

ASSOCIATION OF CHIEF BUSINESS OFFICIALS



# 2019 SPRING CONFERENCE

**MAY 20 - 22**

Resort at Squaw Creek  
Lake Tahoe, California



# ACBO 2019 SPRING CONFERENCE

## MAY 20-22, 2019

### MONDAY, MAY 20

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#### 9 AM-5 PM | LOBBY ALCOVE

Conference Check-In/Information Desk Open

Breakfast on your own

Sponsored by: RBC Capital Markets

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#### 10 AM-11:15 AM | GENERAL SESSION | GRAND SIERRA A/B

##### How the Sausage is Made: A Look Behind the Scenes of State Education Policy Decision Making

**PANELISTS:** Scott Himelstein, President, PBK-REDI; Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services, San Diego CCD

**SESSION DESCRIPTION:** Every year 3,000 legislative bills are introduced in the California Legislature. Around 600 of those bills regulate appropriate and mandate policy and funding for K-16 education. Which and why some of those bills make it through the legislative process is a mystery not only to the public but to those charged with implementing them. This 75 minute interactive session draws back the curtain on the player's, processes and the resulting winners and losers in the making of California education policy.

#### 11:15 AM-11:30 AM | GRAND SIERRA PRE-FUNCTION

Refreshment Break

Sponsored by: Piper Jaffray

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#### 11:30 AM-12:45 PM | CLOSED GENERAL SESSION | GRAND SIERRA A/B

##### ACBO Semi-Annual Association Meeting

(This meeting is for college/district business officials only.)

**PANELISTS:** Ann-Marie Gabel, President, ACBO and Vice Chancellor, Business Services, South Orange CCD (moderator) and the **ACBO Board of Directors**

**SESSION DESCRIPTION:** *This session is the semi-annual meeting of ACBO. Come ready to ask the ABCO Board questions on any burning issue you may have. We want this to be an interactive session to help us get to know each other and learn what's happening with ACBO.*



(MON. MAY 20 CONTINUED)

## 12:45 PM-1:30 PM | CASCADES

### Luncheon

Sponsored by: Student Insurance & BankMobile

## 1:45 PM-2:45 PM | CONCURRENT SESSIONS

### Option One: The New Reality of Rising Pension Costs | Grand Sierra A/B

**PANELISTS:** **Lizette Navarette**, Vice President, Community College League of California; **Dan Troy**, Assistant Superintendent/ Vice President, San Luis Obispo CCD; **Jose Torres**, Executive Vice Chancellor, San Bernardino CCD; and **Maureen Toal**, Senior Vice President, PARS

**SESSION DESCRIPTION:** This session examines the impact of CalSTRS/PERS on college finances and explores options for managing these rising future costs. We will survey the myriad of ways that districts are addressing this fiscal challenge and will feature two in detail: San Luis Obispo County Community College District and San Bernardino Community College District. The panel will discuss latest state retirement system developments, proposed state budget funding, funding sources and strategies, and dealing with Boards and negotiations.

### Option Two: Implementation of the California College Promise Grand Sierra C/D

**PANELISTS:** **Christine Statton**, Vice President Administrative Services, College of the Sequoias; **Bryan Dickason**, Specialist, Student Financial Aid, CCCCCO; and **Jeanette Gordon**, CFO, LACCD

**SESSION DESCRIPTION:** With AB 19 funds allocated in 2018-19 and AB 2 proposed to nearly double the amount of ongoing allocation, Chancellor's Office staff and CBO's will share the goals of the California College Promise, legislative background, legislative requirements, and examples of how the Promise is being implemented at California Colleges for free first and second year college for first-time students. Fee waivers, enrollment fee reimbursement grants, grants to pay other student fees or costs, and other recommendations will be discussed.

## 2:45 PM-3 PM | GRAND SIERRA PRE-FUNCTION

### Refreshment Break

Sponsored by: East West Bank



### 3 PM-4 PM | CONCURRENT SESSIONS

#### Option One: All About Auxiliary Organizations | Grand Sierra A/B

**PANELISTS:** Christopher Fallon, Associate, and Eileen O'Hare-Anderson, Partner, Liebert Cassidy Whitmore; and Eileen Cichocki, Assistant Superintendent/Vice President, Administrative Services, Mendocino-Lake CCD

**SESSION DESCRIPTION:** Community college districts establish auxiliary organizations to operate their bookstores, food services, student associations, facilities, and more. We will discuss the difference between an auxiliary and an independent 501c3 nonprofit, their establishment, and legal implications to the District. This session will also explore the various regulations governing the responsibilities of auxiliary organizations and their activities, including issues relating to fundraising, gifts, donations and raffles.

#### Option Two: The New Funding Formula and How it Changes Collective Bargaining | Grand Sierra C/D

**PANELISTS:** Laura Benson, ESS Consultant and Guy Bryant, Partner, AALRR; and Susan Yeager, Vice Chancellor Fiscal Services, Yosemite CCD

**SESSION DESCRIPTION:** This session is a practical session about the challenges of bargaining with unions and the new funding formula. The presenters have recent experience with collective bargaining, impasse and the challenges that the new funding formula presented in the entire process. Practical information will be provided to help your District prepare for the next round of negotiations.

### 4 PM-4:15 PM | GRAND SIERRA PRE-FUNCTION

#### Refreshment Break

Sponsored by: Stifel

### 4:15 PM-5:15 PM | CONCURRENT SESSIONS

#### Option One: Calculating and Understanding FTES | Grand Sierra A/B

**PANELISTS:** Christine Statton, Vice President Administrative Services, College of the Sequoias and John Mullen, Senior Consultant, Fiscal Services, CCCCCO

**SESSION DESCRIPTION:** The major part of apportionment funding is based on FTES, a unit of measure with a simple name but a complex definition. Learn the details of how to calculate FTES and be prepared to respond to challenging questions from the auditors. Find out how to schedule classes to maximize FTES yield.

#### Option Two: Public Private Partnerships to Enhance Financial Flexibility and Human Capital | Grand Sierra C/D

(MON. MAY 20 CONTINUED)

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**PANELISTS:** Ken Stoppenbrink, Advisor and Lance Holman, CEO, Holman Capital; Fred Harris, Vice President, Administrative Services, Gavilan College; and Mark Graham, Principal, WLC Architects

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**SESSION DESCRIPTION:** Holman Capital Equity Partners will explore how community colleges can forge Public Private Partnerships with investors to build new student housing and educational facilities and optimize existing assets. Now you can right size your pension and healthcare liabilities, modernize your facilities, and upgrade technology to meet the needs of students and staff in the 21st century.

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### 5:15 PM-6:30 PM | SUN AND SPA DECKS

Welcome Reception (Entertainment, Brad Perry)

Sponsored by: PARS & SPURR

### 6:30 PM-9 PM | ALPINE BALLROOM

Casino Night

Sponsored by: Forefront Power, Keenan & CWDL

## TUESDAY, MAY 21

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### 8 AM-5 PM | LOBBY ALCOVE

Check-In/Information Desk Open

Sponsored by: KNN Public Finance

### 7:30 AM-9 AM | CASCADES

Networking Breakfast

Sponsored by: Schools Excess Liability Fund

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### 9 AM-10:15 AM | GENERAL SESSION | GRAND SIERRA A/B

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#### Financial Aid Expansion and Reform—Impacts to SCFF

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**PANELISTS:** Rhonda Mohr, VC, Student Services and Special Programs, CCCO; Elizabeth Friedmann, Postdoctoral Researcher, UC Davis School of Education and Laura Metune, Vice Chancellor for External Affairs, CCCCCO

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**SESSION DESCRIPTION:** There are two simultaneous efforts in play during spring 2019 –both designed to ensure that students have the financial aid resources they need to successfully complete their educational goals. This session will cover SB 291, a bill that would add \$1.5 billion to a financial aid program for CCC students, and efforts to encourage policy and operational changes designed to ensure students are getting all of the funds they are eligible to receive from existing financial aid programs.

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### 10:15 AM-10:30 AM | GRAND SIERRA PRE-FUNCTION

Refreshment Break

Sponsored by: PBK Architects



(TUE. MAY 21 CONTINUED)

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**10:30 AM-11:45 AM | GENERAL SESSION–KEYNOTE PRESENTATION  
GRAND SIERRA A/B** Sponsored by: ASCIP

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**Judah Friedlander, Comedian, star of Netflix specials and part of the 30 Rock TV series cast.**

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**11:45 AM-12:45 PM | CASCADES**

**Luncheon and Welcome Address**

Welcome Address presented by: **Jeff DeFranco**, Superintendent/President,  
Lake Tahoe Community College District

Sponsored by: CFW Inc. & Ellucian

**12 PM-12:30 PM | CASCADES**

**Welcome Address**

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**12:45 PM-1:45 PM | GENERAL SESSION | GRAND SIERRA A/B**

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**The Changing Capital Outlay Program**

**PANELISTS:** **Ann-Marie Gabel**, Vice Chancellor Business Services, South Orange County CCD; **Carlos Montoya**, Director of Facilities Planning and Utilization, CCCCCO

**SESSION DESCRIPTION:** In accordance with the desire of the Board of Governors and in order to better align with the Vision for Success, the Chancellor's Office has requested that the Capital Outlay Program metrics reflect elements that support those goals. The Chancellor's Office requested that the ACBO Facilities Taskforce work with them to envision a new program. Come see where we started and where we are now in recommending changes for the Capital Outlay Program.

**1:45 PM-2 PM | GRAND SIERRA PRE-FUNCTION**

**Refreshment Break**

Sponsored by: WLC Architects

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**2 PM-3 PM GENERAL SESSION | GRAND SIERRA A/B**

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**SCFF Update**

**PANELISTS:** **Christian Osmena**, Vice Chancellor, CCCCCO; **Dr. Bonnie Ann Dowd**, Executive Vice Chancellor, Business & Technology Services, San Diego CCD; **Ann-Marie Gabel**, ACBO President and Vice Chancellor of Business Services, South Orange County CCD; **Jeanette Gordon**, Chief Financial Officer/Treasurer, Los Angeles CCD and **Andy Suleski**, Vice President for Administration, Butte-Glenn CCD.

**SESSION DESCRIPTION:** Members of the CCCCCO Advisory Workgroup on Fiscal Affairs will provide recent and ongoing changes being considered to the SCFF and how these changes might impact your district planning in 2019-20 and beyond. In addition, Ann-Marie and Bonnie, who both serve on the Legislative Oversight Committee formed by Governor Brown, Senate and Assembly leadership to review and address specific aspects of the SCFF over the next three years will provide an update on that committee's work.

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(TUE. MAY 21 CONTINUED)

### 3 PM-3:15 PM | GRAND SIERRA PRE-FUNCTION

#### Refreshment Break

Sponsored by: Holman Capital Corp.

### 3:15 PM-4:15 PM | GENERAL SESSION | GRAND SIERRA A/B

#### Supporting the CBO as a Leader for Educational Equity

**PANELISTS:** **Christian Osmena**, Vice Chancellor, CCCCCO, **Eric Felix**, Post-Doctoral Scholar, University of Southern California Center for Urban Education, **Rigel Massaro**, Senior Staff Attorney, Public Advocates and **Jessie Ryan**, Executive Vice President, Campaign for College Opportunity

**SESSION DESCRIPTION:** The Vision for Success commits to closing equity gaps by 2025, and the SCFF reinforces that a district's budget can be an important lever in improving outcomes. CBOs must lead new discussions around the budget, measure the tradeoffs between different types of expenditures, and make decisions with equity as a key criterion. The Chancellor's Office, with external partners, will present ideas about, and seek feedback on, how to support CBOs in carrying out these responsibilities.

### 4:15 PM-4:30 PM GRAND | SIERRA PRE-FUNCTION

#### Refreshment Break

Sponsored by: CannonDesign

### 4:30 PM-5:30 PM | GENERAL SESSION | GRAND SIERRA A/B

#### Leveraging Chancellor's Office Budget and Financial Data to Improve Institutional Effectiveness

**PANELISTS:** **Christian Osmena**, Vice Chancellor, CCCCCO, **Drew Anderson**, Associate Economist, RAND Corporation, **Tatiana Melguizo**, Associate Professor, USC Rossier School of Education

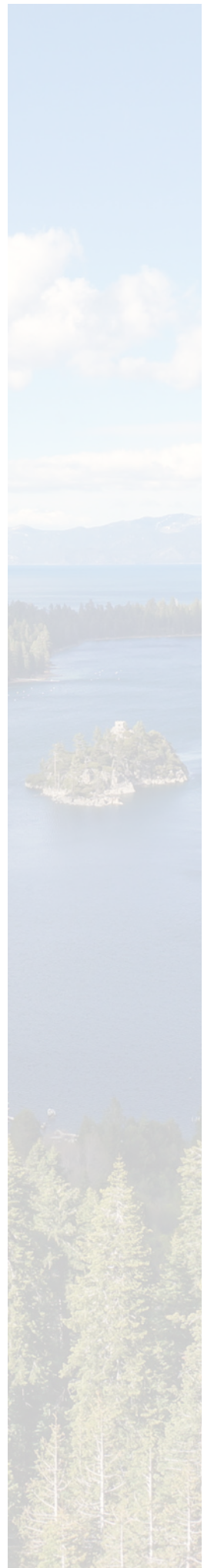
**SESSION DESCRIPTION:** The Chancellor's Office collects various data through the Management Information System, annual budget and financial reports, and other collections. Although the office has partnered with researchers to make student-level data more accessible, and gain new insights about student outcomes, there is less research about the "inputs" that lead to those outcomes. The Chancellor's Office, with research partners, will present initial analysis of the data, discuss concepts for future research, and seek feedback on data quality.

### 5:30 PM-7 PM | SUN & SPA DECKS

#### Reception (Entertainment, Brad Perry)

Sponsored by: Touchnet & Citigroup

#### 7 PM Dinner on Your Own



(TUE. MAY 21 CONTINUED)

## WEDNESDAY, MAY 22

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### 8 AM-11:30 AM | LOBBY ALCOVE

Conference Check-In/Information Desk Open

### 7:30 AM-8:30 AM | CASCADES

Networking Buffet Breakfast

Sponsored by: Nelnet Campus Commerce

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### 8:30 AM-10 AM | CLOSED GENERAL SESSION | GRAND SIERRA A/B

#### Legislative Update

**PANELISTS:** **Lizette Navarette**, Vice President, Community College League of California

**SESSION DESCRIPTION:** California's Community Colleges are in the midst of critical policy and budgetary reforms. The theory of change driving these efforts is an aspiration to increase access, equity, and success. Can colleges expect more changes? What are the key policy conversations at the Capitol this year? Get prepared for the final weeks of negotiations with this informative session. Attendees will receive a state level report on the numbers, discuss strategy and talk about how pending legislation and the current political influences will work together to determine the operational future of colleges.

### 10 AM-10:15 AM | GRAND SIERRA PRE-FUNCTION

Refreshment Break

Sponsored by: Eide Bailly

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### 10:15 AM-11:30 AM | GENERAL SESSION | GRAND SIERRA A/B

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

**PANELISTS:** **Christian Osmeña**, Vice Chancellor, College Finance & Facilities Planning Division; **Frances Parmelee**, Assistant Vice Chancellor; **Carlos Montoya**, Director of Facilities Planning; and **Wrenna Finche**, Director of Fiscal Standards & Accountability

**SESSION DESCRIPTION:** Back for their always informative closing session, the team from the Chancellor's Office will be on hand to update attendees on the latest developments with regard to the state budget, fiscal and facilities issues and other topics of interest to CBOs.

### 11:30 AM | CONFERENCE ADJOURNS



## NOTES

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal blue lines across its entire width, typical of standard notebook or legal stationery. The background is a clean, solid white color. There are no margins, text, or other markings present on the page.

## NOTES

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**2019 SPRING  
CONFERENCE**