

President's Message



Bill Bowen, 2015-16
VASBO President

Allow me to begin by extending my heartfelt appreciation to Wayne Cosby. Wayne had the enormous task of being president of VASBO during our 50th anniversary year. It was a time for celebrating, reflecting, and connecting with old friends. Expectations were high and Wayne's leadership allowed for an outstanding year for VASBO!

Our mission at VASBO is brought to life by the numerous hardworking individuals volunteering their time to serve in one of the many, important roles within the organization. This team of dedicated professionals is comprised of eleven members of the executive committee, eleven committee chairs, and two vendor representatives. As one can see, it takes a team to provide the resources to our members, plan and organize our conferences, and provide meaningful continuing education sessions. That being said, I would like to welcome our newest members to the Board of Directors: Christina Berta, Director, Williamsburg/James City County; Tim Yetter, Director, Loudon County; Tina Cropp, Director, Madison County; Krista Kelly, Continuing Education Committee, Manassas Park; Karen Murray, Constitution and By-laws, Middlesex County; Amy Eberly, Membership, Nottoway County; Chip Jones, Membership, Cumberland County; Jean Rae Hulstine, Welcoming Committee, Poquoson; Joanne Wright, Welcoming Committee, Gloucester. This is an extremely exciting time for VASBO, and we are glad to have you all on board!

The Board recently concluded the summer business meeting in Charlottesville where we began working to update the legislative agenda, identifying issues impacting K-12 education for the coming year and planning for the fall conference. The Board continues work on the strategic plan with the goal of completion by the end of fiscal year 2016.

It is truly an honor to serve this organization as president. I look forward to a meaningful and memorable year ahead in 2015-16 and look forward to seeing you at the fall conference in Newport News, October 15-16.

Best Regards,

Bill Bowen



Past Presidents from left, Joe Black, Edie Williams and Jim Ward participating in a panel discussion at the Spring Conference



Pictured left to right are Tim Yetter, Christina Berta, LaShahn Gaines, Shannon Irvin, Bill Bowen, Brook Thomas, Tina Cropp and Jonathan Miller

Introducing the VASBO 2015-16 Officers		
President	Bill Bowen	Poquoson City
President-Elect	Shannon Irvin	Nelson County
Treasurer	LaShahn Gaines	Spotsylvania County
Secretary	Brook Thomas	Northampton County
Director	Tina Cropp	Madison County
Director	Jonathan Miller	Chesterfield County
Director	Christina Berta	Williamsburg/JCC
Director	Tim Yetter	Loudoun County
Past President	Wayne Cosby	Henrico County
SASBO Director	Misty Caish	Virginia Beach City

Introducing the VASBO 2015-16 Management Team		
ASBO Rep	Wayne Cosby	Henrico County
Audit Committee	John Broderick	Sussex County
Cardinal Award Oversight	Deborah White	Goochland County
Constitution & Bylaws	Karen Murray	Middlesex County
Continuing Education	Krista Kelly	Manassas Park City
Legislative	David Cline	Prince William County
Membership Co-Chair	Amy Eberly	Nottoway County
Membership Co-Chair	Katie Miano	Montgomery County
Membership Co-Chair	Chip Jones	Cumberland County
Nominations	Wayne Cosby	Henrico County
Past President Liaison	Dennis Jarrett	York County
Resolutions	Marilyn Woodall	Chesapeake City
Scholarship Chair	Penny Hodge	Roanoke County
Vendor	Tracey Worley Amy Hardy	Pittsylvania County
Vendor Reps	Dixcy Kilduff Mallory Wiggs	American Fidelity TRA Software
Technology Advisor	Bill Flaherty	Retired
Welcoming-Co Chair	JoAnne Wright	Gloucester County
Welcoming-Co-Chair	Jean Rae Hulstine	Poquoson City



Magician David Harris entertained the members at the Spring Conference

VASBO ANNUAL CARDINAL AWARD

The Virginia Cardinal Award is VASBO's premier recognition given to one of its members each year for exemplifying professionalism, leadership, and innovation in the field of school business management. The award winner is announced at the Spring VASBO conference. The winner also attends the Southeast Association of School Business Officials (SASBO) the following year and is recognized as the Outstanding School Business Official for the Commonwealth of Virginia.

Nominations are accepted year round but close on February 28th for the current award year. If you know a member of VASBO who has made a significant impact in local and state school business finance, please complete the [Cardinal Award Nomination Form](#) and email it to Debbie White at dwhite@glnd.k12.va.us by February 28, 2016.

The current Cardinal Award winner is Lisa Frye, Executive Director of Finance for Frederick County Public Schools. She is a certified Administrator of School Finance and Operations (SFO) through ASBO International and is a Past President of VASBO. In the last few years she has been instrumental in coordinating a shared knowledge base of detailed financial information from the Virginia Department of Education, a blogging platform for sharing ideas and collegial dialogue, and the use of a state-wide document library. For 17 years she has been the primary financial advisor to the Frederick County Superintendent and School Board and has established a number of division tools and programs for student projections, position control, staff severance, and construction fund management. She is valued for her strong team building skills, transparency, and integrity.

Past winners of the Cardinal Award include:

- FY2009 Edith Williams – Richmond County
- FY2010 James Meyer – Spotsylvania County
- FY2011 David Cline - Prince Williams County
- FY2012 Williams Flaherty – Spotsylvania County
- FY2013 Dennis Jarrett - York County
- FY2014 Penny Hodge - Roanoke County

Submitted by Deborah White, 2015-16 Cardinal Award Oversight Chair



Lisa Frye, on the right, receiving her Cardinal Award from Deborah White, Cardinal Award Oversight Committee Chair



Cecil Radcliff, retired from Virginia Retirement Specialist, receives a resolution from Marilyn Woodall for his service as a Vendor Representative on the VASBO Board and being a long-time Vendor.

UVA Cohort II Graduates

VASBO wishes to congratulate the following individuals that completed Cohort II of the UVA Certification Program at the Spring Conference. They are:

Mextli Guerrero—Arlington County

Christina Berta—Williamsburg/James City County

John Broderick—Prince George County

Misty Caish—Virginia Beach City

Sarah Hayes—Winchester City

Becky Hicks—Surry County

Krista Kelly—Manassas Park City

Bruce McMillan—Appomattox County

Karen Murray—Middlesex County

Crystal Pate—Virginia Beach City

Barbie Stombock—Spotsylvania County

Maria Voultsides—Arlington County

UVA Cohort III started at the Spring Conference and there are plans for additional cohorts. If you are interested please contact Cynthia Orshek at cgo3w@eservices.virginia.edu.

COMING SOON! Fall 2015 Conference - Newport News

VASBO's Fall conference (October 15-16) in Newport News, VA will be another great opportunity to learn and grow. The VASBO Conference will be at the Marriott—Center City. VASBO directors and management team are already focused on the conference activities. Mark your calendars now! Here's a partial list of presentations for the conference:

- ◆ Construction Financing
- ◆ Role of VRS in Pension Liability
- ◆ Financial Reporting, CAFR, & Budget documents
- ◆ Local MOE Regulations Update
- ◆ The Cadillac Tax of the ACA

In addition, the keynote speaker for Friday morning will be Senator John Miller, representing Senate District 1.

Legislative Program and Input

Each year, VASBO develops and the membership approves a number of legislative positions representing our concerns to the General Assembly. We are currently in the process of updating the package in preparation for the next legislative session. There are a great many items to consider, ranging from re-benchmarking, support costs, charter schools, 65% rule and etc... The current legislative program for FY 2015 can be found on the VASBO web site or by [clicking here](#). Please review the materials and provide your input and updates by August 15, 2015 to Dave Cline at clined@pwcs.edu. The Legislative proposal will be voted on at the Fall Conference business meeting.

Submitted by Dave Cline, Legislative Committee Chair



ASBO Past President Terrie Simmons speaking at Wednesday Night's opening session

VASBO Scholarships

VASBO offers annual scholarships to deserving high school seniors to attend college. To be eligible, an applicant must be the child or grandchild of a member in good standing of VASBO. The applicant's sponsor must be a current VASBO member for four consecutive years, that includes the current year.

The successful applicant will be chosen based upon the VASBO Scholarship Committee's assessment of the applicant's academic achievement, character, school, and community service, and career goals. The recipients will be chosen after the deadline and announced immediately thereafter.

Scholarship recipients will be invited to the VASBO Spring Conference, typically held in May each year. Each recipient will be formally recognized at the Cardinal Award Lunch which is on the second day of the three day conference.

Application

Please review the application form located on the VASBO website under the Members Only section. If you have any questions please contact Penny Hodge at phodge@rcs.k12.va.us.

Deadline—All required information and forms must be submitted and postmarked by March 1, 2016 to:

Penny Hodge
VASBO Scholarship Chair
5937 Cove Road
Roanoke, VA 24019

Scholarship Winners from 2015 Spring Conference



Pictured above is Anna Henderson-Cox (left) with her mother Nicola Cox from Gloucester County. Others winners not able to attend the Spring Conference were Emily Atkins daughter of David Atkins from Salem City and Cassidy Bear, daughter of Julie Bear from Smyth County.

VASBO Past Presidents

Past Presidents are still an integral part of the VASBO organization by being members of the Nominations Committee. Nominations for next year directors and officers are discussed and approved at the Winter Conference and to be voted on at the Spring Conference. Each year at the Spring Conference VASBO honors the Past Presidents at a reception. All VASBO Past Presidents are invited to the Spring Conference in May 2016.



Past Presidents honored at Spring Conference in Roanoke

Past Presidents

Organizational Meeting		1965	Edith	Williams	1989-90
W.C.	Campbell	1965-66	Stephen	Partin	1990-91
Clement	Jacobs	1966-67	Glenn	Burdick	1991-92
Bayes	Wilson	1967-68	T. J.	Bise	1992-93
Earle	Buffington	1968-69	Bobby	Hall	1993-94
Leon	Cashwell	1969-70	Dave	Papenfuse	1994-95
Marvin	Sutphin	1970-71	Alexander	Bostrom	1995-96
Richard	Wingfield	1971-72	Norma	Frye	1996-97
Rolland	Bowers	1972-73	James	Beckner, Jr.	1997-98
John	Schneider	1973-74	Janet	Brown	1998-99
Joseph	Ringers, Jr.	1974-75	Raymond	Leonard	1999-00
Jerome	Stern	1975-76	Robert	Aylor	2000-01
Paul	Quintrell	1976-77	Robin	Corson	2001-02
Virginia	Thomas	1977-78	Steven	Bateson	2002-03
David	Alexander	1978-79	James	Thorsen, Jr.	2003-04
Nathan	Young	1979-80	Fred	Cabler	2004-05
John	Shughrue	1980-81	James	Meyer	2005-06
George	Atwell	1981-82	Leslie	Peterson	2006-07
Joseph	Black	1982-83	David	Cline	2007-08
Colleen	Dryden	1983-84	Dennis	Jarrett	2008-09
F. Carroll	Alexander	1984-85	Christie	Fleming	2009-10
John	Ryder	1985-86	William	Flaherty	2010-11
Wayne	Mehanes	1986-87	Joanne	Wright	2011-12
Jim	Ward	1987-88	Penny	Hodge	2012-13
Bob	May	1988-89	Lisa	Frye	2013-14
			Wayne	Cosby	2014-15

Open Letter to All Past Presidents



Letter to all VASBO Past Presidents:

Thanks to all of the past president's who participated in VASBO's 50th anniversary celebration last year. Whether it was participating in the learning sessions, networking, or presenting, your participation greatly contributed to the success of the conferences. To highlight just one item, VASBO has received numerous positive comments regarding the Past President's Panel Discussion that was held at the spring conference. Your leadership in public education and in the VASBO organization inspires and leads others in the profession today.

VASBO continues to grow and prosper, and past presidents are a major contributing factor to that success. VASBO continues to recognize the value you bring to the membership by extending into fiscal year 2016 the following benefits to past presidents.

For *retired* past presidents, VASBO will waive the registration fees for all conferences. In other words, retired past presidents can attend the fall, winter, and spring conferences free of charge. Lodging, golf, and special events are not included in this offer. In addition, all past presidents will continue to enjoy free membership to the Virginia Association of School Business Officials (VASBO) - your professional organization, retired or not.

VASBO invites all past presidents to share experiences, tell stories, and model leadership for its members. Your contributions add value to VASBO's newest generation. Please consider joining the program lineup by being a presenter or a discussion leader; or perhaps you have another idea. Contact me, your liaison, and we'll get you plugged into service!

VASBO hopes you will take advantage of these benefits and our invitation to participate or be a presenter. The organization truly values your past service to the organization and the expertise you bring to the profession.

If you should have any questions or would like additional information, please feel free to contact me.

Sincerely,

Dennis R. Jarrett
VASBO Past President Liaison
djarrett@ycsd.york.va.us
757-898-0449



Past President participants seated from left are Dr. David Alexander, Janet Brown, and Dr. Jim Meyer, along with moderator Dennis Jarrett.



Steve Bateson
Executive Director

Executive Director's Report

WOW, what a year VASBO has experienced! There were three outstanding conferences with top notch workshops and continuing education opportunities. Our vendors stepped up to the plate when we needed a speaker or other resources. Once again, our vendors showed their commitment to the organization by providing speakers and other resources when needed. Thank you for all you do for VASBO.

The VASBO 50th Anniversary Party at the Spring Conference may be over but we still have the rest of 2015 to celebrate. I still have some spring conference member give away bags left so I will bring to the Fall conference, just in case anyone wants one.

Our Spring Conference brought back some retired past presidents in a panel discussion about the changes in education over the years as well what was the hot topic when they were president. I want to thank all of the past presidents that came and shared their expertise and knowledge with our members.

VASBO had 41 Vendors in the Vendor Hall displaying their goods and services. There were positive comments from many of the vendor representatives regarding member interaction in the Vendor Hall. Thanks again to those vendors that participated during the 50th Anniversary year. We ended a very busy Thursday with dinner and entertainment. David Harris, a magician, came to Williamsburg to entertain and amaze us all with tricks that boggled all our minds. Many laughs were had by all.

Mark Your Calendars for upcoming VASBO Conferences.

Fall 2015 Conference—October 15-16, 2015
Marriott at City Center, Newport News, VA

Winter 2016 Conference—February 4-5, 2016
Richmond Marriott Downtown, Richmond, VA

Spring 2016 Conference—May 18-20, 2016
Hotel Roanoke and Conference Center, Roanoke, VA



Wayne Cosby, 2014-15 VASBO President and Chris Sorensen, Chesterfield County catching up



Dennis Jarrett, York County, in an intense conversation with Dave Baker, Fredericksburg City

PICTURES:

VASBO 2015 Spring Conference pictures can be seen by clicking [here!](#)

Virginia ASBO and Forecast5 Partnership Update

The data analytics partnership between VASBO and Forecast5 continues to grow. Twenty-three school divisions have signed up for the **5Sight** business intelligence platform since its launch at the VASBO Fall Conference. 5Sight allows school business officials to conveniently access statewide data to identify trends and assess performance. The platform provides interactive visual graphics that help answer commonly asked questions, as well as, generate actionable business insights.

VASBO members are using 5Sight for a variety of projects including:

- Enrollment projections and building capacity analysis
- Compensation and staffing comparisons
- Financial performance analysis
- Recently, Forecast5 added two new data categories with accompanying analytics in the areas of Special Education and Health Insurance benefits.

Several VASBO members have also started to use **5Maps** which is a powerful analytic tool that allows schools to generate dashboard statistics and analysis of student data with the visual benefit of Google Maps. Schools are using this application to analyze school boundaries and strategies to deliver student services. In addition, some schools are integrating student assessment data to create a brand new way of analyzing academic performance.

Forecast5 has also been introducing its long range financial projections tool, **5Cast**, over the last several weeks. 5Cast is a tool that utilizes general ledger accounting data that can be used to generate forecasts and budgets. It also helps school divisions manage multi-variate scenarios for the purpose of identifying optimal decision paths.

If you need any additional information regarding the tools available in the program, contact Mike English at menglish@forecast5analytics.com.

Submitted by: Mike English
CEO of Forecast5 Analytics

SASBO NEWS

The Southeast Association of School Business Officials (SASBO) is already planning for their 2016 Conference "**Rollin on the River**" to be held in Shreveport, LA. The Conference will take place at the Hilton-Conference Center from April 12-14, 2016. This is a Joint Conference and Discovery Forum between SASBO and LASBO (Louisiana Association of School Business Officials). First Time Attendees session starts at 11:15 a.m. on Tuesday, April 12 and concludes with the opening session at 4:30 with a social afterwards. Wednesday includes workshops, visiting the vendor area and lunch. Thursday will start off with Discovery Tracks and end with dinner.

SASBO's Leadership Summit will be held on January 27—29, 2016 at Harrah's Hotel in New Orleans, LA. VASBO usually sends two members to the Leadership Summit. However, SASBO has granted us an additional 3 spaces to attend the Leadership Summit if anyone wishes to attend. Please contact Misty Caish at Misty.Caish@VBSchools.com, or Steven Bateson at admin@vasbo.org if you are interested in attending.

SASBO launched their NEW & IMPROVED website at www.sasbo.org last year. If you haven't visited the site please take some time and visit!

Submitted by Misty Caish, SASBO Director

VASBO wishes to thank our Vendor Members and especially our Sustaining Sponsors that contribute not only funds but their time and expertise to make VASBO a better organization. VASBO is actively updating vendor memberships starting 7/1/2014. Each time a member has interaction with a vendor member please say a hearty Thank You!



Our Family, Dedicated To Yours.®

Vendor Members 2014-15



VACORP

Name	Sponsorship	Primary Contact
Ameresco	Silver	Richard Ritter
American Fidelity Assurance Company	Diamond	Dixcy Kilduff
AXA Advisors/Community Financial group		Christopher Fines CFP
Data Business Systems	Silver	Larry Harmon
Frontline Placement Technologies	Gold	Phil Carr
GCA Education Services	Silver	Russell Leboff
Horace Mann Insurance	Platinum	Keith Brooks
Johnson Controls		Whit Blakely
K12 Enterprise		Jeremy Fass
Kelly Educational Services	Silver	Josh Ellis
Keystone Information Systems	Silver	Judd Van Dervort, Jr.
Legal Resources		Jacqueline Fabitore-Matheny
Mark III Employee Benefits	Silver	David Browder
Minor and Associates		Shelia Minor
New Hope Technology Foundation		John William Hughes IV
Old Dominion Insurance and Investments, Inc.		S. Bryce Allen
Online School Management Systems	Silver	Tony Watkins
PBMares, LLC		Betsy Hedrick
pdfInnovates		Phyllis Flowers
Pierce Group Benefits		Quincy Caspar
RDA Systems	Gold	Mike Witherspoon
RevTrak	Silver	Che Zachary
Schneider Electric	Silver	Janet Tribble
School Dude		Scott Carpenter
Siemens	Gold	Matthew Gilley
Source4Teachers/Mission One	Gold	Joe Walter
SSC Services Solutions	Silver	Matt Cooter
TCPN	Silver	Luanne Shaffer
The Omni Group		Mark Buckley
TRA School Software Solutions	Gold	Sarah Huettl
V M L Insurance Programs		Robert Lauderberg
VACORP	Platinum	Jerry Hardy
Virginia Retirement Specialists, Inc.	Platinum	Robert Cox
Weidenhammer		Kevin Brobst



ASBO REPORT

ASBO Conference:

The ASBO Annual Meeting and Expo is taking place in Grapevine, Texas on October 23-26, 2015. The annual ASBO scholarship *Emerging School Business Leaders* deadline for applications is May 1 of each year. The scholarship provides \$2000 to members with less than 5 years experience to attend the Annual Meeting in the Fall. For the 2015 Annual Meeting 18 scholarships were presented.

Eagle Award:

This award is presented to one individual who best exemplifies visionary leadership in school business management. It includes a \$5,000 scholarship to present to a high school senior of your choice and an all-expenses paid invitation to attend the prestigious Eagle Institute leadership conference. The deadline for applications is June 1 of each year.

Pinnacle Award:

This award recognizes school business officials for outstanding practices and new ideas—from every field of school business management—that have enhanced schools and the lives of students. The top Pinnacle Award earns your district up to \$5,000 of school furniture and increased recognition and credibility, up to \$5,000 for the winner, recognition in ASBO publications, and an all-expenses-paid trip for you and a guest to ASBO International's Annual Meeting & Expo. The deadline for applications is May 1 of each year but it is never too late to be considering this award for next year.

Certificate of Excellence in Financial Reporting:

Transparency and fiscal accountability are critical in today's dynamic education environment, so there's never been a better time to apply for ASBO International's Certificate of Excellence in Financial Reporting (COE). The deadline for applying is December 31 of each year.

Meritorious Budget Award:

This award is designed to recognize excellence in school budget presentation, while enhancing your skills in developing, analyzing, and presenting a clear and effective budget. The deadline for applications is within 90 days of the legal approval of your school budget. There is a new Pathways to MBA program specifically designed for first year applicants.

Certified Administrator of School Finance and Operations (SFO):

The SFO designation defines the essential skills and knowledge that every effective school business professional should possess and lets employers know that you have real-world, practical expertise that can be readily applied to the current work environment. Economic challenges continue to have a huge impact on our schools and force difficult choices. In complex financial situations, it is important that you demonstrate to your community that the school's finances are managed by a knowledgeable and ethical administrator.

All of these programs are further detailed at the ASBO web site at the following address:

<http://www.asbointl.org/about/overview>

Submitted by:

Wayne Cosby

ASBO Representative 2015-16

Prepare Now for Reporting Requirements

The Patient Protection and Affordable Care Act (ACA) continues to fight its way to the top of the busy school business officer's ever-growing to do list. As all school business officers are well aware, the ACA's employer mandate took effect January 1, 2015. The employer mandate requires large employers to either offer affordable, adequate health insurance coverage to substantially all of their full-time workforce, or pay a potential penalty if a full-time (30 hours or more per week) employee goes to the public health insurance marketplace and receives a tax subsidy.

In 2015, employers need only offer coverage to 70% of their full-time workforce to meet the ACA's "substantially all" requirement. Because of this transition relief, some employers may have postponed a hard look at ACA compliance for another day. However, even employers that know they can easily achieve a 70% offer of coverage for 2015 may be caught off guard when the ACA's extensive information reporting and disclosure requirements go into effect in 2016.

In early 2016, employers must report to the Internal Revenue Service (IRS) and disclose to employees detailed data about their workforces and benefits offerings for the 2015 calendar year. Because of the scope and detail of the information required, employers need to plan ahead now to collect and organize the appropriate data.

To see the whole article please [click here](#).

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Dixcy Kilduff
American Fidelity