FSFOA
2018 Conference

FULL STEAM AHEAD

Hyatt Regency
Jacksonville Riverfront
June 11th-15th
The Florida School Finance Officers Association would like to thank RevTrak for their generous donation of the insulated bags and snacks. Sponsor provided snacks in lieu of venue provided snacks has saved thousands to FSFOA and will allow us to continue the great venues, entertainment and programming for which our members have become accustomed.
Welcome to the June 2018 conference. For those of you who usually leave Thursday night, I encourage you to stay through Friday as we will have a report on how to safeguard our schools against school shootings. The speaker will be Captain Rick Francis of the Seminole County Sheriff’s Office, who works closely with Seminole County Public Schools. It will be research based and provide a benchmark against which we can measure the myriad proposals we are all receiving.

The conference will be an opportunity to learn from experts and build relationships with finance staff from other districts. DOE will give us the inside scoop on how they plan to implement new legislation adopted in the most recent legislative session. Our sponsors will have on display, the latest and greatest product and service offerings that could potentially save our respective school districts time and money.

On Tuesday evening, there will be a reception with drinks and hors d’oeuvres to welcome all of you. Thursday evening will be an opportunity to relax with our families in a setting overlooking the St. Johns River with plenty of food (heavy hors d’oeuvres) and cocktails to take the edge off.

Our theme this year is “Full Steam Ahead” in recognition that our hotel, the Hyatt Regency Jacksonville, is located in downtown Jacksonville and is on the St. Johns River where steam boats were once berthed.

Bill Kelly
President FSFOA
Conference Floor Plans

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Public Trust Advisors is a fixed income investment management and advisory firm catering specifically to the institutional public funds marketplace.

Monday, June 11, 2018

4:00 PM - 6:00 PM  Board of Directors Meeting
River Terrace 3
(No Dinner)

Tuesday, June 12, 2018

7:00 AM - 8:00 AM  Continental Breakfast
Sky Bridge
Sponsored by FSFOA

9:00 AM - 4:00 PM  Finance Council Meeting
River Terrace 1
Presiding: Gretchen Saunders

8:00 AM - 9:40 AM  GASB Update
Conference Center B
Tom Cox - Public Risk Underwriters of Florida, Inc.
Presiding: Bill Kelly

9:40 AM - 10:00 AM  Break

10:00 AM - 11:40 AM  A&A Internal Controls and Fraud Detection
Conference Center B
Trey Scott & Daniel Anderson - Mauldin & Jenkins
Presiding: Dawn Meyers

11:40 AM - 1:30 PM  Lunch (On Your Own)

12:00 PM - 5:00 PM  Registration

Concurrent Mini Sessions

1:30 PM - 2:20 PM  MINI SESSION I
River Terrace 2
A - Booster Oversight
Amy Shafran - Pinellas County Public Schools
Presiding: Dawn Meyers

Conference Center B  B - P-Cards Acceptable Use and Tracking
Patrick Snodgrass & Karen O’Steen - St. Johns County Public Schools
Presiding: Trudi Murdock
C - Q&A Panel for Digital Device Rollout and/or Fees
Part - 1
Mariel Milano - Orange County Public Schools
Presiding: Shari Horsey

2:20 PM - 2:30 PM
Break

2:30 PM - 3:20 PM
MINI SESSION II
A - Internal Accounts
Jennifer Christensen - Carr, Riggs & Ingram, LLC
Presiding: Trudi Murdock

River Terrace 3
B - Payments and Processing Accounts Payable
Jeri Winkleblack - Bank of America
Presiding: Ellen Harper

3:20 PM - 3:40 PM
Break

3:40 PM - 4:30 PM
MINI SESSION III
A - Crowdfunding Best Practice
(Go Fund ME, Donors Choose, etc.)
Joshua Henn - Seminole County Public Schools
Presiding: Raymond Church

Conference Center B
B - Resources for New Financial Officers:
Update on Finance Officers Training Project
Mark Eggers & Link Jarrett - FDOE
Presiding: Heater Jenkins

River Terrace 3
C - Cyber Attacks—Are you Ready?
Steven Berlin - Rumberger, Kirk & Caldwell
Presiding: Bonnie Penner

Sunday, June 12, 2018 (continued)

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**Welcome Reception**
5:30 PM – 6:30 PM
River Terrace 1 & Deck

**Wednesday, June 13, 2018**

7:00 AM - 8:00 AM
Continental Breakfast
Conference Center A

7:00 AM – 8:00 AM
Registration

8:00 AM - 8:15 AM
Opening Remarks
Conference Center B

Presiding: Bill Kelly

**Invocation**
Merrill Wimberley - Leon County Public Schools
Presiding: Bill Kelly

**Presentation of Colors and Pledge of Allegiance**
Samuel Wolfson High School - JROTC

8:15 AM - 9:05 AM
DOE Policy and Budget Update
Conference Center B

Linda Champion, Mark Eggers & Link Jarrett - FDOE
Presiding: Gretchen Saunders

9:05 AM—10:05 AM
Sponsor Recognition
Conference Center B

Presiding: Gretchen Saunders & Michael Yanosik

10:05 AM – 10:20 AM
Welcome to Duval County
Conference Center B

Michelle Begley, CFO - Duval County Public Schools
Presiding: Bill Kelly

10:20 AM – 10:40 AM
Break

10:40 AM—11:30 AM
Legislative Update
Conference Center B

Joy Frank - Florida Association of District School Superintendents
Presiding: Ellen Harper
Wednesday, June 13, 2018 (continued)

11:30 AM - 1:30 PM  Lunch (On Your Own)

Concurrent Mini Sessions

1:30 PM – 2:20 PM  MINI SESSION I
Conference Center B
A - TRIM Update and E-Trim
Letecia Blick - Department of Revenue
Presiding: Tomeka Billingsley

River Terrace 3
B - AFR Training for New Employees
Stephanie Heaton - Hillsborough County Public Schools
Joshua Stringfellow - Pasco County Public Schools
Presiding: Idelle Rodriguez

River Terrace 2
C - Transportation - Funding, KPIs and Legislation
Jim Beekman - Hillsborough County Public Schools
Presiding: Gretchen Saunders

2:20 PM – 2:30 PM  Break

2:30 PM -3:20 PM  MINI SESSION II
Conference Center B
A - Cost Report
Jeff Ewaldt - FDOE
Presiding: Ellen Harper

River Terrace 3
B - CAFR Preparation with MD&A Focus
Joshua Stringfellow - Pasco County Public Schools
Presiding: Idelle Rodriguez

River Terrace 2
C - Energy Efficiency
Daniel Badran - Minimise USA
Presiding: Gretchen Saunders

3:20 PM – 3:40 PM  Sponsored Break
Conference Center A

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Wednesday, June 13, 2018 (continued)

3:40 PM – 4:30 PM  MINI SESSION III
River Terrace 2
A - Comparability, Maintenance of Effort, Federal
Miki Presley - FDOE
Presiding: Tomeka Billingsley

River Terrace 3
B - PAFR Preparation
Stephanie Heaton - Hillsborough County Public Schools
Presiding: Idelle Rodriguez

Conference Center B
C - Capital Outlay Policy and Funds
Suzanne Pridgeon - FDOE
Presiding: Ellen Harper

Evening On Your Own

Thursday, June 14, 2018

7:00 AM – 8:00 AM  Continental Breakfast
Conference Center A
Sponsored by FSFOA

7:00 AM – 8:00 AM  Registration

8:00 AM – 8:50 AM  Business Meeting, Elections and Retirements
Conference Center B
Presiding: Bill Kelly

8:50 AM - 9:40 AM  Wage and Hour Presentation
Conference Center B
William Richardson - US Department of Labor
Presiding: Gretchen Saunders

9:40 AM - 9:50 AM  Finance Council
Conference Center B
Olga Swinson - Pasco County Public Schools
Presiding: Gretchen Saunders

9:50 AM – 10:00 AM  Break
Thursday, June 14, 2018 (continued)

10:00 AM – 10:50 AM  
Seminole County Communications Strategy  
Conference Center B  
Dr. Walter Griffin - Seminole County Public Schools  
Presiding: Bill Kelly

10:50 AM – 11:30 AM  
Sponsor Appreciation  
Conference Center B  
Presiding: Gretchen Saunders

11:30 AM – 1:30 PM  
Lunch (On Your Own)

Concurrent Mini Sessions

1:30 PM – 2:20 PM  
MINI SESSION I  
River Terrace 2  
A - Investment Strategies in a Rising Interest Rate Environment  
David Jang & M. Brent Wertz - Water Walker Investments  
Presiding: Dominick Cristofaro

Conference Center B  
B - K12 Budget Planning Tool  
Celeste O’Dea - Oracle  
Presiding: Raymond Church

River Terrace 3  
C - Ethics (Part 1 of 3)  
1:00 PM – 2:30 PM  
William Blend - Moore, Stephens & Lovelace, PA  
Presiding: Janice Slonina

2:20 PM – 2:30 PM  
Break

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Medical Prescription Services
**Thursday, June 14, 2018 (continued)**

2:30 PM – 3:20 PM  
**MINI SESSION II**  
Conference Room B  
A - Update of the Tax Law Changes...  
No More Advance Fundings  
David Moore - PFM  
Presiding: Leanne Evans

River Terrace 2  
B - GFOA Budget Award Changes  
Carol MaCleod - Forecast5 Analytics Inc.  
Presiding: Raymond Church

River Terrace 3  
C - Ethics (Part 2 of 3)  
William Blend - Moore, Stephens & Lovelace, PA  
Presiding: Janice Slonina

3:20 PM – 3:40 PM  
Break

3:40 PM – 4:30 PM  
**MINI SESSION III**  
Conference Center B  
A - Fraud, It’s Everywhere  
Stephen Lenehan & Jacqueline Kobialko - Wells Fargo  
Presiding: Leanne Evans

River Terrace 2  
B - Resources for New Finance Officers  
Panel Discussion  
Olga Swinson - Pasco County Public Schools  
Karen Coffey - Pinellas County Public Schools  
Jim Drake - Monroe County Public Schools  
Presiding: Heather Jenkins

River Terrace 3  
C - Ethics (Part 3 of 3)  
William Blend - Moore, Stephens & Lovelace, PA  
Presiding: Janice Slonina

6:00 PM – 9:00 PM  
**Reception Social with Heavy Hors D’oeuvres**
Friday, June 15, 2018

7:30 AM – 8:30 AM  Continental Breakfast  Sponsored by FSFOA
Sky Bridge

8:30 AM – 9:20 AM  Economic Update
Conference Center B  Augustine Faucher - The PNC Financial Service Group
Presiding: Dominick Cristofaro

9:20 AM – 10:10 AM  School Safety
Conference Center B  Captain Rick Francis - Seminole County Sheriff
Presiding: Bill Kelly

9:20 AM – 10:10 AM  Economic Update
Conference Center B  Augustine Faucher - The PNC Financial Service Group
Presiding: Dominick Cristofaro

10:10 AM – 10:40 AM  Break

10:40 AM – 11:30 AM  Auditor General Update
Conference Center B  Micah Rodgers & J. David Hughes - State of Florida Auditor General
Presiding: Dawn Meyers

11:30 AM – 11:45 AM  Announcements
Conference Center B  Door Prizes

12:00 PM – 1:30 PM  Board of Directors Meeting and Luncheon
River Terrace 3

2018 FSFOA Conference November 5 - 8 in Fort Myers

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