

**AGENDA**  
**64<sup>th</sup> Annual Meeting**  
**Indiana Association of School Business Officials**  
**French Lick Springs Resort**  
**French Lick, Indiana**  
**May 12-14, 2010**

**“LIVING WITH LESS”**

**Wednesday, May 12**

7:30 a.m. & 1:30 p.m.

**Golf Outing**

*Donald Ross Golf Course*  
(Lunch sponsored by City Securities)

8:00 a.m. – 5:00 p.m.

**Registration**

*Events Center First Floor Foyer*

8:00 – 8:30 a.m.

**Pre-Conference Workshops Refreshment Break**

*Events Center First Floor Foyer*

8:30 – 11:30 a.m.

**Pre-Conference Workshops & Certification Classes**

EXCEL: Basics – Technology Lab

*Hickman Room*

Ted Zembala, Business Manager, School City of Hobart  
(Laptops provided by Dell, Inc.)

They're Back! IRS Audit Issues

*Clifton Ballroom I*

Beverly Elsner, CPA and Raelane Hoff, CPA, Government  
Entities – Indiana Field Specialists, Internal Revenue Service

General Fund Referendums: The Law, The Public Relations, The  
Election

*Taggart Room*

Jane Herndon, Esq., Ice Miller

Collective Bargaining Strategy & Law – HR 114 (Certification  
Course)

*Murdock Room*

Susan Traynor Chastain, Esq., Bose McKinney & Evans

Transportation Administration – ADM 117 (Certification Course)

*Erwin Room*

Bob Yoder, Assistant Superintendent, CSC of Southern Hancock  
and Loren Evans, Director of Business and Technology, MSD of  
Mt. Vernon

11:30 a.m. – 1:00 p.m.

**Lunch for Pre-Conference Workshop Participants**

*Clifton Ballroom II*

1:30 – 4:30 p.m.

**Pre-Conference Workshops & Certification Classes**

(Break sponsored by Low Associates)

EXCEL: Advanced – Technology Lab

*Hickman Room*

Ted Zembala, Business Manager, School City of Hobart

(Laptops provided by Dell, Inc.)

They're Back! IRS Audit Issues

*Clifton Ballroom I*

Beverly Elsner, CPA and Raelane Hoff, CPA, Government Entities – Indiana Field Specialists, Internal Revenue Service

Fair Labor Standards Act: Everything You Ever Wanted to Know About FLSA

*Taggart Room*

Michelle Cooper, Esq., Bose McKinney & Evans

School Law & Administrative Rules: Advanced – ADM112  
(Certification Course)

*Murdock*

Lisa Tanselle, Esq., Staff Attorney, Indiana School Boards Association

Accrual Accounting – A114 (Certification Course)

*Erwin*

Tim Armstrong, Consultant, Educational Services Company

2:00 – 8:00 p.m.

**Exhibitor Set-Up/Registration**

*Sports Center*

5:30 – 7:30 p.m.

**Opening Mixer**

*Upper Gardens*

(Sponsored by ING)

## **Thursday May 13**

6:30 – 8:00 a.m.

**Breakfast**

*Colonnade Grand Buffet*

(Sponsored by Bose, McKinney & Evans and City Securities)

7:00 – 8:15 a.m.

**Registration**

*Events Center First Floor Foyer*

8:15 – 9:30 a.m.

**Opening Session**

*Clifton Ballroom*

- Presiding: Kim Fox, IASBO President
- National Anthem: Springs Valley Brass Ensemble
- Invocation: Lynn Kwilasz, Director of Finance & Operations, School Town of Highland
- IASBO Memorial Service
- Introduction of Guests
- Introduction of 2009-10 IASBO Board of Directors

- Recognition of IASBO School Business Officials Leadership Academy Graduates
- Recognition of Certification Program Participants
- Recognition of Years of Service Award Recipients
- State of the Profession  
Kim Fox, IASBO President, Chief Financial Officer, Tippecanoe School Corporation
- Message from ASBO International  
Angie Peterman, ASBO International's Immediate Past President, Salem, Oregon
- IASBO Foundation Scholarship Awards  
Loren Evans, IASBO President-Elect, Director of Business & Technology, MSD of Mt. Vernon
- Nominating Committee Report  
Bob Yoder, IASBO Past President, Assistant Superintendent, CSC of Southern Hancock
- Election of Officers
- Keynote Address  
(Sponsored by Boyce Forms-Systems/Komputrol)  
Bob Ash  
LifeLessons, Inc., Indianapolis, Indiana  
"Your Piece of the Puzzle"

9:45 a.m. – Noon

**Exhibits Open**

*Sports Center*

(Morning break sponsored by CSO Architects)

10:00 a.m. – 4:00 p.m.

**IASBO Retirees "R & R" Room**

*Fairbanks Room*

10:00 a.m. – 11:10 a.m.

**Treasurer/Deputy Treasurer Round Tables**

[Choose 2 of the following 30-minute offerings]

(Break sponsored by Low Associates)

PERF: What's New for Members and Employers

*Murdock Room*

Carl Bright, PERF Field Service Consultant, Southern Region

Teacher Retirement Fund Critical Issues

*Taggart Room*

George Shields, Indiana Teacher Retirement Fund

Reconciling the Bank Statement

*Erwin Room*

Lori Bush, Deputy Treasurer, Penn-Harris-Madison School Corporation

Notary Public Issues

*Dickason Room*

Rebecka Kocsis, Director of Business Services, Penn-Harris-Madison School Corporation

Transfer Tuition

*Hickman Room*  
Melissa Ambre, Director, Division of School Finance, Indiana  
Department of Education

Noon – 1:00 p.m.

**Lunch**  
*Windsor Ballroom II & III*

Noon – 1:00 p.m.

**Guests Luncheon**  
*Clifton Terrace*  
(Sponsored by Arthur J. Gallagher & Company)

1:00 – 3:00 p.m.

**Exhibits Open**  
*Sports Center*  
(Afternoon break sponsored by Bank of New York Mellon Trust  
Co.)

3:15 – 4:15 p.m.

**Clinic Sessions**  
(Break sponsored by TIAA-CREF)

State Board of Accounts – What's New?  
*Clifton Ballroom A*  
Chuck Nemeth and Stan Mettler, State Board of Accounts

Process for Qualifications Based Vendor Selection  
*Dickason Room*  
John Voigt, Director of Facilities Planning, Buildings & Grounds,  
Brownsburg Community School Corporation

Enhancing Employee Success Through Effective Training  
*Hickman Room*  
Steve Bayer, Director of Human Resources, Fayette County  
School Corporation; Christy Hilton, Human Resources Director,  
Greenfield Central School Corporation; and Karen Hoover,  
Personnel Coordinator, West Noble School Corporation

Audit Guidance  
*Murdock Room*  
Joe Licata, Chief Business Officer, MSD of Washington  
Township; Amanda Brackett, Supervisor of Business Services,  
MSD of Washington Township; and Nancy Lumley, Business  
Manager, Seymour Community Schools

Purchasing Ethics  
*Erwin Room*  
David Koch, Director of Purchasing, MSD of Pike Township

Negotiating in Tough Times  
*Taggart Room*  
Susan Traynor Chastain, Esq., Bose McKinney & Evans

4:30 – 5:30 p.m.

**Clinic Sessions**  
  
An Update from the Department of Education  
*Clifton Ballroom I*

Melissa Ambre, Director, Division of School Finance, Indiana  
Department of Education

Design-Build Follow-Up

*Dickason Room*

Tim Thoman, Performance Services, Inc.

Outsourcing Considerations for School Nutrition

*Hickman Room*

Diane Schweitzer, Food Service Director, School City of  
Hammond and Julie Boettger, Director of Operations, inTEAM  
Associates

Circuit Breaker Impact on School Funds

*Murdock Room*

Colette Irwin-Knott, Partner, H.J. Umbaugh & Associates

The Budget Cutting Process in Tough Fiscal Times

*Taggart*

Brock Bowsher, Director of Finance & Operations, Avon  
Community School Corporation ; Fred McWhorter II, Director of  
Business, New Albany-Floyd County CSC ; Ross Sloat,  
Superintendent, Benton Community School Corporation ; and  
Kirby Stahly, Chief Financial Officer, East Allen County Schools

Employee Health Clinics

*Erwin*

Richard Sutton, RE Sutton and Associates, and Marvin Ward,  
Business Manager, Brownsburg Community School Corporation

6:30 – 7:00 p.m.

**Reception**

*Windsor Ballroom III*

(Sponsored by TrustIIndiana)

7:00 – 8:30 p.m.

**Award's Banquet**

*Windsor Ballroom I & II*

(Sponsored by Chartwell's Dining Service)

- Presiding: Kim Fox, IASBO President
- Invocation
- Recognition of Past Presidents
- Recognition of Retiring Members
- Treasurer of the Year Awards  
(Sponsored by National Insurance Company)
- School Business Official of the Year Awards  
(Sponsored by American Fidelity Assurance Company)
- School Support Professional of the Year Awards  
(Sponsored by Chartwell's Dining Service)
- President's Award  
(Sponsored by Performance Services)
- John F. Young Lamplighter Award  
(Sponsored by Indiana ASBO)

## **Friday, May 14**

7:00 – 8:00 a.m.

### **Breakfast**

*Colonnade Grand Buffet*

(Sponsored by Performance Services and Ice Miller)

7:00 – 8:00 a.m.

### **Research Committee Meetings**

*Colonnade Grand Buffet*

8:00 – 9:00 a.m.

### **Registration**

*Events Center First Floor Foyer*

8:15 – 9:15 a.m.

### **Clinic Sessions**

State Board of Accounts – What's New?

*Clifton Ballroom I*

Chuck Nemeth and Stan Mettler, State Board of Accounts

An Update from the Department of Education

*Clifton Ballroom II*

Melissa Ambre, Director, Division of School Finance, Indiana  
Department of Education

Energy Conservation Strategies/Policies

*Taggart Room*

Rodger Smith, Director of Facilities, MSD of Lawrence Township;  
Phil Ritchie, Supervisor of Energy Management/Maintenance,  
MSD of Lawrence Township and Rolonda Brown, Supervisor of  
Custodial Services, MSD of Lawrence Township

Transportation Savings Via the Indiana Bond Bank

*Hickman Room*

Ron Mangus, Indiana Bond Bank and John Righeimer, Maverick  
Energy Group

Records Management: How to Round-Up Employee Files

*Erwin Room*

Shenia Suggs, Deputy Chief Personnel Officer, MSD of Wayne  
Township and Susanne Goldberg, Deputy Chief Financial  
Officer, MSD of Wayne Township

Progressive Employee Discipline

*Murdock Room*

Jodi Gordon, Director of Human Resources, Brownsburg  
Community School Corporation; Mary Rehlander, Director of  
Personnel, MSD of Warren Township; and, Phyllis Davis,  
Director of Human Resources, MSD of Southwest Allen County

9:30 – 10:30 a.m.

### **Clinic Sessions**

School Business Officials Legal Update

*Clifton Ballroom I*

David Emmert, Esq., General Counsel, Indiana School Boards  
Association

Update from the Department of Local Government Finance  
*Clifton Ballroom II*  
Linda Lessaris, DLGF Budget Supervisor, Department of Local Government Finance

After Budget Cuts – Now What?

*Taggart Room*

Loren Evans, Director of Business & Technology, MSD of Mt. Vernon; Kim Fox, Chief Financial Officer, Tippecanoe School Corporation; and David Holt, Chief Financial Officer, MSD of Warren Township

Teacher Licensing Issues

*Murdock Room*

Terri Banks and Veronica Wilson, Office of Educator Licensing and Development, Indiana Department of Education

Unemployment Claims: Department of Workforce Development

*Hickman Room*

Dustin Stohler, Esq., General Counsel, Indiana Department of Workforce Development

Planning for Emergencies

*Erwin Room*

Nate Kleefisch, Director of Operations, Tri-Creek School Corporation

10:30 – 11:00 a.m.

**Break/Hotel Check-Out Time**

*Events Center First Floor Foyer*

(Break sponsored by Administrator Assistance)

11:00 a.m. – Noon

**Clinic Sessions**

School Business Officials Legal Update

*Clifton Ballroom I*

David Emmert, Esq., General Counsel, Indiana School Boards Association

Update from the Department of Local Government Finance

*Clifton Ballroom II*

Linda Lessaris, DLGF Budget Supervisor, Department of Local Government Finance

General Fund Referendums

*Murdock Room*

Kostas Poulakidas, Esq., Krieg DeVault

Dealing with Unemployment Claims

*Taggart Room*

Rick Doss, Director of Human Resources, MSD of Washington Township; Terry Thompson, Director of Human Resources, Clark-Pleasant Community School Corporation; Mary Rehlander, Director of Personnel, MSD of Warren Township; and Susan Traynor Chastain, Esq., Bose McKinney & Evans

How Technology Innovations Can Reduce Costs  
*Hickman Room*  
Pete Just, Chief Technology Officer, MSD of Wayne Township

Going Green with Electronic Documents  
*Erwin Room*  
Jon Bennett, Business Manager, MSD of Bluffton-Harrison

Noon – 1:00 p.m.

**Closing Lunch**

*Windsor Ballroom I & II*

- Presiding: Loren Evans, IASBO President-Elect,  
Director of Business & Technology, MSD of Mt. Vernon
- Invocation
  
- Treasurer's Report  
Lynn Kwilas, IASBO Treasurer, Director of Finance &  
Operations, School Town of Highland
- Constitution & By-Laws Committee Report  
Larry Amonett, Committee Chair, Assistant Business  
Manager, MSD of Lawrence Township
- Executive Director's Report  
Dennis Costerison, IASBO Executive Director
- Awarding of Door Prizes  
(Sponsored by Midwest Transit)

1:00 - 2:00 p.m.

**Super Session**

Federal Health Care Reform Legislation: The Impact on the  
Public Schools  
*Windsor Ballroom I & II*  
Christopher Sears, Esq., Ice Miller

2:00 p.m.

**Adjournment**