2025 VASS-VASBO WINTER CONFERENCE

JANUARY 6 - 7 VIRTUAL





Virginia Association of School Business Officials

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AGENDA

MONDAY, JANUARY 6

8:15AM - 8:45AM Optional Early Bird Session: VDOE Listening Session

Join Dr. Lisa Coons and her team to provide informal feedback on the Work-Based Learning Rubric and Seat Time Flex.

9:00AM - 9:15AM

Welcome and Opening Remarks
Presider: Dr. Keith Perrigan,
VASS President, Washington
Schools Superintendent
Ignite - Dr. Mandy Hester,
Nelson County Schools
Superintendent

9:15AM - 9:45AM

The Governor's Proposed Budget The Honorable Aimee Guidera, Virginia Secretary of Education

9:45AM - 10:30AM Developing the Next Generation of CFOs

Dr. Lisa Coons, Virginia State Superintendent of Public Instruction **Christina P. Berta**, Chief Operating Officer, Virginia Department of Education

10:30AM - 11:00AM

Education Funding Update from the General Assembly The Honorable Louise Lucas, Senate of Virginia Delegate Luke Torian, House Appropriations Chair

11:00AM - 11:15AM Break

11:15AM – 11:40AM Morning Breakout Sessions

1A: 10 Common Mistakes Ed Leaders Make with Retirement Planning and Transitions

Presider: Dr. Zeb Talley, Martinsville City Schools Superintendent Presenter: Dr. Eric Williams,

TCG/HUB International
Listen to this rapid-fire presentation
of ten common mistakes that
superintendents and business/
finance leaders make in planning for
and transitioning to retirement. Learn
strategies to avoid and correct these
errors. Topics include insurance,
retirement savings accounts, electing
VRS and Social Security benefits, and
asset withdrawal strategies in
retirement.

1B: Combating the Rising Cost of Offering Health Insurance Presider: Dr. Andrea Whitmarsh,

Greene County Public Schools Superintendent

Presenter: Ritter Jonas & Sarah Struckmann, OneDigital

Offering health insurance to employees is expensive and continues to increase each year. In this session, OneDigital will discuss creative ways to combat the rising costs to not only the schools but their employees. They will discuss creative ways to make sure your health insurance plan is hitting the mark as you compete for talent.

1C: A New Way of Thinking About your Public-School Employee Benefit Plan

Presider: Dr. Larry Frazier, West Point Schools Superintendent

Presenter: Brendan Nugent,

Jefferson Health Plan
Learn the pros and cons of
becoming self-insured.



11:50AM - 12:15PM

Breakout Sessions

2A: Plan Your Virginia

Retirement: Expert

Guidance for VRS Employees Presider: Kathleen Jackson,

Roanoke City Chief Financial

Cff:

Officer

Presenters: Josh Alloway, CFP and David Stables, IV CFP, ChFC,

CLU, Equitable

Discover a proven program with 25 years of experience helping VRS employees navigate their retirement options. Our team provides a personalized process to analyze your employees' VRS benefits and offers fiduciary recommendations to help them optimize their retirement and achieve their financial goals.

2B: Emerging Trends in Education Presider: Jacquline Brooke,

Norton City Public Schools Supervisor of Finance

Presenter: Charles Solis, Frontline Education

Join us for an overview of emerging trends in educa

emerging trends in education and how school districts are making adjustments.

12:15PM - 12:45PM Lunch on Your Own

12:45PM - 1:15PM
Special Recognition:
Kent Dickey & Barry DuVal
Luncheon Speaker:
Bob Holsworth,
Managing Principal

Managing Principal, DecideSmart

1:15PM - 1:30PM Break

Afternoon Presider: John Broderick, VASBO President, Sussex Schools Director of Finance & Operations 1:30PM - 3:00PM

Afternoon Breakout

Sessions

1A: Communicating Your

Budget

Presider: Cheri McGill,

Participate Learning

Presenter: Dr. Lori Mueller, The

Donovan Group

1B: Financial Management & Sustainability

Presider: Monica Cougan,

Participate Learning

Presenters: Dr. Scott Baker & Dr. Rob Benson, The Berkley Group

1C: Understanding Your
District's Financial Risk Profile:
Build Trust, Sustainability, and
Academic Excellence Through
These Core Process
Improvements
Presider: Marcia Stevens,

Caroline County Chief Operating Officer

Presenters: Michael Potter & Abby Snyder Edwards, Alverez

and Marsal

This session will equip leaders with strategies to assess their financial risk profile. Attendees will learn how to ask the right questions to evaluate their financial operations and implement practices that prioritize student success. The A&M team will share insights and lessons learned from recent engagements with K-12 districts in Virginia and beyond, highlighting common pitfalls to avoid, actionable strategies for fostering accountability and trust, and opportunities to leverage financial capabilities to support strategic priorities.

1D: VASS Executive Coach Training Presenters: Dr. Lori Harper & Dr. Jared Cotton, VASS Senior Coaches

. **1E: Mastermind Groups** - *Limited*

access, Sign-up Required

Presider: Amy Griffin, VASS Deputy

Executive Director

- Navigating Tough Conversations
 Caitlin Sullivan, Leading Now
- Superintendent Mobility –
 Dr. Wayne Harris and Dr. Kevin
 Castner, BWP Associates
- CFO Succession Planning Christina Berta, VDOE
- The 3 E Framework Andy Armstrong, VDOE
- Workplace Wellness for Thriving Teams - Gaynell Lyman, Sr.
 Director of Partnerships, ALP
- VELL Chris Jones and Kathy Burcher

TUESDAY, JANUARY 7

8:30AM - 9:00AM

Welcome & Updates from the

General Assembly

Presider: Dr. Elie Bracy,

Portsmouth City Schools Superintendent

Moderator: Dr. Sarah Calveric.

Caroline County Public Schools

Superintendent

The Honorable Ghazala Hashmi,

Senate of Virginia

The Honorable Sam Rasoul,

Virginia House of Delegates

Ignite: Staci Longest, King William County Public Schools Director of Finance

9:00AM - 9:40AM
Analyzing the Governor's Budget
Jim Regimbal, Fiscal Analytics

9:40AM -10:10AM VRS Update Patricia Bishop, VRS

10:10AM - 10:20AM Break

10:20AM - 11:00AM
Legal Hot Topics
Micah Schwartz, Williams Mullen

11:30AM - 1:00PM VASS Board of Directors Meeting

2025 VASS-VASBO Winter Conference Survey

Please take a moment to provide us with feedback on this year's conference!



2024-2025 Region

VASS

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REGION III Stafford



LATANYA MCDADE

REGION IV Prince William



DOUG STRALEY

REGION V Louisa



KIM HALTERMAN

REGION VI Alleghany Highlands



DENNIS CARTER

REGION VII



ANNETTE BENNETT

REGION VIII
Appomattox



2024-25 VASS PARTNERS

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Weenan Pharmacy Services
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Renaissance







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ASSOCIATE PARTNERS

















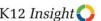




































2024-25 VASBO PARTNERS

DIAMOND









PLATINUM











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SILVER

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