anastasi and Ken Wertz	How do you get to Carnegie Hall? Practice, practice, practice.... Paul and Ken have been co-presenting at public facilities and ASBO conferences across the country, multiple MCPPO and OSD sessions along with corporate leadership training opportunities for 10+ years. They share a common passion for helping children and a love of providing professional development that engages the audience without it being another boring lecture. Which sometimes leads them to some interesting developments....Hear some of the lessons learned from their work over the years. Things that worked well, things that flopped, surprises from the audience, and tips that they have gleaned from other amazing speakers.

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June 5 9:00 - 9:45	Student Opportunity Act: The Impact on Circuit Breaker	Craig Delmonte, Elena DeMelin, and Jay Sullivan	We will provide an update on the implementation of the Student Opportunity Act as it relates to Circuit Breaker that will now include out-of-district special education transportation costs. We will discuss how claims for these additional costs will be reported and answer any questions.
June 8 10:30 - 11:45	Employee Benefits Demystified	Lisa Daley, Sean Glavin, and Deb Testa	Typically the second largest Town, City, or Regional School District expense, Employee Benefits have been a cost driver for well over a decade. In this session, Lockton Companies explains the associated costs of an Employee Benefits Program, and, more importantly, multiple strategies to bend the cost curve down and add savings back to your bottom line.
June 8 1:00 - 2:00	Student Activity Fund Reporting Under GASB 84	Ed Boyd and Scott McIntire	GASB Statement 84 is effective for fiscal year 2020 and may effect where and how these accounts are reported. Learn what you need to know to implement effectively.
June 9 2:30 - 4:00	Dual Language Education Basics and Budget Considerations for Program Planning and Implementation	Phyllis Hardy and Bertha-Elena Rojas	This presentation will provide a foundational knowledge of Dual Language Education as well as an understanding of the planning and commitment required to build a successful program. It will include a review of program structure and of key budget considerations to support effective program implementation.
June 10 9:00 - 10:45	Leadership Case Study	Anne Gulati	<p>Incredible achievement and great tragedy unfolded on the treacherous slopes of Mount Everest in the Spring of 1996. Ninety-eight men and women climbed successfully to the summit, but sadly, 15 individuals lost their lives. On May 10 alone, 23 people reached the summit, including Rob Hall and Scott Fischer, two of the world's most experienced climbers. Unfortunately, Hall, Fischer, and three others died as a storm enveloped the mountain during their descent. Others escaped with their lives after many hours wandering in the dark while braving sub-zero temperatures. Since then, many have sought to understand what happened that day.</p> <p>This session is an interactive leadership discussion of a case study developed by Harvard Business School on the 1996 Mount Everest summit. The discussion will focus on why teams make flawed decisions in high stakes situations, as well as the concept of 'strategic abandonment,' or the idea that sometimes, the only way to make progress is to leave something behind.</p>
June 10 1:00 - 1:45	Investing During Extreme Market Volatility	Phil Hahn, Tamara Indianer, Gregg Libutti, and Michael Linehan	Timely Financial Topics for Plan Sponsors in Today's Environment, featuring the CARES Act, Understanding Markets, and Investing Basics