

Budget Basics & Beyond

Workshop Dates & Locations

May 7, 2010

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

May 14, 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

Introduction to budgets in California schools

- California school finance
- Legal parameters for the budget
- Different types of budgets

The budget development process

- Budget policies
- Budget calendar
- Budget guidelines
- Budget responsibilities
- Budget assumptions
- Budget samples

Steps in budget development

- Step-by-step instructions on preparing a budget

Budget documents and presentations

- FCMAT's User-Friendly Budget Display software, Version 7.4
- Additional ideas and samples of dynamic budget documents and presentations
- Sample school district budgets available for review

Other important related information

- Capital project budgets
- Multi-year projections
- Budget internal control
- A comprehensive glossary of budget terminology and buzz words
- References and resources – where to go for help after the workshop is over

Workshop Summary

This workshop is designed to provide the basics of budget development and budget management including budget presentation tools for personnel at K-12 public school districts and county offices of education. The emphasis will be on:

- Concepts and processes in overall budget development
- Rules, regulations and laws that guide budget management
- Roles and responsibilities in budget development, presentation and monitoring
- Communication tools for budgeting

Participants will receive:

1. A practical, easy-to-use, all-in-one guide to effective budget development and management. The workshop manual will take the participants through every step of the budget processes including: how to prepare budgets, how to present budgets and how to monitor results against budget projections.
2. A CD featuring FCMAT's User-Friendly Budget Display software (Version 7.4) as designed and developed by School Services of California and funded by the Girard Foundation. The software is designed to assist districts in presenting a user-friendly policy instrument rather than just a document of numbers. Included are standardized budget formats for school districts to use in providing quality information to their stakeholders regarding districts financial policies and practices.

The workshop will provide:

- An overview of the entire budgeting process
- Step-by-step, how-to-do-it budgeting techniques
- Introduction to FCMAT's User-Friendly Budget Display software
- A wealth of illustrations, examples, checklists, resources and model data for various aspects of budget development and management

Who Should Attend

This workshop is designed for personnel at K-12 public school districts and county offices of education, including administrators, new chief business officials, business office staff, and anyone wanting a basic knowledge of budget concepts.

About the Presenter

Renee Hendrick is the Executive Director of Business Services at the Orange County Department of Education. She is currently a member of the Eastern Section Financial R&D Committee, and is the President-Elect for CASBO. Renee has many years of experience in preparing and presenting school districts' budgets to boards and negotiation teams. She is currently an instructor for CASBO Professional Development workshops, and an instructor at USC for the School Business Certificate Program. She is also an active member of the County Office Finance Sub Committee of the County Superintendents Educational Services Association.

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.