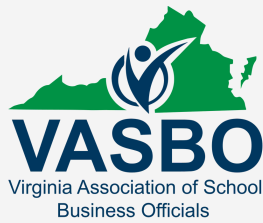


# **2023 VASBO SPRING CONFERENCE**

**WILLIAMSBURG, VA  
MAY 15-17, 2023**





## A MESSAGE FROM OUR PRESIDENT

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Welcome to the 2023 VASBO Spring Conference!

I am so happy we get to gather the VASBO family again for our Spring Conference in Williamsburg. The VASBO team has put together an agenda that will provide all attendees with valuable professional development and needed networking time. We hope you leave with additional information and resources to aid in your day-to-day work.



One of the most valuable resources we have is each other. I encourage you to actively engage in conversations with others to learn, to teach, and to know that we are not alone in what we do each and every day. I hope you find some time while at the conference to seek out the Joy in the Chaos. It is not always easy to find, but it is there if you look for it. Your purpose is worth the challenges.

And while we are here, we hope you have a great time taking in the sights and sounds of Williamsburg. We also look forward to hosting an evening of laughs and scares with our ghost tours on Tuesday.

Thank you for participating in this wonderful and important event for our school divisions and communities, we are glad you are here.

Sincerely,  
Mandy C. Hall

2022-23 VASBO President and Chief Financial Officer of Salem City Schools



## 2022-23 VASBO EXECUTIVE TEAM

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President.....	Mandy Hall, Salem City
Vice President.....	Katie Miano, Montgomery County
Treasurer.....	John Broderick, Sussex County
Secretary.....	Chip Jones, Cumberland County
Director.....	Kathleen Jackson, Roanoke City
Director.....	Marcia Stevens, Caroline County
Director.....	Marc Evans, Montgomery County
Director.....	Heather Lucas, Gloucester County
SASBO Director.....	Debbie White, Goochland County
Immediate Past President.....	Tina Cropp, Madison County

## MANAGEMENT TEAM

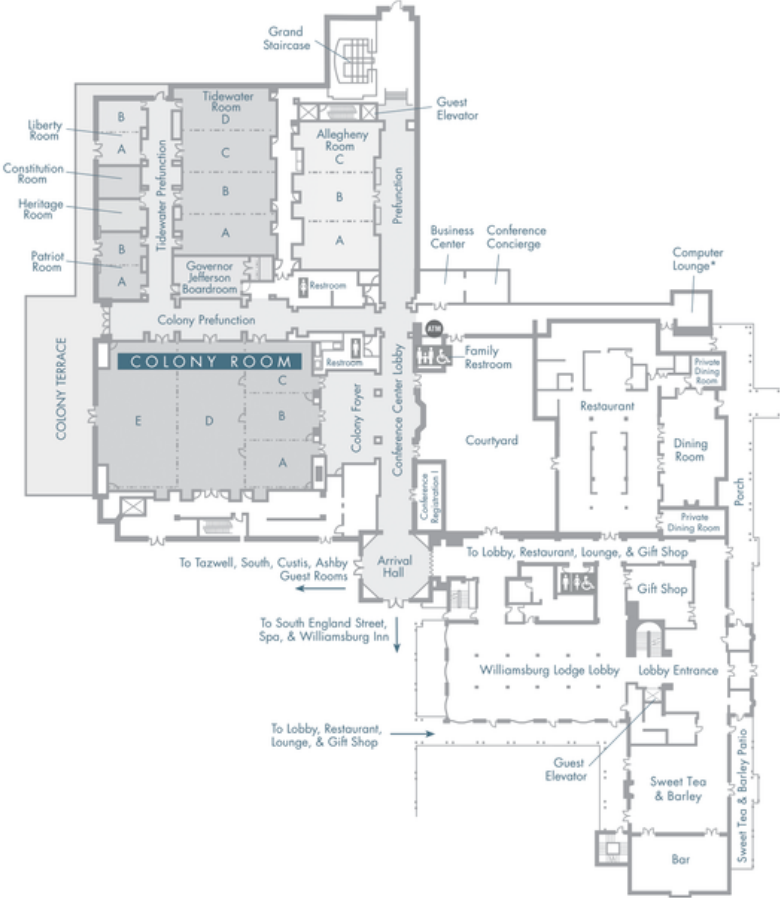
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Audit.....	Brittany Branch, Hampton City
Constitution and Bylaws.....	Whitney Barrack, Lancaster County
Data Quality Improvement.....	Staci Longest, King William County
Investment.....	Christina Berta, Hanover County
Legislative.....	Jacqueline Brooke, Norton City
Membership.....	Marcia Stevens, Caroline County
Nominations.....	Tina Cropp, Madison County
Past President Liaison.....	Brook Thomas, Northampton County
Resolutions.....	Christie Fleming, Dinwiddie County
Scholarship.....	Brook Thomas, Northampton County
Vendor Representative.....	Dixcy Kilduff, Mark III Employee Benefits Riley Davis, RDA Systems
Welcoming.....	Monique Barnes, Prince George County
SASBO Emerging Leader.....	Dana Fox, Richmond

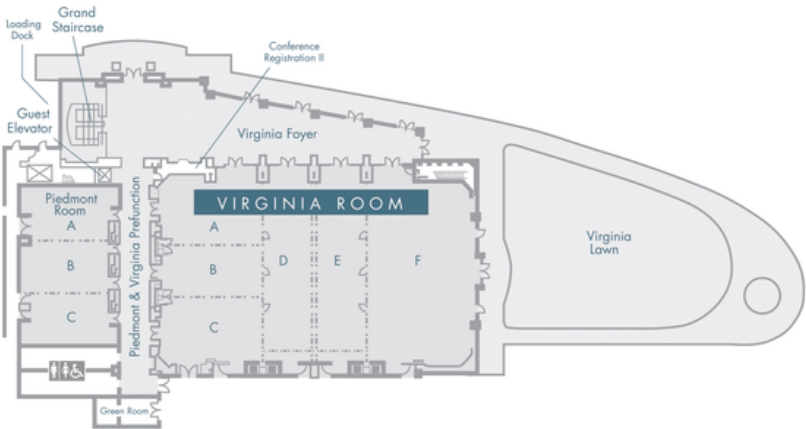


# WILLIAMSBURG LODGE HOTEL

## CONFERENCE CENTER MAIN LEVEL



## LOWER LEVEL



# CONFERENCE AGENDA

## MONDAY, MAY 15, 2023

<b>8:00AM - 4:00PM</b>	<b>REGISTRATION</b> Virginia Foyer- Conference Registration II (Lower Level)
<b>8:00AM - 9:00AM</b>	<b>VASBO MANAGEMENT TEAM BREAKFAST</b> Piedmont Room (Lower Level)
<b>9:00AM - 12:00PM</b>	<b>VASBO MANAGEMENT TEAM MEETING</b> Piedmont Room (Lower Level)
<b>11:00AM - 4:00PM</b>	<b>EXHIBITOR SETUP</b> Virginia Ballroom A-E
<b>12:00PM - 1:00PM</b>	<b>VASBO MANAGEMENT TEAM LUNCH</b> Piedmont Room (Lower Level)
<b>1:00PM - 4:00PM</b>	<b>PRE-CONFERENCE</b> Tidewater C & D (Upper Level) Leigh Burden, Fairfax County Public Schools
<b>2:30PM - 2:45PM</b>	<b>REFRESHMENT BREAK</b>
<b>4:00PM - 6:00PM</b>	<b>VENDOR VISITATION</b> Virginia Ballroom A-E
<b>4:30PM - 5:30PM</b>	<b>NEW MEMBERS RECEPTION</b> *All new members within the last 3 years are welcome to attend! Virginia Ballroom

## TUESDAY, MAY 16, 2023

<b>7:00AM - 5:30PM</b>	<b>REGISTRATION</b> Virginia Foyer- Conference Registration II (Lower Level)
<b>7:00AM - 8:00AM</b>	<b>BREAKFAST</b> Virginia Ballroom F
<b>7:00AM - 8:00AM</b>	<b>VASBO PAST PRESIDENT'S BREAKFAST</b> Traditions Restaurant
<b>8:00AM - 9:00AM</b>	<b>OPENING SESSION</b> Virginia Ballroom F Dr. Jill Siler, Keynote Speaker

**9:10AM - 10:00AM**

**BREAKOUT 1: PROCUREMENT**

Piedmont Room (Lower Level)

Chris Banta, CPA, CFE, Brown Edwards

**BREAKOUT 2: GASB STATEMENT NO. 96, SUBSCRIPTION-BASED INFORMATION TECHNOLOGY ARRANGEMENTS**

Tidewater C & D (Upper Level)

Andrea Nichols, CPA, PBMAres, LLP

**10:10AM - 11:00AM**

**BREAKOUT 1: LEADING THROUGH (FINANCIAL) CRISIS**

Piedmont Room (Lower Level)

Dr. Jill Siler, Keynote Speaker

**BREAKOUT 2: RECORDS MANAGEMENT - COVERING THE BASICS**

Tidewater C & D (Upper Level)

Chad Owen, Library of Virginia

**11:00AM - 11:40AM**

**VENDOR VISITATION AND NETWORKING**

Virginia Ballroom

**11:40AM - 12:30PM**

**BREAKOUT 1: INDIRECT COSTS AND HOW TO USE THEM**

Piedmont Room (Lower Level)

David Rubenstein, South Panola School District, Mississippi

**BREAKOUT 2: EFFECTIVE FINANCIAL MANAGEMENT: STRATEGIES FOR BUILDING CLARITY AND ACCOUNTABILITY OUTSIDE OF FINANCE**

Tidewater C & D (Upper Level)

Tyler Hall, Allovue

**12:30PM - 1:30PM**

**LUNCH AND VENDOR VISITATION**

Virginia Ballroom F

**1:30PM - 2:20PM**

**BREAKOUT 1: THE FUNDAMENTALS OF FRAUD PREVENTION**

Piedmont Room (Lower Level)

Sierre Lindgren, Paymerang

**BREAKOUT 2: BUILD WITH STRENGTH: THE CASE FOR BUILDING RESILIENT HIGH-PERFORMANCE SCHOOLS**

Tidewater C & D (Upper Level)

Frank Gordon, National Ready Mixed Concrete Association



<b>2:20PM - 3:00PM</b>	<b>VENDOR VISITATION AND NETWORKING</b> Virginia Ballroom
<b>3:00PM - 3:50PM</b>	<b>CYBERSECURITY LESSONS LEARNED</b> Virginia Ballroom F VACorp
<b>4:00PM - 4:50PM</b>	<b>BREAKOUT 1: MEDICAID- UPDATE ON RULES</b> Piedmont Room (Lower Level) Amy Edwards, VDOE Casie Pulley, Isle of Wight County Schools <b>BREAKOUT 2: IPAL, SHORTAGE OF TEACHERS AND RECRUITING</b> Tidewater C & D (Upper Level) Frontline Education
<b>5:00PM - 7:00PM</b>	<b>DINNER ON YOUR OWN</b>
<b>7:00PM</b>	<b>GHOST TOURS</b> 3-Hour Pub Crawl Ghost Tour: Meet in Hotel Lobby at 7pm 90-Minute Walking Ghost Tour: Meet in Conference Center Arrival Hall at 7pm

## WEDNESDAY, MAY 17, 2023

<b>6:30AM</b>	<b>RUN/WALK- EVERYONE WELCOME!</b> Meet in Hotel Lobby
<b>8:00AM - 9:00AM</b>	<b>BREAKFAST</b> Virginia Ballroom F
<b>8:45AM - 10:00AM</b>	<b>THRIVING WHILE SURVIVING – 7 WAYS TO GROW PERSONALLY AND PROFESSIONALLY IN DIFFICULTY</b> Virginia Ballroom F Joel McKenzie, American Fidelity
<b>10:00AM - 10:50AM</b>	<b>2023 LEGISLATIVE UPDATE</b> Virginia Ballroom F Stacy Haney, Haney Phinyowattanachip PLLC
<b>11:00AM - 11:30AM</b>	<b>VASBO AWARDS AND BUSINESS MEETING</b> *All members encouraged to attend. Virginia Ballroom F (Lower Level)
<b>11:30AM</b>	<b>DOOR PRIZES AND ADJOURNMENT</b> *Must be present to win.



# MEET THE PRESENTERS

**Leigh Burden** serves as the assistant superintendent for Fairfax County Public Schools (FCPS) department of financial services. Previously, Burden worked for Loudoun County Public Schools, where she was responsible for leading all financial operations for over 14,000 staff members and directing the preparation and administration of a \$1.1 billion budget. She also served as director of financial services for Manassas City Public Schools from 2000 to 2007. As a financial services professional, Burden has presented to the Virginia School Boards Association on budget and finance and provided financial information to aspiring leaders at workshops sponsored by Women Education Leaders Virginia. Burden earned her Bachelor's Degree in Business Administration from Radford University and a Master's in Public Administration from Virginia Tech.



**Dr. Jill Siler** served as the Superintendent of Gunter ISD for nearly ten years and now serves as the Deputy Executive Director for Professional Learning for the Texas Association of School Administrators (TASA). Jill grew up in Rochester & Buffalo, NY, and completed her undergraduate work at the University of Pittsburgh where she was a collegiate swimmer. She was a teacher and coach in Pflugerville ISD and began her administrative career in Marble Falls ISD. In 2004, Jill went to Lake Travis ISD where she served as a campus and district leader for 8 years.

In her first months as a superintendent, Jill faced a financial crisis along with many other challenges. In 2015, her school board was named a TASA Honor Board as one of the top 5 school boards in the state and one of her campuses was named a 2017 National Blue Ribbon School. Jill served as the Chair of the Future-Ready Superintendent Leadership Network (FRSLN) Design Team where innovative leaders across Texas gather to learn, share and grow together.

Jill has a passion for helping others reach their goals and is the leader of Texas' Aspiring Superintendent Academy and leads Texas' First Time Superintendents Academy. Her first book, *Thrive Through the Five* was published in 2020 and talks about how to thrive in the most challenging times.

**Chris Banta** serves as the leader of the Brown Edward's State and Local Governmental Practice serving clients in Virginia, West Virginia, and Tennessee. Chris has been with the firm for over 21 years and is also a certified fraud examiner, providing litigation support, as well as fraud investigations and internal control evaluations. Chris also serves various other industries including beverage and other distributors, national fraternities, electric cooperatives, healthcare facilities, HUD properties, and other nonprofits. In addition, Chris serves as one of four Team Captains in the firm's peer review practice.



**Andrea Nichols** joined PBMares in 2005 and is a manager in the firm's audit department. Ms. Nichols has extensive experience planning and performing audits subject to the provisions of Government Auditing Standards and Uniform Guidance. She has worked on audit teams in various capacities for various public sector audit engagements including authorities, counties, cities, towns, boards, and commissions.

Ms. Nichols is a member of the American Institute of Certified Public Accountants (AICPA), the Virginia Society of Certified Public Accountants, and the Virginia Government Finance Officers' Association. She carries the AICPA Advanced Single Audit Certification that proves heightened competencies surrounding single audit engagements as outlined in the AICPA Competency Framework: Governmental Auditing.





**Chad Owen** has been the Records Management Coordinator at the Library of Virginia since 2016. Previously he spent four years at the Iowa State Archives and fourteen years as a records manager for the University of Louisville. He's originally from Southside Virginia, holds degrees in history from UVA and VCU, and spends his spare time leathercrafting, playing bass, and trying to convince himself that he's retired from rugby.

**David Rubenstein** is the Director of Finance and Business Operations for the South Panola School District in Mississippi. He has been a school business administrator for over 25 years in three school districts. Before that, he was an auditor for a CPA firm and a consultant for a school financial software company. He is a past president of the Mississippi Association of School Business Officials and currently serves as the Mississippi director for SASBO. He holds the Southeastern Association of School Business Officials (SASBO) Certified School Business Administrator (SBA) Certification.



**Tyler Hall** is a Solutions Engineer for Allovue. In this role, Tyler helps prospective districts understand how Allovue can help improve and build upon existing budget and finance processes. Tyler comes from a public administration background and before joining Allovue, spent six and a half years with the Syracuse City School District working with budgeting and finance processes for schools and academic departments. In this role, he also led the district's enrollment forecasting process and managed position control at the site level.

**Sierre Lindgren** is a Senior Fraud Analyst at Paymerang. In addition to overseeing Paymerang's fraud team, Sierre helps create new fraud mitigation tools, policies, and procedures and analyzes recent fraud trends and schemes. She also spends time educating business offices nationwide on how to protect themselves from fraud during thought leadership. Before Paymerang, she spent 11 years in the banking industry, with the last five of those years focusing on fraud and investigating ACH, wire, and debit card fraud disputes from customers. Lindgren holds degrees in Psychology and Criminal Justice from Virginia Commonwealth University. When she's not fighting fraud, she enjoys spending time with her two children and rescue dogs on the Rappahannock River.



**Frank Gordon** is the Senior Director of Building Innovations for the National Ready Mixed Concrete Association. He has been an active member of the design, construction, and facilities management industry for over 34 years. Frank is a graduate of the University of Tennessee with a Bachelors of Architecture and has been a three-time finalist of the World of Concrete's ICF Builder Magazine Design Competition. He and his family reside in Knoxville, TN.

**Amy Edwards** has worked with Medicaid and Schools for over 30 years. She was hired in 1992 by the Hanover Regional Grant to work with four Virginia counties to implement the Medicaid and Schools billing program. In 1999, she was hired by the Virginia Department of Education as the Medicaid Specialist. Amy works closely with Virginia's state Medicaid agency on such issues as memorandum of agreements, development of new school division Medicaid billable services, program requirements, cost reporting, administrative claiming, Medicaid outreach, and the State Plan Amendment. Amy works directly with local school divisions to enhance their Medicaid billing program, which includes regional trainings and statewide annual Medicaid and schools program training, quarterly Medicaid Coordinators Meetings, and technical assistance.





**Casie Pulley** has worked in various DMAS programs for the past 17 years as a Medical Biller, Coder, and Policy Specialist in the Medical field. Over the last 7 years, she has worked in the Medicaid in Schools program. She enjoys working in Policy and assisting other Medicaid Coordinators across the state. She has worked with VDOE and UMASS on numerous presentations. Casie was born and raised in Isle of Wight County and is a proud product of Isle of Wight County Schools. She currently lives on her family farm with her husband and daughter.

**Joel McKenzie** has worked for American Fidelity for over 37 years in a variety of areas all involving training and developing teams. He speaks regularly to education associations on leadership, strategic growth, and personal development.



**Stacy Haney** is a founding member of Haney Phinyowattanachip PLLC, a boutique education law firm in Richmond, Virginia. For more than fifteen years, Stacy has devoted her law practice to the representation of school boards and educational institutions throughout Virginia. Stacy is also the Chief Lobbyist for the Virginia School Boards Association, representing the Association before the Virginia General Assembly. Stacy's work for the VSBA uniquely positions her to have a deep understanding not only of school law but of the policies and trends that shape education throughout the Commonwealth.



## VASBO Job Board

VASBO is excited to share position announcements for careers in school business across Virginia. For information on open positions visit [vasbo.org/job-board](https://vasbo.org/job-board).

**Have a position announcement that you would like to advertise?**

Visit [vasbo.org/job-board](https://vasbo.org/job-board)! This is a free member benefit for all school divisions with active VASBO membership!



Scan the QR code  
to visit the VASBO  
Job Board

# 2023 ASBO AWARD PROGRAMS



The Emerging Leaders Scholarship recognizes new professionals and helps them develop into tomorrow's leaders. 20, \$2,000 scholarships are awarded each year towards ASBO International's Annual Conference & Expo. Apply or nominate by **June 1, 2023!**

ASBO International honors school business professionals who stop at nothing to be change-agents for the students in their district and beyond. The Eagle Awards recognize leadership, service, and achievement in School Business. Apply or nominate by **June 1, 2023!**



**Learn more at [asbintl.org](https://asbintl.org)!**

## SAVE THE DATE!



**NATIONAL HARBOR, MARYLAND  
OCTOBER 19-22, 2023**

# A SPECIAL THANK YOU TO OUR 2022-23 VASBO BUSINESS PARTNERS

## DIAMOND



**ALLOVUE**

**AMERICAN FIDELITY**  
a different opinion



## PLATINUM



**EQUITABLE**



Horace Mann

**Lifetouch**



**Mark III**  
Employee Benefits



**mcclure**  
company



paymerang



Renaissance



## GOLD

**Bolton**



COMPASS  
GROUP



DebtBook



H2I GROUP

Kelly Education

OMNIA<sup>®</sup>  
PARTNERS



The Nutrition



## SILVER

Abacus Sports Installations, LLC  
ABM Building Services, LLC  
Allsynx  
Amazon  
Applied Technology Services  
Cintas Corporation

Class Creator  
ClassWallet  
CommercePayments  
Cunningham Recreation/GameTime  
Edustaff  
Everside Health  
Facilitron  
First Financial Group of America  
GOVMVMT Cooperative  
Hord Coplan Macht  
KEV Group  
Keystone Information Systems  
Level Data  
LINQ  
MemberHub  
Milestone Systems

Motorola Solutions, Inc.  
Ricoh, USA  
School Specialty LLC  
School Window, LLC  
Sonny Merryman  
Sun Tribe Solar  
Tarkett Sports  
TCP Software  
The HON Company  
TIPS - The Interlocal Purchasing System  
Tremco Roofing & Building Maintenance  
Tyler Technologies, Inc.  
U.S. BENCOR/MidAmerica  
UHY LLP, Certified Public Accountants  
Vital Record Control LLC  
ZMM Architects and Engineers