



# TASA/TASB/TASBO 2023 - 24 Budget Cohort

**Tuesday, February 20, 2024**

**8:45 – 9:00**

Introductions and Welcome

TASBO Staff

**9:00 – 10:00**

Understanding Fund Balance

**David B. Pate, RTSBA, CPA**  
*Asst. Superintendent of  
Finance & Support Services  
Richardson ISD*  
**Karen R. Wilson, CTSBO,  
CPA**  
*Policy & Research Associate  
TASBO*

**10:10 – 11:10**

Things to Consider when Closing Your ESSER Funds

**Karen R. Wilson, CTSBO,  
CPA**  
*Policy & Research  
Associate  
TASBO*

**11:20 – 12:20**

Understanding Transportation Funding and Tips for  
Solving Staffing Shortage

**Jill Metcalfe**  
*Director, Transportation  
and Global Logistics  
Technology  
Lone Star College*

**BREAK**

**Lunchtime**

**1:20 – 2:20**

Are You Adequately Insured? Tips to Minimize Your  
Exposure

**Todd Shade**  
*Asst Director, Underwriting/  
Marketing  
TASB Risk Management  
Fund*

2:30 – 3:30

Making Your Master Schedule Work for Your Budget  
and Academics

**Jennifer Barton**  
*HR & Compensation  
Consultant*

**Cheryl Hoover**  
*HR Consultant*

*TASB HR Services*

3:40 – 4:40

Communicating the Complexities of School Finance

**Amanda Bright Brownson,**  
**Ph.D.**

*Deputy Executive  
Director  
TASBO*

