

## President's Message



Shannon Irvin  
VASBO President  
2016-17

Season's Greetings my VASBO friends,

During the holidays we often hear the expression "Let there be peace on earth and goodwill toward men." Wouldn't it be nice if Santa really did bring us peace on earth and goodwill toward ALL men, ALL women, and ALL children? Public education, to me anyway, is the entity that has made the greatest strides in achieving this laudable goal. We are challenged to ensure "*no child is left behind*" no matter his race, his religion, his gender, his ethnicity, or his ability. We take children as they are and work diligently to help them reach their maximum potential. Thank goodness we can see people for whom they are and can help them to realize their inner worth, not burdened by stereotypes and generalities which keep people from reaching their dreams. We know that with hard work and determination, anything is possible.

The month of December brings with it the knowledge that our budget discussions will be heating up in the coming months. Due to the recent elections we can predict that "our cheese will be moved" (for those of you familiar with the book "*Who Moved My Cheese*") and, as a result, we will have to adjust to changing dynamics from our legislators and the U.S. Dept. of Education. Though change is inevitable, we do have a responsibility to stand up for those values and ideals in which we hold dear. Public education has been a major contributor toward making our country great and is vital in ensuring that our country maintains its greatness. I personally do not believe that our country could maintain its greatness without the benefits provided by public education. An educated populace is essential to commerce and governance; thus, the responsibility of educating the masses (not just the chosen few) cannot be taken lightly.

This holiday season, I ask that you spend time with your family and friends and give thanks for all that we have been given. Be thankful for a public education system that has filled many of the voids that are evident in today's society. The provision of guidance, nursing, dental, and nutritional services along with the core subjects of reading, writing and arithmetic is taken for granted by many, as are the availability of career readiness and college courses which help our young people as they exit our doors upon graduation. You have much to be proud of because you are a wheel in the cog that makes the public education system run. You have the responsibility to provide the financial plan to make dreams come true for young people. Yes, Virginia, there is a Santa Claus... and sometimes he comes in the form of the School Business Official who finds a way to make a vision come to life.

Thank-you for all that you do for our children. They are our future.

Shannon Irvin, VASBO President 2016-2017

## VASBO AWARD WINNERS AT ASBO CONFERENCE

VASBO was well represented at the ASBO International Conference in Phoenix, AZ in September. Some came for the professional development opportunities, but most were there to celebrate with two of our own as they were recognized by ASBO International as award winners. Lisa Frye, Loudoun County Schools, was recognized as the International Eagle Award winner. The Eagle awards are sponsored by AXA Advisors. 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 choice and an all-expenses paid invitation to attend the prestigious Eagle Institute leadership conference.



**Lisa K. Frye, MBA, SFO**  
Supervisor of Financial Services

### *Promoting Data Driven Decision Making*

Through her devotion to both the teaching and business professions, Lisa Frye has strengthened the voice of school business officials and increased public trust in her community. By introducing and promoting data-driven decision making, comparative analysis, collaboration, and strategic planning within her school division as well as through VASBO, the state department of education, and legislators, she has generated key relationships and new resources for students.

In addition to the accolades were bestowed our own Leslie Peterson (Arlington County Schools) in the form of the Pinnacle Award of Achievement. The Pinnacle awards are sponsored by VIRCO Manufacturing. The Pinnacle 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 a 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 the winner and a guest to ASBO International’s Annual Meeting & Expo.



**Leslie J. Peterson, MBA**  
Assistant Superintendent for Finance and Management Services

### *Building Community Engagement and Understanding in the Budget Process*

In response to complaints from the community that they were not provided adequate information about the budget with which to make informed decisions, Leslie Peterson developed an online budget balancing tool that gives stakeholders the opportunity to experience “first-hand” the challenges of building and balancing a budget. That tool was supplemented by a variety of publications that explained the budget development process, as well as community forums.

## 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](mailto:dwhite@glnd.k12.va.us) by February 28, 2017.

**The FY 2016 Cardinal Award winner is Joanne C. Wright, Director of Budget and Finance for King and Queen County Public Schools.** She is a Past President of VASBO and currently serves in a new VASBO role of Welcoming Committee. She has spent her entire 28 year career in either King and Queen County or Gloucester County Public Schools. She was instrumental in aiding Gloucester County Public Schools through both the recent economic downturn and a 2011 tornado that destroyed a middle school as well as resolving inequities and loss of competitiveness in the teacher salary scale. In August 2015 she returned to King and Queen County Public Schools (where she had started) to aid them under a new superintendent. As her superintendent, Dr. Carter, says she "always does the right thing, whether it is in her thoughts, words or actions...she has taken on the challenge of leading individuals to achieve goals and inspire them along the way...Mrs. Wright's innovation in the field of budget and finance is evident in every project, report and document she prepares. The result is always the same: positive and professional." Her peers, likewise, value her willingness to mentor others as well as how much she has contributed to VASBO and its membership over the years.

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  
FY 2015 Lisa Frye—Frederick County

Submitted by Deborah White, 2016-17 Cardinal Award Oversight Chair



JoAnne Wright receiving her FY 2016 Cardinal Award from Debbie White, Cardinal Award Oversight Committee Chair

## 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 ([www.vasbo.org](http://www.vasbo.org)) under the Scholarships/Awards tab. If you have any questions please contact Penny Hodge at [phodge@rcs.k12.va.us](mailto:phodge@rcs.k12.va.us).

**Deadline**—All required information and forms must be submitted and postmarked by March 1, 2017 to:

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

### Scholarship Winners from 2016 Spring Conference



Pictured above is BreShahna Gaines with her Mom, LaShahn Gaines from Spotsylvania County. There were two other winners that were not present at the VASBO Spring Conference but won scholarships from VASBO. They are Cameron Cosby, son of Past President Wayne Cosby, and Alea Sharpe, granddaughter of Past President Bill Flaherty

## 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 all VASBO Conferences in 2016-2017.



Past Presidents at Spring Conference include Bob May, Edie Williams, Bill Flaherty, JoAnne Wright, Glenn Burdick, Janet Brown, Steve Bateson, Christie Fleming, Dennis Jarrett, Jim Ward, Dave Cline, Jim Thorsen, Wayne Cosby and Penny Hodge

### Past Presidents

Organizational Meeting		1965	Stephen	Partin	1990-91
W.C.	Campbell	1965-66	Glenn	Burdick	1991-92
Clement	Jacobs	1966-67	T. J.	Bise	1992-93
Bayes	Wilson	1967-68	Bobby	Hall	1993-94
Earle	Buffington	1968-69	Dave	Papenfuse	1994-95
Leon	Cashwell	1969-70	Alexander	Bostrom	1995-96
Marvin	Sutphin	1970-71	Norma	Frye	1996-97
Richard	Wingfield	1971-72	James	Beckner, Jr.	1997-98
Rolland	Bowers	1972-73	Janet	Brown	1998-99
John	Schneider	1973-74	Raymond	Leonard	1999-00
Joseph	Ringers, Jr.	1974-75	Robert	Aylor	2000-01
Jerome	Stern	1975-76	Robin	Corson	2001-02
Paul	Quintrell	1976-77	Steven	Bateson	2002-03
Virginia	Thomas	1977-78	James	Thorsen, Jr.	2003-04
David	Alexander	1978-79	Fred	Cabler	2004-05
Nathan	Young	1979-80	James	Meyer	2005-06
John	Shughrue	1980-81	Leslie	Peterson	2006-07
George	Atwell	1981-82	David	Cline	2007-08
Joseph	Black	1982-83	Dennis	Jarrett	2008-09
Colleen	Dryden	1983-84	Christie	Fleming	2009-10
F. Carroll	Alexander	1984-85	William	Flaherty	2010-11
John	Ryder	1985-86	Joanne	Wright	2011-12
Wayne	Mehanes	1986-87	Penny	Hodge	2012-13
Jim	Ward	1987-88	Lisa	Frye	2013-14
Bob	May	1988-89	Wayne	Cosby	2014-15
Edith	Williams	1989-90	Bill	Bowen	2015-16

## Open Letter to All Past Presidents



### Letter to all VASBO Past Presidents:

Thanks to all of the past president's who participated in VASBO Conferences over the past years. 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 received numerous positive comments regarding the Past President's Panel Discussion that was held at the 2015 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 2017 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](mailto:djarrett@ycsd.york.va.us)  
757-898-0449

# 2016-17 VASBO Officers and Committee Members



Pictured left to right are Christie Fleming, Tina Cropp, Brook Thomas, Jonathan Miller, LaShahn Gaines, Christina Berta, Shannon Irvin, Mandy Hall and Tim Yetter

Introducing the VASBO 2016-17 Officers		
President	Shannon Irvin	Nelson County
President-Elect	LaShahn Gaines	Spotsylvania County
Treasurer	Brook Thomas	Northampton County
Secretary	Tim Yetter	Loudoun County
Director	Tina Cropp	Madison County
Director	Jonathan Miller	Chesterfield County
Director	Christina Berta	Williamsburg/JCC
Director	Mandy Hall	Salem City
Past President	Bill Bowen	Henrico County
SASBO Director	Christie Fleming	Dinwiddie County

Introducing the VASBO 2016-17 Committees		
ASBO Rep	Bill Bowen	Henrico County
Audit Committee	John Broderick	Sussex County
Cardinal Award Oversight	Deborah White	Goochland County
Constitution & Bylaws	Karen Murray	Middlesex County
Constitution & Bylaws	Tracy Shaver	Harrisonburg City
Continuing Education	Krista Kelly	Manassas Park City
5Share/5Sight	Lisa Frye	Frederick County
Legislative	David Cline	Prince William County
Legislative	Lisa Frye	Loudoun County
Legislative	Barbara Stombock	Shenandoah County
Membership	Amy Eberly	Nottoway County
Membership	Katie Miano	Montgomery County
Membership	Chip Jones	Cumberland County
Nominations	Bill Bowen	Henrico County
Past President Liaison	Dennis Jarrett	York County
Resolutions	Marilyn Woodall	Chesapeake City
Resolutions	Vizel Townsend	Hampton City
Scholarship Chair	Penny Hodge	Roanoke County
Vendor	Tracey Worley	
Vendor	Amy Hardy	Pittsylvania County
Vendor	Misty Caish	Virginia Beach City
Vendor	Andrea Philyaw	Loudoun County
Vendor Reps	Dixcy Kilduff Paula Vercammen	American Fidelity Source4Teachers



Hotel Roanoke—Site of 2016 Spring Conference

VASBO 2016-17 Committees—Continued		
Technology Advisor	Bill Flaherty	Retired
Technology	Susan Casale	Loudoun County
Welcoming—Chair	JoAnne Wright	Gloucester County
Welcoming	Betty Clelland	Virginia Beach City
Welcoming	Monique Barnes	Hopewell City
Welcoming	Anita Kapper	Fairfax County

## VASBO Strategic Plan and Input

At the Winter 2015 Conference, VASBO embarked upon drafting a Strategic Plan document to add to its rich history. Overall, strategic planning is a long-range planning process for organizational growth and renewal. VASBO's strategic plan will provide a blueprint for action to enhance professional development offerings, member and vendor engagement and fiscal sustainability. In addition, it will provide a mechanism for the organization to evaluate progress.

To facilitate the creation of the strategic plan document, several key steps were taken:

- Documentation of the importance of having a Strategic Plan
- Development of the Strategic Plan framework
- Compilation of two Strategic Plan Surveys that were completed by the VASBO management team
- Completion of a Strength, Weakness, Opportunity and Threats (SWOT) Analysis
- Development of a timetable by fiscal year of critical tasks to guide the completion of the Strategic Plan

As of December 2016, the current plan includes a vision statement, mission statement, core beliefs, goals, and objectives (see below). The initial strategic planning committee of five members, LaShahn Gaines, Brook Thomas, Jonathan Miller, Misty Caish and Marilyn Woodall has evolved into four goal teams including over 30 VASBO members.

By way of next steps, strategies, action plans and a balanced scorecard to include key performance indicators will be crafted. Once completed, this information will be shared with the entire membership for input and revisions. At the end of this fiscal year when the strategic plan is finalized, the plan will be updated as needed and progress will be monitored through an annual accountability reporting tool.

Special thanks to VASBO members individually and collectively for taking the time to craft this very important plan. Please review the VASBO strategic plan document and feel free to provide your input to LaShahn Gaines at [lgaines@spotsylvania.k12.va.us](mailto:lgaines@spotsylvania.k12.va.us).



*Submitted by LaShahn Gaines, VASBO President-Elect*

## Continuing Education class at Winter Conference

The Continuing Education class offered by VASBO on February 16, 2017 will be related to Medicaid. There will be an update of regulations relating to reimbursements as well as hands on training on completing the proper forms.



Steve Bateson  
Executive Director

## Executive Director's Report

I have been working with Ben Kiser, ED of VASS, Tom Broyles, VDOE, Stuart Roberson with the UVA Cohort and Andy Stamp with VASS to develop some procedures relating to struggling school divisions. Tom Broyles and I have collaborated to develop a detailed risk assessment for school divisions to assess themselves to assure that school divisions stay healthy. With Andy Stamp's assistance this group has decided to provide two drive-in sessions to provide some needed professional development relating to budget development and also to provide some updates on state funding. Both sessions will be held in December with one at the Hotel Roanoke on December 13, 2016 and the second in Richmond at the Hilton in Short Pump on December 15, 2016.

I have been to two big conferences since the VASBO Spring Conference. One was the Maryland/DC Conference in Ocean City, MD. A couple of observations from that conference were that the vendor hall was huge (176 vendors) and there was an enormous collection of vendors relating to facilities, with architects and construction companies. We used to have architects coming to VASBO conferences, but with the development of the Plant Manager's Association, I believe those vendors have migrated away from VASBO. I did work the vendor hall and reached out to many vendors and invited them to join VASBO. The other conference I attended was ASBO International in Phoenix, AZ. I attended the Executive Directors (ED) Group where all the EDs meet together and discuss topics for the good of all states. Again, I worked the vendor Hall to solicit new vendor members and reminisce with familiar vendors. The last item is that members of ASBO will be attending the VASBO Spring Conference this year. Coming are John Musso, ED of ASBO, and Chuck Peterson from PA and is Vice President of ASBO.

### Mark Your Calendars for upcoming VASBO Conferences.

**Winter 2017 Conference**—February 16-17, 2017  
Richmond Marriott Downtown, Richmond, VA

**Spring 2017 Conference**—May 31-June 2, 2017  
Williamsburg Lodge, Williamsburg, VA

### More ASBO Tidbits

The following school divisions have achieved a Meritorious Budget Award for the past 15 years or more:

Fairfax County  
Loudoun County  
Prince William County  
Virginia Beach City  
York County

In addition, Alexandria City has achieved a Certificate of Excellence in Reporting for the past 25+ years.

VASBO wished to congratulate all award winners.

*Helping You  
To Retire In Comfort*



*If Better Is Possible  
Good Isn't Good Enough*



# Virginia Association of School Business Officials

## VASBO Audit Report

Board of Directors and Management Team

Fall Management Team Meeting

Charlottesville, Virginia

I have audited the Financial Report and supporting Statements of Expenditure Detail and Revenue Detail of the Virginia Association of School Business Officials for the year ended June 30, 2016. The financial statements are the responsibility of the Virginia Association of School Business Officials, as prepared by the Treasurer. The responsibility of the Audit Committee is to express an opinion regarding the financial statements based upon the review of the documents.

I conducted the audit in accordance with government auditing standards. Those standards require that I plan and perform the audit to obtain reasonable assurance as to whether the financial statements are free of material misstatements. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing significant estimates made by management, as well as evaluating the overall financial statement presentation. I believe that the audit provides a reasonable basis for our opinion.

In my opinion, the financial statements referred to above present fairly, in all material respects the cash transactions of the Virginia Association of School Business Officials for the year ended June 30, 2016.

I sincerely appreciate the assistance and cooperation provided by the 2015-2016 VASBO Treasurer, LaShahn Gaines, in completing this audit.

John M. Broderick  
Audit Committee

## SASBO Report:

There was 4 Attendees from Virginia @ the 2016 Spring SASBO Conference in Louisiana. Fun & professional development was had by all.

I appreciate the experience & time I have been able to serve as the Virginia Director for SASBO. Christie Fleming, Past VASBO President from Dinwiddie County Public Schools will be taking over for the 2016-2019 term.

I will be staying on as a member of the Emerging Leaders Committee for SASBO.

### **DATES TO REMEMBER:**

January 23-25, 2017  
SASBO Board of Director's Meeting  
Hilton Asheville Biltmore Park, Asheville, NC

January 25-27, 2017  
Leadership Summit,  
Hilton Asheville Biltmore Park, Asheville, NC

April 1-6, 2017  
SASBO Spring Conference & Discovery Forum  
Rosen Plaza, Orlando, FL

Submitted by: Misty Caish, SASBO Director 2015-16



**ASSOCIATION OF  
SCHOOL BUSINESS OFFICIALS  
INTERNATIONAL**

ASBO also offers a certification program called the Certified Administrator of School Finance and Operations (SFO). Virginia has six (6) members that have passed the exam to earn their SFO designation. They are:

Monique Barnes—Hopewell City  
Lisa Frye —Frederick County  
Penny Hodge—Roanoke County  
Paul Imig—Powhatan County (retired)  
Dennis Jarrett—York County  
Thomas Yetter—Loudoun County

Details for this program and application requirements can be found at:

<http://asbointl.org/learning-career-development/certification>.



**ASSOCIATION OF  
SCHOOL BUSINESS OFFICIALS  
INTERNATIONAL**

## SFO® Certification Program



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## 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, and etc.... The current legislative program for FY 2017 can be found on the VASBO web site or by [clicking here](#).

*Submitted by Dave Cline, Legislative Committee Chair*

## ASBO Tidbits

In the latest Accents Online newsletter from ASBO International, Virginia had 3 members join ASBO. Mandy Hall, Salem City, Patty Camery, Frederick County and Scott Higgins, Fairfax County. Congratulations!

## Association of School Business Officials, International Report

The 2016 Annual Meeting and Expo was held September 23-26 in Phoenix, Arizona and VASBO was well represented. On day two of the conference, Lisa Frye was honored as the 2016 International Eagle Award winner and on day three, Leslie Peterson was recognized as a 2016 Pinnacle of Achievement Award winner. Congratulations to Lisa and Leslie for being recognized on their outstanding achievements.

### **ASBO Conference:**

The next Annual Conference will take place September 22–25, 2017 in Denver, Colorado. The annual conference brings together more than 1000 school business leaders for four days of learning and networking. It is an exceptional opportunity to advance professional and leadership skills, as well as to engage face-to-face with peers from around the world. This year's conference had more than 100 hours of hands-on professional development sessions, as well as guest speakers, discussion panels, and networking opportunities.

### **International and Distinguished Eagle Awards:**

The International Eagle 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, 2017. The 2017 Eagle Institute will be July 18–21 in Gettysburg, Pennsylvania.

**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-expense-paid trip for you and a guest to ASBO International's Annual Meeting & Expo. The deadline for applications is on May 1, 2017.

**Certificate of Excellence in Financial Reporting:** ASBO awards qualifying applicants the ASBO International's Certificate of Excellence in Financial Reporting (COE), which recognizes transparency and fiscal accountability. The deadline for applying is December 31, 2016. **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 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. It is important to demonstrate to the 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/learning-career-development/overview>

Submitted by: Bill Bowen, Immediate Past President

VASBO wants to congratulate Melissa Caudill, Washington County and Andrea Philyaw, Loudoun County for being members of ASBO International for 5 years in October.

## Vendor Members 2016-17



Name	Sponsorship	Primary Contact
American Fidelity Assurance Company	Diamond	Dixcy Kilduff
Forecast5 Analytics	Diamond	Mike English
VACORP	Platinum	Stephanie Heintzman
Virginia Retirement Specialist	Platinum	Robert Cox
Horace Mann Insurance	Platinum	Donny Brown
Sourse4Teachers/Mission One	Platinum	Paula Vercammen
ESS—Education Solutions Services	Gold	Russell Leboff
TRA School Software Solutions	Gold	Mallory Wiggs
RDA Systems	Gold	Dave Davis
Pierce Group Benefits	Gold	Donna Nixon
Sonny Merryman, Inc.	Gold	Whitney Kopanko
YellowFolder	Gold	Josh Ferrel
Data Business Systems	Silver	Larry Harmon
First Financial Group	Silver	Scott Middlesworth
Facilitron	Silver	Trent Allen
Keystone Information Systems	Silver	Judd Van Dervort, Jr.
K12 Enterprise	Silver	Jeremy Fass
PCG Education	Silver	Josh Ellis
Online School Management Systems	Silver	Tony Watkins
Pittsburgh Stage, Inc.	Silver	Jake Poling
SODEXO	Silver	Amy Oliver
The Omni Group	Silver	Mark Buckley
Cunningham Recreation/Gametime	Silver	Gregg Dolings
Chalk Schools	Silver	Daniel Obregon
Kronos	Member	John Jamieson
VIRCO Manufacturing	Member	Tiffany Hanna
School Dude	Member	Scott Carpenter
US Communities	Partner	Matt East
Wells Fargo Bank	Partner	Greg Snow

**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 7/1/2016. Each time a member has interaction with a vendor member please say a hearty Thank You!**



## IRS Releases Final ACA Forms and Instructions for 2016

The IRS recently released the final forms and instructions large employers will use to meet their 2016 Employer Mandate reporting obligations under the Patient Protection and Affordable Care Act (ACA). Employers may now view final versions of the following:

[Form 1095-C](#): Individual employee statement used to report details of the health coverage offered to each employee who qualified as full-time under the ACA during 2016 and, for self-funded coverage, to report 2016 enrollment information for all participants covered under a self-funded plan.

[Form 1094-C](#): Transmittal form used to report aggregated employer-level information on a month-by-month basis, including full-time employee count and whether the employer offered coverage during 2016 to "substantially all" full-time employees as defined by the ACA.

The IRS also released final instructions for use in completing the 2016 forms. While the final instructions are substantially similar to the draft version released earlier this year, employers should take note of the following changes:

- **Requests for a Waiver of the Electronic Filing Requirement:** To request a waiver of the electronic filing requirement for filers of 250 or more Forms 1095-C, an employer must submit Form 8508 to the IRS at least 45 days before the due date of the return. Waiver requests will not be processed until January 1, 2017.
- **Increased 2016 Penalty Amounts:** Each failure to distribute a Form 1095-C employee statement to employees and/or to file a copy of each statement with the IRS using Form 1094-C is subject to a penalty of \$260/violation, up to a cap of \$3,193,000.
- **New Conditional Offer Codes for Form 1095-C:** New codes 1J and 1K may be entered on line 14 of the 1095-C to more accurately describe conditional offers of coverage to an employee's spouse.
- **Enrollment by Non-Full-Time Employees in Self-Funded Coverage:** Code 1G is used to report enrollment of individuals other than full-time employees in a self-funded health plan. The final instructions clarify that code 1G must either appear in the "All 12 months box" or in every monthly box.



Dixcy Kilduff  
American Fidelity

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

Article included through permission of American Fidelity Assurance Company



## Creating an Energy Roadmap

By Greg Spencer, Trane North America

One in five children in the United States attend schools with poor indoor air quality (IAQ), according to a U.S. Government Accountability Office (GAO) estimate. Poor IAQ can mean many things: classrooms where children have a hard time hearing the teacher because of poor acoustics; where temperatures climb above 90 degrees because of a lack of air conditioning; or where poor filtration adversely affects a child's focus and health.

In fact, 15,000 schools across the nation are circulating unfit air, according to the GAO. To address the problem, schools need to choose heating, ventilation and air conditioning (HVAC) systems that help create quiet, comfortable classrooms. Most schools would like to do so, but are faced with constraints and priorities that make investment decisions difficult.

Deferred maintenance in aging facilities contributes to rising energy costs and inadequate building performance. Nearly three-fourths of U.S. public schools were built before 1970, and deferred maintenance costs nationally have risen to \$127 billion, according to the GAO. As deferred maintenance needs grow, equipment operates less efficiently, and this leads to high utility costs and poor IAQ.

Schools may be able to free up funds by establishing an energy roadmap. It helps schools outline strategies to improve equipment performance and efficiency. This not only saves money; but also helps provide a better environment for learning.

### **Why create an energy roadmap?**

K-12 schools in the United States spend more than \$8 billion annually on energy. It is the second-highest operating expenditure for schools after personnel costs. By working with a partner to create an energy roadmap, schools can outline and prioritize solutions for an improved classroom environment. From better temperature and humidity control to better acoustics, HVAC technologies are available that play a role in helping schools achieve better IAQ and acoustics in the classroom. These improvements lead to consistently better scores on standardized tests, the U.S. Environmental Protection Agency says.

Upgrading to a building automation system enables remote monitoring, resolution of system alarms, and intelligent dispatching to mobile technology. Image courtesy of Trane.

But getting where you want to go requires a thorough evaluation of where you are today. That is where a roadmap is beneficial. A complete evaluation of a school's needs is an important first step and will help establish benchmarks that can be used to set goals, determine which solutions have the greatest return on investment, and prioritize improvements.

To review the entire article please [click here](#).  
Trane is part of US Communities

## Who Are We?

We are the Virginia Association of School Business Officials (VASBO), a statewide membership organization in Virginia for individuals that work in school business. VASBO promotes the highest standards of school business practices for its membership through professional development, continuing education, networking and legislative impact and access to data analytics for decision making.

### Benefits:

- **Conferences:** We offer fall, winter, and spring conferences geared toward school business issues including financial reporting and compliance related topics. We engage relevant speakers on topics that directly assist finance staff meet their professional responsibilities. In addition, we invite vendor representatives to provide you with information on products and services available to meet the needs of your school division.
- **Collaboration:** Every VASBO member is encouraged to participate in the VASBO networking platform which provides a discussion board, a pictorial member directory, and a resource library.
- **Networking:** We offer opportunities to meet and network with other school divisions in your region and across the state. Several of our regions meet separately and regularly throughout the year to further share ideas and concerns.
- **Certificate program:** We offer a professional development program through the University of Virginia to provide members with a broad exposure of School Finance roles and responsibilities to strengthen their knowledge base.
- **Continuing Education:** We offer Continuing Professional Education credits for conference workshops to assist members in maintaining their professional licenses and certifications.
- **Legislative Updates:** We are active in formulating and communicating our legislative platform to affect Education Policy within the Commonwealth.
- **Data Analytics:** Virginia school divisions have access to a data analytics platform that contains datasets submitted by school divisions to the Virginia Department of Education. The cloud-based platform provides raw data as well as visualizations for 100% of Virginia divisions including student enrollment, demographic, and achievement data. It also contains financial, staffing, salary, transportation, and health insurance information.

*Why don't you visit the VASBO website at [www.vasbo.org](http://www.vasbo.org) and join/rejoin VASBO?*

## Winter Conference and other Professional Development Opportunities

The VASBO Directors are still finalizing the Agenda for the Winter Conference, but VASBO will have some great sessions on leadership, a state budget update, MOE, transportation reporting, and record retention. Come and learn more at the Winter Conference in Richmond, VA at the Marriott Downtown on **February 16-17, 2017!**

