

Advanced Budgeting

Workshop Dates & Locations

January 29, 2010

San Bernardino County Superintendent of Schools
West End Educational Service Center
8265 Aspen Avenue
Rancho Cucamonga, CA 91730

March 16, 2010

Clovis USD
Professional Development Portable School Complex
1715 David E. Cook Way
Clovis, CA 93611

March 19, 2010

El Dorado COE
6767 Green Valley Road
Rooms B1-B2
Placerville, CA 95667

Workshop Schedule

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|-------------------|--------------------------------|
| 8:15 - 9:00 a.m. | Registration, coffee, pastries |
| 9:00 - 12:00 p.m. | Workshop |
| 12:00 - 1:00 p.m. | Lunch |
| 1:00 - 4:30 p.m. | Workshop |

Workshop Topics

Brief review of California school budgets

Review of responsibilities, policies and calendars

The budget building pyramid approach

The school budget development process

- In-depth discussion of the process of timing and requirements of budget development

Steps in budget development

- In-depth and detailed instructions on building a budget
- Tips for how to improve the budget development process
- Analyzing prior year budget variances

Revenues

- Revenue limit (growth and decline), NCLB, ARRA funds, class-size reduction, interest and more

Expenditures

- Budget allocations
- Staffing patterns for growth and decline
- Controlling contributions to programs
- Flexible programs

Position control

- Linking data to positions
- Managing an effective position control system

Multi-year forecasting

- FCMAT Budget Explorer software

Monitoring and reporting on the budget during the fiscal year

Budget documents

- How to use software and processes to improve documents
- School Services of California User-Friendly Budget Display software
- ASBO's meritorious budget program
- Tips for helping others understand your annual budget

Budget presentations

- Samples of successful budget presentations
- Development of a theme for budget presentations

CD will be provided to all participants that will include:

- *Sample presentations*
- *Sample spreadsheets*
- *Multi-year projections*
- *And much more!*

Workshop Summary

This workshop is designed to add an in-depth perspective to the budget development process. Advanced Budgeting starts where CASBO Budget Basics leaves off by providing the workshop attendee with the "tricks of the trade" to develop an outstanding

budget process for any K-12 public school district or county office of education. The emphasis will be on in-depth analysis of concepts and processes used by districts and COEs to develop state-of-the-art budget assumptions and translate their budgets to master plans for their LEAs.

Participants will receive training in how to use School Services of California's User-Friendly Budget Display and FCMAT Budget Explorer software. The workshop manual will provide the participant with excellent tools for budget development that can be used in every step of the budget development process. Samples of award-winning budget documents and presentations will help the attendee develop outstanding documents and presentations.

Who Should Attend

Superintendents, chief business officials, chief financial officers, instructional leaders, budget development staff, business office staff, and anyone wanting an in-depth knowledge of budgeting in California are all encouraged to attend.

About the Presenters

Michael Johnston is currently the Assistant Superintendent of Business Services for Clovis Unified School District. He has a Bachelor of Science Degree in Business Administration emphasis in Accounting, and a Master of Science Degree in Educational Leadership and Supervision. Michael has 16 years experience in public education finances and management of school districts by working in school districts and county offices of education. Michael is certified as a Chief Business Official through CASBO. Michael currently serves as the Assistant Chair of the CASBO Professional Development Committee and is an active member of the Education Mandate Cost Network. Michael also serves as the Executive Director of Central Valley Support Services JPA and continues to be a leader supporting schools.

Tim Zearley is the Chief Business Official for Dos Palos-Oro Loma Joint Unified School District. Prior to becoming the CBO, Tim held the position of Director of Fiscal Services for Los Banos Unified School District. Tim believes strongly in professional development and is currently a member of the CASBO Professional Development Committee and Professional Development Implementation Team. Tim is a CASBO certified Chief Business Official and has 16 years of public education experience from working in school districts and county offices of education. He holds a Bachelor of Science Degree in Business Administration from California State University, Fresno.

Registration Form - Full Day Workshop

A separate registration form must be completed for each participant

Name _____
(Please type or print) Last First Initial

Job Title _____

District/Company _____
(Please give full name of District)

Address _____
(Confirmation will be sent to this address) Street City State Zip

Phone (____) _____ Fax (____) _____ E-mail _____
(Required)

Workshop Title _____

Workshop Date ____/____/____ Workshop Location (City) _____

CASBO Member # (If Known) _____ Please check here for permanent address change
Have you changed employers within the last 12 months? ____ If yes, where were you employed? _____

Payment Method

Please circle payment type and check payment amount:

Check/Credit Card/Purchase Order: CASBO Member \$205 Non-member \$295
 LATE/On-site Registration \$255 CASBO Members (Less than 10 business days
 LATE/On-site Registration \$345 Non-member prior to the workshop date)

Check/PO # _____

Please make checks payable to CASBO

We accept Visa, Mastercard, Discover and American Express

Credit Card # _____ Exp. Date ____/____

Name on Card _____ Cardholder Signature _____

How to Register

Online: www.casbo.org – Click on Calendar of Events, then filter by Workshop to register online. Credit card payment or purchase order number is required.

By Fax: (916) 447-8990 or (916) 447-3794 – Complete and fax registration form with a copy of the purchase order or credit card number. Copies of checks will not be accepted as registration.

By Mail: CASBO Professional Development
1001 K Street, 5th Floor
Sacramento, CA 95814

Complete and mail registration form along with check, credit card number or purchase order.

The **registration deadline** for all workshop locations is **10 business days prior to the workshop date**. If your registration is received less than 10 business days prior to the workshop date, the late registration fees will apply. On-site

registration will be accepted on a space-available basis only, at the late/on-site registration fees. Late and on-site registration may result in participants receiving the workshop materials by mail after the workshop. If the workshop at the location you are interested in attending has reached its capacity, you will be given the choice of an alternative location.

Cancellation Policy

Cancellation requests must be in writing. You may fax your cancellation request to (916) 447-8990. A \$45 fee is charged for cancellations requested 10 business days prior to the workshop date. No refunds are given for requests received less than 10 business days prior to the workshop date. CASBO reserves the right to cancel any workshop with fewer than 25 participants in a single location. If the workshop is canceled by CASBO, enrollees will be given the opportunity to attend the workshop in a different location or obtain a full refund.