

**ACBO 2016 Spring Conference**  
**May 23-25, 2016**  
**Hyatt Regency, Monterey**

***Building a CBO Toolbox***  
***Updated 4/5/2016***

**MONDAY, May 23<sup>rd</sup>, 2016**

9:00 a.m. – 5:00 p.m.

**Conference Check-In/Information Desk Open**  
**Breakfast on Your Own**

10:00 a.m. – 11:15 a.m.

**GENERAL SESSION**

**Topic:** Exhibit C Decoder

**Panelists:** **Kathy Blackwood**, Executive Vice Chancellor, San Mateo CCD, **Jeff DeFranco**, VP Administrative Services, Lake Tahoe CCD, **Ann-Marie Gabel**, VP Administrative Services, Long Beach CCD

**Session Description:** In this session, panelists will review how Exhibit C works, including growth, COLA and stabilization funding, and the college and statewide impact of shifting FTES between years. The panel will provide an electronic version of Exhibit C that will allow you to calculate your own district's funding and project changes due to adding a center or college. We'll discuss the challenges of projecting growth funding and best practices for deficit factors.

11:15 a.m. – 11:30 a.m.

**Refreshment Break**

11:30 a.m. – 12:45 p.m.

**GENERAL SESSION**

**Topic:** May the Odds be Ever in your Favor! But When They Aren't, Know What your Insurance Covers

**Panelists:** **Sue Harrison**, District Offices General Services, San Mateo CCD, **Eric Lucas**, SELF, **Greg Alberti**, Director, Guy Carpenter & Co.

**Session Description:** Improve your odds and join us for a session that will help you survive your next renewal. We'll provide a primer on liability coverage -- what options are out there, how it works, how to make sure the coverage and limits you have are enough, and what to look for when you buy. Using case studies we'll show when higher limits come into play and discuss the changing risk landscape California colleges are facing.

12:45 p.m. – 1:30 p.m.

### **Luncheon and Welcome Address**

1:00 p.m. – 1:30 p.m.

### **Welcome Address: Walt Tribley**



**Dr. Walt Tribley** is the Superintendent/President of Monterey Peninsula CCD, a position he has held since December 2012.

Since assuming the position, Walt has been very active at the college and in the community. Walt is leading the effort to help the college make the profound changes required to adjust to state funding rules. His service to the community includes his roles as a member of the Monterey County Workforce Investment Board, the Monterey County Children's Council, and the Rotary

Club of Monterey. He is also one of the chairpersons of the Monterey County Business Council Higher Education & Research Cluster.

Prior to joining MPC, Walt's experience came from a variety of fields. His first love is teaching and developing students and faculty. He began his academic career as a teacher, earning tenure as a faculty member in biology at Seminole Community College in Florida. He also has extensive experience in academic administration, having served in many academic administrative positions for Wenatchee Valley College in Wenatchee, Washington. Walt also worked as a scientist and manager in a biotechnology company that was attempting to develop biomarkers for gynecologic cancers.

Dr. Tribley will be on hand to welcome you to the Monterey area and share some of his insights and perspective into the importance of the CBO role in District management and leadership.

1:45 p.m. – 2:45 p.m.

### **GENERAL SESSION**

**Topic:** Collective Bargaining Update

**Panelists:** Rick Bolanos, Managing Partner, Liebert Cassidy Whitmore

**Session Description:** This session will focus on the economic aspects of the collective bargaining process, including faculty bargaining issues, and what does, and does not, fall within the scope of bargaining and management rights. We will also discuss how the 50% law affects bargaining and ways to mitigate the challenges that it creates.

2:45 p.m. – 3:00 p.m.

### **Refreshment Break**

3:00 p.m. – 4:00 p.m.

### **GENERAL SESSION**

**Topic:** Red Hot Topics for General Obligation Bond Programs: Are you in Compliance?

**Panelists:** Felipe Lopez, Chief Business Officer, Compton Community College, Renee Graves, Partner, Vicenti, Lloyd, Stutzman LLP, David Casnocha, Shareholder, Stradling Yocca Carlson & Rauth, Joanna Bowes, Managing Director, KNN Public Finance

**Session Description:** The objective of the session is to highlight areas of risk for districts in the context of finance and bond programs. The session will outline changes in Federal Tax Laws including sequestration and refunding tax credit bonds, continuing disclosure due diligence and event filings, SEC Fraudulent misstatements, IRS audit concerns, post-bond issuance compliance, bond premium limitations as related to cost of issuance, and “over issuance” transparency and private placements.

4:00 p.m. – 4:15 p.m.                      **Refreshment Break**

4:15 p.m. – 5:15 p.m.                      **GENERAL SESSION**

**Topic:** Title IX: How the Increased Focus on Sexual Violence on Campus Affects Educational Institutions

**Panelists:** **Aaron O'Donnell**, Partner, Atkinson, Andelson, Loya, Ruud & Romo, **Stephen McLoughlin**, Senior Counsel, Atkinson, Andelson, Loya, Ruud & Romo

**Session Description:** Title IX includes a broad range of laws, regulations, and requirements aimed at eliminating sexual violence, harassment, and discrimination from our nation's publically funded systems. To comply with these laws, educational institutions must develop and implement a comprehensive procedure to address these abuses and make sure all involved, from Chancellors to students and support staff, are aware of Title IX requirements and armed with the knowledge necessary to help meet the compliance obligations.

You won't want to miss this session which will provide the legal perspective on prevention, compliance and response in Title IX situations should they arise on *your* campus!

5:15 p.m. – 6:30 p.m.                      **Welcome Reception**

6:30 p.m. – 8:30 p.m.                      **Sponsored Dinner**

**TUESDAY, May 24<sup>th</sup>, 2016**

8:00 a.m. – 5:00 p.m.                      **Conference Check-In/Information Desk Open**

8:00 a.m. – 9:00 a.m.                      **Networking Breakfast/Round Table Discussion Topics**

9:00 a.m. – 10:15 a.m.                      **GENERAL SESSION**

**Topic:** Audit Updates: Fiscal & Compliance Requirements

**Panelists:** **Heidi White**, Partner, Vavrinek, Trine, Day & Co., **Bill Rauch**, Partner, Vavrinek, Trine, Day & Co., **Brandon Harrison**, Partner, Vavrinek, Trine, Day & Co. **Ron Gerhard**, Associate Vice Chancellor, San Francisco CCD

**Session Description:** the realities of an audit will impact everyone in the fiscal office and beyond. In this session, panelists will present a series of updates to federal and state audit requirements that will impact Community College District reporting for the June 30, 2016 year end.

You don't want to miss this opportunity to get the most current information and interpretations of the trends happening in non-compliance, as well as insights into avoiding the potential pitfalls in your own audit preparation!

10:15 a.m. – 10:30 a.m.      **Refreshment Break**

10:30 a.m. – 11:45 a.m.      **General Session**  
**Keynote Presentation: Suzie Humphreys**



Suzie Humphreys speaks from the heart about **not** missing out on your own life, and she does it with incredible humor—something most of us can appreciate!

Her background is as varied as her audiences. From administrative secretary to TV talk show host, to 20 years in radio, she has “hobnobbed” with movie stars and politicians, interviewed the great and the near-great, and made hundreds of commercials, and musical comedy and motion pictures.

In the course of her adventures, she shot rifles with John Wayne, danced the polka with Lawrence Welk and rode a run-a-way stallion in a buffalo roundup in Licking Springs, Missouri. Throughout the journey, from the outrageous to the mundane, Suzie has found a way to truly savor all of it and she's here to share her own life lesson.

For the ACBO Spring Conference, Suzie will discuss: *Life is What Happens to You While You're Making Other Plans*, and in it, she takes you on a roller coaster ride through her failures at breakneck speed and you'll discover at the end of the ride that those same failures turned out to be the very best things that ever happened to her.

This topic, among her most requested, speaks directly to anyone going through difficult times, including those who work every day in a high-stress profession. She is at once hilarious, moving and unforgettable, and her audiences always come away with a fresh perspective on those things that keep us all up at night, which in the long run aren't really as important as we think they are.

12:00 p.m. – 12:45 p.m.      **Lunch**

12:45 p.m. – 1:45 p.m.      **CONCURRENT SESSIONS**

**Option One:** Solar 101: What CA Community Colleges Need to Know About Going Solar

**Panelists:** **Clyde Murley**, Solar Program Manager, Community College League of California, **Christine Statton**, VP Administrative Services, College of Sequoias, **Kyle Kearney**, VP Project Development Western US, Borrego Solar Systems, Inc.

**Session Description:** Our panel will share an overview of the growing solar landscape as it pertains to California Community College Districts. Using College of the Sequoias CCD as a

case study, CCLC's solar program manager, ACBO member and solar experts will cover best practices and lessons learned in solar system procurement and available financing options. The latest technologies, RFP requirements (e.g., Government Code Section 4217), and net energy metering (NEM) policy will be discussed. Alternative utility tariffs like RES-BCT, and the transition to NEM 2.0 that will impact energy savings, timing and overall benefits of going solar for California CCD's will also be discussed as well.

**Option Two: FUSION – What is it, and Why should I care?**

**Panelists:** **Eric Mittlestead**, Associate VC Construction & Facilities Planning, Kern CCD, **Ann-Marie Gabel**, VP Administrative Services, Long Beach CCD

**Session Description:** Come join our panel for an overview of FUSION – the system-wide database for space inventory and capital outlay needs. Learn how to navigate the system and what information you can easily pull out to answer questions about your facilities such as: square footage, number of buildings and condition of buildings. This session will provide a quick primer on what you need to know and how to access information quickly out of our robust system.

1:45 p.m. – 2:00 p.m.

**Refreshment Break**

2:00 p.m. – 3:00 p.m.

**CONCURRENT SESSIONS**

**Option One: Revisiting Fiscal Leadership through the Lens of Transparency and Participatory Governance**

**Panelists:** **Dr. Anthony Culpepper**, VP Finance & Business Services, Bakersfield College, **Sonya Christian**, President, Bakersfield College, **Steven Holmes**, Academic Senate President, Bakersfield College, **Nick Strobel**, Faculty & Budget Committee Representative, Bakersfield College

**Session Description:** The advantages of using a distributed leadership model is the focus of this panel as they discuss the process of changing a campus culture by removing silos through the leveraging of key participatory governance committees. The panel will explain how the positioning of fiscal leadership as a catalyst to galvanize the academic, administrative, and classified leadership can result in a shared vision of student success. Find out how transparency and full disclosure of budget resources can lead to stronger commitment to a Colleges mission and vision.

**Option Two: Facilities Legal Trends for Business Officers**

**Panelist:** **Christopher Fallon**, Attorney, Liebert Cassidy Whitmore, **Eileen O'Hare-Anderson**, Partner, Liebert Cassidy Whitmore

**Session Description:** Are you prepared to face the important legal trends that are emerging now? Do you know what they all are? This session will provide an update on the legal hotspot issues for Business Officers, including common issues and best practices in bidding, contracts,

construction, as well as hiring a design professional. Attendees will find out about best practices that other districts are using, as well as avoiding mistakes that others have made.

3:00 p.m. – 3:15 p.m.                    **Refreshment Break**

3:15 p.m. – 4:15 p.m.                    **CONCURRENT SESSIONS**

**Option One:** Confronting the New Reality of Rising Pension Costs

**Panelist:** **Dr. Bonnie Ann Dowd**, Executive Vice Chancellor, Business and Technology Services, San Diego CCD, **Michelle McKay Underwood**, Director, Government Relations, School Services of CA Inc. and ACCCA Advocate, **Kimi Shigetani**, Vice President, Community College League of California, **Maureen Toal**, Senior VP, PARS

**Session Description:** This session will address legislative and regulatory issues surrounding CalSTRS and CalPERS contribution rate increases, and will explore fiscal and budgetary options that districts should consider in managing these rising costs in the short and long term. Topics will include: state law giving CalSTRS authority over contribution rates beyond 2021, GASB 68, the new IRS vehicle for setting aside funds for pension costs, educating boards/stakeholders, and approaches of individual districts.

**Option Two:** Essential Factors to Consider Before Embracing the Technology Initiatives!

**Panelists:** **Theresa Tena**, VC Institutional Effectiveness, CCCCCO, **Ann-Marie Gabel**, VP Administrative Services, Long Beach CCD, **Jay Field**, Chief Technology Officer, City College of San Francisco, **Jeff DeFranco**, VP Administrative Services, Lake Tahoe CCD

**Session Description:** This session will provide a real-time perspective on the consideration and best practices for implementation of system-wide technology initiatives. Both the Chancellor's Office and district perspectives will be shared on how districts are evaluating their participation in pilot programs and in implementation of the current initiatives. State resources that are now available, as well as the potential for future state investment will be discussed.

4:30 p.m. – 6:30 p.m.                    **Reception**

6:30 p.m.                                      **Dinner on Your Own**

**WEDNESDAY, May 25<sup>th</sup>, 2016**

8:00 a.m. – 11:00 a.m.                    **Conference Check-In/Information Desk Open**

8:00 a.m. – 8:30 a.m.                    **Networking Buffet Breakfast**

8:30 a.m. – 10:00 a.m.                    **CLOSED GENERAL SESSION**

**Topic: ACBO SEMI-ANNUAL ASSOCIATION MEETING**  
***(This meeting is for college/district business personnel only.)***

**Panelists:** **Andy Suleski**, President, ACBO and Vice President of Administration, Butte-Glenn Community College (moderator) and the regional members of the **ACBO Board of Directors**

Delegates will also hear the reports of ACBO Task Forces and Workgroups that are authorized by ACBO to deliberate on your behalf to address consequential business and finance regulatory and policy issues at the state level.

Come meet your elected ACBO representatives and hear them report on a wide range of issues. An agenda for the meeting, as well as the minutes of the October 2015 meeting and other pertinent background information will be provided at the meeting.

10:15 a.m. – 11:30 a.m.

**Panelist: Larry Galizio**, CEO, Community College League of California, **Lizette Navarette**, Legislative Consultant, CCLC, and **Michelle McKay Underwood**, Advocate for ACCCA and Legislative Director, School Services of California, Inc.

11:30 a.m. **Conference Adjourns**