BASA/OASBO – Team Collaboration: Finance, Facilities, and Safety

Date: February 19-20, 2019

AGENDA

Day 1 –Tuesday, February 19, 2019		**Room**
8:00 – 9:00 a.m.	Registration/Continental Breakfast	Admiral Ballroom A/B
9:00 a.m.	Welcome	Admiral Ballroom A/B
9:10 – 10:25 a.m.	**Everything I Learned About Communications I Read in the Funny Pages** *Rick Manoloff and Mike Sharb, Squire Patton Boggs (US) LLP*	Admiral Ballroom A/B
10:25 a.m.	Break	
10:45 – 11:35 a.m.	**Track Sessions – Session I**	
Facilities	**Facilities Master Planning: A Comprehensive Guide to Building a Successful Capital Plan** The decision to conduct a facility planning process can be a major undertaking for school districts of any size. Districts choose to conduct plans for many reasons, including increasing or declining enrollment, unbalanced enrollment across the district, physical condition of facilities, inadequate educational spaces, or simply the need to upgrade outdated building systems. Whatever the reason, the process by which a facility plan is conducted should be well thought out to decide the type of data that is most critical to decision making, the level of transparency and community engagement that is most effective, the timeline it will take to complete a plan. This presentation explores pathways that districts may choose to follow when conducting a facilities master plan and describes the challenges that can be expected when entering into this type of study. *Tracy Richter, Cooperative Strategies*	Starboard
Safety	**Social/Emotional Education and Mental Wellness, Trauma, and Safety** With each passing year, schools are faced with the challenge of not only meeting high academic expectations, but also the social/emotional, mental wellness, trauma, and safety needs of their students. This presentation will focus on how school districts can tie together their work around student well-being and growth using a comprehensive approach setting students on the path to success. *Keith Kline, Grant Us Hope*	Admiral C

Leadership	**The Real Cost of Risk** With the ever increasing demands on our resources, where do we focus our time? The presenters will outline areas that generate losses within school districts and provide session attendees with specific techniques and practices that can limit and mitigate the financial and reputational impact of losses. *Mike Ugljesa and Travis Thompson, Ohio School Plan/Hylant*	Admiral D
Legal	**The Masonry is Falling Off and the Roof Still Leaks** Discussion on identification of defective work and potential remedies and fronting the cost of a fix. *Scott Gilbert, Miamisburg City SD and* *Chris McCloskey and Robert McCarthy, Bricker & Eckler, LLP*	Port
11:45 am – 12:35 pm	**Track Sessions – Session II**	
Facilities	**Safety Upgrades and Facility Capital Improvements to Our Buildings (Case Study) - Without Asking for NEW Taxes to Fund** Case study of how one district was able to implement a major renovation project, including safety enhancements district-wide, adding air conditioning to non-air-conditioned schools, replacing doors, windows and roofing, and installing LED lighting – doing it all without asking the taxpayers for funding! Panel: *District Superintendent, Treasurer, and Business Manager and* *Greg Smith, Energy Optimizers, USA*	Starboard
Financial	**Creating a Culture of Collaboration** This session will include real examples on how the right culture can create an atmosphere of trust and respect. Participants will learn how to create a culture which will allow them to enhance their strategies and meet their goals. *Christine Morris, Arthur J Gallagher*	Admiral C
Leadership	**Active Shooter Incident: Managing and Preparing** On February 20th, a Jackson Memorial Middle School student brought a gun into the building and suffered a deadly self-inflicted gunshot wound. Superintendent Christopher DiLoreto will outline in this presentation what preparations were made prior to the incident, a review of the incident, and subsequently the actions taken following the incident. Participants will gain insights into managing a critical incident and an overview of school safety preparations. *Christopher DiLoreto, Jackson Local Schools*	Admiral D
Legal	**What You Need to Know About Workers' Compensation and School Safety** Learn the ins and outs of how workplace incidents result in Workers' Compensation claims, how to improve safety and also better investigate all incidents, and finally, learn about the recently launches safety and security program which offers up to $40,000 in grants to schools. *Milko Cecez, Pepple & Waggoner*	Port

12:35 – 1:20 pm Lunch (provided)

1:20 – 2:10 pm **Track Sessions – Session III**

Legal **Construction Law 101** Starboard
Design-Build, Construction Manager-At-Risk, General and Multiple Prime Contracting. These are just a few of the delivery methods available to school districts for purchasing construction improvements and services. In this presentation you'll learn the fundamentals of each delivery method, how they differ, and how to legally utilize these options.
Matthew Sagone, Squire Patton Boggs (US) LLP

Financial **Alternative Financing in an Age of Uncertainty** Admiral C
This presentation will highlight several ways that school districts have financed projects without a typical voted property tax bond issue.
Patrick King, STIFEL

Leadership **Advancing Safety and Security with Tabletop Exercises** Admiral D
There is a reason why tabletop exercises are a mandatory training component for your safety plans – they work. This session will provide you examples of tabletop exercises for safety and security. Additionally, participants will learn how to develop and create "tabletops" specific to their own district safety needs at a low cost, but yet an extremely high value.
Dan Romano, Edventures in Learning

Legal **Combatting the Opioid and Heroin Epidemic in Schools** Port
This presentation will share tools for addressing the impact of the opioid and heroin epidemic in school communities. Learn about proactive programs districts can implement for their students and the legal landscape surrounding the maintenance and use of Narcan by districts.
Susan Anderson, Walter & Haverfield, LLP; Thomas Stuber, The LCADA Way; Robert Scott, Avon Lake City SD

2:20 – 3:10 p.m. **Track Sessions – Session IV**

Facilities **How to Choose the Best Building Automation System for Your New Constructions or Renovation Project** Starboard
Control comfort and cost-of-ownership by choosing the best building automation system for you and your school district.
Dave Zehala, Plug Smart

Financial **Seven Ways to Make Your Ballot Issue Easier** Admiral C
Ballot issues are tough. They are made tougher when the right prep work does not happen. Find out where to maximize your time and energy.
Carole Dorn-Bell, Allerton Hill Consulting

Leadership **Navigating Through a Crisis and the Aftermath** Admiral D
Perry Local Schools experienced multiple student suicides during

the 2017-18 school year. The district continues to deal with issues surrounding these events. This session is intended to use this ongoing experience to share how the district dealt with and continues to deal address through cooperation of many stakeholders.
Scott Beatty, Perry Local Schools; Tom Speaks; Dr. Margaret DeLillo-Storey; Chief Michael Pomesky, Perry Township PD

Legal **Creating a Community-Driven Building Project** Port
RCS & GPD have a successful track record creating community-driven Building projects that often include successful bond issues. Working with districts throughout their building process - from idea to design to financing to reality - we ensure meaningful community engagement and input to help district's building projects reflect the community's unique flavor while earning their support. We will talk about how we help our clients succeed.
Galen Schuerlein and Rodwell King, Roetzel Consulting Solutions/GPD Group

3:10 – 3:30 pm Break

3:30 – 4:20 pm **Track Sessions – Session V**

Facilities **Building Envelope Finance, Facilities, & Safety – The Perfect Marriage** Starboard
Few school districts have enough information and understanding to properly select and implement the very best building envelope funding requests each year. Learn how you can significantly improve district finance, safety, and facility performance. Properly done, all three objectives are synergistically accomplished.
David Hart, Tremco Inc.

Financial **Transformation Through Collaboration: A Case Study** Admiral C
The key to every district's transformation: collaboration. Utilizing a case study on how ShareOhio became a strong partnership, this discussion will focus on the processes and tools that aid in making collaboration a seamless and essential part of every organization. As new generations move into the workforce, into the classroom and into administrative roles, collaboration across generations is more important than ever. Participants will come away with a road map towards a transformed district through learning to prioritize the tools and processes that support collaboration across roles and generations.
Karl Seiler, DataServ, and Joe Prchlik Northern Buckeye Education Council

Leadership **The Ohio Ethics Law: Can I Do That?** Admiral D
This lively session will help public officials and employees in understanding how to identify and avoid acting on potential conflicts of interest. It will also provide information regarding ethics prohibitions related to public contracts and potential post-employment requirements. Attendees will also learn about general assistance available from the Ohio Ethics Commission to assist both the public and private sectors in understanding and complying with the Ethics Laws.
Susan Willeke, Ohio Ethics Commission

Legal	**2019 Project Finance** A review of voted and unvoted financing options, with an emphasis on pipeline revenue and the OFCC funding backlog. Panel: *Becky Princehorn and Katie Johnson, Bricker & Eckler, LLP and Mark Phillips, Treasurer, Fairless Local SD and Tuscarawas Valley Local SD*	Port
4:30 – 5:30 pm	Reception –	Lobby area in front of Admiral Ballroom A/B

Day 2 –Wednesday, February 20, 2019

7:45 – 8:15 am	Registration/Continental Breakfast	Admiral Ballroom A/B
8:15 – 8:20 am	Welcome	Admiral Ballroom A/B
8:20 – 9:20 am	**Public-Private Partnerships Do Work!** *David James, Superintendent and Ryan Pendleton, CFO, Akron Public Schools*	Admiral Ballroom A/B
9:25 – 10:15 am	**Track Sessions – Session I**	
Facilities	Session from *Ohio Facilities Construction Commission*	Starboard
Financial	**I Promise Success** Akron Public Schools had the unique opportunity to partner with the LeBron James Foundation to create the I Promise School. The district negotiated working with a private entity to launch this one-of-a-kind school as well as strengthening the relationship between the Superintendent and the Treasurer/CFO throughout the process. An exclusive partnership was developed that demonstrates that collaboration between the superintendent, the treasurer/CFO, and an outside organization can lead to student success. *David James, Superintendent and Ryan Pendleton, CFO, Akron Public Schools*	Admiral C
Leadership	**Leveraging Peer-to-Peer Programs to Encourage School and Teen Safety** Traffic crashes. Substance use. Mental wellness. Today's teens are bombarded with a variety of risk factors that threaten their personal health and safety. These factors combine to impact your building and district environment. Students Against Destructive Decisions (SADD) is the nation's premier youth health & safety organization that's working to empower teens, engage parents, mobilize communities, and change lives around these topics. This session will focus on best practices of peer-to-peer programs that are proven to influence teen behavior and lead to safer and *happier* schools through SADD. *Rick Birt, SADD, Inc.*	Admiral D
Legal	**Workers' Compensation: Dollars & Sense** An exploration of practical solutions to managing workers' compensation claims. Gain a fuller understanding on how tighter incident	Port

management and more rigorous administrative handling of key claims can prevent dollars from being diverted away from the classroom.
Scott Gedeon, Sarah Moore and Jeffrey Smith, Fisher Phillips

10:25 – 11:15 am **Track Session – Session II**

Facilities — Session from *Ohio Facilities Construction Commission* — Starboard

Financial — **Student Loan Forgiveness & Employee Retention** — Admiral C
Various studies show 40% teacher attrition in the first five years of their career with part being due to huge student loan payments. Federal student loan forgiveness and repayment plans are either not being utilized at all or being done incorrectly. Learn how to properly advise your staff on this topic & change their lives!
Lisa Stevens, American Fidelity

Leadership — **School Safety or Compliance? What Are We Trying to Accomplish?** — Admiral D
Understand where you may have binders in your school safety program. Learn pragmatic prevention and preparedness strategies for a comprehensive school safety program. Better understand drivers, impacts, and preparation challenges related to school safety risks. Discuss how effective school safety programs affect the social and emotional well-being of staff and students.
Tom Strasburger, PublicSchoolWORKS

Legal — **Top 10 Tips to Negotiate More Effectively** — Port
1. Bargaining (classified/certificated) procedures that will give administration an advantage in a subsequent labor contract interpretation dispute. 2. Picking the right tool to achieve your bargaining strategic goals: Traditional/IBB/Modified IBB. A deep-dive on the pros/cons.
Adam Miller, Taft Law