



FLORIDA SCHOOL FINANCE OFFICERS ASSOCIATION

November 10 -13, 2015
Wynham Lake Buena Vista Resort
Orlando, Florida

TIME	PROGRAM ITEM	PRESIDING
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Monday, November 09, 2015

6:30 PM	7:30 PM	Board of Directors Meeting	
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Tuesday, November 10, 2015

7:30 AM	8:30 AM	Continental Breakfast	
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8:30 AM	4:00 PM	Finance Council Meeting	Theresa Boston-Ellis, Chair
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8:30 AM	10:10 AM	Accounting and Audit Update <i>Todd Webster, KPMG LLP</i>	Verna Hurley-Long
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10:10 AM	10:20 AM	Break	
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10:20 AM	12:00 PM	Internal Controls and Fraud Detection <i>Jennifer Christensen & Cheri Swain, Carr, Riggs, & Ingram, LLC</i>	Verna Hurley-Long
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12:00 PM	1:30 PM	Lunch (on your own)	
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Concurrent Mini Sessions

Session I

1:30 PM	2:20 PM	A - Governmental Accounting 101 <i>Karen Briggs, Lake County School District</i>	Trudi Murdock
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		B - Basic Budgeting <i>Stephanie Riviello and Cathy Miley, Manatee County Schools</i>	Tammi Maund
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		C - Cyber Attacks and Prevention <i>Bob Wagner, Vestal-Wiler</i>	Tomeka Billingsley
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2:20 PM	2:30 PM	Break	
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Session II

2:30 PM	3:20 PM	A - Governmental Accounting 102 <i>Karen Briggs, Lake County School District</i>	Debra Noyes
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		B - Advanced Budgeting <i>Heather Jenkins and Stephanie Riviello, Manatee County Schools</i>	Tammi Maund
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		C - Google Docs <i>Jeremy Bunkley, Clay County Schools</i>	Theresa McCants
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3:20 PM	3:40 PM	Break (snack provided)	
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Session III

3:40 PM	4:30 PM	A - Accounting Users Group	Pennie Zuercher
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		B - Budget Users Group	Bonnie Penner
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		C - Digital Classroom Plans <i>Cali Stringer, Florida Department of Education</i>	Erum Motiwala
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5:30 PM	6:30 PM	Registration	
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5:30 PM	6:30 PM	Welcome Reception	
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Dinner (On Your Own)



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TIME	PROGRAM ITEM	PRESIDING
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Wednesday, November 11, 2015

7:00 AM	8:00 AM	Continental Breakfast
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7:00 AM	8:00 AM	Registration
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8:00 AM	8:30 AM	Opening Remarks	David Dose
		Invocation	David Dose
		Presentation of Colors & Pledge of Allegiance <i>Dr. Phillips High School Color Guard</i>	David Dose
		Welcome to Orange County <i>Dr. Jesus Jara, Deputy Superintendent, Orange County School District</i>	David Dose

8:30 AM	10:10 AM	DOE Update <i>Linda Champion, Deputy Commissioner of Finance and Operations, Florida Department of Education</i>	David Dose
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10:10 AM	10:20 AM	Break	
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10:20 AM	11:10 AM	Sponsor Recognition	Gretchen Saunders
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11:10 AM	12:00 PM	Communication, Leadership and Growth <i>Steven H. Johnson</i>	Verna Hurley
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12:00 PM	1:30 PM	Lunch (on your own)	
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Concurrent Mini Sessions

Session I

1:30 PM	2:20 PM	A - GASB - What you should know about Standards Setting <i>Dean Michael Mead, GASB</i>	Trudi Murdock
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		B - Crisis Management - Finance & Transportation <i>Tammy Taylor and Jason Harris, Manatee County Schools</i>	Stephanie Rivello
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		C - Monitoring Charter Schools <i>Link Jarrett, Florida Department of Education</i>	Christy Price
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2:20 PM	2:30 PM	Break	
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Session II

2:30 PM	3:20 PM	A - GASB - On the Horizon at the GASB <i>Dean Michael Mead, GASB</i>	Trudi Murdock
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		B - Fiscal Recovery Plans <i>Michael Degutis, St Johns County School District; Terry St. Cyr, Escambia County School District</i>	Jennifer Cole
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		C - Charter School Application Process for Finance Staff <i>Al Weidner, Sarasota County Schools</i>	Bonnie Penner
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3:20 PM	3:40 PM	Break (snack provided)	
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Session III

3:40 PM	4:30 PM	A - GASB - The reexamination of GASB Statement 34 <i>Dean Michael Mead, GASB</i>	Trudi Mudock
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		B - 2016-17 FEFP Update <i>Lee Davis, Florida Department of Education</i>	Bonnie Penner
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		C - Charter School Current Events <i>Jenna Hodgens, Hillsborough Schools; Dr. Sonia Vazquez-Esposito, Osceola Schools; Terri Roberts, Rader Group</i>	Debra Noyes
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		Dinner (On Your Own)	
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TIME		PROGRAM ITEM	PRESIDING
Thursday, November 12, 2015			
7:30 AM	8:30 AM	Continental Breakfast	
7:30 AM	8:30 AM	Registration	
8:30 AM	8:50 AM	Finance Council Update <i>Theresa Boston-Ellis, Chair</i>	Gretchen Saunders
8:50 AM	9:40 AM	The Effects of Local Issues, Transparency and other factors on Credit Ratings <i>Greg Lipitz and Valentina Gomez, Moody's Ratings</i>	Gretchen Saunders
9:40 AM	10:10 AM	Business Meeting and Elections	David Dose
10:10 AM	10:20 AM	Break	
10:20 AM	11:10 AM	SEC Disclosure Requirements <i>David Moore, Public Financial Management and Ritesh Patel, Nabors, Giblin & Nickerson, PA</i>	Leanne Evans
11:10 AM	12:00 PM	Legislative Update <i>Andrea Messina, Florida School Boards Association</i>	Rhonda Odom
12:00 PM	1:30 PM	Lunch (on your own)	
Concurrent Mini Sessions			
Session I			
1:30 PM	2:20 PM	A - Classroom Supply Program <i>Gretchen Saunders, Hillsborough County Schools; Nancy Samuels, Palm Beach County Schools; and Jason Pitts, Polk County Schools</i>	Christy Price
		B - How to reduce OPEB Liabilities <i>David Ford, Polk County Schools/FSRBC</i>	Renae Prevatt
		C - Outsourcing Treasury Management Services, including changes in the investment world <i>Chris Greco, SawgrassAsset Management LLC</i>	Pennie Zuercher
2:20 PM	2:30 PM	Break	
Session II			
2:30 PM	3:20 PM	A - Sales Tax - when should you collect? <i>Curt Horton, Florida Department of Revenue</i>	Steven Compton
		B - Risk Management Emerging Issues (ACA, Cyber Liability, etc.) <i>Eric Scott and Michael Guzman, Aurther J. Gallagher & Co</i>	Tammi Maund
		C - Updating Debt Policies and Procedures including Disclosure Requirements <i>Lisa Olsen, Digital Assurance Certification (DAC)</i>	Leanne Evans
3:20 PM	3:40 PM	Break (snack provided)	
Session III			
3:40 PM	4:30 PM	A - IRS ACA Reporting <i>Sam White, North East Florida Educational Consortium (NEFEC)</i>	Rhonda Odom
		B - E-Rate <i>Lyell Walker, Division of Telecommunications, Florida Department of Management Services</i>	Jose Gonzalez
		C - Treasury User Group	Leanne Evans
5:30 PM	8:00 PM	Reception Buffet	



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TIME		PROGRAM ITEM	PRESIDING
Friday, November 13, 2015			
7:30 AM	8:30 AM	Continental Breakfast	
8:30 AM	9:20 AM	Economic Update <i>Jeff Sirota, J.P. Morgan</i>	Verna Hurley-Long
9:20 AM	10:10 AM	Effective Marketing Strategies for School Districts <i>Amity Chandler, Lee County Public Schools</i>	Jose Gonzalez
10:10 AM	10:40 AM	Break	
10:40 AM	11:30 AM	Auditor General Update <i>Joan Valle, Florida Auditor General</i>	Renae Prevatt
11:30 AM	11:45 AM	ANNOUNCEMENTS DOOR PRIZES	
12:00 PM	1:30 PM	Board of Directors: Meeting and Luncheon	