



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

June 19 - 23, 2017
Sanibel Harbour Marriott Resort & Spa
Fort Myers, FL

TIME	PROGRAM ITEM	ROOM	PRESIDING
------	--------------	------	-----------

Monday, June 19, 2017

4:00 PM	6:00 PM	Board of Directors Meeting	Azalea	
---------	---------	----------------------------	--------	--

Tuesday, June 20, 2017

7:00 AM	8:00 AM	Continental Breakfast (Sponsored by FSFOA) - Palm Gardens Foyer		
9:00 AM	4:00 PM	Finance Council Meeting □	Island	Theresa Boston-Ellis, Chair
8:00 AM	9:40 AM	GASB 75 is Coming! - Getting Ready for OPEB's New Impact on Your Financials <i>Alan Lowers, Partner, Carr, Riggs, and Ingram</i>	Royal/Sabal Palm	Dawn Meyers
10:00 AM	10:20 AM	Break		
10:20 AM	12:00 PM	A&A Internal Controls and Fraud Detection <i>Jennifer Murtha, Senior Director</i> <i>Laura Manlove, Manager, RSM US LLP</i>	Royal/Sabal Palm	Dawn Meyers
12:00 PM	1:30 PM	Lunch (on your own)		
noon	5:00 PM	Registration		

Concurrent Mini Sessions

Session I

1:30 PM	2:20 PM	A - How to Prepare an AFR <i>Stephanie Heaton, Manager, Accounting Services, Hillsborough County Schools; Joshua Stringfellow, Senior Finance Manager - Financial Reporting, Pasco County Schools</i>	Sabal Palm	Ellen Harper
		B - District Budgeting for Beginners <i>Judith Padres, Ernest JeanBaptiste - Orange County Schools</i>	Royal Palm	Steve Compton
		C - How to Understand IT Budgets <i>Michael Pinnella, Director of Network Operations, Holmes County Schools</i>	Queen Palm	Kelly Leavins
2:20 PM	2:30 PM	Break		

Session II

2:30 PM	3:20 PM	A - AFR Conversion Entries and Reconciliations <i>Valerie Maggi, Accounting Supervisor, Sarasota County Schools, and Annette Pinnock, Financial Accounting Manager, Palm Beach Schools</i>	Sabal Palm	Theresa McCants
		B - Tight Budgets - Leadership and Strategies <i>Michael Degutis, Chief Financial Officer, St. Johns County Schools</i>	Royal Palm	Steve Compton
		C - IT Change Management <i>Sandra Ford, Chief Operations Officer, Manatee County Schools</i>	Queen Palm	Heather Jenkins
3:20 PM	3:40 PM	Break		

Session III

3:40 PM	4:30 PM	A - GASB 68 Entries and Note Disclosures <i>Alice Posada, Director of Finance, Marion County Schools</i>	Sabal Palm	Dominick Cristofaro
		B - Asset Tracking <i>Rita Thomas, Orange County Schools</i>	Royal Palm	Steve Compton
		C - Classroom Technology - Panel Discussion <i>Dwayne Alton, Director, Infrastructure Services, Lee County Schools</i>	Queen Palm	Ami Desamours
5:30 PM	6:30 PM	Welcome Reception - Palms Pool Deck		
Evening On Your Own				



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

June 19 - 23, 2017
Sanibel Harbour Marriott Resort & Spa
Fort Myers, FL

TIME		PROGRAM ITEM	ROOM	PRESIDING
Wednesday, June 21, 2017				
7:00 AM	8:00 AM	Continental Breakfast (Sponsored by FSFOA) Gardens Ballroom		
7:00 AM	8:00 AM	Registration		
8:00 AM	8:30 AM	Opening Remarks	Royal/Sabal Palm	Mitsi Corcoran
		Invocation	Royal/Sabal Palm	Mitsi Corcoran
		Merrill Wimberley, Chief Financial Officers, Leon County Schools		
		Presentation of Colors and Pledge of Allegiance	Royal/Sabal Palm	Mitsi Corcoran
		Cypress Lake High School, Army JROTC		
8:30 AM	9:20 AM	Welcome to Lee County	Royal/Sabal Palm	Mitsi Corcoran
		Dr. Gregory Adkins, Superintendent, Lee County Schools		
8:30 AM	9:20 AM	DOE Update	Royal/Sabal Palm	Mitsi Corcoran
		Mark Eggers, Assistant Deputy Commissioner, Florida Department of Education		
9:20 AM	10:20 AM	Sponsor Recognition	Royal/Sabal Palm	Gretchen Saunders
10:20 AM	10:40 AM	Break		
10:40 AM	11:30 AM	Developing a Leadership Mindset: Culture, Climate, and Communication	Royal/Sabal Palm	Bill Kelly
		Chris Colwell, Associate Professor and Chair of Education, Stetson University		
11:30 AM	1:30 PM	Lunch (on your own)		
Concurrent Mini Sessions				
Session I				
1:30 PM	2:20 PM	A - Solutions to Track and Control ESE Costs	Sabal Palm	Christy Price
		Will Gordillo, Senior Associate, Public Consulting Group, Inc.		
		B - P-Cards Acceptable Use and Tracking Bid/Non-Bid Items	Royal Palm	Heather Jenkins
		Ann Altman, Purchasing Services Manager, Pasco County Schools		
		C - Construction Audits	Queen Palm	Leanne Evans
		Vic Incinelli, Carr, Riggs and Ingram		
2:20 PM	2:30 PM	Break		
Session II				
2:30 PM	3:20 PM	A - Inquiring Minds Want to Know...What's on the Auditor General's Office Operational Audit Radar?	Sabal Palm	Pennie Zuercher
		Dawn Meyers, Director, Auditing and Property Records, Pinellas County Schools		
		B - Making Sense of PCI Compliance	Royal Palm	Ami Desamours
		Todd Stephenson, IT Security & Compliance Specialist, ControlScan		
		C - Comparability - Title 1	Queen Palm	Link Jarrett
		Martha Asbury, Assistant Deputy Commissioner, Finance and Operations, Florida Department of Education		
3:20 PM	3:40 PM	Break (snack provided) - Gardens Ballroom & Palm Gardens Foyer		
Session III				
3:40 PM	4:30 PM	A - Public Private Partnerships - Building New Schools Alternative	Sabal Palm	Leanne Evans
		David Moore, Managing Director, PFM		
		B - Purchasing Policies Under Uniform Grant Guidance (UGG)	Royal Palm	Christy Price
		Martha Asbury, Assistant Deputy Commissioner, Finance and Operations, Florida Department of Education		
		C - OPEB Hands On Training and Impact of GASB 75	Queen Palm	Ellen Harper
		James Rizzo, Senior Consultant and Actuary, and Piotr Krekor, Consultant and Actuary, Office of Gabriel, Roeder, Smith & Company (GRS)		
Evening On Your Own				



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

June 19 - 23, 2017
Sanibel Harbour Marriott Resort & Spa
Fort Myers, FL

TIME		PROGRAM ITEM	ROOM	PRESIDING
Thursday, June 22, 2017				
7:00 AM	8:00 AM	Continental Breakfast (Sponsored by FSFOA) - Gardens Ballroom		
7:00 AM	8:00 AM	Registration		
8:00 AM	8:50 AM	A - GASB 67/68 Information Garry Green, Chief of Research and Education, Florida Department of Management Services	Royal/Sabal Palm	Mitsi Corcoran
8:50 AM	9:10 AM	Finance Council Update Theresa Boston-Ellis , Deputy Superintendent of Support Services, Marion County Schools	Royal/Sabal Palm	Mitsi Corcoran
9:10 AM	9:30 AM	Business Meeting and Elections	Royal/Sabal Palm	Mitsi Corcoran
9:30 AM	9:50 AM	Break		
9:50 AM	10:40 AM	Fact vs. Myth - Marketing Financial Information (PAFR) Amity Schuyler, Chief Officer of Strategic Communication and Engagement, Palm Beach Schools	Royal/Sabal Palm	Leanne Evans
10:40 AM	11:30 AM	Legislative Update Joy Frank, Florida Association of District School Superintendents	Royal/Sabal Palm	Bonnie Penner
11:30 AM	1:00 PM	Lunch (on your own)		
Concurrent Mini Sessions				
Session I				
1:00 PM	2:20 PM	A - Ethics for Governmental CPAs in Florida - part 1 of 3 Laura Krueger-Brock, CPA/CFF, CFE, Kerkerling, Barberio & Co., CPAs	Sabal Palm	Mitsi Corcoran
1:30 PM	2:20 PM	B - TRIM Update and E-Trim Wyatt Peters, Tax Law Specialist, Florida Department of Revenue	Royal Palm	Pennie Zuercher
		C - Post Issuance Compliance Lisa Olsen, Senior Executive Director, Digital Assurance Certification	Queen Palm	Dominick Cristofaro
2:20 PM	2:40 PM	Break		
Session II				
2:40 PM	3:30 PM	A - Ethics for Governmental CPAs in Florida - part 2 of 3 Laura Krueger-Brock, CPA/CFF, CFE, Kerkerling, Barberio & Co., CPA	Sabal Palm	Mitsi Corcoran
		B - Academic ROI Carol MacLeod, Chief Financial Officer, Lake County Schools	Royal Palm	Bonnie Penner
		C - Investing in a Rising Rate Environment Orrin Edwards, Manager of Taxable Fixed Income Strategy Group, Raymond James & Associates, Inc.	Queen Palm	Steve Compton
3:30 PM	3:40 PM	Break		
Session III				
3:40 PM	4:30 PM	A - Ethics for Governmental CPAs in Florida - part 3 of 3 Laura Krueger-Brock, CPA/CFF, CFE, Kerkerling, Barberio & Co., CPAs	Sabal Palm	Mitsi Corcoran
		B - Cash Flows and Forecasting Dominick J. Cristofaro, Senior Finance Manager – Treasury, Pasco County Schools	Royal Palm	Dawn Meyers
		C - Controlled Open Enrollment Forecasting Gene B. Tanner, Educational Policy Consultant, Florida Department of Education	Queen Palm	Theresa McCants
6:00 PM	7:00 PM	Reception (Sponsored by TSA & Bencor) - Everglades Foyer & Veranda		
7:00 PM	12:00 AM	Banquet - Everglades AB		



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

June 19 - 23, 2017
 Sanibel Harbour Marriott Resort & Spa
 Fort Myers, FL

TIME		PROGRAM ITEM	ROOM	PRESIDING
Friday, June 23, 2017				
7:30 AM	8:30 AM	Continental Breakfast (Sponsored by FSFOA)		
8:30 AM	9:20 AM	Economic Outlook Jim Glassman, Managing Director and Head Economist, J.P.Morgan Chase	Royal/Sabal Palm	Dominick Cristofaro
9:20 AM	10:10 AM	Leadership: "Find Your FAFA" Dr. Diana Greene, Superintendent of Schools, Manatee County Schools	Royal/Sabal Palm	Stephanie Riviello
10:10 AM	10:40 AM	Break		
10:40 AM	11:30 AM	Auditor General Update Micah Rogers, CPA , Audit Supervisor, State of Florida Auditor General	Royal/Sabal Palm	Dawn Meyers
11:30 AM	11:45 AM	ANNOUNCEMENTS DOOR PRIZES	Royal/Sabal Palm	Mitsi Corcoran
12:00 PM	1:30 PM	Board of Directors: Meeting and Luncheon	Azalea	