

Encumbrance Clerks/Treasurer Workshops

April 17, 2013
Meridian Convention Center
737 S. Meridian, OKC

This Pre-Conference day can be used to meet the requirements of the training 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. Certificates will be given to registrants.

8:00 a.m. - **Registration Begins**

9:00 a.m. — **Welcome/Introductions**
*Ann Wade, Executive Director
Oklahoma ASBO*

9:05 a.m. — **Ethics for Schools Business Officials**
*Dr. Jo Pettigrew, Chairperson
Oklahoma Ethics Commission*

10:30 a.m. — **Refreshment Break**

10:45 a.m.— **Getting the Most Out of the State Aid Formula**
*Steven Crawford, Executive Director
CCOSA*

11:45 a.m. — **Morning Wrap-up**
Ann Wade, Executive Director

12:00 p.m. – **Lunch (Provided)**

1:00 p.m. – 4:00 p.m.- Break out sessions begin at 1:00 p.m., and registrants may join any room to listen to the presentation. Each session is scheduled for 50 minutes. Registrants may then change to another room. There is a 10-minute break between each session. Three rotations are scheduled.

Break Out Topics

Roles & Responsibilities for School District Treasurers

*Presenter: Darrel Johnston, CPA
Angel, Johnston and Blasingame, PC*

Roles & Responsibilities for Encumbrance Clerks

Presenter: Beth Buchanan, CFO, Meridian Technology Center, OkASBO Board Director

Investment Policies & Strategies

Presenter: Tim Green, Executive Director of Finance, Bartlesville Schools

Internal Controls—Can That Happen To Me?

*Presenter: Jeff Hewett, CPA
Sanders, Bledsoe & Hewett, LLC*

Estimate of Needs

Presenter(s) Roger Adair, Director of Finance, Moore Norman Technology Center and Brenda Burkett, CFO, SFO, CSBA, Norman Schools, ASBO International Board Director

4:00 p.m. – Summary & Certificate Presentation

*Ann Wade, Executive Director
Oklahoma ASBO*

DIS has printed this Newsletter, for six years, at their office located at 9300 "C" Broken Arrow Expressway, Tulsa, at no cost to OkASBO. Thanks to Terry Bourke and Nick Patterson.
918-664-8800.



April 18-19, Spring Conference Program

Thursday, April 18, 2013

Meridian Convention Center, OKC

- 8:00 a.m. **Vendor Showcase Opens**
- 8:00 a.m. **Registration Begins (located in the Vendor Showcase room - includes Continental Breakfast)**
- 8:45 a.m. **First General Session**
 Moderator: *President Tom Linihan Superintendent, Adair Schools*
- Flag Salute/Opening Entertainment**
- 9:00 a.m. **Health Care Reform—What You Need to Know to Comply Today and Plan for the Future**
 Presenter: *Susan Relland, JD American Fidelity Assurance Company*
- 10:00-10:45 a.m. **“Yes You Can”**
Jim Stovall, Keynote Speaker
- 10:45 –11:00 a.m. **Refreshment break**
- 11:00—12:00 p.m. **“Ultimate Productivity”**
Jim Stovall, Keynote Speaker
- 12:00 - 1:00 p.m. **Luncheon**
- Recognition of :
 “SDE Outstanding Schools in Financial Reporting”
 “School Business Official of the Year”
 “OkASBO Senior Scholarship Recipient”

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1:00 p.m.- 3:45 p.m. - At this time, the breakout sessions will begin. Registrants may choose any room to listen to the presentation and discussion. Each session is scheduled for 45 minutes. Registrants may then change to another room. There will be three rotations scheduled. There is a 15 minute break between breakout sessions to allow you time to visit the vendor showcase.

1:00 p.m. - 1:45 p.m. **Breakout Session A**

- √ **OCAS Updates**
 Presenter: *Nancy Hughes, OkASBO Board Director Executive Director of Financial Accounting, Auditing Oklahoma State Department of Education*
 Moderator: *Cindy Shiever, OkASBO President Elect Administrative Assistant, Crescent Schools*

- √ **State Wave for Business Officials**
 Presenter: *Alex Pettit, CIO, Office of Management & Enterprise Services*
 Moderator: *Bill Casey, Director of Technology, Jenks Schools, OkASBO Committee Chair*

- Health Care Reform—How are Districts Responding**
 Presenter: *Kacey Booth and Wayne Ryan American Fidelity Assurance Co.*
 Moderator: *Donna Campo, Superintendent, Liberty Schools. OkASBO Committee Chair*

- √ **Social Media—Legal Ramification**
 Presenter: *Stephanie Mather, Attorney, OSSBA*
 Moderator: *Stacey Butterfield, OkASBO Vice President, Deputy Superintendent, Jenks Schools*

- √ **Tax Preference Bonds & Federal Compliance Requirements**
 Presenter *Sandee Stallings, Managing Director, BLX*
 Moderator: *Roger Adair, Director of Finance, Moore Norman Technology Center, OkASBO Committee Chair*

1:45- 2:00 p.m. Vendor Showcase/Break

2:00 - 2:45 **Breakout Session B**

- Time Clock**
 Presenter: *TBA*
 Moderator: *Dr. Penny Haynes, OkASBO Board Director, Supt., Allen Bowden Schools*

- √ **State Wave for Business Officials**
 Presenter: *Alex Pettit, CIO, Office of Management & Enterprise Services*
 Moderator: *Steve Shiever, OkASBO Education Liaison*

- √ **Social Media—Legal Ramification**
 Presenter: *Stephanie Mather, Attorney, OSSBA*
 Moderator: *Marilyn Vann, Accounting Director, Norman Schools, OkASBO Committee Chair*

- √ **Tax Preference Bonds & Federal Compliance Requirements**
 Presenter *Sandee Stallings, Managing Director, BLX*
 Moderator: *Beth Buchanan, CFO, Meridian Technology Center, OkASBO Board Director*

April 18-19, Spring Conference Program

Thursday, April 18, 2013
Meridian Convention Center, OKC

NEW: 2 hour session

2:00 - 4:00 p.m. **Everything You Need to Know About School Finance**

(Especially designed for Superintendents)

Presenter: *Vernon Florence, Education Consultant*

Moderator: *Bill Denton, Superintendent, Yukon Schools, OkASBO Past President*

2:45 p.m.- 3:00 p.m. Vendor Showcase/Break

3:00 p.m.– 3:45 p.m. **Breakout Session C**

Time Clock

Presenter: *TBA*

Moderator: *Bill Casey, Director of Technology, Jenks Schools, OkASBO Committee Chair*

√ **Social Media—Legal Ramifications**

Presenter: *Stephanie Mather, Attorney, OSSBA*

Moderator: *Sara Frye, Director of Finance, Bowlegs Schools, OkASBO Committee member*

√ **Tax Preference Bonds & Federal Compliance Requirements**

Presenter: *Sandee Stallings, Managing Director, BLX*

Moderator: *Roger Adair, Director of Finance, Moore Norman Technology Center, OkASBO Committee Chair*

Career Tech Updates

Moderator: *Madonna Tidwell, CSBA, Director of Finance, Pontotoc Technology Center*

4:00 - 5:00 p.m. **Visit Vendor Showcase and The Money Machine**

5:00 - 9:00 p.m. OPENING NIGHT MIXER:

5:00—6:00 p.m. All-American Buffet

6:00—7:00 p.m. Lee Cole's Magicomedy
One of the finest comedy magicians in the business. A terrific mix of magic, comedy and audience participation.

7:00—9:00 p.m. *Robin and Jerry*
Great music to sing by, and dance by.....

An excellent opportunity to make new friends, visit with your peers and just have fun!

Please join us for a night filled with laughter!

Friday, April 19, 2013
Meridian Convention Center, OKC

8:00 a.m. **Registration**
Continental Breakfast

8:30 a.m. **Second General Session:**
Moderator: *Cindy Shiever, OkASBO President Elect, Administrative Assistant, Crescent Schools*

8:30 – 9:00 a.m. **SDE Updates**
Presenter: *Dr. Janet Barresi, State Superintendent Of Public Instruction*

√ 9:00– 9:45 a.m. **Internal Controls—Preventing Fraud**
Presenter: *Gary Jones, CPA, Oklahoma State Auditor & Inspector*

√ 9:45– 10:30 a.m. **Education Technology**
Presenter: *Dawn Pearce, CIO, Yukon Schools*

10:30– 10:45 a.m. **Break**

√ 10:45—11:45 a.m. **Legislative Updates**
Panel: *TBA*
Moderator: *Steve Shiever, OkASBO Educ. Liaison*

11:45 – 12:00 p.m. **Business Meeting**
Moderator: *Ann Wade, Executive Director*
A) *Nomination/Approve New Board Member*
B) *New Website*

12:00 p.m. **Adjourn /Door Prizes**

12:15 - 2:15 p.m. **OkASBO Board Meeting**
Light lunch will be provided

* *Sessions marked by the check mark on Thursday and Friday are approved for additional continuing education requirements for Encumbrance Clerks and Treasurers. To receive the credit, you must sign the "Sign-In Roster" for each session attended. A certificate will be emailed to you.*

Send to OkASBO

Oklahoma ASBO
14121 S. 248th East Ave.
Coweta, OK 74429

T: (918) 279-0301 FAX: (918) 279-0302

Pre-registration Form (or pre-register on-line at www.okasbo.org)
OkASBO Spring Conference , April 18-19, 2013 Meridian Convention Center

If you are a Member, your Registration costs follow.

Registration Cost – Institutional Mbr (\$ 0.00); Individual Mbr (\$100); Non-Mbr (\$150)
(If the school district pays your dues, you are an Institutional Member)

Registration for: _____
Title: _____
School/Business: _____
Email: _____

The Vendor /Member Dinner will be on Thursday, April 18th 5:00 - 6:00 p.m.
The Vendor/Member Entertainment will be on April 18th 6:00 - 9 p.m.
I will ___ will not ___ attend. I will bring ___ guest(s) with me. (\$25.00 each)
(Mail or FAX this form to OkASBO)

Send to OkASBO

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14121 S. 248th East Ave.
Coweta, OK 74429

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Encumbrance Clerk & Treasurer Workshops
Pre-Conference Registration Form

Registration fee: \$75.00 OkASBO member; \$125.00 non member
This fee is due, whether you attend or not, if not cancelled by April 1, 2013

April 17, 2013 9:00 a.m. – 4:00 p.m. Meridian Convention Center, OKC

Enroll me for: ___ Encumbrance Clerk ___ Treasurer
(If above is not marked, no certificate will be prepared)

Name: _____
Title: _____
School/Business: _____
Email: _____

OkASBO member: ___ Yes ___ No
Payment Enclosed ___
Bill: Me ___ District ___
P.O. #: _____

Send to the Clarion Hotel

Magnuson Hotel and Meridian Convention Center
737 S. Meridian Ave.
Oklahoma City, OK 73108
Reservations: (405) 942-8511 FAX: (405) 946-7126

Name of Group: **Oklahoma ASBO** Function Date: **April 17-19, 2013**
Group Rates: **\$79.00** (Plus tax, unless a P.O. or direct bill is used)
___ King ___ Double-Double ___ Smoking ___ Non-Smoking
Reserve 4/16/2013 ___ Reserve 4/17/2013 ___ Reserve 4/18/2013 ___ Other _____

Name: _____
Address: _____
City/St/Zip: _____
Phone: _____

P.O. Attached
___ Yes ___ No

Credit Card No. _____
Exp. Date _____ Type: MC VISA Other _____

Reservation cutoff date for this rate is 3/16/2013. Reservations held until 6pm unless secured by a deposit or credit card number. Send this form to the Magnuson (formerly Clarion) Hotel, NOT to OkASBO.