



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

June 18-21, 2019
 Hyatt Regency Jacksonville Riverfront
 Jacksonville, FL

AGENDA

TIME	PROGRAM ITEM	PRESIDING	ROOM
Monday, June 17, 2019			
4:00 PM	6:00 PM	Board of Directors Meeting	River Terrace 3
Tuesday, June 18, 2019			
7:00 AM	8:00 AM	Breakfast (Sponsored by TSA)	Conference Center A
9:00 AM	4:00 PM	Finance Council Meeting <i>Olga Swinson, Chair</i>	Gretchen Saunders River Terrace 1
8:00 AM	9:40 AM	GASB Update <i>Donna Collins, Milestone Professional Services</i>	Dawn Meyers Conference Center B
9:40 AM	9:50 AM	Break	
9:50 AM	11:30 AM	A&A Internal Controls and Fraud Detection <i>Lance Schmidt and Chriss Kessler, Clifton, Larsen & Allen</i>	Dawn Meyers Conference Center B
11:30 AM	1:30 AM	Lunch (on your own)	
12:00 PM	5:00 PM	Registration	Sky Bridge 3rd Floor
Concurrent Mini Sessions			
Session I			
1:30 PM	2:20 PM	A - AFR Basics <i>Stephanie Heaton, Hillsborough Schools</i>	Ellen Harper Conference Center B
		B - Internal Audit <i>Linda Lindsey, Michele Kiker & Manuel Ippolito</i>	Idelle Rodriguez River Terrace 2
		C - The Business of Education: A Contemporary Perspective on Improving Retention and Recruitment <i>Jamie Rosenberg, Classwallet</i>	Shari Horsey River Terrace 3
2:20 PM	2:30 PM	Break	
Session II			
2:30 PM	3:20 PM	A - Conversion Entries <i>Marcelle Richardson, Baker Schools; Alice Posada, Marion Schools; Stephanie Heaton, Hillsborough Schools; Janice Scott, Duval Schools</i>	Ellen Harper Conference Center B
		B - School Banking <i>Magi Betancourt, Miami-Dade; Leanne Evans, Palm Beach Schools</i>	Idelle Rodriguez River Terrace 2
		C - The Crowdfunding Dilemma <i>Troy Richie, SnapRaise</i>	Shari Horsey River Terrace 3
3:20 PM	3:40 PM	Break	
Session III			
3:40 PM	4:30 PM	A - Financial Statement Notes <i>Marcelle Richardson, Baker Schools; Alice Posada, Marion Schools; Stephanie Heaton, Hillsborough Schools; Janice Scott, Duval Schools</i>	Ellen Harper Conference Center B
		B - Internal Accounts - Hot Topics <i>Lorena Bruneau and Teri Ambrose</i>	Idelle Rodriguez River Terrace 2
		C - Integrated Payables & Best Practices for Card Program Optimization <i>John Lee, JP Morgan</i>	Shari Horsey River Terrace 3
5:30 PM	6:30 PM	Welcome Reception	River Terrace 1
Evening On Your Own			



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TIME	PROGRAM ITEM	PRESIDING	ROOM
Wednesday, June 19, 2019			
7:00 AM	8:00 AM	Continental Breakfast	
7:00 AM	8:00 AM	Registration	
8:00 AM	8:30 AM	Opening Remarks	
		Trudi Murdock	
		Invocation	
		Trudi Murdock	
<i>Merrill Wimberley</i>		Conference Center B	
Presentation of Colors and Pledge of Allegiance		Idelle Rodriguez	
<i>Samuel Wolfson High School JROTC</i>		Conference Center B	
Welcome to Duval		Idelle Rodriguez	
<i>Duval County Public Schools</i>		Conference Center B	
8:30 AM	9:20 AM	Auditor General Update	
<i>Micah Rodgers, State of Florida Auditor General</i>		Dawn Meyers	
9:20 AM	10:20 AM	Keynote Speaker	
<i>Vera Jones</i>		Gretchen Saunders	
10:20 AM	10:40 AM	Break	
10:40 AM	11:30 AM	Sponsor Recognition	
		Gretchen/Michael	
11:30 AM	1:30 PM	Lunch (on your own)	
Concurrent Mini Sessions			
1:00 PM	5:00 PM	Ethics for CPAs	
<i>Laura Krueger Brock</i>		Shari Horsey	
Session I			
1:30 PM	2:20 PM	A - TRIM Update & E-Trim	
		<i>Wyatt Peters, Florida Department of Revenue</i>	
		Raymond Church	
B - Utilities Review		Idelle Rodriguez	
<i>Edgar Fostveit</i>		River Terrace 2	
C - Credit Ratings Update		Leanne Evans	
<i>Valentina Gomez, Moody's</i>		River Terrace 3	
2:20 PM	2:30 PM	Break	
Session II			
2:30 PM	3:20 PM	A - School Finance as a Civil Rights Issue	
		<i>Justin Dayhoff, Allovue</i>	
		Raymond Church	
B - FEMA Reimbursement		Idelle Rodriguez	
<i>Patrick Snodgrass</i>		River Terrace 2	
C - Debt Management		Leanne Evans	
<i>Rick Patterson, Raymond James; Jerry Ford, Ford & Associates; Ritesh Patel, Nabors Giblin & Nickerson</i>		River Terrace 3	
3:20 PM	3:40 PM	Break - Sponsored by Ameresco	
Session III			
3:40 PM	4:30 PM	A - Succession Planning	
		<i>Mike Degutis, St. Johns County Schools</i>	
		Janice Slonina	
B - School Safety Report		Trudi Murdock	
<i>Captain Rick Francis, Seminole County Sheriff</i>		River Terrace 2	
C - Investment Management		Leanne Evans	
<i>Steven Alexander, PFM</i>		River Terrace 3	
Evening On Your Own			



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Thursday, June 20, 2019

7:00 AM	8:00 AM	Continental Breakfast		Conference Center A
7:00 AM	8:00 AM	Registration		Sky Bridge 3rd Floor
8:00 AM	8:20 AM	Finance Council <i>Olga Swinson, Chair, Pasco County Public Schools</i>	Bonnie Penner	Conference Center B
8:20 AM	9:10 AM	DOE Policy and Budget Update <i>Suzanne Pridgeon and Mark Eggers, Florida Department of Education</i>	Trudi Murdock	Conference Center B
9:10 AM	9:30 AM	Break		
9:30 AM	9:50 AM	Economic Update <i>Mark Schmidt, Morgan Stanley</i>	Leanne Evans	Conference Center B
9:50 AM	10:40 AM	Sponsor Appreciation	Michael Yanosik	Conference Center B
10:40 AM	11:30 AM	Business Meeting, Elections and Retirements	Trudi Murdock	Conference Center B
11:30 AM	1:30 PM	Lunch (on your own)		
Concurrent Mini Sessions				
Session I				
1:30 PM	2:20 PM	A - Cost per Student Station <i>DOE Staff</i>	Leanne Evans	Conference Center B
		B - Cost Report - Basics <i>Jeff Ewaldt, Florida Department of Education</i>	Shari Horsey	River Terrace 2
		C - Risk Assessment <i>Clara Ewing, RSM</i>	Raymond Church	River Terrace 3
2:20 PM	2:30 PM	Break		
Session II				
2:30 PM	3:20 PM	A - Capital Plan Development <i>Fran Pickett</i>	Leanne Evans	Conference Center B
		B - Cost Report <i>Thomas Kauffman, Alachua Schools; Latoya Gary, Marion Schools; Sandy Gannon, Sarasota Schools</i>	Shari Horsey	River Terrace 2
		C - GASB 84 Implementation <i>Heather Knust, Palm Beach Schools</i>	Raymond Church	River Terrace 3
3:20 PM	3:40 PM	Break		
Session III				
3:40 PM	4:30 PM	A - Referendums - Managing After the Vote <i>Leanne Evans, Palm Beach Schools</i>	Raymond Church	Conference Center B
		B - Cost Report - Advanced <i>Jeff Ewaldt, Florida Department of Education</i>	Shari Horsey	River Terrace 2
		C - Managing Priorities / Time Management <i>Lisa Lynch, Osceola Schools</i>	Dawn Meyers	River Terrace 3
6:00 PM	9:00 PM	Banquet Reception		River Terrace 1



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Friday, June 21, 2019				
7:30 AM	8:30 AM	Continental Breakfast		Sky Bridge 3rd Floor
8:30 AM	9:20 AM	EDR - Office of Economic & Demographic Research <i>Amy Baker - EDR</i>	Trudi Murdock	Conference Center B
9:20 AM	10:10 AM	Pursuing Deep Work: Leaving the Shallows to Create Value <i>Craig Davis</i>	Idelle Rodriguez	Conference Center B
10:10 AM	10:40 AM	Break		
10:40 AM	11:30 AM	Legislative Update <i>Joy Frank, Florida Association of District School Superintendents</i>	Shari Horsey	Conference Center B
11:30 AM	11:45 AM	Announcements & Door Prizes	Trudi Murdock	Conference Center B
12:00 PM	1:30 PM	Board of Directors: Meeting and Luncheon	Trudi Murdock	River Terrace 3