

# Encumbrance/Treasurer Workshops - October 1, 2014

**October 1, 2014**

*Reed Conference Center  
Midwest City, Oklahoma*

*This Pre-Conference day can be used to meet the training requirements for Encumbrance Clerks and Treasurers or to simply gain additional knowledge to perform your school job. You can receive 6 hours for the complete day.*

- 8:00 a.m.      **Registration - Reed Center Lobby**  
*Continental Breakfast  
Sponsor: Horace Mann*
- 9:00 a.m.      **Reed CD Rooms**  
**Welcome/Introductions/Overview**  
*Ann Wade, Executive Director/OKASBO*
- 9:05 a.m.      **What To Expect When The IRS Show  
Up At Your School**  
*Diane Adamson, CFO/Tahlequah Schools*
- 10:20 a.m.     **Refreshment Break**  
*Sponsor: OSIG*
- 10:35 a.m.     **OCAS NEWS**  
*Nancy Hughes, Executive Director,  
Financial Reporting, OCAS, Audits/SDE  
President Elect/OKASBO*
- 11:50 a.m.     **Morning Wrap Up**  
*Ann Wade, Executive Director/OKASBO*
- 12:00 p.m.     **Lunch Provided**  
*Sponsor: Focus Financial*
- 12:30 p.m.     **Vendor Showcase Opens**

*The showcase provides us time to spend with vendors reviewing the latest and greatest products and services for Oklahoma school districts. Make sure you spend as much time as possible in the showcase learning about what they can do to contribute to the success of our students. You may even have a chance to win great prizes!*

DIS has printed this Newsletter, for eight years, at their office located at 9300 "C" Broken Arrow Expressway, Tulsa, Oklahoma at no cost to OKASBO.



**Thanks** to Terry Bourke and Nick Patterson.  
**918-664-8800.**

## Breakout Sessions

(1:30 - 2:20) (2:30 - 3:20) (3:30 - 4:20)

Breakout sessions begin at 1:30 p.m., and attendees may attend any session. Each session is scheduled for fifty (50) minutes. Registrants may then change to another session. Three rotations are scheduled.

- Jovner Room**      **Encumbrance Clerks 101**  
*Brenda Burkett, CFO/Norman Schools  
OKASBO Committee Chair*
- Reed A Room**      **Treasurer 101**  
*TBA*
- Reed E Room**      **Most Common Audit Errors Found  
For Encumbrance Clerks and Treasurers**  
*Pat Carroll, CPA/Chas. C. Carroll, PLC*
- Maynard Room**     **School Personnel Reporting**  
*Heather Butler, Coordinator School  
Personnel Records/SDE*
- Reed F Room**      **Worxtime**  
*Che Yi, Sr. Health & Welfare Plan  
Consultant/American Fidelity Administrative  
Services, LLC*
- 4:20 p.m.      **Summary & Certificate Presentation**  
*Cindy Shiever, Business Office Manager  
Past President/OKASBO*
- 4:30 p.m.      **Opening Hospitality**  
*Sponsor: Gourmet Solutions*



*Left to right: Michael Welch, President/ Justin Mills, Vice President/Courtney Flores, Director of Business Operations*

# Tentative Fall Program - October 2-3, 2014

## Thursday, October 2, 2014 Reed Conference Center, Midwest City

- 8:00 a.m. **Vendor Showcase Opens**
- 8:00 a.m. **Registration Begins**  
(located in the Vendor Showcase room)  
**Continental Breakfast provided**  
*Sponsored by: Barlow Education and  
MAS, Inc.  
OSIG*
- 9:00 a.m. **First General Session**  
*Moderator: Stacey Butterfield, Superintendent  
Jenks Schools/President, OKASBO*
- 9:05 a.m. **Student Performance**  
*Presentation of Colors: TBA  
Student Performances: TBA*
- 9:30 a.m. **Legislative Panel**  
*Moderator: Stacey Butterfield, Superintendent  
Jenks Schools/President, OKASBO*
- 10:15 a.m. **Refreshment Break**  
*Sponsored by: OSAG*
- 10:30 a.m. **Leading Others - Leadership vs Authority**  
**Reggie Rivers—Keynote Speaker**  
*Sponsored by: OSAG*
- 12:00 p.m. **Lunch provided**  
*Sponsored by: American Fidelity Assurance*

### *Recognition of:*

**“SDE Outstanding Schools in Financial Reporting”**  
*Sponsored by SDE & OKASBO*

**“Leroy Holloway Scholarship Recipient”**  
*Sponsored by: OKASBO*

**“Associate Membership Scholarship Recipient”**  
*Sponsored by: American Fidelity Assurance  
Company, LLC*

12:45 p.m. **Vendor Showcase - Prize Drawings**  
*Take advantage of all that this year’s exhibitors have to offer! These tips will help you for indispensable partnerships that will benefit your district.*

- **PLAN YOUR TIME**

*Plan a route that allows you to efficiently visit each booth that is relevant to your needs*

- **TAKE YOUR TIME**

*Allocate enough time to cover the exhibit floor effectively. Rushing through the showcase will be exhausting and it will discourage you from asking the questions that could help you find exactly what you need.*

- **BESPECIFIC**

*Exhibitors can better serve you if they know exactly what you are after.*

## Thursday, October 2, 2014 Reed Conference Center, Midwest City

1:30 p.m.– 4:20 p.m. - At this time, the breakout sessions will begin. Each session is scheduled for 50-minutes with a 10-minute rotation break between each session. There are three rotations scheduled.

Breakout Session A = 1:30 p.m. - 2:20 p.m.  
Breakout Session B = 2:30 p.m. - 3:20 p.m.  
Breakout Session C = 3:30 p.m. - 4:20 p.m.

Session Strands Offered:

1. Finance
2. Human Resources
3. Technology
4. Vendor
5. State Dept. of Education
6. Common Cent\$

### FINANCE STRAND

**A. P-Card Panel**

*Panel: Jamie Cole, Business Manager/Briggs Schools  
Jan Cowen, Admin. Asst./Hartshorne Schools  
Roger Adair, Dir. Of Finance/Moore Norman  
Technology Center*

*Moderator: Debbie Secrest, Treasurer, Seiling Schools  
Finance Committee Member, OKASBO*

**B. Signs of Trouble For Your District**

*Presenter: Julie Miller, General Counsel/OSSBA*

*Moderator: Cody Way, CFO - Jenks Schools  
Finance Committee Chair, OKASBO*

**C. State Aid Break Down**

*Presenter: Shannon Meeks, CFO/Putnam City Schools*

*Moderator: Dennis Schulz, Asst. Supt., Guthrie Schools  
Finance Committee Member, OKASBO*

### HUMAN RESOURCES STRAND

**A. Unemployment Issues/Updates**

*Presenter: Jessica Sherrill, Director/OPSUA,  
Attorney/OSSBA*

*Moderator: Connie Garrett, Personnel Manager,  
Tahlequah Schools, H.R./Risk Management  
Committee Member, OKASBO*

**B. Employment Procedures/Legal Issues**

*Presenter: Jason Brown, Asst. Supt./Norman Schools  
Moderator: Marilyn Vann, Accounting Coordinator,  
Norman Schools, H.R./Risk Management  
Committee Chair, OKASBO*

**C. Workers Compensation Issues/Updates**

*Presenter: Jack Dryden, Executive Director/OSAG*

*Moderator: Kevin Hime, Supt./Clinton Schools  
Director/OKASBO*

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## TECHNOLOGY STRAND

- A. Google for Education**  
*Presenter: Kevin Hodges, Sales Manager, Google for Education*  
*Moderator: Steve Haynes, Supt., Briggs Schools, Director, OKASBO*
- B. Addressing Upcoming Technology Funding Challenges**  
*Presenter: Derrel Fincher, Education Project Manager, Office of Management & Enterprise Services*  
*Moderator: Sara Frye, Director of Finance, Bowlegs Schools, Director, OKASBO*
- C. Technology Roundtable/Panel Discussion**  
*Presenter: Todd Borland, Union Schools; Bill Casey, Jenks Schools; Jason Johnson, Pryor Schools*  
*Moderator: Bill Casey, Jenks Schools*

## VENDOR STRAND

- A. E-rate Issues**  
*Presenter: Jane Kellogg, President, Kellogg & Sovereign Consulting*  
*Moderator: Trish Williams, CFO/Tulsa Schools, Finance Committee Member/OKASBO*
- B. Outsourcing Services**  
*Presenter: Ken Holman, Business Operations Director*  
*Moderator: Richard Wood, Director of Finance, Canadian Valley Technology Center, SDE/Career Technology Centers Committee Member, OKASBO*
- C. SEAS Education**  
*Presenter: Jann Arnold, Medicaid Director*  
*Moderator: Rick Peters, Supt., Caney Valley Schools, Professional Membership Committee Member/OKASBO*

## STATE DEPT. OF EDUCATION STRAND

- A. Child Nutrition Requirements for 2015**  
*Presenter: Debbie Hamilton, Director of Training/SDE*  
*Moderator: Dwight Yokum, Director of Finance, Chickasha Schools, SDE, Career Technology Centers Committee Member, OKASBO*
- B. Personnel Reporting**  
*Presenter: Heather Butler, Coordinator of School Personnel Records/SDE*  
*Moderator: Beth Buchanan, CFO, Meridian Technology Center, Director, OKASBO*
- C. OCAS/Maintenance Of Effort**  
*Presenter: Nancy Hughes, Executive Director, Financial Accounting, OCAS, Auditing/SDE*  
*Moderator: Kelly Shannon, CFO, Ardmore Schools, Finance Committee Member, OKASBO*

## COMMON CENTS

- A. Teacher Retirement Reporting Updates**  
*Presenter: Debra Plog, Client Reporting Manager Teacher Retirement Department*  
*Moderator: Cindy Shiever, Business Office Manager, Enid Schools/Past President, OKASBO*

- B. What To Expect From Your RAO (Regional Accreditation Officer)**  
*Presenter: Shellie Gammill, RAO/SDE*  
*Moderator: Rick Kibbe, Supt., Catoosa Schools/ Legislative-Legal Committee Member, OKASBO*
- C. Career Technology Center Meeting**  
*Presenter: Diane Durham, OK State Department of Career Technology*  
*Moderator: Roger Adair, Director of Finance, Moore Norman Tech Center/SDE-Career Technology Centers, Committee Chair, OKASBO*

## 5:00 - 9:30 OPENING NIGHT MIXER - Reed CD Room

- 5:00-6:00 Dinner**  
*All members are invited*
- 6:00-7:30 OKASBO Carnival - Fun, Fun, Fun!**
- 7:30-9:30 Music : Shawna Russell Band**

## Friday, October 3, 2014 Reed Conference Center Midwest City, OK

- 8:30 a.m. **Registration - Reed Center Lobby**  
 Continental Breakfast provided  
*Sponsor(s): Horace Mann Focus Financial Specialist*
- 9:00 a.m. **Second General Session:- Reed CD**  
*Moderator: Nancy Hughes, Executive Director Financial Accounting, OCAS, Audits/SDE, President Elect/OKASBO*
- 9:15 a.m. **Meet the State Superintendent Candidates**  
 (Each candidate will be given 15-minutes to speak)  
*Moderator: Nancy Hughes, Executive Director, Financial Accounting, OCAS, Auditing/SDE, President Elect/OKASBO*
- 10:00 a.m. **Refreshment Break**  
*Sponsor(s): OSIG*
- 10:15 a.m. **State Aid Mid-Term Adjustments**  
*Moderator: Steven Crawford, Executive Director/CCOSA*
- 11:00 a.m. **Pension Plans - Defined Compensation - Defined Benefits**  
*Moderator: Gary Jones, CPA/Oklahoma State Auditor & Inspector*
- 11:45 a.m. **Business Meeting, Announcements,**  
*Moderator: Ann Wade, Executive Director/OKASBO*  
 Business Item: Discussion, vote to approve or disapprove OKASBO Bylaws as presented.
- 12:00 p.m. **Door Prize Drawings, Adjourn**
- 12:15 p.m. **OKASBO Board Meeting**  
 ( Light lunch provided )  
*Sponsor: Focus Financial Advisors*

