

ACBO 2016 Fall Conference
October 24-26, 2016
Omni Rancho Las Palmas, Rancho Mirage CA

The Shifting Sands of a CBO

Monday, October 24, 2016

9:00 a.m. – 5:00 p.m.

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

Sponsored by: CASHNet
Room: Las Palmas Foyer

10:00 a.m. – 11:15 a.m.

GENERAL SESSION

Room: Las Palmas A-D

Topic: How to Establish a Framework for Fiscal Stability and Compliance

Panelists: *Sharlene Coleal*, Vice President of Business Services, College of the Canyons and *Mario Rodriguez*, Vice Chancellor, Finance & Facilities Division, California Community College Chancellor's Office

Session Description: Fiscal stability and compliance provides a foundation for success by connecting every department, program and activity through collaborative processes. Compliance requires the ability to effectively interpret and implement Federal, State and local regulations, correctly apply guidelines for grant and categorical funds and update and implement board policies and procedures on a regular basis. Fiscal indicators to achieve fiscal stability have been established by various agencies; State Chancellor's Office, FCMAT, ACCJC, etc. Adopting fiscal indicators with benchmarks creates a framework of criteria that can be evaluated regularly. The work of IEPI (Institutional Effectiveness Partnership Initiative) has encouraged districts to establish local indicators through a collaborative process and with the assistance of PRT (Partnership Resource Teams), colleges are able to share best practices throughout the Community College system and funding is made available to help meet the goals established by the indicators. Meeting fiscal stability criteria and maintaining compliance year after year will ensure the fiscal viability and success of a college and ultimately culminates in the best outcomes for our students.

11:15 a.m. – 11:30 a.m.

Refreshment Break

Room: Las Palmas E

Sponsored by: Stifle & Borrego Solar

11:30 a.m. – 12:45 p.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: Current Challenges and Evolving Trends in Campus Safety & Security

Panelists: *Kathy Blackwood, Executive Vice Chancellor, San Mateo County CCD and Steven Healy, Co-Founder & Managing Partner, Margolis Healy*

Session Description: This session addresses current issues in campus safety and the evolving trends for campus security and policing, and describes San Mateo County CCD's current process for deciding whether to arm its public safety officers. Community colleges are impacted by the troubling events occurring in our communities regarding police-community relations. Additionally, campus community members are calling for change in policies and practices on our campuses. We will explore the complex issues facing campus safety and security and recommend strategies for successfully addressing them.

12:45 p.m. – 1:30 p.m. **Luncheon and Welcome Address**
Room: Starlight Terrace
Sponsored by: Crowe Horwath

1:00 p.m. – 1:30 p.m. Welcome Address

Presenter: *Dr. Joel Kinnamon, Superintendent/President, College of the Desert*

Dr. Joel Kinnamon has been working in community colleges for over 25 years. A first generation college graduate, he attended Seminole Junior College in Oklahoma, and Oklahoma State University. There he received a Bachelors of Science in Agricultural Economics, and an M.B.A. with honors at Oklahoma City University. Later he earned a Doctorate degree in Higher Education Administration from Nova Southeastern University. He held various positions from 1989-2000 at Oklahoma City Community College, including Academic Dean, Department Chair, and Professor. Dr. Kinnamon was Provost for the Southeast Campus of Tulsa Community College from 2000 to 2002. In 2002, Dr. Kinnamon moved to the Bay Area where he served as Vice Chancellor of Educational Services and Planning, then Chancellor, at Chabot-Las Positas Community College District. In 2012, Dr. Kinnamon was appointed Superintendent/President at College of the Desert. Dr. Kinnamon currently lives in Palm Springs.

1:45 p.m. – 2:45 p.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: Integration Strategy of ALL Technology Initiatives

Panelists: *Theresa Tena, Vice Chancellor, Institutional Effectiveness, California Community College Chancellor's Office and Lou Delzompo, Chief Technology Officer, CCC Technology Center*

Session Description: The community colleges are evolving into a system! Come learn about project glue - the CCC system integration strategy. The project will connect the online education initiative, Common Assessment, and the Education Planning Initiative. It will integrate ERP

systems and result in an unprecedented data exchange model for the system. This project will set in motion new business practices impacting the registration of students and the determination of financial aid eligibility. In addition, massive amounts of data will be generated which will dramatically impact current administrative practices like enrollment management. Come learn more about the vision and timeline for this project!

2:45 p.m. – 3:00 p.m. **Refreshment Break**
Room: Las Palmas E
Sponsored by: VTD

3:00 p.m. – 4:00 p.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: Auxiliary Organizations Manual

Panelists: Heather McGee Decauwer, Senior Manager, Vicenti and Felipe Lopez, Chief Business Officer, Compton CCD

Session Description: A discussion on the much anticipated Auxiliary Organization Manual - A Guide to Establishing, Operating, Accounting and Reporting for California Community College Auxiliary Organizations. What's new about the manual and when it will be issued.

4:00 p.m. – 4:15 p.m. **Refreshment Break**
Room: Las Palmas E
Sponsored by: AALRR

4:15 p.m. – 5:15 p.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: What CBOs need to know about Effective and Defensible Workplace Investigations

Panelists: Pilar Morin, Partner, Liebert Cassidy Whitmore

Session Description: Business Officers may be required to participate in workplace investigations triggered by the need to comply with legal obligations, ensure consistent enforcement of District policies, and maintain operational integrity. Workplace investigations address allegations of workplace violence, misconduct, and policy violations and often have high stakes and a significant impact in any related discipline or litigation. This presentation will walk attendees through a blueprint for conducting meaningful, defensible investigations, following key protocols, and avoiding key pitfalls.

5:15 p.m. – 6:30 p.m. **Welcome Reception**
Room: Starlight Terrace
Sponsored by: ASCIP & PARS

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

Please join us for the presentation of the 2017 Walter Star Robie Award and the CBO Longevity

Pin Ceremony.

Room: Starlight Terrace

Sponsored by: Piper Jaffray, KNN Public Finance, Keenan & Associates, Morgan Stanley, RBC Capital Markets

Tuesday, October 25, 2016

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

8:00 a.m. – 9:00 a.m. **Networking Breakfast/Round Table Discussion Topics**
Room: Sunrise Terrace
Sponsored by: WLC Architects

9:00 a.m. – 10:15 a.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: Leading Change, Proven Organizational Change Strategies

Panelists: Dr. Bonnie Ann Dowd, Executive Vice Chancellor, Business & Technology Services and Jeff DeFranco, Vice President, Administrative Services, Lake Tahoe CCD

Session Description: This presentation will cover the unique elements of leading change in the California Community College system with lessons based on the organizational change literature. Current best practice change models will be discussed with information deriving from Ted Talks, NY Times best sellers, and research based change leadership articles. The presentation will cover tools to lead change at both the college and district level. Examples from higher education and industry, both successful and unsuccessful, will be shared.

10:15 a.m. – 10:30 a.m. **Refreshment Break**
Room: Las Palmas E
Sponsored by: Nelnet Business Solutions

10:30 a.m. – 11:45 a.m. **General Session**
Room: Las Palmas A-D
Sponsored by: BRJ & Associates, Bergman Dacey

Keynote Presentation: Roger Crawford

Who Do You Think You Are?
How to Achieve Peak Performance

Sports Illustrated has acknowledged Roger Crawford as “one of the most accomplished physically challenged athletes in the world”. After realizing tremendous success on Center Court, as a Division 1 athlete he took his talents to Center Stage and became a motivational speaker. Roger positively influences audiences worldwide, eloquently sharing the principles he has lived—adaptability, possibility thinking, and

eliminating self-imposed obstacles. Roger has been inducted into the National Speakers Association Hall of Fame in recognition of his professional speaking success.

The foundation of exceptional performance is the belief that success is possible and that we have the capability to achieve our objectives. Because we rarely if ever perform better than we believe we can. This dynamic program provides skills and strategies needed to positively redefine who you think you are, shatter self-imposed limitations & unleash peak performance.

12:00 p.m. – 12:45 p.m. **Lunch**

Room: Starlight Terrace

Sponsored by: BankMobile Disbursements

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

Option One: Sustainably Managing Risk: The Business Official's Role beyond Internal Controls

Room: Las Palmas F-H

Panelists: *Sarah Schrader, Controller, Yosemite CCD; Bert Nuehring, Partner, Jeff Jensen, Partner, and Kathy Lai, Partner, Crowe Horwath LLP*

Session Description: Managing risk at a college is not solely the responsibility of the Risk Manager, but includes the Board, CBO, Fiscal Services and IT. Many Enterprise Risk Management (ERM) programs have been initiated only to diminish and disappear in a few short years. Based on field tested practices this session will focus on specific strategies for developing a sustainable ERM program that adds value to your community college district.

Option Two: Managing Change Through Difficult Times

Room: Las Palmas A-D

Panelists: *CM Brahmhatt, Managing Director, Cambridge West Partnership LLP; Dr. Don Wallace, Superintendent/President and Russi Egan, Vice President, Administrative Services, Palo Verde College*

Session Description: During the economic downturn of recent years, managing expectations was difficult. Trying to juggle the needs of human, technological, facility and financial resources were nearly impossible. You heard of the bad times and some of the things being done to recover at Palo Verde College. The story concludes with a look back over the last five years and the results of hard work and community support.

2:00 p.m. – 3:00 p.m. **CONCURRENT SESSIONS**

Option One: Leveraging State Funding With Integrated Planning

Room: Las Palmas A-D

Panelist: *Ann-Marie Gabel, Vice President, Administrative Services, Long Beach City College; Melanie Siddiqi, Vice President, Administrative Affairs, Chaffey College; Eric Mittlestead, Associate Vice Chancellor for Facilities, Kern CCD; and Deborah Shepley, AIA LEED AP Director, Higher Education, Gensler*

Session Description: Learn how to improve the integration of your campus planning efforts to maximize opportunities to leverage state funding for capital construction projects. This session will provide you with tools, techniques and strategies to improve coordination between your facilities master plan, your five year construction plan, IPPs and FPPs. Expand your understanding of the Capital Outlay Program and acquire strategies to educate your campus leadership, inform your facilities planning discussions and leverage state funding.

Option two: ROI of Moving your ERP to the Cloud

Room: Las Palmas F-H

Panelist: *Ed Maduli*, Vice Chancellor, Administrative Services and *Ron Smith*, Chief Information Officer, West Valley Mission CCD; **Chris Collier**, Cloud Account Executive and **Bob Zwarycz**, Director of Cloud Applications, Ellucian

Session Description: The proliferation of the cloud has been transformational within higher education, but has it lived up to its promises? Many are waiting to see what the ROI looks like for institutions that have decided to make the move. Hear directly from West Valley Mission Community College District about why they decided to move their ERP to the cloud and how it is helping to provide educational services that are flexible, cost-effective, and tailored to constituents' needs.

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

Room: Las Palmas E

Sponsored by: Gensler

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

Option One: Proposition 39: Year 4 Update and What Lies Ahead

Room: Las Palmas A-D

Panelists: *JoAnn Higdon*, Vice President, Administrative Services and **Bob Bradshaw**, Manager Design & Construction, El Camino College; and **Lisa Hanamann**, Southern California Edison

Moderator: *Peter Hardash*, Vice Chancellor, Business Operations/Fiscal Services, Rancho Santiago CCD

Session Description: The California Community Colleges have embarked on Year 4 of the Five Year Proposition 39 Clean Energy and Jobs program. The program has been very successful in utility cost savings with over \$145 million in energy savings projects funding to date. In this presentation you will hear from representatives of the Chancellors Office, District CBO's and Facility Managers, and the CCC/IOU Partnership about Proposition 39 success stories and how to prepare for Year 5 and beyond. Don't miss it!

Option Two: We Received a "Public Records Act Request"! - Now What?

Room: Las Palmas F-H

Panelists: *Stephan Birgel*, Sr. Director of Litigation Management, ASCI and **Neal Meyers**, Attorney, Meyers Fozi LLP

Moderator: *Teresa Scott*, Executive Chancellor, Yosemite CCD

Session Description: Districts have seen an increase in the amount of requests they receive for information pursuant to the Public Records Act. This seminar will assist community colleges and their employees by addressing legal and practical obligations imposed on a college when served with such a request. The seminar will provide a hands on explanation of the what to do when served with a request. Attendees will gain an understanding of the obligations imposed, appropriate responses and the ramifications for not complying. The seminar will include real world examples and provide the tools to confidently handle all issues related to Public Records Act requests.

4:30 p.m. – 5:30 p.m.

CLOSED GENERAL SESSION

Room: Las Palmas A-D

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

Panelists: *Andy Suleski, President, ACBO and Vice President of Administration, Butte-Glenn Community College (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 are tasked with addressing 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 May 2016. You'll hear about the progress made on the Association's objectives to achieve strategic goals, and planned activities for the 2016-17 operating year as they relate to the ACBO 2016-18 Strategic Direction.

5:30 p.m. – 7:00 p.m.

Reception

Room: Sunrise Terrace

Sponsored by: Ellucian & Student Insurance

7:00 p.m.

Dinner on Your Own

Wednesday, October 26, 2016

8:00 a.m. – 11:30 a.m.

Conference Check-In/Information Desk Open

Room: Las Palmas Foyer

8:00 a.m. – 8:30 a.m.

Networking Buffet Breakfast

Room: Las Palmas E

Sponsored by: SELF

8:30 a.m. – 10:00 a.m.

CLOSED GENERAL SESSION

Room: Las Palmas A-D

Topic: Semi-Annual Report of the Chancellor's Office & the Community College League of California System Update

Panelist: Mario Rodriguez, Vice Chancellor, Finance & Facilities Division, California Community College Chancellor's Office and **Lizette Navarette**, Vice President of Strategy & Policy Development, Community College League of California

Session Description: Is your head spinning trying to understand what happened at the Capitol this year? This session can help. The Chancellor's Office and the League will provide legislative and budget updates, including: chaptered bills that will affect your colleges, implementation for the 2016-17 Budget Act, and expectations for the 2017-18 budget process. You'll hear polling updates and impacts of Proposition 51 and Proposition 55. They'll also discuss major policy changes that continue to influence colleges.

10:00 a.m. – 10:15 a.m. **Refreshment Break**
Room: Las Palmas Foyer

10:15 a.m. – 11:30 a.m. **GENERAL SESSION**
Room: Las Palmas A-D

Topic: State Budget and Economic Update

Panelist: Robert Miyashiro, Vice President, School Services of CA Inc.

Session Description: This presentation will include a brief overview of the outlook for the U.S. and California economies and recent developments in state revenue collections. In addition, Robert will review the revenue and Proposition 98 assumptions contained in the 2016-17 Budget Act and comment on the likelihood that these assumptions will prove correct. Finally, Robert will offer some insights into the upcoming Governor's Budget for 2017-18, which will be released in just over two months.

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