

2025

VASS-VASBO

WINTER
CONFERENCE

JANUARY 6 - 7
VIRTUAL



VASS 2024-25

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Kathleen Jackson
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Christina Berta
SASBO Director
VDOE



Brandon Monk
Executive Director



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

President: 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**

President: 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**

President: 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**

President: 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

Presenter: Kathleen Jackson, Roanoke City Chief Financial 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

Presenter: Jacqueline Brooke, Norton City Public Schools Supervisor of Finance

Presenter: Charles Solis, Frontline Education

Join us for an overview of 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, DecideSmart

1:15PM - 1:30PM

Break

Afternoon Presenter: John Broderick, VASBO President, Sussex Schools Director of Finance & Operations

1:30PM - 3:00PM

Afternoon Breakout Sessions

1A: Communicating Your Budget

Presenter: Cheri McGill, Participate Learning
Presenter: Dr. Lori Mueller, The Donovan Group

1B: Financial Management & Sustainability

Presenter: 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

Presenter: Marcia Stevens, Caroline County Chief Operating Officer
Presenters: Michael Potter & Abby Snyder Edwards, Alvarez 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



SUPERINTENDENTS OF THE YEAR



MERV DAUGHERTY

REGION I
Chesterfield



OLWEN HERRON

REGION II
Williamsburg-James City



THOMAS TAYLOR

REGION III
Stafford



LATANYA MCDADE

REGION IV
Prince William



DOUG STRALEY

REGION V
Louisa



KIM HALTERMAN

REGION VI
Alleghany Highlands



DENNIS CARTER

REGION VII
Smyth



ANNETTE BENNETT

REGION VIII
Appomattox

Save the Date!

2025 VASBO Spring Conference
May 19-21, 2025
Cavalier Hotel - Virginia Beach



2024-25 VASS PARTNERS



SENIOR PARTNERS



PARTNERS



SENIOR ASSOCIATE PARTNERS



ASSOCIATE PARTNERS



2024-25 VASBO PARTNERS

DIAMOND



PLATINUM



GOLD



SILVER

ClearGov

Key Group

Keystone Information Systems

Sonny Merryman

TrackYourFunds

U.S. BENCOR/MidAmerica

Whitsons Culinary Group

Window Film Depot



