



THE ASSOCIATION OF CHIEF BUSINESS OFFICIALS
SPRING CONFERENCE

Barreling Forward:

Navigating a
Changing System



May 18-20, 2015
Hyatt Vineyard Creek Inn, Santa Rosa

MON 5/18

9:00 a.m. – 5:00 p.m.

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

ALEXANDER VALLEY FOYER

Sponsored by:



10:00 a.m. – 11:15 a.m.

GENERAL SESSION

ALEXANDER VALLEY 1/2

Topic: **GASB68: What Does it Mean for my District?**

Panelists: **Brandon Harrison**, Manager, Vavrinek, Trine, Day & Co. LLP; **Ron Gerhard**, Vice Chancellor, City College of San Francisco; and **Jeff DeFranco**, Vice President of Administrative Services, Lake Tahoe Community College

Session Description: With the 2014-15 fiscal year annual audit around the corner, what does your district need to do to prepare for accounting and financial reporting for pensions? The panelists in this session will provide an overview and background as well as reporting impacts of GASB 68 (Governmental Accounting Standards Board Statement No. 68.) You will hear an auditor's perspective on what your district should do to prepare for this change and the impacts on your district's Statement of Net Position (balance sheet.) Hear from CBO's on how they are preparing for and addressing the change in the management's discussion and analysis as well as communicating how this will impact Districts' Net Position. You will also learn more about where and when you can get a report on your district's proportionate share of the net pension liability for CalSTRS and CalPERS.

11:15 a.m. – 11:30 a.m.

Refreshment Break

ALEXANDER VALLEY FOYER

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11:30 a.m. – 12:45 p.m.

GENERAL SESSION

ALEXANDER VALLEY 1/2

Topic: **ADA Transition Plans - What You Need To Know To Protect Your District**

Panelists: **Sharlene Coleal**, Assistant Superintendent, Vice President, Business Services, College of the Canyons; **Peter Hardash**, Vice Chancellor, Rancho Santiago CCD; and **Terry Tao**, Partner, AALRR

Session Description: With the recent change in ADA law, the focus of ADA lawsuits has changed from private to public. Community colleges have a unique exposure with expansive facilities open to the public. The key to managing this exposure is the ADA Transition Plan. Learn about the resources available to prepare this document that will identify potential areas to be upgraded, including the cost and development of a workable timeline. Presenters will discuss the difference between Title II - Private (entire facility is subject to scrutiny) and Title III - Public (scrutiny is subject to paths of travel/student programs and services).

12:45 p.m. – 1:30 p.m.

Luncheon and Welcome Address

KNIGHTS VALLEY GARDEN

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1:00 p.m. – 1:30 p.m.

Welcome Address

Presenter: **Kindred Murillo**, Superintendent-President, Lake Tahoe CCD



Kindred Murillo currently serves as the Superintendent/President of the Lake Tahoe Community College District. Dr. Murillo has formerly served as Vice Chancellor of Administrative Services for the Contra Costa Community College District and Vice President of Administrative Services at Pasadena City College and Copper Mountain Community College. In

addition to her years of experience as an administrator and faculty member in higher education, Kindred's background includes a variety of management positions in the business sector. In her welcome address, Dr. Murillo will discuss *A CEO's Viewpoint through a Former CBO's Eyes: The Unique Role We Each Play in Navigating a Changing System.*

1:45 p.m. – 2:45 p.m.

CONCURRENT SESSIONS

OPTION ONE: The CEO/CBO Relationship: The Expectations and Requirements of a Relationship that Must Succeed
ALEXANDER VALLEY 1/2

Panelists: **Kindred Murillo**, Superintendent-President, Lake Tahoe CCD; **Helen Benjamin**, Chancellor, Contra Costa CCD; **Jose Ortiz**, Chancellor, Peralta CCD; **Teresa Scott**, Executive Vice Chancellor, Yosemite CCD; **Dr. Bonnie Ann Dowd**, Executive Vice Chancellor, Business & Technology Services, San Diego CCD; and **Sharlene Coleal**, Assistant Superintendent, Vice President Business Services, College of the Canyons

Session Description: This panel of district management leaders will discuss the ever-changing expectations of the community college system they must navigate, and how they find ways together to meet those expectations. Both external and internal in nature, the issues include State funding and regulatory changes, as well as providing information and context to local boards, internal committees and represented groups. Whether or not the relationship between a CEO and the CBO is successful can make or break the progress of a district and has everything to do with real Student Success. Hear from these experienced professionals about the best practices and the pitfalls of these mutual roles.

OPTION TWO: Technology Rules: A Good Investment or a Waste of Money?

ALEXANDER VALLEY 3/4

Panelists: **Sean Olcott**, Manager, BIM Services, **Yehudi Gaffen**, CEO, and **John Turner**, Vice President, Marketing, **Gafcon Inc.**; and **Sue Rearic**, Vice Chancellor, Business Services, Grossmont-Cuyumaca College

Session Description: You are ready to start your Bond campaign but you find yourself questioning whether or not the effort will actually result in the valuable investment you hope for. Your focus is design and construction, but will your decisions ultimately have a negative impact on your ability to operate and maintain the buildings you're planning? Project governance is in place, but will your financial accounting system help or hinder your ability to appropriately manage Bond funds?

The experiences of four community college bond programs are featured in case studies that will explore capital planning, integrated program controls and BIM for Owners.

2:45 p.m. – 3:00 p.m.

Refreshment Break

ALEXANDER VALLEY FOYER

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3:00 p.m. – 4:00 p.m.

CONCURRENT SESSIONS

OPTION ONE: Planning a Successful Construction Program
ALEXANDER VALLEY 1/2

Panelists: **Steven Crow**, Vice President, Business & Financial Affairs, Southwestern CCD; **Leigh Sata**, Executive Bonds Manager, Solano CCD; and **Mark Kelley**, Partner, Dannis Woliver Kelley

Session Description: Whether you recently passed a bond or are planning one, you need to have a solid plan to build what you promise. This session, featuring seasoned District and legal personnel, will provide a roadmap for each step in a successful construction program, including setting expectations, planning budgets and schedules, choosing delivery systems, and meeting legal requirements. Panelists will provide real world scenarios and useful forms that can streamline your process and be applied now.

OPTION TWO: Risky Business: Managing Risk and Preventing Fraud in your Organization
ALEXANDER VALLEY 3/4

Panelists: **Christy White**, Partner, **Tanya Rogers**, Partner, and **Steven Currie**, Manager, Christy White & Associate; and **Dr. Bonnie Ann Dowd**, Executive Vice Chancellor, Business & Technology Services, San Diego CCD

Session Description: Is there fraud occurring within your organization? While we always hope the answer is no, if you are not taking the steps to diagnose the "fraud temperature", it may be occurring. A strong internal control environment will include effective monitoring and testing to determine if the original design is still effective. When the controls are no longer working or effective and fraud is suspected or detected, what steps you take next are critical to reaching a resolution.

4:00 p.m. – 4:15 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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4:15 p.m. – 5:15 p.m.
CONCURRENT SESSIONS

OPTION ONE: How to Compete for State Capital Outlay Funds
ALEXANDER VALLEY 1/2

Panelists: **Ann-Marie Gabel**, Vice President of Administrative Services, Long Beach CCD and **Susan C. Yeager**, Administrator, Facilities Planning & Utilization, California Community Colleges Chancellor's Office

Session Description: This presentation will help you understand California's Community College Capital Outlay Program. Panelists will discuss how projects are prioritized at the Chancellor's Office and help you understand how to position your capital outlay projects to effectively compete for limited state funds. Come and learn about how capital outlay projects are categorized, how points are calculated and how leveraging local funds makes projects more competitive!

OPTION TWO: STRS Creditable Compensation Update
ALEXANDER VALLEY 3/4

Panelists: **Frances Rogers**, Attorney, Liebert Cassidy Whitmore and **Dr. Bonnie Ann Dowd**, Executive Vice Chancellor, Business & Technology Services, San Diego CCD

Session Description: STRS statutes and regulations have recently been amended to reform the definition of creditable compensation for members of STRS. This impacts those items of compensation that will be credited to member retirement. Community colleges must take action prior to 1/1/16 to reform employment contracts and salary tables to ensure that creditable compensation is not lost as part of the legislative and regulatory changes. This session will focus on the legal reform, what

colleges should be doing now and in the future, and other STRS changes that may be on the horizon.

5:15 p.m. – 6:30 p.m.
Welcome Reception
KNIGHTS VALLEY GARDEN
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6:30 p.m. – 8:30 p.m.
Sponsored Dinner
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TUE 5/19

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

8:00 a.m. – 9:00 a.m.
Networking Breakfast/Round Table Discussion Topics
DRY CREEK BALLROOM
Sponsored by:



9:15 a.m. – 10:30 a.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Title IX Today: How Increased Focus on Sexual Violence on Campus Affects College Operations

Panelists: **Stephen McLoughlin**, Associate and **Aaron O'Donnell**, Partner, AALRR; and **Cindy Vyskocil**, Vice Chancellor, Human Resources, Coast CCD

Session Description: This session is intended to provide a starting place for those unfamiliar with Title IX, as well as those who may need an update on recent changes to the law and how it is currently being enforced. Title IX includes a broad range of laws, regulations, and requirements aimed at eliminating sexual violence, harassment and discrimination from our nation's education system. To comply with these laws, schools are required to develop and implement a comprehensive procedure to address these abuses and make sure all people involved with the school, from Chancellors to students and support staff, are aware of the Title IX requirements and armed with the knowledge necessary to help meet the compliance obligations.

The federal government recently launched a national campaign to reexamine how sexual misconduct on campus is addressed and the resulting scrutiny has led to a number of high profile incidents that all colleges should take note of. Is your district adequately meeting the requirements of Title IX and related laws, such as the Clery Act?

This workshop will provide a summary of the law and provide a detailed analysis of some of the recent high profile investigations as well as related regulations that dictate how sexual misconduct must be handled.

Panelists will discuss Title IX compliance which depends on the active participation of all school personnel.

10:30 a.m. – 10:45 a.m.

Refreshment Break

ALEXANDER VALLEY FOYER

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10:45 a.m. – 11:45 a.m.

Keynote Presentation:

ALEXANDER VALLEY 1/2

Topic: Ethical Wisdom: Doing the Right Thing in Uncertain Times



Presenter: Jack Gilbert

Dr. Jack Gilbert is a program director and clinical associate professor at Arizona State University (ASU), and a Lincoln Scholar in the Lincoln Center for Applied Ethics. He is a noted expert in organizational and personal integrity, innovation leadership, and large-scale change. Among other roles, Jack has consulted to organizations large and small in many fields including financial services.

He is the author of *Strengthening Ethical Wisdom* (2007) and co-author of *The Heart of Leadership* (2010) both published by the American Hospital Association Press. He is also the author of *Gilbert's Fables* (2009).

Jack holds his doctorate from The George Washington University in Washington, D.C. where his dissertation focused on the role of ethics in decision-making for senior executives.

12:00 p.m. – 12:45 p.m.

Lunch

KNIGHTS VALLEY GARDEN

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1:00 p.m. – 2:00 p.m.

CONCURRENT SESSIONS

OPTION ONE: Phoenix Rising: Responding When your Non-Profit Foundation Implodes

ALEXANDER VALLEY 3/4

Panelists: Greg Nelson, Vice President Finance & College Operations, College of Marin and **Randy Parent**, Attorney, Liebert Cassidy Whitmore

Session Description: What do you do if your nonprofit foundation cannot meet its financial obligations to be self-sufficient or if the foundation board stakes out a position in opposition to District's Board of Trustees and President? Now, what would happen if the nonprofit completely implodes?

This occurred in 2012 when the College of Marin Foundation imploded in a very public display. The College of Marin Foundation board of directors decided they did not trust the District's Board of Trustees or the Superintendent/President based on an irrational fear that the District was going to "steal" the Foundation's money. Foundation Board members spent significant restricted funds on operating expenses and then they all resigned in an open letter to the press and the attorney general.

To rebuild its fundraising capacity, the District has chosen to bring its development activities in house, rather than resurrect the old foundation or start a new nonprofit. The IRS recently approved the District's application for tax exempt status under section 501(c) (3) of the internal revenue code, and the strategy is rapidly paying dividends.

The citizens of Marin County are now supporting the District directly

rather than through an affiliated nonprofit organization. Randy and Greg will share the story, the lessons learned, and will discuss the District's rationale for going in this new and exciting direction.

OPTION TWO: Barreling Forward Toward Institutional Effectiveness: Technical Assistance Teams and What to Expect

ALEXANDER VALLEY 1/2

Panelists: Theresa Tena, Vice Chancellor Institutional Effectiveness, Chancellor's Office; **Dr. Barry Gribbons**, Deputy Chancellor, College of the Canyons; **Dr. Matthew Lee**, IEPI Project Director; **Mario Rodriguez**, Assistant Vice Chancellor Fiscal Services, Chancellor's Office; and **Davit Khachatryan**, Vice President Administrative Services, Irvine Valley College

Session Description: The Institutional Effectiveness Partnership Initiative (IEPI) is a collaborative effort to help advance an institution's ability to serve students. Through the dedicated work of teams of volunteer technical experts (Partnership Resource Teams—PRTs), the Initiative will respond to a college's call for assistance by focusing on specific challenges to progress as outlined by the college. This is one of several ways in which IEPI differs from the accrediting process and serves as an essential resource for the overall success of a college in meeting accreditation expectations.

You'll hear about how the process can work for your college as they present an overview of the technical assistance process and how your district can request this opportunity. *Imagine, finally addressing and overcoming some of the most difficult barriers to progress facing your college through a collaborative process!*

In addition to the technical assistance process, the panel will describe additional resources that will be available through regional training; and discuss how colleges/districts can establish goals for the framework of indicators. This session will result in a better understanding of the larger context for overall higher education goal setting, and it will clarify how the IEPI process compares with the accreditation process and illuminate the service of partnership resource team members and how you might get involved as a member of a technical assistance team.

2:00 p.m. – 2:15 p.m.

Refreshment Break

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2:15 p.m. – 3:15 p.m.

General Session

ALEXANDER VALLEY 1/2

Topic: Sacred Cows or Obstacles to Progress: Reconsidering Statutory and Regulatory Restrictions on Budget Allocation—Can We Do Better?™

Panelist: Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD; **David Morse**, President, ASCCC; and **Willy Duncan**, President, Sierra College

Session Description: The various statutory and regulatory requirements that dictate or restrict the ways in which California community colleges may allocate their budgets can be a major source of contention on our campuses and in our system. Worse yet, many of these statutory and regulatory requirements are decades old and conflict with each other, creating unintended consequences or conflicting challenges.

Many administrators advocate for greater flexibility when allocating state revenues in college budgets, whereas many faculty see such requirements as the 50% Law and the Faculty Obligation Number

as essential protections. Could we develop a more effective way to address budgetary concerns and needs that would satisfy all concerned parties? Join us for an exploration of the issues surrounding this topic and identifying possible directions for the future as ACBO, ACCCA and ASCCC work together to identify solutions.

3:15 p.m. – 3:30 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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3:30 p.m. – 4:45 p.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Acknowledging and Managing Stress: Taking Care of Yourself and Your Team

Panelists: Sue Brandy, LCSW

Session Description: This session is an overview that will define the many forms of stress and how it affects each of us, and will focus particularly on Community College Administrators. Along with the unique pressures of “critical incident” stress and management, the emphasis will be on personal stress and will provide techniques you can use to manage the impact of your stress.

Our presenter will explore the mounting research of the power of mindfulness on mitigating stress in the lives of athletes, law enforcement officers, business leaders and people in all walks of life. Experiential exercises will give a brief glimpse into mindfulness and other stress management techniques.

4:45 p.m. – 5:00 p.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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5:00 p.m. – 6:00 p.m.
CLOSED GENERAL SESSION
ALEXANDER VALLEY 1/2

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

Panelists: Fred Williams, President, ACBO and Executive Vice Chancellor, Finance, North Orange CCD (moderator) and the ACBO Board of Directors

Session Description: This session is the semi-annual meeting of ACBO--the Association of Chief Business Officials. ALL college/district staff attending the conference are members of the Association and are invited to attend this business meeting. Come meet your elected ACBO representatives and hear them report on a wide range of issues.

Information will be provided on the progress of various ACBO Task Forces and Workgroups that address critical business and fiscal issues on behalf of all 72 districts. The meeting agenda will also include a review of significant actions taken by the ACBO Board since the last semi-annual Association meeting in October 2014. You'll hear about the progress made on the Association's objectives to achieve strategic goals, and planned activities for the 2015-16 operating year as they relate to the ACBO ongoing Strategic Plan.

6:00 p.m. – 7:00 p.m.
Reception
This reception will include complimentary wine tasting from the award winning Shone Farms, brought to you by Santa Rosa Junior College.
KNIGHTS VALLEY GARDEN

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7:00 p.m.
Dinner on Your Own

WED 5/20

8:00 a.m. – 10:00 a.m.
Conference Check-In/Information Desk Open
ALEXANDER VALLEY FOYER

8:00 a.m. – 8:30 a.m.
Networking Buffet Breakfast
ALEXANDER VALLEY FOYER

8:30 a.m. – 10:00 a.m.
CLOSED GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Semi-Annual Report of the Chancellor's Office and System Update

The Chancellor's Office executive team will be on hand to update attendees on the latest with regard to Budget, apportionment issues, the FON and other fiscal matters. This will be followed by a presentation from members of the Workgroup on Fiscal affairs with information regarding the Growth formula, the \$125 million base allocation recommendation and other issues the Workgroup has addressed since our last conference report. This is to be followed by a comprehensive Q&A so all your questions and concerns can be addressed.

10:00 a.m. – 10:15 a.m.
Refreshment Break
ALEXANDER VALLEY FOYER
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10:15 a.m. – 11:30 a.m.
GENERAL SESSION
ALEXANDER VALLEY 1/2

Topic: Legislation, Policy and Advocacy: An Organizational Perspective

Presenters: Michelle McKay Underwood, Legislative Director, School Services of California, Inc. and ACCCA Legislative Advocate and Thuy Thi Nguyen, Interim President and CEO, Community College League of California (CCLC)

Session Description: Following the System Update by the Chancellor's Office, our friends from the League and ACCCA will weigh in with a discussion of some of the political realities facing community colleges in the current session and beyond. Critical policy issues, legislation and strategies for effectively advocating for districts as well as their students, staff and administrators will be discussed.

11:30 a.m.
Conference Adjourns

2015 ACBO Spring Conference

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Company Bio: CWDL, Certified Public Accountants has over 100 combined years of public accounting experience behind it. Our firm offers a diverse array of governmental assurance and fraud services to clients ranging from single campus districts to multi-billion dollar government investment pools. The partners and staff at CWDL have considerable experience in working with California Community College Districts and we welcome the opportunity to participate in your next RFP.

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Company Bio: Morgan Stanley is a global financial services firm and a market leader in

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Company Bio: Piper Jaffray is a leading financial and underwriting firm serving the needs of California schools and community colleges since 1988. We provide custom and innovative financing solutions by structuring and underwriting General Obligation Bonds, Lease Revenue Bonds, Tax Revenue Anticipation Notes (TRANS), GASB 45 Liability Fundings, Bond Refinancings and Bridge Financings. Piper Jaffray's California Education Finance Team is based in San Francisco and Los Angeles.



RBC Capital Markets

RBC Capital Markets, LLC

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Company Bio: RBC Capital Markets is a premier investment bank that provides a focused set of products and services to clients around the world. We operate out of 70 offices in 15 countries. Operating since 1869, RBC is one of the top 15 largest banks in the world and the fifth largest in North America, as measured by market capitalization. With RBC's recently announced acquisition of City National, we are committed to creating a powerful expansion platform for long-term growth.



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Company Bio: Established in 1982, KNN Public Finance provides independent finance advisory

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Company Bio: BRJ & Associates provides balanced, prudent and valued construction management leadership to address our clients' needs. Our value is found in capital improvements that meet our clients' goals.

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Company Bio: Mr. Dacey has been litigating complex jury and bench trials for over 26 years. His primary focus is complex construction problem solving and litigation. Mr. Dacey has successfully litigated over 500 private & public construction related disputes.

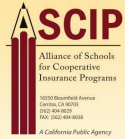


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Company Bio: We have been serving the insurance needs of students since 1950. If you have students, we have just the insurance plan(s) they need: accident insurance for students and athletes, special risks coverage for all occasions, health insurance for domestic, international and study-abroad students. If your students need it, we have it. STUDENT INSURANCE led the industry in 1950 and we continue to lead the industry.

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Company Bio: Stifel structures and underwrites G.O. bonds and COPs for California's community college districts.



School Project for Utility Rate Reduction (SPURR)

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Company Bio: The School Project for Utility Rate Reduction (SPURR), a California joint powers authority, aggregates purchasing in the procurement of utilities for school districts, community colleges, and county offices of education.



WLC Architects, Inc.

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Company Bio: As a client-focused firm of talented professionals, WLC Architects is passionate about creating timeless design.

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Company Bio: AECOM provides comprehensive planning, design, program management and construction management services to California CCD's.



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Company Bio: Christy White Associates provides quality audit services to local government and nonprofit agencies.



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Company Bio: Crowe Horwath LLP is one of the largest public accounting, consulting, and technology firms in the U.S.



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Company Bio: Keygent is a financial advisory firm focused on serving California education districts on bond programs.



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