

Pre-Conference Agenda

Tuesday, April 30, 2019

9:00 am – 4:30 pm

Registration

1:00 - 4:30 pm

Pre-Conference Workshops

Workshop #1

Track:

Location:

Facilities Management

Finance and Accounting

Sand Castle

Presenters:

David Smith, AASBO

Ethan Taylor, Alabama State Department of Education

Connie Wallace, Florence City Schools

Course will focus on school facility management and operations. Effective school facility management protects the capital investments and provides an enhanced learning environment for students and teachers. Topics will include planning, budgeting and purchasing for facility management, environmental issues, staffing standards, the capital planning process and standards and procedures of the Alabama Building Commission.

Workshop #2

Track:

Location:

RSA/PEEHIP Update

Payroll/Personnel

Ballroom E

Presenter:

Ryan Gibney, Harris School Solutions

Jennifer Tritz, Retirement Systems of Alabama

This session will provide an update to the RSA Portal and will review the PEEHIP/RSA program for FY 2019. There will be an opportunity for questions related to information for the upcoming year.

Workshop #3

Track:

Location:

Financial Procedures for Local School Funds I

Local School

Ballroom FGH

Presenters:

Michele McCay, Hoover City Board of Education

Teresa Meadows, Hoover City Board of Education

Sonja Peaspanen, Alabama State Department of Education

Lois Stephenson, Retired, Mountain Brook Board of Education

This two-part course will be an in depth review of the Local School Financial Procedures Manual that each district has adopted including proper accounting procedures related to cash receipts/disbursements, fundraisers, outside organizations and other financial transactions.

Workshop #4**Track:****Location:****School Business Operations I****Purchasing/Procurement****Ballroom ABCD**

Presenters:

Dennis Heard, Alabama State Department of Education**Mandy Jones**, Decatur City Schools**Linda McGhee**, AASBO

It is important that purchasing directors and other school business officials understand school business operations. This two-part course will provide an overview of key areas of school business, finance and management, including a foundation of laws, policies and regulations that affect the day-to-day operations of a school business office.

Wednesday, May 1, 2019**7:15 - 8:00 am****Continental Breakfast****8:00 - 11:30 am****Pre-Conference Workshops****Workshop #5****Track:****Location:****NextGen Budget Prep for New CSFO's****Finance and Accounting****Sand Castle**

Presenters:

Ryan Gibney, Harris School Solutions**Karen Lusk-Smith**, AASBO

Budgeting today requires new thinking, utilization of technology and a more productive process. This class will cover utilizing budget works and position control to help facilitate the development of the annual budget as well as a discussion of best practices in developing a sound, workable and manageable budget.

Workshop #6**Track:****Location:****Employment Leave Laws****Payroll/Personnel****Ballroom E**

Presenters:

Whit Colvin, Bishop, Colvin, James & Kent, LLC**Dennis Heard**, Alabama State Department of Education

An in-depth review of the federal and state leave laws for education employees. Topics to include sick leave, personal leave, catastrophic, and military leave. Review of the requirements under the Family Medical Leave Act and discussion of other types of extended leaves.

Workshop #7

Track:

Location:

Financial Procedures for Local School Funds II

Local School

Ballroom FGH

Presenters:

Michele McCay, Hoover City Board of Education

Lois Stephenson, Retired, Mountain Brook City Schools

This two-part course will be an in depth review of Local School Financial Procedures Manual that each district has adopted including proper accounting procedures related to cash receipts/disbursements, fundraisers, outside organizations and other financial transactions.

Workshop #8

Track:

Location:

School Business Operations II

Purchasing/Procurement

Ballroom ABCD

Presenter:

Avery Embry, Talladega County Schools

Jennifer Hornsby, Pike County Schools

Josh Peach, Dude Solutions

Sonja Peaspanen, Alabama State Department of Education

Lori Zirlott, Mobile County Board of Education

It is important that purchasing directors and other school business officials understand school business operations. This two-part course will provide an overview of key areas of school business, finance and management, including a foundation of laws, policies and regulations that affect the day-to-day operations of a school business office.

11:30 am - 12:15 pm

11:00 am- 12:15pm

Lunch for Pre-conference Attendees Only

Past Presidents Luncheon (Invitation Only)

Grand Reef

Voyager's

Wednesday, May 1, 2019

12:30 – 2:00 pm

Location:

Presiding:

First General Session

Ballroom

Melanie Maples, President AASBO, Decatur City Schools

Recognition of Past Presidents

AASBO Awards:

David Smith, AASBO

Keynote Presentation:

Generation "THEM": Managing a Multi-Generational Workforce

Kristin Scroggins, GenWHY

2:00 - 2:30 pm

Refreshment Break Sponsored by EDUStaff

2:30 - 3:30 pm

Breakout Sessions

Breakout Session #1

Track:

Location:

Best Practices in Financial Reporting

Finance and Accounting

Ballroom ABC

Presenter: **David Smith, AASBO**

Best Practices in Financial Reporting- How can CSFOs effectively communicate the essential financial information boards/superintendents need to serve the district? Discussion of presenting financial reports in a user-friendly format for non-financial people.

Breakout Session #2

Track:

Location:

RSA Update

Payroll/Personnel

Ballroom D

Presenter: **Jennifer Tritz, Retirement Systems of Alabama**

This session will review the PEEHIP/RSA program for FY 2019-2020 and will provide opportunity for questions related to any new information for the upcoming year.

Breakout Session #3

Track:

Location:

Facility Assessment/Utilizing the SDE AIMs Portal

Purchasing

Ballroom E

Presenter: **Ethan Taylor, Alabama State Department of Education**

Are you utilizing the Facility Assessment and SAFE to its fullest potential when developing your Capital Plan? This session will discuss the importance of accurate SAFE and Facility Assessment data and information to create and implement a good capital improvement plan for your district in accordance to SDE guidelines.

Breakout Session #4

Track:

Location:

Budgeting and GL Coding for Local Schools

Local School

Ballroom FGH

Presenter: **Gena Groce, Madison County Board of Education**
Tanya Holcombe, Pell City Schools

This session will discuss the process/ procedures for budgeting CIS funds. A review of the GL account codes, set up, common errors and why correct coding is important in local school accounting.

Breakout Session #5

Financial Training for Your Principals and Directors

Track:

General

Location:

Sand Castle

Presenters: **Avery Ford**, Thomasville City Schools
Monique Rector, Jasper City Schools

Hear experienced CSFOs discuss their in-house training program for principals, coordinators and directors.

Breakout Session #6

Position Control in NextGen – Hands on Lab

Track:

Harris School Solutions

Location:

Sand Dollar

Presenters: **Shannon Blake**, Harris School Solutions

This session will be dedicated for NextGen clients currently using the Position Control module.

Breakout Session #7

Preparing for Tax Renewals

Track:

Finance & Accounting

Location:

Azure

Presenters: **Kane Barnett**, Bradley
Alan Zeigler, Bradley

Preparing for Tax Renewals- This session will include a general overview of ad valorem tax basics and discuss the recommended procedures/ processes when a locally-levied property tax is close to expiration. Discussion of strategies that have recently proved successful in connection with the routine renewal of existing ad valorem taxes and the planning process for potential tax increases.

3:30 – 5:00 pm

**Dedicated Vendor Showcase
CSFO/ Purchasing Agents Only**

Grand Reef

CSFO's and/or their purchasing agent are invited to early access to the Vendor Showcase.

3:45 – 4:45 pm

Breakout Sessions

Breakout Session #8 **Financing Capital Assets**
Track: **Finance and Accounting**
Location: **Ballroom ABC**

Presenters: **Kane Barnett**, Bradley
 Alan Zeigler, Bradley

Financing capital projects require careful planning and coordination among many different participants. Discussion of Alabama law related to the borrowing options for financing equipment and capital needs.

Breakout Session #9 **Sick Leave Bank Procedures**
Track: **Payroll/Personnel**
Location: **Ballroom D**

Presenter: **Dennis Heard**, Alabama State Department of Education
 Jennifer Hornsby, Pike County Schools

A discussion of the recommended board policies for the utilization of sick leave for education employees. Topics to include state law related to utilization of sick leave, sick leave bank, catastrophic leave and other situations.

Breakout Session #10 **Google Suite Tutorial for Beginners**
Track: **General**
Location: **Ballroom E**

Presenter: **Kelli Lane**, Hoover City Schools

Discover the easy but powerful features of GSuite for EDU that will support change in the way you work, share, collaborate, and save time. Participants will learn all they need to know to get started with all things Google!

Breakout Session #11 **Best Practices in Local School Accounting**
Track: **Finance & Accounting**
Location: **Ballroom FGH**

Presenters: **Kelly Augsburger**, Auburn City Schools

Many tools exist to assist with the workflow processes in your local schools. Are you utilizing the right tools? In this session, you will learn how one system is using software and other tools to improve workflow efficiency and reduce paperwork in local school accounting.

Breakout Session #12 **Maintenance of Effort**
Track: **General**
Location: **Sand Castle**

Presenter: **Sonja Peaspanen**, Alabama State Department of Education
Maintenance of Effort (MOE) refers to the responsibility of the Local Education Agency to maintain the same level of expenditures for the education of children with disabilities from one fiscal year to the next. Participants will learn the financial reporting requirements of MOE and the impact of their budgets.

Breakout Session #13 **NextGen Allocation Tracking – Hands on Lab**
Track: **Harris School Solutions**
Location: **Sand Dollar**

Presenter: **David Steelman**, Harris School Solutions
This will be a refresher course on the Allocation Tracking system. Best Practices and recommendations.

Breakout Session #14 **A+ College Ready Accounting Procedures**
Track: **General**
Location: **Azure**

Presenter: **Jennifer Glover**, A+ College Ready
 Kim Wallace, A+ College Ready
This session is designed for those districts that receive A+ College Ready Grants. A review of the grant process and the required accounting procedures for utilization of the funds.

5:00 – 6:00 pm	Vendor Product Showcase	Grand Reef
6:00 – 9:00 pm	Reception by the Pool	Pool Deck

Thursday, May 2, 2019

8:00 – 10:30 am	Vendor Product Showcase and Continental Breakfast Door Prizes! Must be present to win.	Grand Reef
9:30 – 10:20 am	Breakout Sessions	

Breakout Session #15 **CSFO Guide to Managing the CNP Program**
Track: **Finance and Accounting**
Location: **Ballroom ABC**

Presenter: **Russell Raney**, Cullman City Schools
Are you involved in the management of your district's food service program? Hear a CSFO/CNP Supervisor discuss the financial management of their district's food service program and the key indicators that CSFOs need to understand in operating their program.

Breakout Session #16 **Calculating and Paying Mid-Year Degree Changes**
Track: **Payroll/Personnel**
Location: **Ballroom D**

Presenter: **Vivian Lovorn**, Homewood City Board of Education
This session will discuss calculation for paying mid- year degree changes and other payroll calculations.

Breakout Session #17 **Utilizing a Purchasing Card Program**
Track: **Purchasing**
Location: **Ballroom E**

Presenters: **Tiffany Lovelace**, Regions

Discussion of the benefits a procurement card/accounts payable solution program can provide for your district. Hear school districts discuss how they have utilized the program to streamline their procurement process by providing p cards to teachers, parent organizations and department heads.

Breakout Session #18 **Public vs Non-Public Activity Funds**
Track: **Local School**
Location: **Ballroom FGH**

Presenters: **Dennis Heard**, Alabama State Department of Education
Public or Non- Public? Allowable or Non-Allowable Purchase? These are the questions. This session will focus on the financial rules and laws related to local school funds including classification, control and other financial transactions.

Breakout Session #19 **Procedures for Crowd Funding**
Track: **General**
Location: **Sand Castle**

Presenters: **Tina Hancock**, Huntsville City Schools
 Christy Mead, Albertville City Schools

Technology and social media has changed the process for fundraising for school districts. A discussion of the recommended procedures and policies for implementation of these programs at the local school level.

Breakout Session #20**Track:****Location:****NextGen Web Procurement (ESS) – Hands on Lab****Harris School Solutions****Sand Dollar**

Presenters: **Judy Cosminsky**, Harris School Solutions
An Introduction to ESS Web Requisitions.

Breakout Session #21**Track:****Location:****SFO Certification Prep****General****Azure**

Presenters: **Linda McGhee**, AASBO
Ryan Miller, Leeds City Schools
Serena Owsley, Athens City Schools
Cindy Parker, Blount County Schools

Are you are considering sitting for the Certified Administrators of School Finance and Operation (SFO) exam with ASBO International? If so, you don't want to miss this discussion and information on the Alabama ASBO SFO Certification Preparation Program. Attend this session for information and input on the program and hear from Alabama CSFOs who recently passed the exam and obtained their SFO Certification. Join the ranks of the prestigious group of 11 Alabama SFOs.

10:30 – 11:20 am**Breakout Sessions****Breakout Session #22****Track:****Location:****Financial Management/Budgeting and Forecasting****Finance and Accounting****Ballroom ABC**

Presenter: **Lauren Butts**, Alabaster City Schools
Karen O'Bannon, Madison County Schools

School districts should have a financial planning process that assesses financial sustainability of current and future programs. This session will identify key components of forecasting and provide examples and models for districts to utilize.

Breakout Session #23**Track:****Location:****Retirement Planning for Employees****Payroll****Ballroom D**

Presenters: **Kit Gallop**, Retirement Systems of Alabama
Russell Raney, Cullman City Schools

Do your employees understand the importance of planning for retirement and the retirement process? This session will provide tips for discussing retirement with your employees including Tier I and II, retirement benefits, sick days, cost of insurance and other information.

Breakout Session #24 **Alabama Competitive Bid Law/Public Works Law**
Track: **Purchasing**
Location: **Ballroom E**

Presenters: **Jason Paulk**, Department of Examiners of Public Accounts
An overview of the procurement and administrative requirements under the Alabama Competitive Bid Law and the Public Works Law.

Breakout Session #25 **Implementation of Credit Card Payments**
Track: **Finance & Accounting**
Location: **Ballroom FGH**

Presenter: **Moriah Earnest**, Auburn City Schools
Best practice discussion on streamlining the cash receipt process by accepting credit/debit card payments for school activities and programs.

Breakout Session #26 **Public Budget Hearings for Alabama School Districts**
Track: **Finance & Accounting**
Location: **Sand Castle**

Presenter: **Melanie Maples**, Decatur City Schools
Whether presenting to staff, school board members or the public, a successful budget presentation is about more than just the numbers and required forms. Learn how to present financial information to a non-financial audience in a concise and understandable format.

Breakout Session #27 **NextGen Web Apps – Hands on Lab**
Track: **Harris School Solutions**
Location: **Sand Dollar**

Presenter: **Jason Pond**, Harris School Solutions
David Tucker, Harris School Solutions
Demonstration of Remote Receipts, Purchasing and Employee Maintenance.

Breakout Session #28 **Working with Pivot Tables**
Track: **General**
Location: **Azure**

Presenter: **Laverne Williams**, Chilton County Schools
Pivot Tables in Excel are one of the most powerful features within Microsoft Office used to query, organize and summarize data in a quick and easy manner. Learn how to utilize this tool to save time and create reports in an efficient way.

11:30 am – 12:20 pm

Breakout Sessions

Breakout Session #29

Track:

Location:

Guide to Federal Programs

Finance and Accounting

Ballroom ABC

Presenter: **Lynn Buch**, Homewood City Schools

Do you understand and utilize E-Gap to its fullest potential? Attend this session to learn more about EGAP Consolidated, Set-A-Sides and PPA.

Breakout Session #30

Track:

Location:

Best Practices for Monthly Payroll Documentation

Payroll/Personnel

Ballroom D

Presenter: **Jan Swiderski**, Auburn City Schools

There are several reports generated during the monthly payroll process. Do you know what reports should be printed and/or saved? Attend this session to learn what payroll processing documents should be maintained.

Breakout Session #31

Track:

Location:

Utilizing Purchasing Consortiums

Purchasing

Ballroom E

Presenters: **William Burnett**, Omnia Partners
Pam Phillips, Huntsville City Board of Education

Best practice discussion on the benefits and cost savings of utilizing cooperative and joint purchasing agreements.

Breakout Session #32

Track:

Location:

Visitor Management Systems

Finance and Accounting

Ballroom FGH

Presenter: **Chris Hardman**, Auburn City Schools

How are you monitoring and tracking visitors in your schools during the school day? Attend this session to hear how a school district has implemented a Visitor Management System that provides staff with the ability to safely and effectively monitor all visitors entering into the building to keep the school, students, staff and volunteers safe.

Breakout Session #33 **Current Audit Issues**
Track: **General**
Location: **Sand Castle**

Presenter: **James Hall**, Department of Examiners of Public Accounts
Join this session where the Examiners of Public Accounts will discuss some of the current issues and topics related to the financial/compliance audits of Alabama school districts.

Breakout Session #34 **Remote Payroll Lab**
Track: **Harris School Solutions**
Location: **Sand Dollar**

Presenter: **Jason Pond**, Harris School Solutions
This session will cover Nextgen options for Input Pay and talk about upcoming enhancements to the leave approval system in ESS and importing Service Reports from Excel.

12:20 – 1:15 pm **Lunch On Your Own**

1:15 – 4:30 pm **Certificate Program Elective Course**
Dealing with Difficult People
Location: **Ballroom**

Presenter: **Ed Nichols**, ENspire Consulting

Friday, May 3, 2019

8:00 – 8:30 am **Breakfast**

8:45 – 11:00am **Second General Session**
Location: **Ballroom**
Presiding: **Melanie Maples**, Decatur City Schools

Presenter: **Andy Craig**, Alabama State Department of Education

Certificate Program Graduation Ceremony

AASBO Business Meeting