

THE ASSOCIATION OF CHIEF BUSINESS OFFICIALS



CALIFORNIA: Recovery
in Motion

SPRING CONFERENCE

May 20-22, 2013

Hilton Arden West, Sacramento

Conference Agenda

MONDAY, May 20, 2013

8:00 a.m. to 10:00 a.m.

ACBO Board Meeting
Brandywine

9:00 a.m. to 5:00 p.m.

Conference Check-In / Information Desk

Atrium/Solarium

Sponsored by:



10:00 a.m. to 11:00 a.m.

General Session:

Report from FCMAT

Eagle/Berryessa/Tahoe

In this general session, FCMAT Chief Executive, **Joel Montero** will provide an overview of what's trending now with regard to the impact of the May Revise on college operations and the general status of the state's economy. FCMAT indicators for the fiscal health of districts will be reviewed including an examination of colleges that are in need of, or on the verge of needing FCMAT assistance.

Find out what the pitfalls are in the coming year, and what preventative steps you can take now to head off trouble in the future. A Q&A session will follow the presentation.

Presented by: **Joel Montero, CEO, FCMAT**

11:00 a.m. to 11:15 a.m.

Refreshment Break

Atrium/Solarium

Sponsored by:



Backstrom McCarley Berry & Co., LLC

11:15 a.m. to 12:15 p.m.

General Session:

Quality Assurance and the Role of CBOs in Accreditation Evaluation Teams

Eagle/Berryessa/Tahoe

One of the most important steps a CBO can take toward their own professional development is having the unique experience of serving as the CBO member of an Accreditation Team. Not only is the experience a great resume builder, it will expand your knowledge base, assist your colleagues around the state and you'll directly benefit from the enhanced professional network you'll be creating at the same time.

Joining us today are Executive Director of ACCJC, **Barbara Beno** and her staff member **Norv Wellsfry** who explore the role of CBOs on teams, the purpose and methodology of an accreditation team, and available resources that provide a road map to maintaining fiscal integrity, and supporting institutional self-evaluation.

Presented by: **Barbara Beno, Executive Director and Norv Wellsfry, Administrator, ACCJC**

12:15 p.m. to 1:30 p.m.

Luncheon/Welcome Address

Atrium/Solarium

Dr. Smith joined the Yosemite Community College in January of 2007 as Columbia College's President and served in that capacity until her appointment to Interim Chancellor of the District, in August of 2010. In February of 2011, she was appointed by the Board of Trustees to lead the District as Chancellor.

Presented by: **Joan Smith, Chancellor, Yosemite CCD.**

Sponsored by:



1:45 p.m. to 2:30 p.m.

General Session:

A Report from the Board of Governors

Eagle/Berryessa/Tahoe

As the Board of Governors prepares to take on a very full agenda in 2013-14, ACBO has the distinct pleasure of welcoming one of its long time members and former President, Mr. Lance Izumi. When he is not debating community college policy and looking after the system's mission as a member of the BOG, Mr. Izumi spends his time as the Senior Koret Fellow with the Pacific Research Institute, a Bay Area think tank, where he heads up the Education Studies unit.

Mr. Izumi joins us today to speak to the BOG's agenda in 2013-14 and his hopes for the community college system in the future.

Presented by: **Lance Izumi, Member, California Community Colleges Board of Governors**

2:30 p.m. to 2:45 p.m.

Refreshment Break

Atrium/Solarium

Sponsored by:



Vavrinek, Trine, Day & Company, LLP
Certified Public Accountants

2:45 p.m. to 3:45 p.m.

Concurrent Sessions:

Option I: AB 806 and the Never-Ending Fight for a Rational Approach to the 50% Law

Eagle/Berryessa/Tahoe

By the time this session is presented, one of two things will be true—either AB 806 will have passed out of the Assembly Appropriations Committee and be headed to the Assembly Floor for a vote, or it will have become yet another unsuccessful attempt to finally deal rationally with the effects of the 50% law on Districts.

Either way, one thing is clear—more education is needed about the impact of arbitrarily sequestering half your districts budget on just two things, a narrow definition of faculty salaries and benefits, and the other half on everything else. Two stalwarts in the fight for a rational approach to "50%" are here to provide an overview of where we now stand with legislation to finally address this road block to student success.

Presented by: **Sharlene Coleal, Vice President for Business Services, College of the Canyons and Willy Duncan, CEO at Sierra CCD**

Option II: Collective Bargaining and the Slow Recovery

Shasta

Between the cuts in state funding in recent years, the focus on student success, and the expectations of constituents now that Proposition 30 has passed, community colleges are faced with significant challenges, even as the economy and state funding improves. The pressure is on districts to now reverse prior concessions and restore programs and services in order to meet the competing demands of the various stakeholder groups.

Along with federal health care and pension reform these are the issues that are at the forefront during collective bargaining. This session will focus on strategies and tools to help districts address barriers to successful negotiations, and will also explain what happens if negotiations were to dissolve into impasse, fact-finding, and beyond.

Presented by: **Maureen Evans, VP, School Services of California, Suzanne Speck, Director, Management Consulting Services, School Services of California**

3:45 p.m. to 4:00 p.m.

Refreshment Break

Atrium/Solarium,

Sponsored by:



Making retirement work for you.

4:00 p.m. to 5:00 p.m.

Concurrent Sessions:

Option I: FRAUD! A Case Study

Shasta

The anatomy of a fraud case can be incredibly revealing. Not only in terms of the crime itself, but in what it reveals about safeguards and internal controls that can mean the difference between smooth sailing and having your office tied up indefinitely with investigations and legal proceedings.

San Mateo CCD had to deal firsthand with this development, and much can be learned from their experience with a purchasing fraud case. In this case study presentation, panelists will focus on how the fraud was uncovered, the resulting forensic audit, and the subsequent work with the DA to successfully resolve the incident. Panelists will explore the changes to the districts internal controls that resulted and how your district can adapt them to your own processes.

*Presented by: **Kathy Blackwood**, Executive Vice Chancellor, San Mateo CCD, **Tim Bryan**, Senior Manager, Forensic Technology Services, Crowe Horwath LLC*

Option II: Preventing and Responding to Data Breaches

Eagle/Berryessa/Tahoe

Data security breaches can be disastrous and costly, and in spite of increased vigilance in protecting personal information, data security breaches can still occur. Commonly not covered by insurance, depending on the type of compromised electrically stored information, legal and reporting duties may be triggered and political nightmares ensue.

Do you have a plan to respond, or a designated team that is trained to respond? Do you have insurance to cover the risk? If not, you'll want to attend this session. Participants will learn legal requirements and best practices for responding to breaches and be prepared to head off disaster before it happens.

*Presented by: **Scott Sachs**, Senior Associate, Atkinson, Andelson, Loya, Ruud & Romo, **Lisa Allred**, Partner, Atkinson, Andelson, Loya, Ruud & Romo*

Ms. Dell joins us today to share her own unique community college perspective and her insights into the rewards and challenges of newspaper publishing.

*Presented by: **Cheryl Dell**, CEO and Publisher, Sacramento Bee*

10:15 a.m. to 10:30 a.m.

Refreshment Break

Atrium/Solarium

Sponsored by:



10:30 a.m. to 12:00 p.m.

Concurrent Sessions:

Option I: Retirement and Pensions- A Report from CalSTRS

Eagle/Berryessa/Tahoe

CalSTRS is making every effort on your behalf to educate policymakers and other stakeholders about the viability and value of the Defined Benefit retirement system. The presentation covers difficult financial conditions that affect the CalSTRS pension system and what's being done to address them. A review of recent pension legislation changes is discussed along with celebration events to mark CalSTRS 100 year anniversary.

*Presented by: **Ed Derman**, Deputy CEO, Plan Design and Communication, CalSTRS*

Option II: Post Bond Issuance Compliance

Shasta

This panel will summarize post-bond issuance IRS/SEC compliance rules, such as maintaining tax-exemption, balancing governmental status vs. revenue generation, timelines to spend bond money, and continuing disclosure. In addition, accounting for bond expenditures will be discussed, emphasizing facility management and technology endowment bonds.

*Presented by: **David Casnocha**, Partner Stradling Yocca Carlson & Rauth, **Ann Kennedy**, President, A. Kennedy Group, **Joanna Bowes**, Managing Director, Keygent Advisors*

5:00 p.m. to 6:00 p.m.

Welcome Reception

Entertainment provided by Riverside CCD students!

Atrium/Solarium, Music by Professor **Steve Homan**, Los Rios CCD

Sponsored by:



6:00 p.m. to 8:00 p.m.

Sponsored Dinner and Ten Year Recognition Presentations

Atrium/Solarium

Your hosts for the evening include:



TUESDAY, May 21, 2013

8:00 a.m. to 5:30 p.m.

Conference Check-In/Information Desk Open

Atrium/Solarium

8:00 a.m. to 9:00 a.m.

Networking Breakfast/Round Table Discussions

Atrium/Solarium

Sponsored by:



9:15 a.m. to 10:15 a.m.

General Session:

The Value of Our Community College System

Eagle/Berryessa/Tahoe

Cheryl Dell has been the CEO and Publisher of the Sacramento Bee since 2008. With an audience that exceeds four million readers in print and online, The Bee is the largest media in the Sacramento region.

12:00 p.m. to 1:45 p.m.

Luncheon/Keynote Address

Atrium/Solarium



Speaker: Mike Robbins, Speaker/Author/Life Coach

Leadership can be challenging, especially in today's face-paced, globalized world. Leaders with a strong sense of emotional intelligence (EQ) and an ability to lead with personal transparency have a distinct advantage. This program delves into practical ways for REAL leaders to enhance their impact and effectiveness by leading with authenticity.

Sponsored by:



1:45 p.m. to 2:00 p.m.

Refreshment Break

Atrium/Solarium

Sponsored by:



2:00 p.m. to 3:00 p.m.

CLOSED GENERAL SESSION

ACBO Statewide Association Business Meeting

Eagle/Berryessa/Tahoe

The spring semi-annual meeting of the statewide CBOs, this closed session meeting will address the Association's status on its Strategic Plan and allow members the opportunity to weigh in. Reports will be provided by chairs of ACBO committees and task forces.

*Presented by: **Bonnie Ann Dowd**, San Diego CCD and President of the ACBO Board, with reports from **Sue Johnson**, Ventura CCD on Fiscal Standards Committee, **Ann-Marie Gabel**, Long Beach CCD on the Community College Funding Workgroup and **Carol Horton**, Citrus CCD, on the Facilities Task Force*

WEDNESDAY, May 22, 2013

3:00 p.m. to 3:15 p.m.

Refreshment Break

Atrium/Solarium

Sponsored by: **J.P.Morgan**

3:15 p.m. to 4:15 p.m.

General Session:

Implementation of the Affordable Care Act (ACA): New Strategies for New Rules

Eagle/Berryessa/Tahoe

As full implementation of the Affordable Care Act or "Obama Care" approaches, businesses including Community College Districts are busy preparing. Get the latest strategies to maximize benefits for employees and minimize operational impact for you from experts who are closely monitoring all aspects of implementation and a District CBO who's well versed on the subject. What you don't know about ACA can hurt you, so get up to speed and get your questions answered here!

Presented by: **Martha Espinoza**, Principal Risk Services Consultant, ASCIP; **Bruce Caldwell**, Area St. Vice President, Gallagher/BPI; **Dan Sanger**, Sr. Director Health Benefits, ASCIP; **Peter Hardash**, Vice Chancellor Business Operations, RSCCD

4:15 p.m. to 4:30 p.m.

Refreshment Break

Atrium/Solarium

Sponsored by:



4:30 p.m. to 5:30 p.m.

Concurrent Sessions:

Option I: GO Bond Reauthorization™ and NMTC

Eagle/Berryessa/Tahoe

Many K-14 districts have voter-approved GO bonds which cannot be sold due to decreased assessed valuations and Prop 39 tax rate restrictions. A new product, GO Reauthorization Bonds™, allows districts to sell these bonds and continue their construction and maintenance projects. In addition, this financing method avoids costly capital appreciation bonds and is compliant with newly proposed AB 182 bond restrictions. Although just recently developed, GO Reauthorization Bonds™ were approved in twelve districts last November.

Presented by: **Ken Stoppenbrink**, Vice Chancellor Business, West Hills CCD; **Dale Scott**, President, Dale Scott and Company; **Mark Levinson**, Co-Chair Financial Services, Fox Rothschild

Option II: Facilities Funding; Pending Legislation- A Comprehensive Review

Shasta

This session focuses on the political and economic climate as it relates to all sources of facilities funding. Specifically, what does state funding look like if/when the State pursues a new bond measure? What will the future hold for CCD's redevelopment dollars with more than \$360 million in jeopardy through early termination of pass through payments? How does the recent passage of Prop 39 affect solar facilities funding? How will the proposed AB 182 impact your general obligation bond issuance or campaign? CCLC and Dolinka Group will discuss the impact of what is being proposed, future legislation related to facilities funding and how it will all impact your overall facilities funding program. 4:30 p.m. to 5:30 p.m.

Presented by: **Theresa Tena**, Vice President, CCLC; **Ann Fenge-Gagne & Heather Hagopian**, The Dolinka Group

5:30 p.m. to 6:30 p.m.

Reception

Music by **Fernando Rios**

Pool Deck (weather permitting) In the case of rain, the reception will be moved to the Atrium/Solarium.

Sponsored by: **HMC Architects**

6:30 p.m.

Dinner on Your Own

8:00 a.m. to 11:30 a.m.

Conference Check-In/Information Desk - Atrium/Solarium

8:00 a.m. to 8:30 a.m.

Networking Breakfast - Atrium/Solarium

8:30 a.m. to 10:00 a.m.

CLOSED SESSION

Chancellor's Office Report: The May Revise and Related Topics

Eagle/Berryessa/Tahoe

As we all know, when it comes to the state budget, we really don't know anything until the May Revise. Fresh from their focused analysis of the Governor's proposed budget revision, our intrepid team from the Chancellor's Office will bring us the facts and answer all your questions!

This panel provides the definitive inside scoop on the budget process and fiscal implications that ultimately will impact your district's budget. The annual session that is certainly not to be missed, stay and find out what the likely scenarios are and their anticipated effect on the deferral buy-down, student success recommendations and the EPA as well as other critical budget issues.

Presented by: **Dan Troy**, Vice Chancellor for Finance and Facilities Planning; **Diane Brady**, Director of Fiscal Policy and **Fred Harris**, Assistant Chancellor

10:00 a.m. to 10:15 a.m.

Refreshment Break - Atrium/Solarium, Sponsored by: **Payden & Rygel** Investment Management

10:15 a.m. to 11:30 a.m.

CLOSED SESSION:

Legislative, Political, and State Update

Eagle/Berryessa/Tahoe

As essential as the Chancellor's Office is to policy and operations, members of this panel are the ones we look to for the latest information on legislation and budget strategy going forward. The give and take on budget and the always-moving legislative process requires a trained eye to follow, let alone interpret, and our panelists happen to be four of the most talented in that regard. We're always pleased to welcome back our system advocates, and anxious to hear their take on the issues!

Presented by: **Scott Lay**, CEO and President of the League; **Theresa Tena**, Vice President, CCLC; and **Michelle McKay-Underwood**, Director of Legislation, School Services of California, Inc.

11:30 a.m.

Conference Adjourns

12:00 p.m. to 2:00 p.m.

ACBO Board Meeting - Shasta

Acknowledgements:

Bill Hooper Memorial ACBO Golf Classic was sponsored by **Student Insurance and Keenan & Associates**

General sponsors of this conference included:

