

## 53rd ANNUAL TASBO CONFERENCE

November 12<sup>th</sup> - 15<sup>th</sup>, 2019

Embassy Suites & Convention Center  
Murfreesboro, TN

We invite you to join us for the 53rd Annual TASBO Conference. The conference offers diverse educational experiences for all professionals in school business and management. Our conference brings us together to learn and to connect by sharing challenges, successes, best practices and more.

This year's conference registration will again be processed online through MemberClicks. The 2019 TASBO Conference Registration Form is available at <https://tasbo.memberclicks.net>.

If you would like to bring a guest to any of the conference events, please complete the optional guest registration form found at the same location.

Once again this year, we are offering a registration option for those who only want to attend the pre-conference sessions on Tuesday, November 12th. These sessions provide an excellent educational opportunity for everyone.

Finally, a membership only registration option is available for anyone NOT able to attend the conference.

*The online registration site requires a log-in with username and password. If you are not currently a member, you can enter your email in the new user section and create your account for log-in purposes.*

*PLEASE NOTE: The registration system requires each person to register with his/her own username and email address. If anyone attempts to register multiple attendees under one username or email address, the data for all attendees will be lost. We appreciate your attention to this requirement of our system.*

All of our TASBO officers, directors and coordinators have worked diligently throughout the year to bring you a conference filled with great professional development and networking opportunities.

Stay tuned for updates about our conference agenda, app, and festivities. We look forward to seeing you at conference!

Scott Rhea  
2019 TASBO President

# Tuesday, November 12, 2019

TIME		
	Oakleigh A	Oakleigh B & C
10:00 AM to Noon	Planning for the Financial High-tide of Retirement and Insurance <i>(a session for Directors of Schools and Directors of Finance)</i>	
10:00 AM To 5:00 PM	Conference Registration at Registration Desk	
	Oakleigh A	Oakleigh B & C
1:00-2:50 PM	Hot Topics in the World of Employment and Benefits: Ashley Trotto and PSC Legal	Riding the Waves of Internal School Funds: Rene Brison
2:50- 3:10 PM	<b>Beverage and Snack Break</b> <b>Sponsored by: DELTA DENTAL</b>	
3:10-5:00 PM	Hot Topics in the World of Employment and Benefits: Ashley Trotto and PSC Legal	Riding the Waves of Internal School Funds: Rene Brison
6:30-9:00 PM	<b>Welcome Reception, Dinner, and Line Dancing - Mirabella Grand Ballroom</b> <b>Sponsored by: AMERICAN FIDELITY, CANON, &amp; PUBLIC RISK INSURORS</b>	

## Wednesday, November 13, 2019

TIME							
6:30-9:30AM	<b>Breakfast Provided by Embassy Suites for Registered Guests</b>						
7:30AM-5:00PM	Conference Registration at Registration Desk						
8:20- 10:20AM	<b>Opening Session- Mirabella Grand Ballroom:</b>						
Starting Promptly	Welcome- Scott Rhea, President National Anthem			Oakland High School JROTC Speaker: State Finance Update- Maryanne Durski			
	<b>Oakleigh A</b>	<b>Oakleigh B</b>	<b>Oakleigh C</b>	<b>Cambridge A &amp; B</b>		<b>Broadlands A</b>	<b>Broadlands B</b>
Professional Development 10:30- 11:20 AM	Current Issues in School Law: Ben Torres, TSBA Attorney	Legal Issues for LEA's: PSC, Legal	Finance Q & A Session: Maryanne Durski	Internal School Funds: Rene Brison	Thank you for attending!	Finance Roundtable, SASBO Session: Adam Steele, NCASBO	GASB 87 Leases/GASB 84 Fiduciary Activities: John Sutton, CTAS
11:30AM- 1:15PM	<b>Recognition Luncheon- Mirabella Grand Ballroom,</b> Charter Members, Past Presidents, and Past James D. McCullough Distinguished Service Award Winners <b>Sponsored by: ALLOVUE, FIVE POINTS, SODEXO, STAFFEZ, &amp; USABLE LIFE</b>						
	<b>Oakleigh A</b>	<b>Oakleigh B</b>	<b>Oakleigh C</b>	<b>Cambridge A</b>	<b>Cambridge B</b>	<b>Broadlands A</b>	<b>Broadlands B</b>
Professional Development 1:30-2:20pm	Current Issues in School Law: Ben Torres, TSBA Attorney	Legal Issues for LEA's: PSC, Legal	Wages, Overtime, and Other Common HR Problems: Chris McCarty	Student Transportation: Lt. Ray Robinson and Joseph Chilton	How to Enjoy the Beach and Avoid the Riptides of Due Process and Discipline: Rebecca Owens, Wilson County Schools	In the Weeds, Expert Exchange Video: SASBO Session	GASB 34 Financial Statements: John Sutton, CTAS
Vendor Session 2:30- 3:00pm	<b>ABM</b>	<b>AFLAC</b>	<b>ALLOVUE</b>	<b>AMERICAN FIDELITY</b>	<b>CANON</b>	<b>ESS</b>	<b>FIVE POINTS</b>
3:00-3:20PM	<b>Beverage Break</b> <b>Sponsored by: AIG</b>						
Professional Development 3:20-4:10PM	Tips for Good Construction Projects: Mickey Hall, Wilson County	Per Pupil Expenditure: Maryanne Durski	Dealing with and Preparing for the EEOC: Chris McCarty	Student Transportation: Lt. Ray Robinson and Joseph Chilton	Riding the Waves of Policy and Procedure: Rebecca Owens, Wilson County Schools		CCFO Class Overview: John Sutton, CTAS
<b>Wednesday evening you will be on your own to explore Murfreesboro.</b>							

## Thursday, November 14, 2019

TIME							
6:30-9:30AM	<b>Breakfast Provided by Embassy Suites for Registered Guests</b>						
8:00-11:00AM	Conference Registration & Visit with Vendors						
	<b>Oakleigh A</b>	<b>Oakleigh B</b>	<b>Oakleigh C</b>	<b>Cambridge A</b>	<b>Cambridge B</b>	<b>Broadlands A</b>	<b>Broadlands B</b>
Professional Development 8:30-9:20	TN Compass Overview: Karen Justice	State Health Insurance for LEA's: Laurie Lee	Legislative Updates: Chuck Cagle	HR Session with Richard Stokes, MTAS	Introduction Session: Gary W. Jaeckel, MTAS	School Nursing: Sara Winters, Rutherford County Schools	
Professional Development 9:30-10:20AM	TN Compass Staff Reporting (formerly PIRS): Karen Justice	Payroll Roundtable: Scott Rhea and Jeanie Mowery	Wages, Overtime, and Other Common HR Problems: Chris McCarty	HR Session with Richard Stokes, MTAS	Lincoln on Leadership: Pat Hardy, MTAS	School Nursing: Sara Winters, Rutherford County Schools	Tools for Stress Management: Beverly Boyd
Vendor Session 10:30-11:00AM	<b>FORECAST5 ANALYTICS</b>	<b>HORACE MANN</b>	<b>NEXT GENERATION UNDERWRITERS</b>	<b>PUBLIC RISK INSURORS</b>	<b>SODEXO</b>	<b>STAFFEZ</b>	<b>USABLE LIFE</b>
	<b>Lunch with Vendors in the Mirabella Grand Ballroom</b>						
11:00AM- 12:50PM	James D. McCullough Distinguished Service Award TASBO Conference 2020- Selena Coker, President Elect			Sponsor Recognition- Joe Anderson			
	<b>Oakleigh A</b>	<b>Oakleigh B</b>	<b>Oakleigh C</b>	<b>Cambridge A &amp; B</b>		<b>Broadlands A</b>	<b>Broadlands B</b>
Professional Development 1:00-1:50PM	Supplement and NOT Supplant: Regional Finance Consultants	Student Activity Funds: David Huss	Dealing with and Preparing for the EEOC: Chris McCarty	ePlan Update: Melissa Brown	Thank you for attending!	Medicaid Reimbursements: Holly Christopher	How to Avoid Audit Findings: Jeff Bailey and Katie Armstrong
Professional Development 2:00-2:50PM	Supplement and NOT Supplant: Regional Finance Consultants	School Support Organizations: David Huss	An Overview on the Budget Process and the Use of Debt: Comptroller's Office, Lori Barnard and Steve Osborne	TCRS- Online Retirement and Employer Reporting: Retire Ready Staff		School Nutrition Updates- what Finance needs to know: SNP Staff	How to Avoid Audit Findings: Jeff Bailey and Katie Armstrong
2:50-3:10PM	<b>Beverage Break</b> <b>Sponsored by: MARK III EMPLOYEE BENEFITS</b>						
Professional Development 3:10-4:00PM	Best Practices for School Finance: Regional Finance Consultants	ePlan Update: Melissa Brown	An Overview on the Budget Process and the Use of Debt: Comptroller's Office, Lori Barnard and Steve Osborne	Everything TCRS- Q & A Session: Your TCRS Staff		School Nutrition Updates- what Finance needs to know: SNP Staff	Q & A Session: David Huss
6:30PM-9:30	<b>TASBO DINNER IN THE MIRABELLA BALLROOM</b>  <b>Games and Fun for ALL!</b> <b>Sponsored by: ABM, AFLAC, &amp; ESS</b>						

**Friday, November 15, 2019**

TIME		
6:30-9:30AM	<b>Breakfast Provided by Embassy Suites for Registered Guests</b>	
9:00-10:45AM	<p><b>Closing Speaker: Gerry Brooks</b> <a href="https://www.gerrybrooksprin.com/">https://www.gerrybrooksprin.com/</a></p> <p><b>Sponsored by: FORECAST5 ANALYTICS, HORACE MANN, NEXT GENERATION UNDERWRITERS, &amp; RISO</b></p>	OAKLEIGH A,B, & C
10:45-11:30	<p><b>Closing Business Session &amp; Door Prizes</b></p>	
<p><b>Conference A/V Production Services</b> <b>Sponsored by:</b> <b>CIGNA, ENA, ESD, KELLY EDUCATIONAL STAFFING, SCHNEIDER ELECTRIC, SKYWARD, SCRIBBLES,</b> <b>THE TENNESSEE CREDIT UNION, US OMNI, VALUTEACHERS, &amp; VOYA</b> <b>AND</b> <b>ATA, ARAMARK, INTELLIGENT AUTOMATION TN, PARCOU, PRAIRIE FARMS DAIRY, REGIONS BANK, SKB &amp; TSA</b></p>		

**TASBO 2019 CONFERENCE  
BREAKOUT INTEREST SESSIONS**

**Planning for the Financial High-tide of Retirement and Insurance**

Come discuss the many aspects of retirement planning and insurance payment with a panel of experts. Featuring Jamie Wayman, Tennessee Consolidated Retirement System; Laurie Lee, State of Tennessee Benefits Administration; John Sutton, County Technical Assistance Service.

**Hot Topics in the World of Employment and Benefits: Ashley Trotto and PSC Legal**

This session will cover legal updates to and common employer questions about the FLSA, ACA, Paid Leave, Employee Handbooks, and more.

**Riding the Waves of Internal School Funds: Rene Brison**

Plan to review proper processes and procedures for internal school funds and hear of some findings that will help guide your internal practices.

**Current Issues in School Law: Ben Torres, TSBA Attorney**

This session will cover current school law issues school districts are facing.

**Tips for Good Construction Projects: Mickey Hall, Wilson County**

Come hear about how to manage a successful construction project and issues to be aware of as you proceed.

**Legal Issues for LEA's: PSC, Legal**

"Employment Law from the Trenches." The firm will walk attendees through actual employment cases they are currently litigating or have recently litigated on behalf of schools across the state of Tennessee. In so doing, the firm will touch on a number of topics that spawn litigation against school systems such as the ADA/ADEA/FMLA/Title VII/Title IX/Section 1983/FLSA and many others.

**Finance Q & A Session: Marianne Durski**

Get your questions answered by the finance expert during this question and answer session.

**Per Pupil Expenditure: Marianne Durski**

A session to review the new per pupil expenditure requirement for school systems.

**Wages, Overtime, and Other Common HR Problems: Chris McCarty**

This interactive session takes attendees through hypothetical HR scenarios, and offers advice regarding the same.

**Dealing with and Preparing for the EEOC: Chris McCarty**

This session familiarizes attendees with the Equal Employment Opportunity Commission, and examines how it often approaches complaints and investigations.

**Internal School Funds: Rene Brison**

Plan for a brief review of proper processes and procedures for internal school funds.

**How to Enjoy the Beach and Avoid the Riptides of Due Process and Discipline: Rebecca Owens, Wilson County Schools**

This session will address employee discipline issues and how to navigate through daily challenges.

**Riding the Waves of Policy and Procedure: Rebecca Owens, Wilson County Schools**

Learn about making effective policies and procedures.

**Finance Roundtable, SASBO Session: Adam Steele, NCASBO**

Collaboration with Adam Steele to discuss best practices he implemented in his office. Come exchange ideas with a SASBO leader.

**In the Weeds, Expert Exchange Video: SASBO Session**

SASBO's Expert Exchange will be streamed to expose members to the vast array of professional development offered.

**GASB 87 Leases/GASB 84 Fiduciary Activities: John Sutton, CTAS**

**GASB 84 Fiduciary Activities** will change how certain parts of combining the Internal School Funds financial statements into your County or City's CAFR may change. Also what are the possible changes if you offer a retirement, deferred compensation or OPEB Plan that is **not through** TCRS or the State of TN? **GASB 87 Leases** changes the accounting and disclosures for prior "capital leases" and "operating leases" when reporting within your City's, or County BOE GASB 34 Government Wide (full accrual) financial statements.

**GASB 34 Financial Statements: John Sutton, CTAS**

GASB 34 Government Wide financial statements – are you reporting and disclosing all of your assets and liabilities? This session will focus on some illustrative case studies where some material assets and liabilities were not reported on the full accrual basis of accounting and how they were detected.

**CCFO Class Overview: John Sutton, CTAS**

Certified County Finance Officers (CCFO) program started in 2018 and is taught and administered by the University of Tennessee's Institute for Public Service – County Technical Assistance Service (CTAS) in conjunction with the Tennessee Comptroller of the Treasury. This session will focus on the overall program, course requirements and the benefits of improving your overall financial management skills.

**Student Transportation: Lt. Ray Robinson and Joseph Chilton**

Understanding the current requirements surrounding student transportation and new driver requirements. A "big picture" presentation to assist our understanding and fiscal input.

**TN Compass Overview: Karen Justice**

During this sessions key features of TN Compass will be reviewed.

**TN Compass Staff Reporting (formerly PIRS): Karen Justice**

Staff reporting will be reviewed in this session with Karen Justice.

**Supplement and NOT Supplant: Regional Finance Consultants**

Your local finance consultants will supplement your current understanding to effectively utilize funds and will focus on planning with "NOT Supplant" in mind.

**Best Practices for School Finance: Regional Finance Consultants**

Come and discuss best practices for school finance.

**ePlan Update: Melissa Brown**

This session will changes in the ePlan environment.

**State Health Insurance for LEA's:Laurie Lee**

This session will help us as we go back to our districts and manage the health insurance needs of our employees.

**Payroll Roundtable: Scott Rhea and Jeanie Mowery**

Come collaborate with others who process payroll across the State.

**Student Activity Funds: David Huss**

This session will cover the developments since last November in the area of Student Activity Funds. Public Chapter 134 will also be covered in this session.

**School Support Organizations: David Huss**

Mr. Huss will discuss SSO and the in and outs of what is expected when anyone in your school collects funds.

**Legislative Updates: Chuck Cagle**

Learn about possible bills that could be moving thru our state legislature in its next session and the impact such would have on our job duties.

**An Overview on the Budget Process and the Use of Debt: Comptroller's Office, Lori Barnard and Steve Osborne**

Representatives from the Comptroller's Office of State and Local Finance will present a high-level view of the budget process and how cities and counties finance capital projects for their school systems. They will also present various techniques for how to communicate the budget to the governing body as well as when and how to use operating loans.

**HR Session with Richard Stokes, MTAS**

MTAS will present an information session on human resource practices.

**Introduction Session: Gary W. Jaeckel, MTAS**

MTAS: the How, What, Why, Where, When

**Lincoln on Leadership: Pat Hardy, MTAS**

Come sample an amazing leadership training available through MTAS

**TCRS Retire ReadyTN - Your Retire Ready Staff**

Come to this session and interact with representatives from TCRS and get updates on Concord and other issues. Focus on online reporting & retirement.

**TCRS Q & A Session- Your TCRS staff**

An opportunity to discuss TCRS features and reporting with the experts.

**School Nursing: Sara Winters, Rutherford County Schools**

Discuss the future of school nursing and how districts can be prepared for the increased need for health professionals.

**Medicaid Reimbursements: Holly Christopher**

Explore some tools for district reimbursement for student health needs.

**School Nutrition Updates- what Finance needs to know: SNP Staff**

An overview of the School Nutrition component of school finance.

**Tools for Stress Management: Beverly Boyd**

This session will provide some relaxation tools to help you through your day.

**How to Avoid Audit Findings: Jeff Bailey and Katie Armstrong**

Join us for a discussion of the audit process and how to prepare.

**Q & A Session: David Huss**

Tax topics (income and sales) will be addressed in this session. The new W4 form will also be discussed.



## **TRIPLE DIAMOND SPONSOR:**

### **Aflac**

After working nearly 65 years in business and working with more than 38,000 public sector customers, Aflac has developed a range of services addressing a variety of needs for our public employers in today's changing healthcare landscape. From technology solutions to cost-management strategies and customized products and services, we deliver tailored solutions to the public sector. Contact us today to see how our solutions can help mitigate risk & attract quality talent with a brand people know and trust.

## **DOUBLE DIAMOND SPONSORS:**

### **ABM**

ABM champions cost controls and sustainability for K-12 schools, rescuing operational dollars from inefficiency and empowering district leaders to support and improve learning environments. Through custodial services, grounds management, athletic fields, electrical and HVAC maintenance, energy savings performance contracting, and more, ABM helps K-12 schools overcome funding, staffing, and infrastructure dilemmas so they can focus their budgets and efforts on student achievement. Learn more at [abm.com/K-12](http://abm.com/K-12).

### **ESS**

ESS is a substitute and permanent employee management company that focuses exclusively on the K-12 market. The company performs every function related to these employees from recruiting and hiring to training and scheduling through to disciplining and providing full payroll related services. To attract and retain these staff, ESS provides numerous benefits and incentives including weekly pay, recognition events, and access to health and many other benefits. ESS is unique to the market in many ways due to its investments in the communities it serves including the local districts themselves to community-specific events like walk-a-thons, other fund raisers, holiday events, and more.

## **DIAMOND SPONSORS:**

### **Allovue**

Allovue's software platform, Balance, integrates seamlessly with districts' existing accounting systems and other data systems to help educators allocate, budget, manage, and evaluate spending. In addition to Balance, Allovue provides services including chart of accounts revisions, strategic budgeting consulting, and financial management training. Allovue's solutions help educators make better decisions about their budgets and spending by giving them dynamic, up-to-date, and user-friendly data. Our mission is to empower educators to strategically and equitably allocate resources to best support the needs of students.

## **American Fidelity**

American Fidelity offers benefit strategies to help empower you to make benefits decisions that help both your organization and your employees. Our goal is to act as an extension of your human resources department by educating, enrolling, and supporting the development of competitive employee benefits packages—all while ensuring seamless administration and employee satisfaction. Our supplemental employee benefits and wide range of products and administrative services allow us to become a one-stop-shop for your benefits needs. This helps simplify your administration and benefits management, and allows us to be your true strategic partner. We hire and train account managers and benefits strategists capable of educating you and your employees about benefits, executing your annual enrollment, and providing strategic benefits plan recommendations.

## **Canon**

Canon is currently the sole awarded vendor to the State of Tennessee for all Multi-Function Devices (MFD's) which encompasses copiers, printers, fax machines, scanners, etc. and all service and support for same. As such, we are tied very closely with the Educational market in the state and are currently the largest supplier of MFD's to the schools and universities in Tennessee and are providing the lowest possible cost, full service and support and the easiest method of procurement available. Our goal for the 30 minute session is to meet with as many of the schools and school systems as we can gather to discuss the new SWC 400, #62117 contract and to answer their questions and see how this contract can dramatically lower their copy/printing/scanning costs, as it is doing for their sister schools. It will also make their acquisition efforts so much easier as the State has already created the vehicle for them to tap onto.

## **Five Points**

Five Points Benefits Solutions is committed to helping schools, governments and private employers get more and give less when it comes to managing employee benefits. We offer insurance, retirement and wellness solutions as well as online enrollment, benefits administration, ACA, Section 125, HSA and FSA services partnered with HR and benefits technology. It's all designed to save you money, reduce workload and ultimately improve your benefits program.

## **Forecast5 Analytics**

Analytics increases financial and organizational performance by empowering local government leaders with analytics. We develop state-of-the-art technology used for data discovery and decision support. Our collaborative staff of experts take high-level ownership of public sector challenges with a sense of urgency to create great outcomes for our clients and the communities they support.

## **Horace Mann**

Horace Mann, an insurance company *Founded by Educators for Educators*<sup>®</sup>, partners with schools to offer school payroll slots for auto and life insurance and 403(b) annuities as a convenient benefit for their employees.

## **Next Generation Underwriters:**

NGU Risk Management serves as the program administrator for the Tennessee Risk Management Trust programs of insurance (TNRMT), covering public entities for their general liability, property, casualty and other insurance and risk management needs. NGU provides a direct access or Agency Partnership with Tennessee's most advanced insurance pool program. NGU provides marketing, underwriting, and risk management services for the TNRMT in addition to serving a broader array of risk management needs to public entities such as local governments, public schools, and utility districts, across the state of Tennessee.

### **Public Risk Insurors**

Public Risk Insurors is an independent insurance agency that specializes in providing commercial property, liability, student accident, and workers compensation insurance products to school districts, cities, towns, counties, and municipalities across the state. According to recent insurance bids involving public school districts, Public Risk Insurors provides broader coverage for up to 35% less than governmental pools including coverage solutions for the new Work Based Learning legislation. In partnership with our commercial insurance carriers, our clients have advised that the risk management assistance, claims service, and on campus training that they receive is by far superior to anything they have experienced in the past.

### **Sodexo**

We create university dining halls that routinely make top 10 lists, we are redefining hospital food, we get picky 8-year-olds to eat happily, while also serving gold medal athletes and lovers at the top of the Eiffel tower. We make each dining experience special by watching what's new in food, and by thinking about our guest's expectations and finding ways to surpass them.

### **StaffEZ**

StaffEZ, formerly known as PESG, is a leading national provider of staffing and service solutions for educational markets. Whether you need top-notch substitute staffing, world-class facilities management, or other specialty educational services, PESG has the people, processes, and programs in place to help.

### **RISO**

RISO provides High Speed, Low Cost, Reliable PRINT-COPY-SCAN for K-12. Our two platforms of technology have benefited over 50,000 schools across America. Our latest breakthrough for K-12; delivering single color prints for the same low price of black and white. Remember, RISO...we are innovators...not copiers.

### **USAbLe Life**

USAbLe Life offers employee benefits, including life and disability insurance. Our dedicated account management team assists with enrollment and section 125 administration, and provides year-round service to ensure an unparalleled customer experience.

