



Finance+CTE Joint Academy – March 25–26, 2024

Agenda | Day One

8:45 – 9:00

Introductions and Welcome

TASBO & CTAT Staff

9:00 – 10:00

CTE + Finance + PEIMS 101

On the CTE side, discuss the essentials common to high quality CTE pathways, including programs of study, industry-based certifications, student organizations, and technical skill attainment. On the finance side, learn the key components involved in generating funding from the state allotment, how to calculate FTE's, identify the districts basic allotment, and apply the program of study course multiplier.

Mark Boshier
Director of Technical Assistance and Training
CTAT

Becky Estrada, RTSBA
Chief Certification Officer
TASBO

10:10 – 11:10

Procurement with State and Federal CTE Funds

Participants will gain an understanding of the procurement process for State and Federal CTE funds. We'll talk about applicable procurement regulations and requirements, best practices for ensuring compliance, tips for navigating the procurement process and more.

Mark Boshier
Director of Technical Assistance and Training
CTAT

Becky Estrada, RTSBA
Chief Certification Officer
TASBO

11:20 – 12:20

Travel – Staff and Student (Allowable and Unallowable Costs)

In this session, participants will gain an understanding of the allowable and unallowable costs associated with staff and student travel for Career and Technical Education (CTE) programs. Topics include federal and state regulations governing travel expenses, specific examples of allowable and unallowable costs, best practices for documenting and tracking travel expenses and tips for ensuring compliance.

Mark Boshier
Director of Technical Assistance and Training
CTAT

Becky Estrada, RTSBA
Chief Certification Officer
TASBO

BREAK

Lunchtime

1:20 – 2:20

Update on CTE Program and State Allotments (Focus on PIC 22)

Coding, course offerings, and system setup, there can still be a loss of funding for CTE. The importance of accurate coding cannot be underestimated. Miscoding can lead to a chain reaction of misreporting, which can impact funding, harm accountability, and create an inability for a student to graduate. Understanding the student attendance connection to funding for CTE is a vital component of the puzzle.

Mark Boshier
Director of Technical Assistance and Training
CTAT

Becky Estrada, RTSBA
Chief Certification Officer
TASBO

2:30 - 3:30

CTE Student Businesses- Promoting Them While Maintaining Financial Oversight

Presenters will discuss how to how to effectively promote CTE student businesses while ensuring sound financial oversight, including establishing and implementing financial controls for CTE student businesses; monitoring and evaluating the financial performance of CTE student businesses and more.

Mark Boshier
Director of Technical Assistance and Training CTAT

Becky Estrada, RTSBA
Chief Certification Officer TASBO

3:40 - 4:40

Fundraisers

Fundraising at the district and campus-level can be challenging. Does your district have written procedures? What are the considerations related to face-to-face and web-based fundraising such as crowdfunding for teachers and complying with TDA guidelines?

Becky Estrada, RTSBA
Chief Certification Officer TASBO

Agenda | Day Two

8:55 - 9:00

Welcome

9:00 - 10:00

PEIMS Data Quality - CTE Program and Finance Considerations

Coding, course offerings, and system setup, there can still be a loss of funding for CTE. The importance of accurate coding cannot be underestimated. Miscoding can lead to a chain reaction of misreporting, which can impact funding, harm accountability, and create an inability for a student to graduate. Understanding the student attendance connection to funding for CTE is a vital component of the puzzle.

Rhonda L. Rhode, RTSBA
Director of Finance Round Rock ISD

Sheri Bonds
CTE Director Round Rock ISD

D'Lynne Johnson
PEIMS Manager Round Rock ISD

BREAK

Hotel Check Out

10:20 - 11:20

Budgeting CTE funds (CTE), Monitoring Expenditures (Finance) and Reporting (PEIMS)

Get the perspectives from both the finance and program areas as they discuss funding, monitoring and reporting.

Rhonda L. Rhode, RTSBA
Director of Finance Round Rock ISD

Sheri Bonds
CTE Director Round Rock ISD

D'Lynne Johnson
PEIMS Manager Round Rock ISD

11:20 - 12:20

Collaboration in Building (CTE), Reporting (PEIMS) and Funding (Finance) of CTE Master Schedules

The CFO and CTE program director must have a seat at the table during schedule development to ensure the district receives maximum funding and that students are offered a coherent sequence of courses towards their chosen career path.