



**Thursday, February 7, 2019**  
**University of San Diego**  
**Joan B. Kroc Institute for Peace and Justice Center**  
**5998 Alcalá Park, San Diego, CA 92110**

### **THE AGENDA:**

- **8:00am - 8:55am: Meet & Greet, Registration & Breakfast**
- **9:00am - 10:00am: Session 1 Workshops**
  - CalPERS: Understanding Your Retirement
  - Getting Organized for Your USDA Procurement Review
  - 2019 Audit Guide Update
- **10:00am - 10:55am: Vendor Show**
- **11:00am – 12:00pm: Session 2 Workshops**
  - Ethics and Conflicts of Interest in the Purchasing World
  - Your Bond Passed, What's Next?
  - Cybersecurity: Protecting Employee and Payroll Data
- **12:00pm – 1:15pm: Lunch with Guest Speaker**
- **1:20pm – 2:20pm Session 3 Workshops**
  - EDGAR Procurement Update
  - Cash Handling: How to Prevent Fraud
  - Avoiding Legal Consequences of Hiring Retirees
- **2:25pm – 3:00pm: Closing with Dessert and Prizes**

**REGISTER BY THURSDAY, JANUARY 31, 2019**  
**\$55 per Participant**

Questions? Contact Connie Fierro at [cfierro@ramonausd.net](mailto:cfierro@ramonausd.net)



Annual Conference  
Participant Registration

## Passport to Your Career Journey

When: Thursday, February 7, 2019

Where: University of San Diego,  
Joan B. Kroc Institute for Peace and Justice

Time: 8:00am - 3:00pm

Cost: \$55 per Participant

*\*\*Breakfast/Registration begins at 8:00am*

**Breakfast and Lunch is included, Parking Validation with Code to Follow**

### Workshop Selection

*Please select one workshop for each session.*

#### Session 1 9:00a - 10:00a

- CalPERS: Understanding Your Retirement
- USDA Procurement Review
- 2019 Audit Guide Update

#### Session 2 11:00a - 12:00p

- Ethics/Conflict of Interest in Purchasing
- Your Bond Passed, What's Next?
- Cybersecurity: Protect Emp/Payroll Data

#### Session 3 1:20p - 2:20p

- EDGAR Procurement Update
- Cash Handling: How to Prevent Fraud
- Avoiding Legal Conseq. of Hiring Retirees

### Registrant Information

Name: \_\_\_\_\_

District: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

**Please complete and email form to [casbosdi@gmail.com](mailto:casbosdi@gmail.com)**

**Checks to be made payable to CASBO.** Please mail payments to  
Element Education, Attn: Doug Miller, 1441 Montiel Road, Escondido, CA 92026

No Cancellations after January 31, 2019, alternate attendee allowed

## SESSION I 9:00 AM – 10:00 AM

### CalPERS: Understanding Your Retirement

It's never too early to begin planning your retirement! Whether you are new member, mid-career, or near retirement, this workshop will provide information about CalPERS retirement benefits, the retirement process, and resources for additional information to assist in your retirement planning.

**Presenter:** CalPERS San Diego Regional Office Representative

### Getting Organized for Your USDA Procurement Review

The USDA has put new emphasis on the procurement process for the National School Lunch Program, and now the CDE is executing its new method to review programs. You will learn about the new process and what documents will be requested.

**Presenter:** Jennifer Marrone, Business Manager, Nutrition Services, San Diego Unified School District

### 2019 Audit Guide Update

This workshop will provide you with the latest details on the 2019 Audit Guide. You will learn what is new this year and what to expect as part of your annual external financial audit. **Presenter:** Heather Daud, Christy White & Associates

## VENDOR SHOW: 10:00 AM to 10:55 AM

## SESSION II 11:00 AM – 12:00 PM

### Ethics and Conflicts of Interest in the Purchasing World

The workshop will cover the Fair Political Practices Committee guidelines for determining when a conflict of interest arises and best practices for running an ethical purchasing process **Presenter:** Guiselle Carreon, Consultant, Purchasing & Accounts Payable

### Your Bond Passed, What's Next?

The 2018 election had positive results for CA school districts that successfully passed general obligation bonds. Whether you passed your GO bond already or are planning a future ballot measure, you will learn important and timely next legal steps you should take.

**Presenter:** Tom Silva, Tom Silva Consulting and James Traber, Fagen, Friedman & Fulfroost, LLP

### Cybersecurity: Protecting Employee and Payroll Data

District data is vulnerable to the threat of cyberattacks. Come learn tips from experts on keeping your district data safe and secure.

**Presenter:** Cybersecurity Team, San Diego County Office of Education

## MAIN BALLROOM: LUNCH: 12:00 PM- 1:15 PM

Guest Speaker

## SESSION III 1:20 PM – 2:20 PM

### EDGAR Procurement Update

This workshop will cover the federal procurement requirements for federal grantees. The workshop will cover micro, small, formal bid limits, certification requirements, records retention, and inventory **Presenter:** Guiselle Carreon, Consultant, Purchasing & Accounts Payable

### Cash Handling: How to Prevent Fraud

Districts have a variety of positions that handle cash and checks. Come learn about the fraud triangle and proper cash handling techniques with best practices from an auditor. **Presenter:** Accounting and Finance Professional Council

### Avoiding Legal Consequences of Hiring Retirees

Hiring CalSTRS or CalPERS retirees is an attractive option because of their depth of expertise. However, districts must follow relevant laws when employing retirees from these systems. You will learn best practices to help you identify and avoid legal problems when choosing to employ a retiree. **Presenter:** Liebert Cassidy Whitmore

## CLOSING WITH DESSERT & PRIZES: 2:25 PM- 3:00 PM

**Joan B. Kroc Institute for Peace & Justice**

**University of San Diego**

5998 Alcalá Park, San Diego, CA 92110

Operations/Events Office: 619-260-7808

**DRIVING DIRECTIONS & PARKING INFORMATION**

**MAP:** <http://www.sandiego.edu/maps/>

**ARRIVE EARLY TO ALLOW ENOUGH TIME TO TAKE THE  
CAMPUS TRAM OR WALK TO THE VENUE**

**From the North (Los Angeles, La Jolla)**

- Use I-5 (South), exit at Sea World Drive and Tecolote Road
- Turn Left on Tecolote Road.
- Right on Morena Blvd.
- Left on Napa Street to Linda Vista Road.
- Make a left at the 1<sup>st</sup> stoplight on Linda Vista Road onto Marian Way, USD's West Entrance.
- Take 1<sup>st</sup> Left after security booth and enter the "West Lot"
- Pay or use the validation code provided for your parking at one of the pay stations throughout the west parking structure. **CASBO VALIDATION CODE TO FOLLOW**
- Visitors may take the campus tram to the venue, or walk up the hill.

**From the South (Downtown, Convention Center)**

- Use I-5 (North) to I-8 (East) and exit at the first exit, Morena Blvd.
- Follow Morena Blvd, and bear right onto Linda Vista Road.
- Make a left at the 1<sup>st</sup> stoplight on Linda Vista Road onto Marian Way, USD's West Entrance.
- Take 1<sup>st</sup> Left after security booth and enter the "West Lot"
- Pay or use the validation code provided for your parking at one of the pay stations throughout the west parking structure. **CASBO VALIDATION CODE TO FOLLOW**
- Visitors may take the campus tram to the venue, or walk up the hill.

**From the East**

- Use I-8 (West), exit at Morena Blvd.
- Bear right onto Linda Vista Road.
- Make a left at the 2<sup>nd</sup> stoplight on Linda Vista Road onto Marian Way, USD's West Entrance.
- Take 1<sup>st</sup> Left after security booth and enter the "West Lot"
- Pay or use the validation code provided for your parking at one of the pay stations throughout the west parking structure. **CASBO VALIDATION CODE TO FOLLOW**
- Visitors may take the campus tram to the venue, or walk up the hill.

**The Institute venue is a 5 minute walk up the hill and is the first building on the right.**



