



**Business Managers Conference**  
**Three Rivers Convention Center**  
**7016 W Grandridge Blvd**  
**Kennewick, WA**

**Room: Crescent C & D**

**Monday, July 16, 2018 | 8:00 am – 8:00 pm**

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8:00 am – 8:15 am	Welcome & Introductions
8:15 am – 8:55 am	WASBO Website and Member Benefits Brianne King, Angie Marek & Patti Leverenz
8:55 am – 9:45 am	Levy & Local Effort Assistance (LEA) Melissa Jarmon, Apportionment Program Supervisor, OSPI
9:45 am – 10:00 am	Break – Sponsored by Inspirus
10:00 am – 12:00 pm	Budgeting & Monitoring Angela Von Essen, Assistant Superintendent for Business & Operations - West Valley Yakima School District and ASBO International Board Director
12:00 pm – 1:00 pm	Lunch – Sponsored by Inspirus
1:00 pm - 2:00 pm	Apportionment – Part 1 T.J. Kelly, Director School Apportionment & Financial Services, OSPI
2:00 pm – 2:15 pm	Take away activity
2:15 pm – 2:30 pm	Break – Sponsored by American Fidelity
2:30 pm – 3:30 pm	Apportionment – Part 2 Trisha Schock, Executive Director Administrative Services, North Central ESD 171, Wenatchee and WASBO Board Incoming President
3:30 pm – 4:30 pm	Enrollment Cathy Hays, Student Information Services Manager, University Place School District
6:00 pm – 8:00 pm	Offsite Networking Reception – Sponsored by Gallagher/VEBA Tagaris – 844 Tulip Lane, Richland, WA





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8:00 am – 9:00 am	<b>Purchasing, Federal Procurement, Small Works &amp; Public Works</b> Bruce Merritt, Purchasing Manager, Franklin Pierce School District and WASBO Purchasing Networking Group Co-Chair
9:00 am – 10:00 am	<b>Grants</b> Trisha Schock, Executive Director Administrative Services, North Central ESD 171, Wenatchee and WASBO Board Incoming President Debbie Cook, Business Manager, Ephrata School District
10:00 am – 10:10 am	<b>Break – Sponsored by Clear Risk Solutions</b>
10:10 am – 11:00 am	<b>Addressing Personnel Challenges through Effective Leadership</b> Pat Flannery, Consultant, Clear Risk Solutions
11:00 am - 12:00 pm	<b>F-196 &amp; Year End</b> Mathew Knott, Director of Business Services, Mead School District, WASBO Leadership Development Networking Group Chair and WASBO Board Director, ESD 101 Region Lisa Piacquadio, Assistant Director of Business Services, Mead School District and WASBO ASB Networking Group Co-Chair
12:00 pm – 1:00 pm	<b>Lunch – Sponsored by Clear Risk Solutions</b>
1:00 pm - 2:00 pm	<b>F-196 &amp; Year End (Continued)</b>
2:00 pm – 3:00 pm	<b>Internal Controls and Audit Focus</b> Jamie Ledezma, Financial Compliance Accountant, Puyallup School District Ryan Montgomery, Team School Programs Assistant Audit Manager, State Auditor’s Office
3:00 pm – 3:15 pm	<b>Take away activity</b>
3:15 pm – 3:30 pm	<b>Break – Sponsored by Forecast5</b>
3:30 pm – 4:30 pm	<b>Staffing, Contracts, Reduction in Force(RIF), Letters of Assurance</b> Suzanne Reister, Executive Director, HR, North Central ESD 171, Wenatchee





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**Wednesday, July 18, 2018 | 8:00 am – 5:00 pm**

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8:00 am – 9:00 am	<b>Transportation</b> Dan Payne, Regional Pupil Transportation Coordinator, ESD 105, Yakima
9:00 am – 10:00 am	<b>Capital Projects</b> Amber Porter, Executive Director of Finance and Operations, Blaine School District and WASBO Facilities Networking Group Chair
10:00 am – 10:10 am	<b>Break</b>
10:10 am – 11:00 am	<b>Risk Management</b> Paul Harrison, Loss Control Specialist, North Central ESD 171, Wenatchee and WASBO Risk Management Networking Group Chair
11:00 am - 12:00 pm	<b>The Past, Present and Future of School Levies and Elections</b> Cory Plager, Vice President, Public Finance, D.A. Davidson & Co. and Jon Gores, Managing Director, D.A. Davidson & Co.
12:00 pm – 1:00 pm	<b>Lunch – Sponsored by D.A. Davidson</b>
1:00 pm - 2:00 pm	<b>S-275 – Personnel Reporting</b> Cory Beck, Business Systems Analyst, Mead School District Wendy Rimmelpacher, Executive Director Financial Services, Clarkston School District and WASBO Board Director ESD 123 Region Chris Alaniz, HR Director, Clarkston School District
2:00 pm – 3:00 pm	<b>Records Retention</b> Claire Skinner, Records Manager, Vancouver Public Schools and WASBO Records Management Networking Group Chair. Scott Sackett, Principal Records Consultant, Washington State Archives
3:00 pm – 3:15 pm	<b>Take away activity</b>
3:15 pm – 3:30 pm	<b>Break</b>
3:30 pm – 5:00 pm	<b>Healthcare, Retirement, Reporting, School Employee Benefits Board (SEBB)</b> Bobbi Catone, Business Manager, Tonasket School District and WASBO Payroll, Personnel and Retirement (PPR) Networking Group Co-Chair Angie Marek, Member Services Director, WASBO



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**Thursday, July 19, 2018 | 8:00 am – 1:30 pm**

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8:00 am – 9:00 am	<b>Reconciliations – County Treasurer, Local and General Ledger</b> Holly Burlingame, WASBO Instructor
9:00 am – 10:00 am	<b>Accounts Payable</b> Holly Burlingame, WASBO Instructor
10:00 am – 10:10 am	<b>Break</b>
10:10 am – 11:00 am	<b>Nutrition Services</b> Lisa Johnson, Director, Nutrition Services, Highline Public Schools and WASBO Child Nutrition Networking Group Co-Chair
11:00 am - 12:00 pm	<b>Associated Student Body (ASB)</b> Paula McCoy, Executive Director of Business Services, Ridgefield School District and WASBO Board Director ESD 112 Region
12:00 pm - 12:10 pm	<b>Take away activity</b>
12:10 pm – 12:30 pm	<b>Box Lunches – Sponsored by Tyler Technologies</b>
12:30 pm - 1:30 pm	<b>Duties and Responsibilities – Administrative and Board Relations</b> Paula McCoy, Executive Director of Business Services, Ridgefield School District and WASBO Board Director ESD 112 Region

