

# Encumbrance Clerk/Treasurer Workshop - Sept. 16, 2015

## Conference Schedule

<b>8:00 A.M.– 8:45 A.M. Room C</b>	<b>Registration, 2<sup>nd</sup> Floor</b> <b>Continental Breakfast</b> Sponsor: Oklahoma Schools Insurance Group (OSIG)				
<b>8:45 A.M.– 8:55 A.M. Room C</b>	<b>Welcome/Announcements</b> Dawn Pearce, Executive Director, OKASBO				
<b>9:00 A.M.– 11:50 A.M.</b>	<b>MORNING BREAKOUT SESSIONS</b>				
	<i><b>JOYNER</b></i>	<i><b>EF</b></i>	<i><b>A</b></i>	<i><b>MAYNARD</b></i>	<i><b>THEATER</b></i>
<b>9:00 A.M.– 9:50 A.M.</b>	<b>Activity Fund Guidelines</b>  Julie Miller Deputy Executive Director, General Counsel, OSSBA	<b>Encumbrance Clerks (0-3 experience)</b>  Diane Adamson Director of Finance, Tahlequah Schools, OKASBO Committee Chair	<b>School District Treasurer (0-3 experience)</b>  David Harp Business Manager, Shawnee Schools	<b>Unemployment Issues, Updates</b>  Stephanie Mather Attorney and Director of Legal Information, OSSBA	<b>OCAS Updates Beginning of Year Procedures (4+ experience)</b>  Pam Honeysuckle Financial Specialist, OK St. Dept. of Education
<b>10:00 A.M.– 10:50 A.M.</b>	<b>Booster Club Guidelines and Laws</b>  Doug Mann Attorney, Rosenstein, Fist, & Ringold, Inc.	<b>Encumbrance Clerks (4+ experience)</b>  Roger Adair Director of Finance, Moore Norman Tech. Center, OKASBO Board	<b>TRS Reporting and Updates</b>  Debra Plog Manager of Employer Reporting, Teacher Retirement System	<b>Payroll Best Practices</b>  Dusty Dilldine Director of Payroll, Broken Arrow Schools  Sara Frye, Director of Finance, Bowlegs Schools, OKASBO Board	<b>OCAS Updates Beginning of Year Procedures (0-3 experience)</b>  Iona Martin Financial Specialist, OK St. Dept. of Education
<b>11:00 A.M.– 11:50 A.M.</b>	<b>School Personnel Reporting</b>  Heather Butler Coordinator, School Personnel Records, OK St. Dept. of Education	<b>School District Treasurer (4+ experience)</b>  Cathy Bentley Dir. of Financial Reporting, Union Schools	<b>TRS Reporting &amp; Updates</b>  Debra Plog, Manager of Employer Reporting, Teacher Retirement System	<b>Payroll Best Practices</b>  Dusty Dilldine Director of Payroll, Broken Arrow Schools  Sara Frye Director of Finance, Bowlegs Schools, OKASBO Board	<b>Child Nutrition Updates &amp; Coding</b>  Jan Smith Project Coordinator, Child Nutrition, OK St. Dept. of Education
<b>12:00 P.M.– 12:30 P.M.</b>	<b>LUNCH – EXHIBIT HALL – 1ST Floor</b> Co-Sponsor: Focus Financial Advisors Co-Sponsor: Sodexo				

# Encumbrance Clerk/Treasurer Workshop - Sept. 16, 2015

<b>12:30 P.M.– 1:00 P.M.</b>  <b>Exclusive Exhibit Time</b>	<b>VENDOR SHOWCASE OPENING – 2<sup>ND</sup> Floor</b> Take this time to visit the vendor showcase area and review the latest products and services for Oklahoma school districts. Make sure you spend as much time as possible in the showcase learning about what they can do for you and your district.  You may even have a chance to win great prizes!  <i>Note: The Exclusive Exhibit Time is only a portion of the total exhibit hours. During these time slots, no educational sessions are occurring.</i>
---	--

## AFTERNOON BREAKOUT SESSIONS

	<i>JOYNER</i>	<i>EF</i>	<i>A</i>	<i>MAYNARD</i>	<i>THEATER</i>
<b>1:00P.M.– 1:50 P.M.</b>	<b>School Personnel Reporting</b>  Heather Butler Coordinator, School Personnel Records, OK St. Dept. of Education	<b>Encumbrance Clerks (4+ experience)</b>  Roger Adair Director of Finance, Moore Norman Tech. Center, OKASBO Board	<b>School District Treasurer (0-3 experience)</b>  David Harp Business Manager, Shawnee Schools	<b>School District Audit Laws and SDE Requirements</b>  Kathrine Black OK St. Dept. of Education	<b>Accountability, Preparation for your RAO</b>  Lynn Jones Executive Director, Accreditation OK St. Dept. of Education
<b>2:00 P.M.– 2:50 P.M.</b>	<b>Activity Fund Guidelines</b>  Julie Miller Deputy Executive Director, General Counsel, OSSBA	<b>Encumbrance Clerks (0-3 experience)</b>  Diane Adamson Director of Finance, Tahlequah Schools, OKASBO Committee Chair	<b>School District Treasurer (4+ experience)</b>  Cathy Bentley Dir. of Financial Reporting, Union Schools	<b>Charter Schools Regulations - What You Need to Know</b>  Rebecca Wilkenson Executive Director, Charter Schools, SDE	<b>State Aid Break Down</b>  Shannon Meeks CFO, Putnam City Schools


<b>2:50P.M.– 3:30 P.M.</b>	<b>Showcase Closing – Prize Drawings</b> Last chance to take advantage of all the products and services the exhibitors have to offer, and an opportunity to win great prizes!
--------------------------------	--

<b>3:30 P.M.– 4:20 P.M. Room D</b>	<b>School Business Ethics</b> Brenda Burkett, CPA, SFO ASBO Int'l Vice President 2015, President 2016 Chief Financial Officer, Norman Schools, OKASBO Committee Chair
--	---

<b>4:20 P.M.– 4:30 P.M. Room C</b>	<b>Closing Remarks/Distribute Certificates</b> Nancy Hughes, Executive Director, Financial Accounting-OCAS, OK State. Dept. of Education President, OKASBO
--	---

# OKASBO Fall Conference - Thursday, Sept. 17, 2015

## Conference Schedule

8:00 A.M.– 9:00 A.M.	<b>Registration, 2<sup>nd</sup> Floor</b>  <b>Continental Breakfast</b> Co-Sponsor: Municipal Accounting Systems, Inc. Co-Sponsor: Barlow Education Management Services  <b>Vendor Showcase Opens - 2<sup>nd</sup> Floor</b>
9:00 A.M.– 9:20 A.M.	<b>First General Session</b> <b>Welcome:</b> Nancy Hughes, President, OKASBO Executive Director, Financial Accounting-OCAS, OK State. Dept. of Education Dawn Pearce, Executive Director, OKASBO
9:20 A.M.– 9:40 A.M.	<b>Student Performance</b> <b>Chickasha High School, School Steppin' Out Show Choir</b> Under the direction of Mr. David Briscoe
9:40 A.M.– 10:15 A.M.	<b>The Elementary and Secondary Education Act (ESEA) Reauthorization</b> Dr. David Pennington, Superintendent, Ponca City Schools
10:15 A.M.– 10:30 A.M.	<b>Refreshment Break</b> Sponsor: Oklahoma Schools Assurance Group (OSAG)
10:30 A.M.– 12:00 P.M.	<p><b>“It All Starts With Attitude!” - Says Sam Glenn - The Attitude Guy</b>            Sponsor: Oklahoma Schools Assurance Group (OSAG)</p> <p>If anyone knows how to recharge positivity, recognize employee efforts, and ignite innovation and fun, it's Sam Glenn. Sam is a nationally-known speaker, author, and winner of multiple awards like Best Speaker of the Year and Most Outstanding Motivational Training Video. But Sam insists that <i>he is just a regular guy who understands the importance of recognizing, rewarding, and recharging people for personal and professional success.</i> Sam is also no stranger to adversity. Having lost a very successful business due to fire, Sam became negative, broke, depressed, jobless, and homeless. Sam's negative and toxic attitude poisoned his employment, relationships, and health—until he got what he calls "A Kick in the Attitude." Now, more than 16 years later, Sam still has the same fire and passion on the topic of attitude. <u>Sam has a simple philosophy: “When people get better, the organization will get better—and it all starts with attitude.”</u> Sam Currently resides in Indianapolis with his wife and daughter. If you need a positive pick me up, hundreds visit Sam's website daily to watch one of his videos to laugh and get an attitude adjustment.</p> <p><a href="http://www.SamGlenn.com">www.SamGlenn.com</a></p> 
12:00 P.M.– 12:45 P.M. Exhibit Hall— 1st Floor	<b>LUNCH</b> Sponsor: American Fidelity Assurance Company  <b>Award: Leroy Holloway Grant</b> Sponsor: OKASBO <b>Award: OKASBO PD Scholarship</b> Sponsor: American Fidelity Assurance Company <b>Award: SDE Financial Accounting Awards</b> Sponsor: OKASBO
12:45 P.M. – 1:10 P.M.	<b>Vendor Showcase</b>

# OKASBO Fall Conference - Thursday, Sept. 17, 2015

## Conference Schedule

Session Strands	<i>Breakout Session I 1:10 – 2:00 PM</i>	<i>Breakout Session II 2:10 -3:00 PM</i>	<i>Breakout Session III 3:10– 4:00 PM</i>
<b><u>Finance</u> AB Rooms</b>	<b>Appropriate Management of Activity &amp; Booster Fund Accounts</b>  Jeanise Morton Business Manager, Edmond Schools	<b>OCAS Updates</b>  Pam Honeysuckle Financial Specialist, OK St. Dept. of Education	<b>Open Session/ Unconference Model</b>  Finance
<b><u>Human Resources</u> EF Rooms</b>	<b>HR Best Practices Panel</b>  Jason James, Superintendent, Alex Schools  Stephanie Mather, Attorney and Director of Legal Information, OSSBA	<b>TRS Reporting &amp; Updates</b>  Debra Plog Manager of Employer Reporting, Teacher Retirement System	<b>Open Session/ Unconference Model</b>  Human Resources
<b><u>Technology</u> Cain Room</b>	<b>E-Rate Rules and Updates</b>  Mel Van Patten Director of Operations, Kellogg & Sovereign Consulting, LLC	<b>Going 1:1 Access for Every Student</b>  Kevin Hime, Superintendent, Clinton Schools  Beth Richert Dir. of Instructional Tech., Clinton Schools	<b>Open Session/ Unconference Model</b>  Technology
<b><u>State Department of Education</u> Theater Room</b>	<b>Child Nutrition Updates</b>  Jan Smith Project Coordinator, Child Nutrition, OK St. Dept. of Education	<b>Federal Program Updates</b>  Bo Merritt and Corina Ene Federal Programs, OK St. Dept. of Education	<b>Open Session/ Unconference Model</b>  SDE/Legislative
<b><u>Common Cent\$</u> Joyner Room</b>	<b>Grant Writing for Crowd Funding - Donors Choose</b>  Tyler Bridges Assistant Superintendent, Clinton Schools	<b>OUSF - Increasing your Odds for Full Broadband Funding</b>  Derrel Fincher OUSF Recertification Coordinator Oklahoma Corporation Commission	<b>Career Technology Center Meeting</b>  Diane Durham, CSBA, Financial Analyst, OK Dept. of Career Technology Centers
<b><u>Vendor</u> Maynard Room</b>	<b>Buy Board Cooperative Purchasing</b>  Travis Maese, Asst. Manager, Buy Board	<b>Affordable Care Act IRS Reporting</b>  Martha Pate Vice President, Central Region Manager American Fidelity Assurance  Cassie Waters Group Management, Employees Group Insurance Division, OMES	<b>Qualified Zone Academy Bonds (“QZAB’s”) and the Oklahoma Cash Management Program (Tax Anticipation Notes)</b>  Ryan McDonald Executive Vice President Stephen H. McDonald & Associates  J.C. Leonard, Vice President Stephen H. McDonald & Associates
<b>4:00 P.M.- 5:00 P.M.</b>	<b>VENDOR SHOWCASE Prize Drawings</b> Last chance to visit with vendors and see the latest products and services offered to school districts.		

# OKASBO Fall Conference - Friday, Sept. 18, 2015

## Conference Schedule

8:00 A.M.– 9:00 A.M.	<b>Registration</b> <b>Continental Breakfast</b> Sponsor: Oklahoma Schools Insurance Group (OSIG)		
9:00 A.M.– 9:05 A.M.	<b>Welcome – Second General Session</b> Kevin Hime, OKASBO President-Elect, Superintendent, Clinton Public Schools		
9:05 A.M.– 9:45 A.M.	<b>Financial Forecast</b> Mr. Steven Crawford, Executive Director, CCOSA Mr. Shawn Hime, Executive Director, OSSBA Dr. Marcie Mack, State Director, Career Tech		
9:45 A.M.– 10:00 A.M.	<b>Business Meeting</b>		
<b>Breakout Sessions</b>			
10:00 A.M. – 11:15 A.M.	<b>Refreshments Provided –Please pick up something to enjoy during your session.</b>		
Session Strands	<i>Breakout Session I 10:00 – 10:50 PM</i>		<i>Breakout Session II 11:00-11:50</i>
<b>Finance</b> AB Rooms	<b>State Aid 101</b>  Kevin Hime, Superintendent, Clinton Schools  Jason James, Superintendent, Alex Schools		<b>Open Session/ Unconference Model</b>  Finance
<b>Human Re- sources</b> EF Rooms	<b>Workers Compensation</b>  Jack Dryden, Administrative Director Oklahoma Schools Assurance Group (OSAG)		<b>Open Session/ Unconference Model</b>  Human Resources
<b>Technology</b> Cain Room	<b>Going Google</b> <b>Making the Conversion to GAFE</b> <b>(Google Apps for Education)</b>  Josh Pearce, Director of Information Technology, Piedmont Schools		<b>Open Session/ Unconference Model</b>  Technology
<b>State Department of Education</b> Theater Room	<b>The Reauthorization of ESEA</b>  Cindy Koss Deputy Superintendent for Academic Affairs and Planning, OK St. Dept. of Education		<b>Open Session/ Unconference Model</b>  SDE/Legislative
<b>Common Cent\$</b> Joyner Room	<b>Health Choice – High vs. HAS</b>  David Rose Group Management Specialist, Employees Group Insurance Division, OMES		<b>Open Session/ Unconference Model</b>  Career Technology Centers
<b>Vendor</b> Maynard Room	<b>Microsoft Campus Software Agreements</b>  Ashley Myers, K12 Account Rep SHI		<b>Emergency Planning for School Business Officials</b>  Cindy Swearingen, Business Development, TRC Disaster Solutions
11:50 A.M.– 12:00 A.M.	<b>Door Prizes</b> Evaluations - Closing Comments		
12:15 P.M. – 2:15 P.M.	<b>Board of Directors Meeting – Light Lunch provided</b> Sponsor: AXA Insurance		