



Power of Connection

2019 Fall Conference

Co- Sponsored by

**Florida Association of School Business Officials
&
Florida School Finance Officers Association, Inc.**

**November 12 – 15, 2019
DoubleTree by Hilton at the Entrance to Universal
Orlando**



A Message from the Presidents

**Florida Association of School Business Officials
&
Florida School Finance Officers Association, Inc.**



Welcome to the FASBO/FSFOA Joint November 2019 Conference.

The Directors of FSFOA and FASBO have come together to plan a joint conference this year. It will be an opportunity to learn from experts and build relationships with school finance and business staff throughout the state. You'll also have time to visit with our partners. They will display the latest and greatest products and services that could potentially save time and money. We are excited to work together to provide great learning opportunities for all conference attendees November during this joint conference with FASBO/FSFOA. We are currently working on the agenda to create great learning opportunities for all attendees.

Our theme for the November conference is "Power of Connection". This is in recognition of our joint conference as well as the Universal Studios Marvel Comics superheroes that help those in need. It also pays tribute to the superheroes you are everyday in your district. Just like the Marvel superheroes, school finance and business officials use our tools and skills to help those around us. The roles we play in our districts are so intertwined and our connections are vital to everyday successes in our districts. Each year we seem to face new and sometimes frightening challenges. To conquer these challenges, we need each other and our "Power of Connection".

The conference structure will be a little different as we merge the best of each association. On Tuesday morning there will be sessions on Accounting, Auditing and Internal Controls as well as Accounts Payable and Payroll Certification sessions. Then in the afternoon, you can meet with your peers at roundtables in the areas of Operations/Maintenance, Energy and Purchasing/Contract/Warehousing/Property Records or attend special interest breakout sessions. In the evening there will be a Welcome Reception in the Courtyard with drinks and hors d'oeuvres.

The conference will officially begin Wednesday morning and lunch will be provided in the EXPO hall. The afternoon will be filled with special interest breakout sessions. Our conference banquet will be held on Wednesday evening this November. This night will be fun, filled with games and interaction with our partners as well as each other. There will be plenty of food and cocktails to enjoy your evening.

On Thursday, DOE will provide information on new legislation and will cover important subjects that pertain to our respective school districts. We will end the day with a networking reception for our members.

Friday morning, after hearing an update from FRS and an economic update, Andrea Messina from the Florida School Board Association will fill us in on additional legislative updates.

Be sure to download the conference app which will provide the agenda, your customizable schedule and the most up-to-date information about the conference, including speaker bios, maps and sponsor listings

We look forward to connecting with you!

Becky Gideon *Trudi Murdock*

Becky Gideon
FASBO President

Trudi Murdock
FSFOA President

Monday, November 11, 2019

4:00 PM – 6:00 PM
Sun & Surf – Room I

Board of Directors Meeting
(No Dinner)

Tuesday, November 12, 2019

7:00 AM – 8:00 AM
Seminole Lobby

Continental Breakfast
Sponsored by FSFOA

8:00 AM – 12:00 PM
Space Coast – Room III

Payroll Certification
Payroll 101

12:00 PM – 1:00 PM

Lunch

1:00 PM – 5:00 PM

Payroll Certification – Continued

8:30 AM – 12:00 PM
Space Coast – Room II

Accounts Payable Certification
Accounts Payable

12:00 PM – 1:00 PM

Lunch

1:00 PM – 4:00 PM

Accounts Payable – Continued

9:00 AM – 4:00 PM
Space Coast – Room I

Finance Council Meeting
Presiding: Gretchen Saunders

8:00 AM – 9:40 AM
Seminole Ballroom – Room E

2019 GASB Update
David Alvarez, Carr, Riggs, and Ingram, LLC
Presiding: Dawn Meyers

9:40 AM – 10:00 AM

Break

10:00 AM – 11:40 AM
Seminole Ballroom – Room E

Governmental Fraud, Waste and Abuse
Curtis Binney, Binney Accounting and Assurance Services, PLLC
Presiding: Dawn Meyers

11:40 AM – 1:30 PM

Lunch (On Your Own)

12:00 PM – 5:00 PM

Registration

2:00 PM – 9:00 PM

Sponsor Set up

1:30 PM – 4:30 PM
Sun & Surf – Rooms IV & V

Roundtables – Operations/Maintenance/Energy
FASBO

1:30 PM – 4:30 PM
Gold Coast – Room IV

Roundtables – Purchasing/Contracts/Warehousing/Property Records
FASBO

Concurrent Mini Sessions

1:30 PM – 2:20 PM

SESSION I

Seminole Ballroom – Room E

A – Federal and State Grant Process – Part 1 of 2
Melissa Ramsey and Mari Presley, Florida Department of Education
Presiding: Ellen Harper

Tuesday, November 12, 2019 (Continued)

Gold Coast – Room I	B – Audits – New Internal Audit Requirements Lenia Blades, Duval County Presiding: Idelle Rodriguez
Gold Coast – Room II	C – OSOs – Barricade your Booster Bucks from Being Bamboozled Mary Soyster, Sr. Auditor & Amy Shafran, Internal Accounts Technician, Pinellas County Schools Presiding: Dawn Meyers
2:20 PM – 2:30 PM	Break
2:30 PM – 3:20 PM	<u>MINI SESSION II</u>
Seminole Ballroom – Room E	A – Federal and State Grant Process – Part 2 of 2 Melissa Ramsey and Mari Presley, Florida Department of Education Presiding: Mark Eggers
Gold Coast – Room I	B – Let’s Look at Leases – GASB 87 – Part 1 of 2 Donna Collins, Milestone Professional Services, Inc. Presiding: Dawn Meyers
Gold Coast – Room II	C – Understanding Sales & Use Tax Obligations Yvette Salley, Senior Tax Specialist, FL Department of Revenue Presiding: Lorena Bruneau
3:20 PM – 3:40 PM	Break
3:40 PM – 4:30 PM	<u>MINI SESSION III</u>
Seminole Ballroom – Room E	A – Perkins V Grants Gloria Spradley-Brown, Florida Department of Education Presiding: Kelly Leavins
Gold Coast – Room I	B – Let’s Look at Leases – GASB 87 – Part 2 of 2 Donna Collins, Milestone Professional Services, Inc. Presiding: Dawn Meyers
Gold Coast – Room II	C – Considerations and Models for Relationships between Education Foundations and School Districts Mary Chance, Consortium of Florida Education Foundations Presiding: Leanne Evans
5:30 PM – 6:30 PM Pool Terrace	Welcome Reception Sponsored by Bencor, Hilltop Securities, and TSA
Evening on Your Own	

Wednesday, November 13, 2019

7:00 AM – 8:00 AM
Universal Center

Continental Breakfast
Sponsored by FASBO/FSFOA

7:00 AM – 3:30 PM

Registration

8:00 AM – 10:10 AM

Seminole Ballroom – Room C

Welcome – Introduction & Announcements

Becky Gideon, President FASBO/ Trudi Murdock, President FSFOA

Presentation of Colors

Dr. Phillips High School ROTC

Presiding: Jeff Robison and Dominick Cristofaro

Pledge of Allegiance and Moment of Silence

Presiding: Jeff Robison and Dominick Cristofaro

Chorus

Apopka High School

Presiding: Shari Horsey

Welcome to Orange County

Scott Howat, Chief Communications Officer, Orange County Schools

Presiding: Shari Horsey

SASBO Greetings

Stu White, SASBO President/Suanne Lee, SASBO Representative

Presiding: Suanne Lee

Vendor Greetings

Presiding: Tracey Gallentine, McKim & Creed/Gretchen Saunders

10:10 PM – 10:20 PM

Break

10:20 AM – 11:10 AM

Seminole Ballroom – Room C

Auditor General Update

Micah Rodgers, Florida Auditor General

Presiding: Dawn Meyers

11:10 AM – 12:00 AM

Seminole Ballroom – Room C

Motivational Speaker – If you Can Be Anything Be Au Sum

Josh Peach, Dude Solutions

Presiding: Becky Gideon

12:00 AM – 1:50 PM

Expo Open Sponsor Trade Show and Member/Sponsor Luncheon

Concurrent Mini Sessions

1:50 PM – 2:40 PM

Space Coast – Room I

SESSION I

A – Power of Data

Josh Peach, Dude Solutions

Presiding: Mike Hewett

Space Coast – Room II

B – Empowering Everyone Around You to Become Better

Melia Adams, Principal of Belleview Middle, Escambia

Presiding: Jim Drake

Wednesday, November 13, 2019 (Continued)

Space Coast – Room III	C – How to Choose the Right Document Management System for Your Organization Vestina Crayton, Pinellas County Office of Technology and Innovation Presiding: Cindy Lambeth
Gold Coast – Room I	D – New Changes to Exempt Salaried Employees’ Pay – Part 1 of 2 William “Roy” Richardson, US Dept of Labor/Wage and Hour Division Presiding: Becky Gideon
Seminole Ballroom – Room C	E – Cybercrime Tactics and Techniques Jarryd Boyd, Malwarebytes Presiding: Kelly Leavins
Sun & Surf – Rooms IV & V	F – Building Resilient School Districts Kathleen Hardi and Douglas Tripp, Orange County Schools Presiding: Shari Horsey
Sun & Surf – Rooms II & III	G – Revenue Generation – Admin Claims Chris Patton, Sivic Solutions Group Presiding: Idelle Rodriguez
2:40 PM – 2:45 PM	Break
2:45 PM – 3:35 PM	<u>SESSION II</u>
Space Coast – Room I	A – R290 Refrigerant – Moving Into A School Kitchen Near You Neil Robinson, Pinellas county Schools Presiding: Mike Hewett
Space Coast – Room II	B – From School Business to Sandy Beaches, Retirement Planning Made Easy Matt Foxhall, Executive Vice President, AXA Presiding: Jim Drake
Space Coast – Room III	C – Emerging Issues in Public Procurement & Contracts Suzanne D’Agresta, Shareholder, Garganese, Weiss, D’Argesta & Salzman, PA Presiding: Cindy Lambeth
Gold Coast – Room I	D – New Changes to Exempt Salaried Employees’ Pay – Part 2 of 2 William “Roy” Richardson, Us Dept of Labor/Wages and Hour Division Presiding: Becky Gideon
Seminole Ballroom – Room C	E – Fraud Prevention and Awareness Dan Eveloff & Alicia Somers, Regions Bank Presiding: Trudi Murdock
Sun & Surf – Rooms IV & V	F – Mental Health – Early Detection Mary Bridges, Orange County Public Schools Presiding: Shari Horsey
Sun & Surf – Rooms II & III	G – Crowdfunding – Best Practices Josh Henn & Ryan Peetz, Seminole County Public Schools Presiding: Raymond Church
3:35 PM – 3:50 PM	Beverage Break

Wednesday, November 13, 2019 (Continued)

3:50 PM – 4:40 PM
Space Coast – Room I

SESSION III

A – LED Testing A Practical Solution to Evaluating LED Lamps
Mark Fox, Pasco County Schools
Presiding: Mike Hewett

Space Coast – Room II

B – What is Your Leadership Superpower?
Jim Drake, Monroe County Schools
Presiding: Jim Drake

Space Coast – Room III

C – The Threat of the Phish
Brian Johnson, Manager of Security, Escambia County Schools
Presiding: Brian Johnson

Gold Coast – Room I

D - Grievance
John Palmerini, Associate General Counsel, Orange County Schools
Presiding: Robert Waremburg

Seminole Ballroom – Room C

E – K-12 Student Scholarship Programs
Cathy Russell, Florida Department of Education
Presiding: Raymond Church

Sun & Surf – Rooms IV & V

F – Controlling Retiree Healthcare Cost Using HRAs
Trent Teesdale, Sr. Vice President, MidAmerica Administrative & Retirement Solutions, LLC
Presiding: Dominick Cristofaro

Sun & Surf – Rooms II & III

G – Public Sector Cybersecurity: Understanding the Cyberthreat Landscape
Shan Grant, RSM
Presiding: Gretchen Saunders

5:30 PM – 6:30 PM
Universal Center

FASBO/FSFOA Member/Sponsor Reception

7:00 PM
Universal Center

Dinner & Entertainment for All

Thursday, November 14, 2019

7:30 AM – 9:30 AM	Sponsor Breakdown
7:30 AM	Sponsor Wrap Up
7:00 AM – 8:00 AM Gold Coast Foyer	Continental Breakfast Sponsored by FSFOA/FASBO
8:00 AM – 11:00 AM	Registration
8:00 AM – 9:30 AM Seminole Ballroom – Room A	Vendor Round Tables An opportunity for vendors & Attendees to discuss more specifically and informally topics relating to various areas in Operations Presiding: FASBO
8:00 AM – 8:15 AM Seminole Ballroom – Room C	Finance Council Gretchen Saunders, Chair – Hillsborough County Public Schools Presiding: Gretchen Saunders
8:15 AM – 9:10 AM Seminole Ballroom – Room C	DOE Update Suzanne Pridgeon, Mark Eggers, and other Staff – Florida Department of Education Presiding: Gretchen Saunders
9:10 AM – 9:30 AM Seminole Ballroom – Room C	Business Meeting and Elections Trudi Murdock, FSFOA President Presiding: Trudi Murdock
9:30 AM – 9:45 AM Seminole Ballroom – Room A	Business Meeting and Elections Becky Gideon, FASBO President Presiding: Becky Gideon
9:45 AM – 9:50 AM	Break
9:50 AM – 10:40 AM Seminole Ballroom – Room C	Legislative Insights from FADSS Merrill Wimberly, FADSS Presiding: Mitsi Corcoran
10:40 AM – 11:30 AM Seminole Ballroom – Room C	Business Email Compromise/Cybercrime trends Stephanie Cassidy, Florida Department of Law Enforcement Presiding: FASBO
11:30 AM – 1:30 PM	Lunch (On Your Own)

Thursday, November 14, 2019 (Continued)

Concurrent Mini Sessions

1:30 PM – 2:20 PM

SESSION I

Seminole Ballroom – Room C

A – Records Retention in the Sunshine

Les P. Vaughn, Orange County Public Schools
Presiding: Brian Johnson

Seminole Ballroom – Room A

B – Florida Best and Brightest Teacher and Principal Award Programs

Abbey Stewart, Florida Department of Education
Presiding: Mark Eggers

Sun & Surf – Rooms III & IV

C – GASB 84 – Fiduciary Activities

Yvonne Clayborne, CPA, CITP, from Carr, Riggs & Ingram, LLC
Presiding: Lorena Bruneau

Sun & Surf – Rooms I & II

D – Credit Ratings

Linda Vanderperre, Kroll Bond Rating Agency
Presiding: Leanne Evans

2:20 PM – 2:30 PM

Break

2:30 PM – 3:20 PM

SESSION II

Seminole Ballroom – Room C

A – Public Records Inspection; the Ongoing Saga

Les Vaughn FCRM, Orange County Public Schools
Presiding: Brian Johnson

Seminole Ballroom – Room B

B – The Use of Drones & Infrared Surveys for Roof Studies

Terry Marchetti, Pinellas County Schools
Presiding: Mike Hewett

Gold Coast – Room II

C – CCNA Prequalification & Construction Contracting

Ed Ames, Construction & Contracting of Orange County Schools
Presiding: Robert Waremburg

Gold Coast – Room I

D – Fringe Benefits for School Districts: When is a Gift Not a Gift?

Julie Lewis & Lynn Knight Attorney | Principal Lewis Law Office, LLC and
Business Manager Nekoosa School District
Presiding: Becky Gideon

Seminole Ballroom – Room A

E – From Zero to Hero: Everything you need to know to be a CAPE Superhero! - Finance Officers' Edition

Kathryn Wheeler, Florida Department of Education
Presiding: Raymond Church

Sun & Surf – Rooms III & IV

F – Use of Capital Funds

Omar Shim, Director of Capital Budget of Broward County Public Schools
Presiding: Diana Martens

Sun & Surf – Rooms I & II

G – To TAN, or not to TAN? (Not a Suntan)

Laura Howe & Robert Wilson, PFM Financial Advisors; Ritesh Patel, Nabors,
Giblin & Nickerson
Presiding: Leanne Evans

Thursday, November 14, 2019 (Continued)

3:20 PM – 3:40 PM

Break

3:40 PM – 4:30 PM

SESSION III

Seminole Ballroom – Room C

A – Fleet Maintenance – Parts Inventory Management Do's and Don'ts

Tommy Fitzpatrick, Manager Vehicle Maintenance, Broward County Schools
Presiding: Robert Waremburg

Seminole Ballroom – Room B

B – Energy Efficiency Retrofits as a Service

Jeff Stokes, ESG
Presiding: Mike Hewett

Gold Coast – Room II

C – Navigating through the complicated intersection of ADA, FMLA and Workers' Compensation

Julie Lewis & Lynn Knight Attorney | Principal Lewis Law Office, LLC and
Business Manager Nekoosa School District
Presiding: Becky Gideon

Seminole Ballroom – Room A

D – GFOA's Award for Best Budgeting Practices and Introduction to Academic Return on Investment

Carol MacLeod, CPA, Forecast 5 Analytics
Presiding: Dawn Meyers

Sun & Surf – Rooms III & IV

E – Cost per Student Station Requirements

Leanne Evans & Wanda Paul, Palm Beach Schools
Presiding: Lorena Bruneau

Sun & Surf – Rooms I & II

F – Post-Issuance Compliance Fundamental Concepts: Arbitrage, Continuing Disclosure and Private Use

Erik Dingwall, BLX Group LLC
Presiding: Dominick Cristofaro

5:30 PM – 6:30 PM

Pool Terrace

FASBO/FSFOA Member Reception

Sponsored by FASBO/FSFOA

Evening on Your Own

Friday, November 15, 2019

7:30 AM – 8:30 AM

Seminole Lobby

Continental Breakfast

Sponsored by FSFOA/ FASBO

8:30 AM – 9:20 AM

Seminole Ballroom – Room C

Retirement Plans & Inventory Trends

Frank Wan, Burgess Chambers & Associates

Presiding: Becky Gideon

9:25 AM – 10:15 AM

Economic Forecast

David Jang, Partner, Water Walker Investments

Presiding: Becky Gideon

10:40 AM – 11:30 AM

Seminole Ballroom – Room C

Florida's Election Year Legislative Session – Opportunities and Expectations

Andrea Messina, Executive Director, Florida School Board Association

Presiding: Trudi Murdock

11:30 AM – 11:45 AM

Introduction of New Officers and Directors and Announcements & Door Prizes

Presiding: Becky Gideon/Trudi Murdock

12:00 PM – 1:30 PM

Gold Coast – Room I

Board of Directors: Meeting and Luncheon

Everyone have a safe trip home!!

Session Descriptions and Biographies

Tuesday, June 18, 2019

8:00 AM – 9:40 AM

2019 GASB Update - Donna Collins, Milestone Professional Services

Brief Description: This session will cover GASB standards that will be applicable in the near future and will also cover what GASB is working on further down the horizon.

Biography: With more than 15 years of experience in public accounting, with 5 of those years being with KPMG, David has significant experience in serving governmental clients, not-for-profit, financial services, and public companies while at CRI as well as when he was with KPMG. David leads the government practice for the Tampa Bay offices of CRI.

10:00 AM – 11:40 AM

Governmental Fraud, Waste, and Abuse - Curtis Binney, Binney Accounting and Assurance Services, PLLC

Brief Description: Fundamentals of Governmental Fraud, Waste and Abuse, with a focus on computer related fraud.

Biography: Curt Binney is the owner of Binney Accounting and Assurance Services, PLLC. He specializes in for-profit, not-for-profit, and governmental auditing, as well as any fraud examinations and litigation support. Curt's experience includes twenty-three years of public and private accounting. Curt has audited or worked in the construction, manufacturing, real estate, not-for-profit, medical, governmental, and restaurant industries. He has a bachelor's in accounting from Shippensburg University of Pennsylvania, as well as a bachelor's in finance and a master's in accounting from the University of Central Florida. Curt is a licensed Florida Certified Public Accountant and a Certified Fraud Examiner and was also a faculty member at the University of Phoenix – John Sperling School of Business.

Concurrent Mini Sessions

1:30 PM – 2:20 PM

Session I

A– Federal and State Grant Process – Part 1 of 2 – Melissa Ramsey and Mari Presley, Florida Department of Education

Brief Description: This is a two-part presentation on an overview of the federal and state grant process

Biography: Melissa Ramsey is the new Executive Vice-Chancellor of the Division of Public Schools at the Florida Department of Education leading student services, school improvement and federal programs. She recently transitioned from the Executive Director of School Improvement, the system that identifies, monitors and supports low-performing schools. Under Melissa's leadership, the number of failing schools has been reduced by over 70 percent statewide in the last four years. She is a former teacher, school counselor, principal and district leader who has engaged with the education system at every level. Now, as the Executive Vice-Chancellor, she leads a team of directors that come together to serve all of Florida's students to ensure equitable education as well as strategic alignment of support services

Biography: Mari M. "Miki" Presley is an Assistant Deputy Commissioner, Finance and Operations at the Florida Department of Education. Ms. Presley's responsibilities include oversight of the Bureau of Contracts, Grants, and Procurement; the Office of Audit Resolution and Monitoring; and the ESEA Private School Ombudsman. Ms. Presley is a licensed attorney and was formerly with the Office of the General Counsel. Ms. Presley began her career in private practice and subsequently served as an attorney for the Department of Health, ultimately holding the position of Deputy General Counsel. She has been with the Department of Education since 2007. Ms. Presley holds a Juris Doctorate, which she earned summa cum laude from the Florida State University College of Law.

Tuesday, November 12, 2019 (Continued)

B- Audits – New Internal Audit Requirements – Lenia Blades, Duval County

Brief Description: A general overview discussing the who, what, when, where, and why of the new amendments made to Section 1001.42, F.S., Powers and Duties of District School Board, related to internal audit.

Biography: She is a Florida native, born and raised in Fort Lauderdale, FL, however, has been a resident of Jacksonville, FL since late 2004. She obtained her Bachelor of Science degrees in accounting and finance from Florida State University (class of 1999). Ms. Blades has a son who is a freshman at Florida International University (majoring in Public Relations) and a daughter who is a senior in high school. She is currently serving as the Internal Board Auditor of Duval County Public Schools bringing her knowledge and experience obtained while employed with the Auditor General's Office for over 19 years in the Educational Entities and Local Government Audits Division. Ms. Blades is also a member of the Institute of Internal Auditors, the Florida School Finance Officers Association, and the Florida Government Finance Officers Association.

C- OSOs – Barricade your Booster Bucks from Being Bamboozled – Mary Soyster, Sr. Auditor & Amy Shafran, Internal Accounts Technician

Brief Description: This presentation will identify the processes needed to effectively monitor the financial activity of OSOs and PTAs at the school. Government requirements and public perception will be addressed along with a review of the documentation that the school should require from each organization and the steps involved in reviewing that documentation.

Biography: Mary Soyster is a CPA who has spent her career working as an auditor in both the public and private sector prior to leaving the work force to raise two children. She reentered the work force in 2014 when joining the auditing team at the Pinellas County School District. Mary's audit emphasis is focused on identifying improvements to methods and procedures used within the district to assist the district in reaching the goal of excellence in education.

Biography: Amy Shafran has been employed with Pinellas County Schools for 14 years and is currently serving as an Internal Accounts Technician in the Auditing and Property Records Department. With more than 25 years' experience in banking, customer service, bookkeeping, and volunteering, Amy has developed her passion for working with administrators and support staff in the education field. In her current position, she creates and delivers training to assist with the financial activities that take place in the school setting. Amy has recently returned to college and is pursuing a Bachelor of Science Degree in Public Policy and Administration at St. Petersburg College in Clearwater.

2:30 PM – 3:20 PM

Session II

A– Federal and State Grant Process – Part 2 of 2 – Melissa Ramsey and Mari Presley, Florida Department of Education

Brief Description: This is a two-part presentation on an overview of the federal and state grant process

Biography: Melissa Ramsey is the new Executive Vice-Chancellor of the Division of Public Schools at the Florida Department of Education leading student services, school improvement and federal programs. She recently transitioned from the Executive Director of School Improvement, the system that identifies, monitors and supports low-performing schools. Under Melissa's leadership, the number of failing schools has been reduced by over 70 percent statewide in the last four years. She is a former teacher, school counselor, principal and district leader who has engaged with the education system at every level. Now, as the Executive Vice-Chancellor, she leads a team of directors that come together to serve all of Florida's students to ensure equitable education as well as strategic alignment of support services

Biography: Mari M. "Miki" Presley is an Assistant Deputy Commissioner, Finance and Operations at the Florida Department of Education. Ms. Presley's responsibilities include oversight of the Bureau of Contracts, Grants, and Procurement; the Office of Audit Resolution and Monitoring; and the ESEA Private School Ombudsman. Ms. Presley is a licensed attorney and was formerly with the Office of the General Counsel. Ms. Presley began her career in private practice and subsequently served as an attorney for the Department of Health, ultimately holding the position of Deputy General Counsel. She has been with the Department of Education since 2007. Ms. Presley holds a Juris Doctorate, which she earned summa cum laude from the Florida State University College of Law.

Tuesday, November 12, 2019 (Continued)

B- Let's Look at Leases – GASB 87 – Part 1 of 2 - Donna Collins, Milestone Professional Services, Inc.

Brief Description: GASB 87 changes financial reporting for Leases. This session will cover how lease accounting for governments is changing, how to prepare for this new standard and some practical tips (including sample entries and disclosures) for implementing GASB Statement No. 87.

Biography: Donna is the President of Milestone Professional Services, a consulting firm specializing in governmental accounting services. Her background encompasses compliance monitoring and reporting, internal control development and evaluation, as well as financial reporting, CAFR preparation and budget preparation assistance. Donna has served as a technical reviewer for Comprehensive Annual Financial Reports and is a frequent speaker for the FGFOA. She is a member of the GFOA, FGFOA, AICPA and FICPA. Donna recently served as the FICPA State and Local Government Committee Chair and Chair of the FICPA State and Local Government Annual Conference Committee.

C- Understanding Sales & Use Tax Obligations– Yvette Salley, Senior Tax Specialist, FL Department of Revenue

Brief Description: Overview of Sales Tax for School Associations and Organizations, Purchases by School Districts, School Materials and Supplies, Food Drinks and Various Charges

Biography: Yvette is a Senior Tax Specialist with the General Tax Administration, Jacksonville Service Center. Yvette has been with the DOR since 1994 and began her career as a Tax Auditor II and progressed to Tax Auditor IV. Yvette conducted a workshop with a local School District on Sales and Use Tax for Schools: Grades K through 12 and received rewarding feedback and performed various other presentations in supporting the Taxpayer Education and Communication team. Yvette holds a bachelor's degree in Accounting.

3:40 PM – 4:30 PM

Session III

A– Perkins V Grants – Gloria Spradley-Brown, Florida Department of Education

Brief Description: The presentation will share general information and new fiscal budget alignment requirements related to Perkins V implementation.

Biography: Gloria Spradley-Brown is the Bureau Chief of Grants Administration and Compliance in the Division of Career and Adult Education. She has over 25 years of experience working in an educational leadership role. A recognized state administrator known for her in-depth knowledge, understanding and skills related to federal regulations, rules and statutes pertinent to the management and oversight of federal and state contracts and grants.

B- Let's Look at Lease – GASB 87 – Part 2 of 2 – Donna Collins, Milestone Professional Services, Inc.

Brief Description: GASB 87 changes financial reporting for Leases. This session will cover how lease accounting for governments is changing, how to prepare for this new standard and some practical tips (including sample entries and disclosures) for implementing GASB Statement No. 87.

Biography: Donna is the President of Milestone Professional Services, a consulting firm specializing in governmental accounting services. Her background encompasses compliance monitoring and reporting, internal control development and evaluation, as well as financial reporting, CAFR preparation and budget preparation assistance. Donna has served as a technical reviewer for Comprehensive Annual Financial Reports and is a frequent speaker for the FGFOA. She is a member of the GFOA, FGFOA, AICPA and FICPA. Donna recently served as the FICPA State and Local Government Committee Chair and Chair of the FICPA State and Local Government Annual Conference Committee.

Tuesday, November 12, 2019 (Continued)

C- Considerations and Models for Relationships between Education Foundations and School Districts – Mary Chance, Consortium of Florida Education Foundations

Brief Description: The Consortium of Florida Education Foundations will provide an overview of Florida's county-wide school district education foundations including the level and types of support they provide, their different operating and governance structures, trends and best practices for relationships with school districts.

Biography: Mary Chance has served as the president and CEO of the Consortium of Florida Education Foundations (CFEF) for 11 years. The CFEF is the membership organization for Florida's school district-wide education foundations and is considered a national leader, facilitating the country's only legislative dollar for dollar match for local education foundation led initiatives. The organization also provides professional development for member foundations and represents their interests on a state level. Mary previously led the Education Foundation of Alachua County for 10 years, through a period of tremendous growth and changes in governance structure.

Wednesday, November 13, 2019

10:20 AM – 11:10 AM

Auditor General Update – Micah Rodgers, Florida Auditor General

Brief Description: The Florida Auditor General's Office conducts financial, Federal and operational audits of school Districts. The presentation will include discussions about the district school board Summary of Significant Findings and Financial Trends report.

Biography: Micah Rodgers, CPA, received his Bachelor of Science in Accounting and Masters of Accounting from the University of Florida. He has been with the State of Florida Auditor General's Office for over 10 years. Micah is the Audit Manager of District School Boards responsible for planning and review of Financial, Federal, and operational audits.

10:00 AM – 11:40 AM

Motivational Speaker – If you Can Be Anything Be Au Sum – Josh Peach, Dude Solutions

Biography: With over 20 years of experience in the operations management arena and an accomplished speaking resume from industry events around the world, Joshua Peach has set himself apart as a thought leader for best practices in operations management. As a subject matter evangelist for Dude Solutions, Josh brings a broad understanding of management issues that spans across industries, organization sizes and focus areas. To date, he has spoken on a host of timely topics, from common maintenance challenges to keynotes on teamwork, leadership and customer service. He is currently one of only two recipients of the ASBO International Corporate Leader Award and the only vendor representative to have received the ISTE Making IT Happen Award and recipient of the MASBO Friend of MASBO Award, NSPMA Donna Peoples Corporate Leadership Award, SCSPMA Vicar Award and the NHASBO Al Blastos Distinguished Service Award

When he's not sharing knowledge on the road, he lives outside of Boston and is both a supporter of and participant in the South Shore Great Pumpkin Challenge. Josh is also actively involved with many of the industry's most important organizations, including: •ASBO International/State/Regionals ISTE •NSPMA •State and Regional Affiliates •Midwest FMC (Committee)•NSPMA National School Plant Managers Association (Board) •Ohio ASBO FMC •Northern New England FMC[LC1]

Concurrent Mini Sessions

1:50 PM – 2:40 PM

Session I

A– Power of Date – Josh Peach, Dude Solutions

Wednesday, November 13, 2019 (Continued)

B- Empowering Everyone Around You to Become Better -Melia Adams, Principal of Belleview Middle, Escambia

Brief Description: Ensuring that everyone has the resources and tools needed to become Better!

Biography: Melia Adams believes that her role as a middle school principal is about making sure everyone has the resources and tools needed to become better. Beginning her professional career as a clerk-typist in the School District of Escambia County, Melia has served in a wide variety of roles in education – from educational support roles such as clerk-typist, Administrative Secretary I, II and III to instructional and administrative roles. She has previously served on committees with the Escambia Education Association, district Teacher of the Year committee and has received the Escambia Association for Career & Technical Education Rookie Teacher of the Year for Service and Dedication award and Outstanding Assistant Principal of the Year for the Escambia County School District 2011-2012. Melia is currently serving in her 7th school year as the Principal of Bellview Middle School and strives to lead by example in all that she commits to doing.

C- How to Choose the Right Document Management System for Your Organization – Vestina Crayton, Pinellas County Office of Technology and Innovation

Brief Description:

Biography:

D- New Changes to Exempt Salaried Employees' Pay – Part 1 of 2 -William “Roy” Richardson, US Dept of Labor/Wage and Hour Division

Brief Description: Details of the Final Rule on 541 Updates

Biography: WILLIAM RICHARDSON began his career as a Federal Investigator with the USDOL’s Wage and Hour Division enforcing the provisions of Acts such as the FMLA and the FLSA. His compliance efforts have been recognized with Special Congressional Recognition and multiple Secretary of Labor’s Exceptional Achievement Awards. Currently, he serves as an Outreach and Planning Specialist, working to provide compliance assistance and educate the public on the requirements of the laws that the Wage and Hour Division enforces.

E- Cybercrime Tactics and Techniques – Jarryd, Malwarebytes

Brief Description: This presentation will discuss the current threat landscape and we shall touch on why schools should take these threats more seriously.

Biography: Jarryd Boyd joined Malwarebytes to provide pre-sales technical support across the Eastern United States. He previously worked within the network security space with a expertise in utilizing NetFlow to help identify cyber threats.

F- Building Resilient School Districts – Kathleen Hardi & Douglas Tripp, Orange County Public Schools

Brief Description: This presentation will explore district preparedness, response and recovery to adverse events, business disruptions and emergencies from multiple perspectives.

Biography: Kate Hardie is the Director of Emergency Management and Business Continuity at Orange County Public Schools. She received her Bachelor of Arts degree in Environmental Studies and Growth Management from Rollins College. She has been active in the fields of emergency management and planning for 10 years and has been published in the Journal of Business Continuity and Emergency Planning. Her areas of emphasis at the school district includes all-hazards emergency preparedness planning, training and exercise programs, incident management, community sheltering, and disaster recovery efforts.

G- Revenue Generation – Admin Claims – Chris Patton, Sivic Solutions Group

Brief Description: Maximizing your SDAC reimbursement levels through the Random Moment Time Study process.

Biography: Mr. Patton has more than 25 years of extensive experience in Fee for Service and Administrative Claiming under the Medicaid in Schools program. He provides revenue maximization services allowing school districts to access federal Medicaid reimbursement. He also has extensive experience in providing business process outsourcing services to the healthcare and public sector environments. Mr. Patton oversees SSG Medicaid in Schools claiming for district clients in the State of Florida, and other locations as needed.

Wednesday, November 13, 2019 (Continued)

2:45 PM – 3:35 PM

Session II

A– R290 Refrigerant – Moving into A School Kitchen Near You – Neil Robinson, Pinellas County Schools

Brief Description: R290 refrigerant is becoming more common place in kitchen equipment. This refrigerant is propane based and volatile.

Biography: Mr. Robinson has been with Pinellas County Schools since 1997. Along with two other managers he oversees the maintenance and repair of 137 educational facilities throughout Pinellas County. After high school, Neil attended one of our own vocational schools, Pinellas Technical Education Center earning certification in air conditioning and refrigeration; he has attended the Florida State Fire School and is a Florida State Fire Inspector.

B- From School Business to Sandy Beaches, Retirement Planning Made Easy -Matt Foxhall, Executive Vice President, AXA

Brief Description:

Biography:

C- Emerging Issues in Public Procurement & Contracts – Suzanne D’Agresta, Shareholder, Garganese, Weiss, D’Agresta & Salzman, PA

Brief Description:

Biography:

D- New Changes to Exempt Salaried Employees’ Pay – Part 2 of 2 -William “Roy” Richardson, US Dept of Labor/Wage and Hour Division

Brief Description:

Biography:

E- Fraud Prevention and Awareness – Dan Eveloff & Alicia Somers, Regions Bank

Brief Description: Bank fraud can take shape in various forms from bookkeeping fraud to payment fraud and can happen to anyone. Learn about various examples and steps to prevent your School Board from fraud.

Biography: Dan Eveloff, Senior Vice President Commercial Treasury Management Executive for Florida. He is responsible for leading the overall success of Treasury Management Operations throughout the Bank’s Florida footprint. He joined Regions in 2006 as a Business Banker, was promoted to Business Banking Sales Manager in 2009, South West Florida City President in 2013 and to his current position in May of 2018. Dan is a five-time Regions Chairman’s Club recipient. He spent his first five years in consumer leadership with Bank of America.

Biography: Alicia Somers, Vice President Financial Wellness Relationship Manager. Recognized and respected throughout the Northern Florida banking community, Alicia has delivered excellence to her clients in consumer and commercial banking for 20-plus years. She strives to provide customer excellence and a strong commitment to the community through ongoing collaborations with her customers and partners. In her current role as a Financial Wellness Manager, Alicia provides business and consumer financial wellness programs that help make employees healthier and business more profitable.

F- Mental Health – Early Detection – Mary Bridges, Orange County Public Schools

Brief Description: This session will discuss how schools can Identify Mental Health Concerns in Students. It will discuss how OCPS is training all employees to understand mental health.

Biography: Mary Bridges began her career as a high school social studies teacher and soon transitioned to a position as a school administrator where she served for ten years. She then became the Director of Psychological and Social Services before becoming the Executive Director of Student Services. She now works with all K-12 schools to establish safe and healthy learning environments while ensuring all students have equitable access to success.

Wednesday, November 13, 2019 (Continued)

G- Crowdfunding – Best Practices – Josh Henn & Ryan Peetz, Seminole County Public Schools

Brief Description: Crowdfunding has become a popular way for teachers to raise money for their classrooms. The appeal of raising money online can be enticing, but crowdfunding can present challenges for teachers and districts. Seminole County has adopted both board policy and district processes to help teachers and coaches navigate the Crowdfunding waters. Join us to learn more about how Seminole has implemented the policy and processes along with some of the pitfalls we found along the way.

Biography: Ryan Peetz has worked in Seminole County Public Schools for the past 17 years in various capacities. After graduating from the University of Central Florida, Ryan started his teaching career as a 5th grade teacher in 2001. Ten years later he was fortunate enough to transition into the school's Educational Technology Facilitator in 2011. In 2015, Ryan made the move to the district office as a Manager of Blended and Digital Learning where he is currently serving under the outstanding leadership of our district's Chief Information Officer and Director of Teaching and Learning.

Biography: Josh Henn is an Integration Specialist for Seminole County Public Schools. Josh holds a strong belief that technology is a powerful tool to improve classroom learning and other processes across an organization. Since coming to Seminole County, Josh has assisted with the introduction and expansion of Google products in the district as well as the district's Student Data Privacy initiative. He also worked on the creation and implementation of online crowdfunding training for the district.

3:50 PM – 4:40 PM

Session III

A– LED Testing A Practical Solution to Evaluating LED Lamps – Mark Fox, Pasco County Schools

Brief Description: This topic will discuss the methods of evaluation LED lamps and a practical solution to ensuring you are choosing the right product.

Biography: Mark Fox is the Director of Maintenance and Facilities Services for the Pasco County School Board. He started working for the District in 1994. He has served in his current position as the Director for the past seven years. Prior to that I worked as Senior Crew Chief for ten years and as Paint Crew Chief for eight years. He came to work for the District with an extensive background in commercial coatings and worked as a Spec Writer for the Army Core of Engineers at MacDill on all paint projects. When he began working as the Director, he had one goal in mind to make the best choices on spending taxpayer's dollars and to operate the Maintenance Department effectively and efficiently in all areas from the smallest to the biggest projects.

To date he is extremely proud of the accomplishment in reorganizing the Maintenance Department and the total restructuring of the Custodial Services training program.

B- What is Your Leadership Superpower? – Jim Drake, Monroe County Schools

Brief Description:

Biography:

C- The Threat of the Phish – Brian Johnson, Manager of Security, Escambia County Schools

Brief Description:

Biography:

D- Grievance -John Palmerini, Associate General Counsel, Orange County Schools

Brief Description:

Biography:

E- K-12 Student Scholarship Programs – Cathy Russell, Florida Department of Education

Brief Description: Overview of the Gardiner Scholarship, John M. McKay Scholarships for Students with Disabilities Program, Family Empowerment Scholarship Program, Opportunity Scholarship Program, Florida Tax Credit Scholarship Program and the Hope Scholarship Program

Biography: Currently the Director of Operations, Cathy has served in several capacities in the Office of Independent Education and Parental Choice since she joined the department in 2007, including Scholarship Programs Manager.

Wednesday, November 13, 2019 (Continued)

F- Controlling Retiree Healthcare Cost Using HRAs – Trent Teesdale, Sr. Vice President, MidAmerica Administrative & Retirement Solutions, LLC

Brief Description: Are potential retirees changing their minds due to the cost of health insurance premiums? Are your OPEB liabilities continuing to increase due to implicit rate subsidies? Learn about new HRA applications which could help you address both issues.

Biography: As Senior Vice President of Business Development, Trent provides critical insight on plan compliance, marketing strategies, product development and client relationships. With more than 15 years of employee benefits consulting and insurance expertise, Trent works closely with employers to help them create customized benefits solutions that fit the unique needs of the organization. Employers enhance their employee benefits offerings with his guidance, while realizing real cost savings. Trent's individualized approach to benefits structuring and track record of success separates MidAmerica from its peers as a true benefits partner.

His analytical background and strive for innovation have been an invaluable asset to MidAmerica's development during his over ten-year relationship with the company, having administered a variety of plans, including FSA, HRA, HSA, 457(b), 403(b) and 401(a) plans, over the decade. His strong interpersonal skills have facilitated new partner and client relationships, as well as maintained the longstanding history with MidAmerica's existing partners. Trent holds a Bachelor of Public Administration degree from Polk State College, where he graduated Magna Cum Laude, and has obtained his State of Florida Life, Health & Variable Annuity License, Series 6 and 63 securities licenses, GBA, RPA, and CEBS designations.

G- Public Sector Cybersecurity: Understanding the Cyberthreat Landscape – Shan Grant, RSM

Brief Description:

Biography:

Thursday, November 14, 2019

9:50 AM – 10:40 AM

Legislative Insights from FADSS– Merrill Wimberley, FADSS

Brief Description: Merrill Wimberley will present legislative and budget information from current activities

Biography: Merrill Wimberley, CPA, currently serves as the CFO for the Florida Association of District School Superintendents (FADSS). He recently retired on June 30, 2019, after 23 years with Leon County Schools. He was CFO for 21 of those years and Assistant Superintendent for the final two years. He was an active member of the Florida School Finance Officers Association and the Florida School Finance Council during these years. Prior to his employment with Leon County Schools, he was the CFO for Baker County Schools for 2 years and employed by the Florida Auditor General 3 years. He graduated in 1988 from Stetson University with a Post Baccalaureate in Accounting and Business and worked in Private accounting firms until 1991.

10:40 AM – 11:30 AM

Business Email Compromise/Cybercrime trends – Stephanie Cassidy, Florida Department of Law Enforcement

Brief Description: Agent will cover business email compromise topic including what it is, examples, and how to prevent being a victim. Agent will then go over cybercrime trends in the state of Florida.

Biography: Special Agent Cassidy has 9 years of law enforcement experience starting at the Escambia County Sheriff's Office. She has been with the Florida Department of Law Enforcement for 2 years and is currently assigned to the Cyber Squad where she specifically works Network Intrusion investigations. She is also in the US Navy Reserves and works as an IT.

Thursday, November 14, 2019 (Continued)

Concurrent Mini Sessions

1:30 PM – 2:20 PM

Session I

A- Records Retention in the Sunshine – Les P. Vaughn FCRM, CPM, District Records Custodian, Orange County Public Schools

Brief Description: This session will explore records retention requirements, best practices, and potential impacts and consequences influencing compliance to public records inspection requirements.

Biography: Les Vaughn's career as a Records Manager spans over 25 years, serving with OCPS for 16 years and Lake County Clerk of Court for 10 years. He has served on the Board of Directors for the Florida Records Management Association for over 10 years and has presided over the organization for 3 years as well as the Orlando Chapter of ARMA for many years. Les is a Florida Certified Records Manager and a Certified Public Manager. Part of his duties as District Records Custodian is to oversee and ensure compliance to public records law, records storage, retention, and legal discovery mandates.

B- Florida Best and Brightest Teacher and Principal Award Programs – Abbey Stewart, Florida Department of Education

Brief Description: This session will provide an overview of the Florida Best and Brightest Teacher and Principal Award Programs.

Biography: Abbey Stewart serves as the Chief for the Bureau of Educator Recruitment, Development and Retention at the Florida Department of Education. She is committed to supporting the preparation, recruitment, development and retention of a quality teacher for every classroom and recognizing educators for the positive impact they have on the lives of Florida's students. Abbey has held various roles in the Division of Educator Quality, always with a focus on work to ensure that every student has access to the quality education she would expect for her own son.

C- GASB 84 – Fiduciary Activities – Yvonne Clayborne, CPA, CITP, from Carr, Riggs & Ingram, LLC

Brief Description: Considerations for implementing the provisions of GASB Statement No. 84 - Fiduciary Activities - what to expect, determining the impact on your organization and how to prepare.

Biography: Yvonne is an audit & attest partner in the Melbourne, Florida office of CRI. She has more than 20 years of experience in public practice serving clients in a variety of industries that include local governments and not-for-profit organizations.

D- Credit Ratings – Linda Vanderperre, Kroll Bond Rating Agency

Brief Description: This presentation will provide an overview of considerations relevant to public finance credit ratings and will discuss aspects of KBRA's ratings approach and methodologies.

Biography: Linda Vanderperre joined KBRA as a Senior Director after having worked in the Public Finance banking groups at UBS, JP Morgan and most recently, Ramirez. Linda has over 30 years of public finance investment banking experience. She has served as the lead banker on more than \$30 billion in senior managed transactions for municipal issuers in Florida, New York and the mid-Atlantic. Over her career, Linda has developed and implemented customized financing plans for many of the nation's largest and most active municipal issuers. Linda is a member of the Municipal Analyst Group of New York, the National Foundation of Municipal Analysts, and the National and Northeast chapters of Women in Public Finance. She has served as a mentor for women in the public finance industry for more than 10 years. Linda has an MBA in finance from the New York University Stern School of Business. She holds FINRA Series 7, 53, and 63 licenses.

Thursday, November 14, 2019 (Continued)

2:30 PM – 3:20 PM

Session II

A- Public Records Inspection; the Ongoing Saga – Les Vaughn FCRM, Orange County Public Schools

Brief Description: This session will explore records retention requirements, best practices, and potential impacts and consequences influencing compliance to public records inspection requirements.

Biography: Les Vaughn's career as a Records Manager spans over 25 years, serving with OCPS for 16 years and Lake County Clerk of Court for 10 years. He has served on the Board of Directors for the Florida Records Management Association for over 10 years and has presided over the organization for 3 years as well as the Orlando Chapter of ARMA for many years. Les is a Florida Certified Records Manager and a Certified Public Manager. Part of his duties as District Records Custodian is to oversee and ensure compliance to public records law, records storage, retention, and legal discovery mandates.

B- The Use of Drones & Infrared Surveys for Roof Studies – Terry Marchetti, Pinellas County Schools

Brief Description: Reducing Construction Costs Through the Use of Drones

Biography: Terry performs inspections and works closely with project coordinators in the Facilities Design and Construction Department. Terry is an FAA certified drone pilot and private pilot (single engine land).

C- CCNA Prequalification & Construction Contracting – Ed Ames, Construction & Contracting of Orange County Schools

Brief Description: CCNA Pre-Qualification and Construction Contracting

Biography: Ed Ames has over 28 years of experience in the Procurement and Contracting arena. Ed began his career as a Contracts Specialist working with Federal Government awards and went on to become a Director and Chief Procurement Officer with several higher Education institutions. Ed is currently the Director of Procurement overseeing the Facilities and Construction Contracting Department at Orange County Public Schools. During his tenure at Orange County Ed has successfully directed over 120 CCNA projects.

D- Fringe Benefits for School Districts: When is a gift Not a Gift? -Julie Lewis & Lynn Knight Attorney | Principal Lewis Law Office, LLC and Business Manager Nekoosa School District

Brief Description: Is a five-dollar school supply gift card reportable income to the employee? What about Friday coffee and doughnuts? Can we buy dinner for employees who are working late to help with a big project without having to tax employees on the value of the meal? Do we have to report the \$20 stipend a teacher receives for completing a Department of Education survey?

Biography: Attorney Julie A. Lewis is the principal and owner of Lewis Law Office, LLC serving clients in Wisconsin and Minnesota. Julie specializes in employee benefits, employment law and general commercial law. She has had the pleasure of advising Wisconsin school districts on employee compensation and benefits matters since 2012. In November 2019, Julie will complete a Certificate in Education Finance from the McCourt School of Public Policy at Georgetown University.

Biography: Lynn Knight has spent over 10 years performing school business management functions for the School District of Nekoosa and the Stevens Point Area Public School District. Prior to that she worked in a public accounting firm auditing governmental entities, including school districts, for 7 years. Lynn is also a past president of the WASBO Board of Directors and is a current member of WASBO's Accounting Committee. Lynn is an ASBO Director candidate for the Fall 2021 election.

E- From Zero to Hero: Everything you need to know to be a CAPE Superhero! - Finance Officers' Edition – Kathryn Wheeler, Florida Department of Education

Brief Description: This session will provide a comprehensive overview of Florida's Career and Professional Education Act (aka CAPE Act), including major program and funding components.

Biography: Kathryn Wheeler serves as the CAPE Industry Certification Manager at the Florida Department of Education. In her work, she provides technical assistance on industry certifications and the implementation of the CAPE Act to district and college administrators, educators, students and parents.

Thursday, November 14, 2019 (Continued)

F- Use of Capital Funds – Omar Shim, Director of Capital Budget of Broward County Public Schools

Brief Description: This session explores the utilization of capital millage, COPs financing, PECO, CONDS/COBI and impact fees.

Biography: Omar Shim is the Director of Capital Budget for Broward County Public Schools and has been with the District for 20 years. Mr. Shim facilitates the process of developing the District Educational Facilities Plan and oversees the District's \$1.3 billion capital budget. He is a graduate of Florida Atlantic University and is a member of the Government Finance Officers Association (GFOA) and the Florida Finance Officers Association (FSFOA).

G- To TAN, or not to TAN? (Not a Suntan) – Laura Howe & Robert Wilson, PFM Financial Advisors Ritesh Patel, Nabors, Giblin & Nickerson

Brief Description: The panel will discuss the reasons Tax Anticipation Notes are utilized and how a TAN can be an effective tool in managing Districts cashflow needs. In many instances the TAN also provides enhanced revenue to the general fund.

Biography: Ritesh S. Patel graduated cum laude with honors from the Florida State University (B.S. 1998) with a degree in Political Science. In 2002, Mr. Patel received his law degree from the University of Florida, College of Law (J.D., with honors). Mr. Patel joined NG&N in October 2002 and practices with the Firm's Public Finance Group. During his tenure with NG&N, Mr. Patel has worked on numerous tax-exempt financings in the capacity of bond counsel, disclosure counsel and underwriter's counsel representing various Florida school districts, municipalities, counties and special districts. In the area of education facilities financing, Mr. Patel has experience in transactions utilizing general obligation bonds, TANS, RANS, certificates of participation, tax-exempt equipment leases, letters of credit, lines of credit, sales tax revenues bonds, qualified school construction bonds and qualified zone academy bonds.

Biography: Laura joined PFM in 2010 and currently serves as a senior managing consultant in the firms Orlando office. She is a project manager for the majority of PFM's Southeast school district clients, providing client support on more than \$11 billion in debt financings and specializing in unique financings. She is responsible for serving as project manager on financial advisory engagements, performing credit analysis, structuring and sizing municipal bond issues, performing analysis of refunding opportunities and providing debt/strategic plans clients. She has experience with competitive bond sales and negotiating pricings for both tax-exempt and taxable new money and refunding bond issues, as well as interest rate swaps. Laura graduated from Florida State University with a Bachelor of Science degree in Multinational Business, and later received her MBA from Florida State University. She is a registered Municipal Advisor Representative (Series 50) and serves on the Board of the Florida Chapter of Women in Public Finance. She is an active sponsor and past speaker for FSFOA.

Biography: Robert Wilson joined PFM in 2015 and is staffed in the Orlando, Florida office. He works with transportation clients and in the general financial advisory sector, providing technical and quantitative support for various clients. His present duties include structuring, sizing, pricing new money, and refunding bond issues.

3:40 PM – 4:30 PM

Session III

A- Fleet Maintenance – Parts Inventory Management Do's and Don'ts– Tommy Fitzpatrick, Manager Vehicle Maintenance, Broward County Schools

Brief Description: Cost containment strategies to reduce bus repair downtime by identifying parts in to categories of A, B, and C, using vendor/partner managed inventory, and the use of RFID labels and the role they play with asset security and management.

Biography: Tommy Fitzpatrick is the Manager of Fleet Maintenance for Broward County Schools and has over 30 years' experience between public and private endeavors. Before starting his career at Broward Schools, Mr. Fitzpatrick worked for Western Auto corporate installing and training employees on the transition from looking up parts and inventory in books to entering data into computers with Windows 3.1. This led to an opportunity to work with Firestone as they merged with Bridgestone, this merger expanded the principals of Total Quality Management (TQM) within the Fleet side of doing business. After many years of traveling it was time for a change, this led Mr. Fitzpatrick to Clay County Schools, in which he started as a Shop Manager, Operations Supervisor and to Director. Mr. Fitzpatrick is on many different committees for the Florida Association of Pupil Transportation and speaks at most conferences on ways to help with customer service and Lean principals.

Thursday, November 14, 2019 (Continued)

B- Energy Efficiency Retrofits as a Service – Jeff Stokes, ESG

Brief Description: Implementing today's latest cost saving technologies utilizing Off-Credit transactions

Biography: As the Senior Director of Project Finance, Dan oversees all aspects of ESG's project financing processes. He understands both traditional and alternative financing options and works with customers and financiers to coordinate and close project financings. Dan has over 30 years of commercial banking and energy services industry experience and has a proven track record of developing and managing large financing programs. Dan has developed project financing solutions involving a wide array of financial instruments including tax-exempt leases, commercial leases, loans, installment purchase agreements, energy services agreements, and Tax Credit Bonds such as Qualified Energy Conservation Bonds (QECB) and Qualified Zone Academy Bonds (QZAB). Dan has been an active member in the Association for Governmental Leasing and Finance (AGL&F) for the past 25 years, and previously served on their Board of Directors and is a past Chairman of AGL&F.

C- Navigating through the complicated intersection of ADA, FMLA and Workers' – Julie Lewis & Lynn Knight Attorney | Principal Lewis Law Office, LLC and Business Manager Nekoosa School District

Brief Description: This session provides a short overview and checklist every business and finance office should have. Lynn Knight, Nekoosa School District will share her stories to help you understand the triggers that indicate you may be entering an FMLA, ADA or WC situation. Julie Lewis will also provide some additional situations for discussion. Opportunity is provided for you to decide "What would I do?" in response to scenarios, network with others and share your insights and experiences. Note that we will be speaking to federal regulations and requirements of ADA and FMLA. The session will be looking at situations from federal case law where a school district or other local government entity was a defendant in an ADA and/or FMLA employment lawsuit. Worker's compensation and state laws regarding disability discrimination and family/medical leave differ by state. Our presentation will focus on federal law. We will not provide advice or information regarding Florida state law regarding worker's compensation or leave entitlement.

Biography: Attorney Julie A. Lewis is the principal and owner of Lewis Law Office, LLC serving clients in Wisconsin and Minnesota. Julie specializes in employee benefits, employment law and general commercial law. She has had the pleasure of advising Wisconsin school districts on employee compensation and benefits matters since 2012. In November 2019, Julie will complete a Certificate in Education Finance from the McCourt School of Public Policy at Georgetown University.

Biography: Lynn Knight has spent over 10 years performing school business management functions for the School District of Nekoosa and the Stevens Point Area Public School District. Prior to that she worked in a public accounting firm auditing governmental entities, including school districts, for 7 years. Lynn is also a past president of the WASBO Board of Directors and is a current member of WASBO's Accounting Committee. Lynn is an ASBO Director candidate for the Fall 2021 election.

Thursday, November 14, 2019 (Continued)

D- GFOA's Award of Best Budgeting Practices and Introduction to Academic Return on Investment -Carol MacLeod, CPA, Forecast 5 Analytics

Brief Description: The GFOA's Distinguished Budget Presentation Award Program was revamped into the Award for Best Budgeting Practices in 2017. With a fundamental change in focus, the award now looks to the strategic plan to drive the budget process with focus on student achievement rather than limited resources. Learn how the development and assessment of SMARTER goals to support the strategic plan provide the foundation needed to begin to evaluate the A-ROI of educational programs.

Biography: Carol MacLeod retired from the Lake County School District, where she served as the Chief Financial Officer from May 2007 until July 2017. She served in similar positions in Florida Schools since 2000 and had been a member of the Florida Auditor General's staff for 14 years. She is currently a Senior Analytics Advisor with Forecast5 Analytics, Inc., a leading provider of analytic and decision support system software to the public sector. She has been a licensed Certified Public Accountant (CPA) in Florida since 1986. She holds a B. A. in Accounting from the University of South Florida, a M.S.M in Information Technology from the Florida Institute of Technology and the professional designations of Certified Internal Auditor (CIA), Certified Information Systems Auditor (CISA), Certified Governmental Auditing Professional(CGAP) and Certified Administrator of School Finance and Operations (SFO). She is active professionally through several organizations and serves as a Budget Reviewer for the Government Finance Officers Association. In 2012, Lake County was one of four school districts that participated in the Gates Foundation "Spending Money Smartly" project which laid the foundation for the GFOA's Best Budgeting Practices for School Districts, Smarter School Spending and the Budget Alliance.

E- Cost per Student Station Requirements – Leanne Evans & Wanda Paul, Palm Beach Schools

Brief Description: Recent legislative changes to the cost per student station impact Districts ability to construction or renovate buildings. This session will discuss the impact on both your facility and finance departments.

Biography: Wanda Paul has been with the School District of Palm Beach County since May 2017, hailing from Houston, Texas, she began her career in the U. S. Army. Ms. Paul joined the Houston Independent School District in 1999, becoming the School Maintenance Manager in 2002, monitoring and supervising the custodial operations and maintenance activities. She moved to the Spring Branch Independent School District, as the Director of Building and Grounds, and in January 2013, to the Dallas Independent School District, as the Executive Director of Maintenance and Operations. Wanda Paul received a promotion to Chief Operating Officer in June 2013. As the Chief Operating Officer for the School District of Palm Beach County, Ms. Paul provides overall leadership to the Operations Division. In addition to managing more than 2,800 employees, she manages the 2016 \$1.6 billion Sales Tax Referendum.

Biography: Leanne Evans has served as the Treasurer of Palm Beach Schools since 2001. Prior to that date, she worked in government banking. In her current role, she manages over \$1 billion of investments for the district, including all banking relationships, as well the \$5.7 billion capital plan and \$1.4 billion of debt. During her tenure, she has coordinated over \$7.7 billion of debt issues. Ms. Evans serves on the board of FSFOA and the advisory committee for Florida Palm, a LGIP formed specifically for Florida School Districts that has expanded to serve all local governments in Florida. She holds a BS in Finance and a BA in International Business from Florida Atlantic University and is a Certified Treasury Professional, as designated by the Association of Financial Professionals.

F- Post- Issuance Compliance Fundamental Concepts: Arbitrage, Continuing Disclosure and Private Use – Erik Dingwall, BLX Group LLC

Brief Description: Fundamental concepts related to tax-exempt bond compliance will be discussed. The goal of the presentation will be to enable attendees to identify and understand important post-issuance compliance terminology and concepts when they encounter them in real-world situations.

Biography: Erik Dingwall is a Managing Director of the Tampa office of BLX responsible for overseeing operations as well as leading BLX business development efforts throughout the Southeastern United States. Mr. Dingwall holds a BS degree in Bioengineering from University of California San Diego and a MBA from the University of Southern California. He is an active speaker and member of the Florida Government Finance Officers Association and the Florida School of Finance Officers Association. He is a registered Municipal Advisor representative holding the Series 50 registration.

Friday, November 15, 2019

8:30 AM – 9:20 AM **Retirement Plans & Inventory Trends** – Frank Wan, Burgess Chambers & Associates

Biography: Mr. Frank Wan is a senior consultant responsible for economic research, asset allocation, plan design and investment consulting. Mr. Wan is the Chair of the Investment Committee and his research has been published by Investor Business Daily and Forbes. Prior to joining BCA, Frank was an equity analyst for a market-neutral hedge fund, where he was responsible for financial modeling. Frank received his undergraduate degree from Stetson University and MBA from Rollins College. Frank is a frequent speaker at industry conferences, including FPPTA and FGFOA.

9:25 AM – 10:15 AM **Economic Outlook for 2020** – David Jang, CTP Water Walker Investments

Brief Description: This session will provide a review of current economic indicators, a look at what is in store for next year and the impact on school district finances.

Biography: A proud graduate of the Florida public school system; earned his Bachelors of Science in Economics from the Wharton School, University of Pennsylvania; is a Registered Investment Advisor with the Florida Department of Financial Regulation.

10:40 AM – 11:30 AM **Florida’s Election Year Legislative Session - opportunities and expectations** – Andrea Messina, Executive Director, Florida School Board Association

Brief Description: The Florida Legislature scheduled the 2020 Legislative Session to be “early” and run from January to March so that legislators can return home and begin their campaign for re-election. What opportunities does this present for school districts? What are the priorities that you can expect to see legislative leadership pushing? These questions and more will be addressing in this insider’s look at the process.

Biography: Andrea Messina has been the Executive Director of the Florida School Boards Association since 2015. As Executive Director, she leads all aspects of the statewide professional organization for Florida’s elected School Board members, including Superintendent search services.

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Julia McCord - Hillsborough	1984-85		Jeff Robison - Hillsborough	2011-12
Gary C. Harnage - Nassau	1985-86		Tommy Crosby - Marion	2012-13
Alton J. Noelle, Jr. - Orange	1986-87		Art Dunham - Pinellas	2013-14
Billye M. Wilcox, Sr. - DeSoto	1987-88		Robert Waremburg - Clay	2014-15
Sandra J. McCracken - Pinellas	1988-89		Sam Bays - Broward	2015-16
Noah Powers - Marion	1989-90		Rhonda Odom - Putnam	2016-17
Bob Wilson - Collier	1990-91		Suanne Lee - Monroe	2017-18
Frank K. West - West Palm Beach	1991-92			

FSFOA

Officers

President	Trudi Murdock	Seminole
Vice President	Dominick Cristofaro	Pasco
Treasurer	Bonnie Penner	Columbia
Secretary	Shari Horsey	Orange
At Large Director	Mitsi Corcoran	Sarasota

Directors

Kelly Leavins	<u>District I</u> (11/2016 – 11/2019)	Holms
Janice Slonina	(11/2017 - 11/2020)	Washington

District II

Ellen Harper	(11/2016 – 11/2019)	Nassau
Idelle Rodriguez	(11/2017 – 11/2020)	St. Johns

District III

Lorena Bruneau	(11/2018 – 11/2020)	Seminole
Vacant		

District IV

Dawn Meyers	(11/2016 – 11/2019)	Pinellas
Heather Jenkins	(11/2017 – 11/2020)	Manatee

District V

Raymond Church	(11/2017 – 11/2020)	Palm Beach
Diana Martens	(11/2018 – 11/2019)	Broward

Historian/Webmaster	Leanne Evans	Palm Beach
Sponsor Coordinator	Gretchen Saunders	Hillsborough

DOE	Mark Eggers	Tallahassee
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FASBO

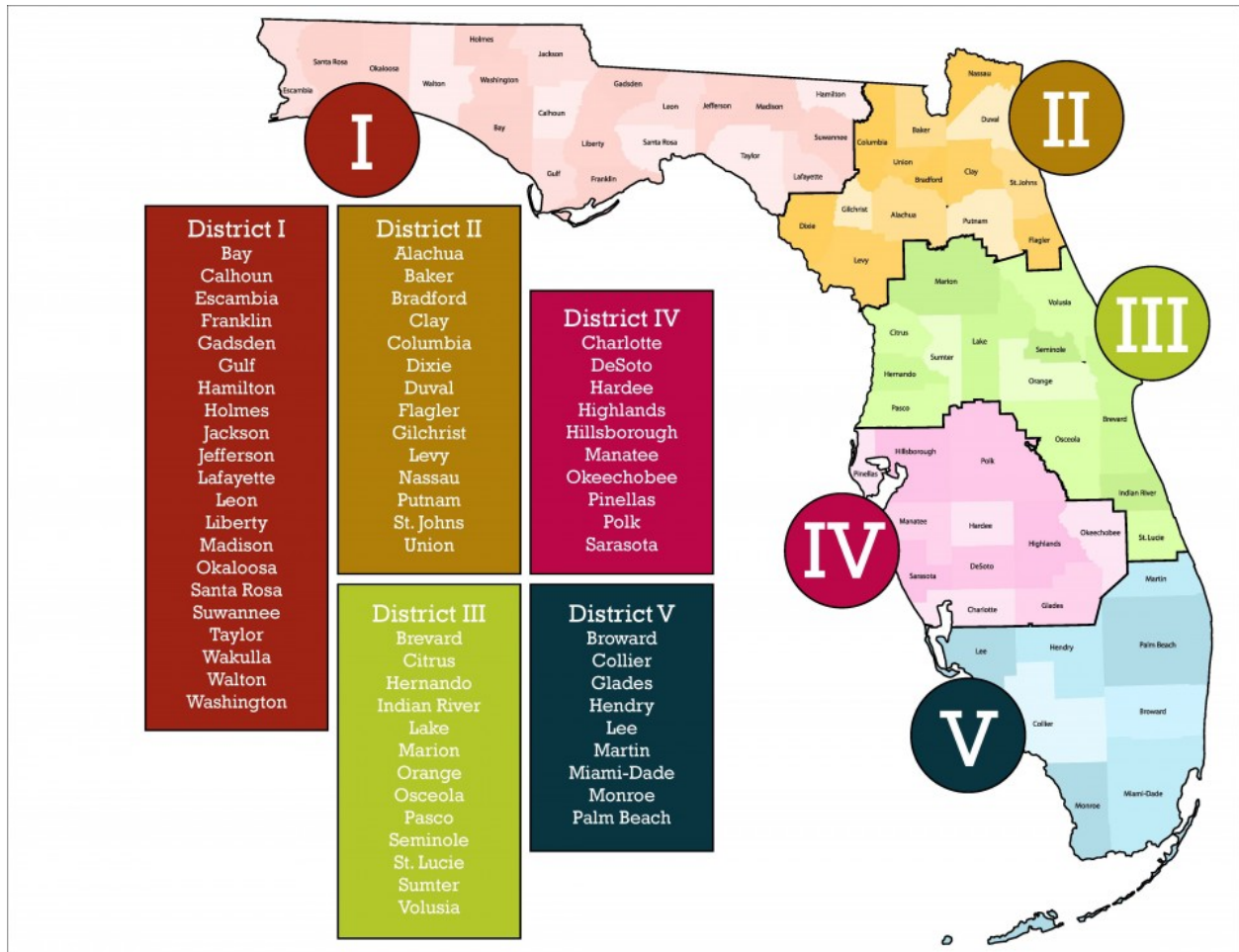
Officers

President	Becky Gideon	Marion
Vice President	Jeff Robison	Hillsborough
Treasurer	Jim Drake	Monroe
At Large Director	Rhonda Odom	Putnam

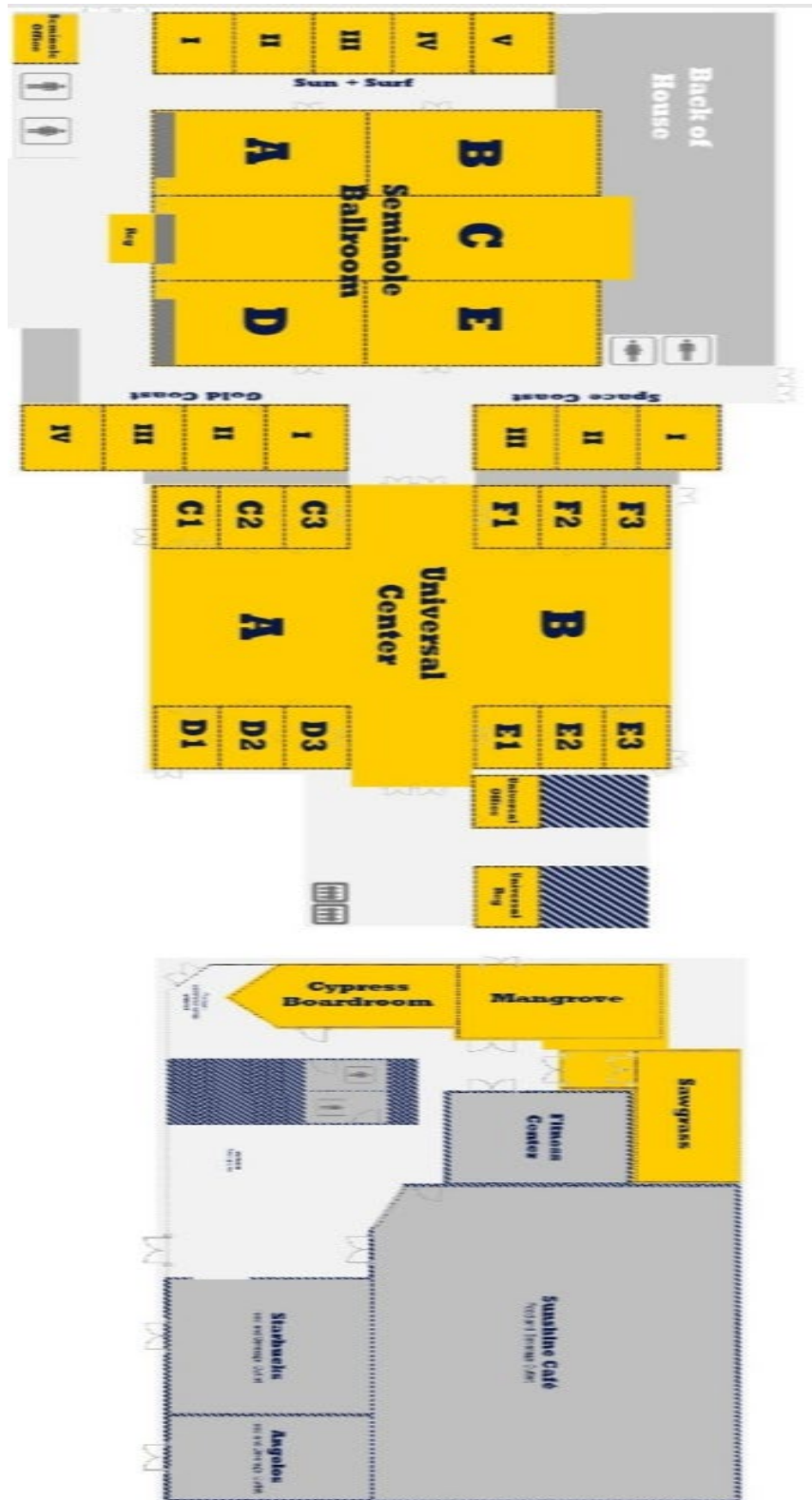
Directors

Accounting Management	Pam Norwood	Broward
Financial Management	Dawn Meyers	Pinellas
Human Resources Management	Tami Brown	Duval
IT Management	Brian Johnson	Escambia
Operations Management	Mike Hewett	Pinellas
Purchasing Management	Cindy Lambeth	Santa Rosa
Certification Director	Marcia Saulo	Lighthouse Academies
SASBO Representative	Robert Waremburg	Orange
Emerging Leader	LaTresa Carlisle	Escambia
Executive Director	Robin Hukill	Escambia
Vendor Representative	Tracey Gallentine	
Editor Naylor Magazine	Sid Tally	Orange

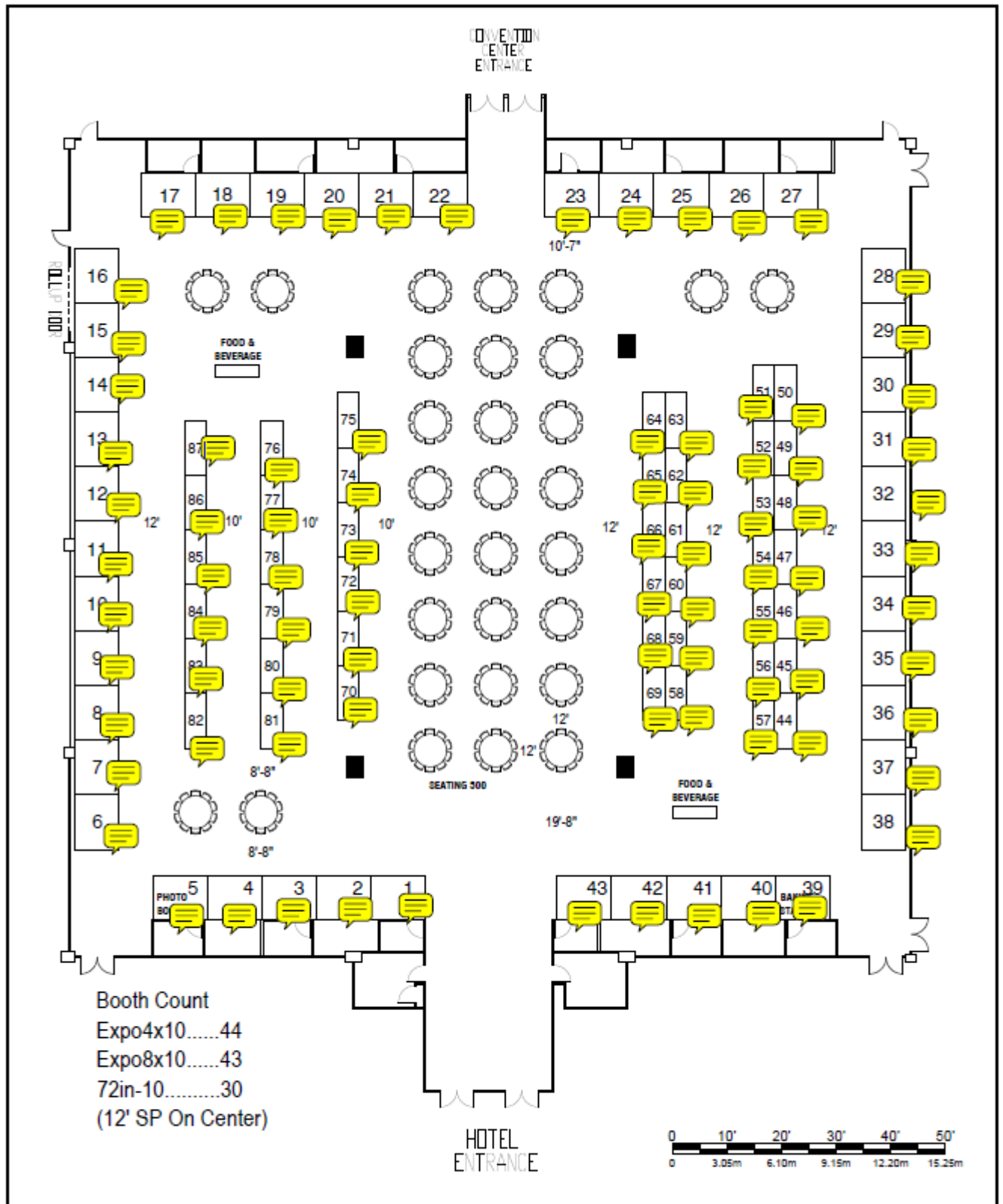
FSFOA



Hotel Map



Sponsor Layout



FASBO 2019
 November 11-15, 2019
 DoubleTree Universal/Universal Center/Orlando, FL

DRAWN BY: Tony Harris REVISION DATE: 11/01/19

ALLIANCE
 nationwide exposition

Company	Booth Number	Company	Booth Number
Accent Distributing	73	Key Benefit Concepts	51
Advanced Roofing	61	Marathon Health	83
Allovue	27	MCCi	12
Andrews Technology	77	MidAmerica Administrative & Retirement Solutions	6
Assured Guaranty	87	Minimise USA	52
AXA	70	MySchoolBucks/Heartland School Solutions	33
B & H Photo Video	54	National Chemical Laboratories	41
Bank of America	11	Omnia Partners	16
BBVA Compass	82	Online School Management Systems	30
Bencor	69	PAEC	68
BLX Group LLC	15	Palmer Hamilton, LLC	13
CanaRX	85	Parchment	44
Careerstaff Unlimited	25	PFM Asset Management LLC	64
Cherry Bekaert/Bravo	45	PFM Asset Management LLC	65
Cintas	3	PMA Financial Network	38
ClassWallet	49	PNC	32
Commerce Bank	84	PowerSchool	71
Digital Designs	60	Profit Solutions Group	22
Dude Solutions	14	Pure Air Control Services	62
E&I Cooperative Services	50	Regions Bank	20
EDUStaff	63	RevTrak, a Vanco Company	5
Energy Systems Group	35	RISO	23
Equal Level	48	RoofConnect	79
ESS	43	rSchoolToday	55
Facilitron	2	SchoolPay	53
Fastenal	34	Securitech Group, Inc	10
FIS Integrated Payables	74	Security Benefit	47
FLCLASS	26	Sivic Solutions Group	Entrance
Florida Prime - Federated Investors	36	Skyward, Inc	21
Florida School Boards Insurance Trust	80	Sodexo	67
FLSTAR	72	Softdocs	76
Forecast5 Analytics, Inc	37	Sourcwell	75
FSBA BuyBoard Purchasing Cooperative	78	Sun State Bus Centers	66
Gabriel, Roeder, Smith & Company	57	Sun Trust Bank	39
Genuine Foods	86	Synovus	28
GoGuardian	40	TD Bank, NA	42
GovDeals	18	The Nutrition Group	19
Hertz Furniture	7	TIPS	58
Hertz Furniture	8	TSA Consulting	Entrance
Horace Mann Companies	31	Tyler Technologies	24
Instream	81	Valic	17
Jarvis Property Restoration	46	Water Walker Investments	1
Johnstone Supply	59	Wells Fargo Bank	4
JP Morgan	9	West Corporation	56
KEV Group	29		

