



tasbo

2023 Budget Academy
Allen Courtyard Marriott

Agenda | Day One | November 14

8:45 – 9:00

Introductions and Welcome

TASBO Staff

9:00 – 10:00

Budget Reduction Strategies

Panelists from small, medium, and large districts will discuss strategies for reducing school budgets in the face of ESSER funding cuts, inflation, compensation increases, and changes in tax values.

David Pate, RTSBA
CFO
Richardson ISD

Brandy Mayo, RTSBA
CFO
Venus ISD

Kimberly Smith, CPA
Chief Finance & Strategy
Officer
Frisco ISD

10:10 – 11:10

Settle Up and Your Budget

This session will cover how not correctly handling settle-up can affect your school district's budget. Topics include: What is settle-up and why is it important; common mistakes districts make in handling settle-up; how to avoid these mistakes and protect your budget; how to make year-end entries prior to audit. By understanding the settle-up process and avoiding common mistakes, districts can ensure that they record the full amount of funding to which they are entitled and avoid costly budget mistakes.

Karen Wilson, CTSBO, CPA
Policy & Research Associate
Organization
TASBO

11:20 – 12:20

Budgeting Quick Hits and Think Abouts

There are many components that go into the budget process. Together we will "Quick Hit" and "Think-About" everything from contingencies, campus allocations, and activity accounts, to parameters, student nutrition, athletics, and debt service. We might even talk a little about local capital project funds. We will cover 90 minutes in only 60!

Brian Carter
Chief Financial Officer
Allen ISD

BREAK

Lunchtime

1:20 – 2:20

School Funding Update

Amanda Brownson
Associate Director of Policy
& Research
TASBO



2:30 – 3:30

Financial Compliance Update from TEA

Attendees will hear about changes the Financial Compliance Division at TEA has made including new financial management reviews, changes to the FASRG, and updates on the state allotments. Additionally there will be updates on FIRST and budgeting with ESSER funds. This is also a great opportunity to have any pending questions answered as it relates to financial compliance.

David Marx

Division Director, Financial Compliance
Texas Education Agency

3:40 – 4:40

Communicating Your Budget to Your Stakeholders

Hear from a seasoned CFO and CCO team on how to communicate effectively with board members, the community, and staff during the budget process. This session will cover what board members need to know, how to make the budget process understandable to the community, and ways to show transparency during the budget process.

Byron L. Bryant, RTSBA, CPA

CFO - Royse City ISD

Adi Bryant

Chief Communications Officer - Royse City ISD

Agenda | Day Two | November 15

8:55 – 9:00

Welcome

9:00 – 10:00

Planning for ESSER Closeout

TEA Grant and Compliance Administration staff will discuss the requirements for closing out of ESSER pandemic funding. Session objectives will include participants learning correct fiscal and reporting of ESSER funds and the alignment to LEA accounting and reporting systems.

Cory Green, BS MST

Associate Commissioner and Chief Grants Officer
Department of Grant Compliance and Administration

Matt Lashlee, PMP

Executive Director
Federal Compliance and Support Section

BREAK

Hotel Check Out

10:20 – 11:20

Staffing & Contract Challenges after ESSER

TASB HR Services consultants will provide guidance and practical strategies to help school leaders maximize staffing and manage contract challenges as ESSER funding comes to an end.

Jennifer Barton

HR & Compensation Consultant

Lauren Wurman

HR & Compensation Consultant

TASBO HR Services

11:30 – 12:30

Topics will include: how to evaluate and maximize staffing when program changes occur; challenges of reducing staffing levels and positions with funding changes; contract implications for the restructuring of staff; and strategies to minimize disruptions to district operations when ESSER funding ends.



Thank you to our event sponsors:



EQUITABLE

