

Fiscal Survival for Educational Executives: What are your reports telling you?

Workshop Dates & Locations

May 3, 2010

Sacramento COE
Mather Room
10474 Mather Blvd.
Mather, CA 95655

May 4, 2010

Kern Co. Supt. of Schools
Conference Room: US 1
2000 K Street
Bakersfield, CA 93301

May 11, 2010

San Bernardino Co. Supt. of Schools
West End Educational Service Center
8265 Aspen Avenue
Rancho Cucamonga, CA 91730

Workshop Schedule

8:15 - 9:00 a.m. Registration, coffee, pastries
9:00 - 12:30 Noon Workshop

Workshop Topics

This program is designed for those who want to:

- Use financial reports to move their district toward greater fiscal and educational excellence
- Use the financial reports of their district to make informed decisions
- Interpret the financial information provided by district staff and outside auditors
- Understand the key drivers of school finance
- Understand the sequence of events in development of a school district budget
- Gain knowledge of the terms and assumptions incorporated in school district budgets

- Learn the fiscal reporting and financial disclosure requirements for school districts
- Recognize red flags and other warning signals
- Recognize the financial implications of collective bargaining agreements, personnel actions, purchasing reports, actuarial studies

Workshop Summary

This is a workshop designed to train school district management personnel to understand the purpose and significance of the financial reports produced by school districts so that they may make informed decisions affecting the district's financial condition.

Who Should Attend

This workshop is geared toward school district leaders responsible for setting policies and priorities. Teams, including school board members, superintendents and cabinet-level management of school districts, should be encouraged to attend together, and those aspiring to these positions. New chief business officials and staff of county offices of education are also encouraged to attend.

About the Presenters

Patricia Reid Koch is a CASBO-certified chief business official and has served California schools since 1978, including 13 years as a Chief Business Official with responsibility for school finance, facilities, purchasing, risk management, educational technology and food services. She was a member of the Working Group on Finance and Facilities for the Joint Legislative Committee for a California Master Plan for K-University Education. In January 2005, Dr. Koch joined David Koch in his consulting practice with school districts throughout the United States, including projects in Guilford County (Greensboro), NC and Memphis, TN. She is a graduate of Georgetown University and received her doctorate at UCLA.

Christine Fullerton began her career in education as a classroom teacher at the middle school level. She has served as a site assistant principal, principal and is currently the Administrator of Pupil Personnel and Special Projects for the Westminster School District. Her responsibilities include categorical programs and budgets as well as student enrollment and attendance, coordinating student assessment and data, and student welfare and discipline. She completed the School Business Management Program at USC. She holds a Bachelor's Degree in Business Administration and a Master's Degree in School Administration from California State University, Fullerton.

Registration Form - Half 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 **\$165** Non-member **\$255**
 LATE/On-site Registration **\$215** CASBO Members (Less than 10 business days
 LATE/On-site Registration **\$305** 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.