



Government Finance Officers Association



GROUP-LIVE  
COURSE

# Alliance for Excellence in School Budgeting – Fall 2018 Conference

October 18 – 19, 2018 – Chicago, Illinois

LEVEL: Intermediate

CPE CREDITS: 14

FIELD OF STUDY: Finance

PREREQUISITE: Currently employed at a school district and basic familiarity with school budget and planning processes.

The Alliance for Excellence in School Budgeting is a network of school districts formed by GFOA from across the nation working to implement GFOA's Best Practices in School Budgeting. The Best Practices in School Budgeting provide a framework to enhance a school district's budget and planning process through better alignment of strategic goals/student outcomes and resource allocation.

## Who Will Benefit:

This training and “mini” conference is designed for school district senior level staff from both the academic and budget/ finance areas who lead and are integral participants in the district's budget and planning processes (superintendents, and potentially board members would benefit from attendance as well).

## Program Description:

The two-day event will provide participants with an overview of the Best Practices in School Budgeting and also more in depth discussion, exercises, and practical examples of key portions of the enhanced budget process framework. The conference will consist of self-assessments, group exercises, networking activities, and facilitated discussions — all centered on the best practices framework, examples from districts implementing the best practices, and other supporting content. Portions of the event will be geared towards the finance and academic sides working separately in order to share challenges anonymously to facilitate a broader discussion on improving collaboration. Additional emphasis will be placed on the initial steps of the best practices framework — including steps of the framework that present more challenges to implement such as developing robust goals, measuring performance, cost-effectiveness measurements, and strategic financial planning. These emphasized areas will help serve as the foundation for an enhanced budget process that focuses on aligning scarce resources to optimizing student achievement.

The event will also include ample opportunities to share and collaborate with other districts in attendance — including discussions and a networking event.



School districts attending the training need to also complete the Alliance Registration form posted at <http://www.gfoa.org/application-alliance-excellence-school-budgeting>

## Seminar Objectives:

- Complete a self-assessment to determine next steps for your district in improving its budget process
- Learn more about the Best Practices in School Budgeting framework
- Network with other districts working to improve their budget processes
- Gain perspectives on budget process pain points of your academic or finance peers
- Gain additional tips, advice, and tricks from other districts working to implement the best practices

## Instructors:

- **Jeff Rose, EdD**, Superintendent of Schools, Fulton County Schools, Atlanta, Georgia
- **Claire Hertz**, Deputy Superintendent for Business and Operations, Portland Public Schools, Portland, Oregon
- **Carol MacLeod, CPA**, Retired CFO, Lake County Schools, Tavares, Florida
- **Michele Trongaard**, Assistant Superintendent for Finance and Operations, Wylie Independent School District, Wylie, Texas
- **Kim Spicer, EdD**, Deputy Superintendent, Wylie ISD (Collin County), Wylie, Texas
- **Matthew Malinowski**, Business Manager/Board Secretary, Upper Moreland School District, Willow Grove, Pennsylvania
- **Lindsey Stock, M.Ed.**, Supervisor of Education, Office of Teaching, Learning, and Assessment, Upper Moreland School District, Willow Grove, Pennsylvania
- **Lisa Bracken**, Chief Financial Officer, Atlanta Public Schools, Atlanta, Georgia
- **Nate Levenson**, President, District Management Group, Boston, Massachusetts
- **Matt Bubness**, Senior Manager, GFOA, Chicago, Illinois
- **Shayne Kavanagh**, Senior Manager, Research, GFOA, Chicago, Illinois

For further study check out GFOA's Best Practices in School Budgeting at [www.gfoa.org](http://www.gfoa.org).

**To learn more or register for this event, visit [www.gfoa.org](http://www.gfoa.org).**

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## Program Schedule

**Thursday:** Attendee check-in and distribution of course materials will take place from 8:00 a.m. – 8:30 a.m. The seminar hours will be 8:30 a.m. – 4:30 p.m. followed by a networking reception (Central)

**Friday:** The seminar hours will be from 8:30 a.m. – 2:30 p.m. (Central)

## Program Location and Hotel Information

The course will take place at the Hyatt Regency Chicago, 151 E. Upper Wacker Dr, Chicago, Illinois 60601

Phone: (312) 565-1234; Fax: (312) 239-4795

- Room Rate: Single/Double: \$226 plus 17.4% tax (or current government per diem)
- Based on availability, GFOA's group rate is valid until September 28, 2018. Should the GFOA block fill up or if reservations are made after this date, reservations will be accepted on an overall hotel space availability and may not qualify for GFOA's discounted rate.
- Reserve your room at <https://book.passkey.com/go/GFOAOCT18>

## Please print or type (or register online at [www.gfoa.org](http://www.gfoa.org))

Check here if you are faxing this form or scanning and e-mailing this form to [training@gfoa.org](mailto:training@gfoa.org). Fax: 312-977-4806.

**If faxing, do not mail the original.**

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

Title: \_\_\_\_\_

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: (Required) \_\_\_\_\_

GFOA Membership # (if available) \_\_\_\_\_

Check box to indicate if you are substituting for an active member.

Active Member #: \_\_\_\_\_

Active Member Name: \_\_\_\_\_

Please photocopy this form for additional registrants.

**A copy of the confirmation will be sent as a PDF attachment via e-mail from [training@gfoa.org](mailto:training@gfoa.org). Please add this address to your allowed senders list.**

**CPE Credits:** GFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).



National Registry of CPE Sponsors  
150 Fourth Avenue North • Suite 700  
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## Connect with GFOA

Government Finance Officers Association (GFOA)

@GFOA (#GFOA and #GFOA2019) | @GFOAJobs | @chrisgfoa

GFOA of the US & Canada | GFOA Members Group

**Cancellation Policy:** Cancellations can be faxed to the GFOA at 312-977-4806 or e-mailed to [training@gfoa.org](mailto:training@gfoa.org). Requests for refunds received prior to September 28, 2018, will be levied a \$50 administrative service charge. Requests for refunds received between September 28 – October 12, 2018, will be refunded 50 percent of the registration fees. No refunds will be granted after and October 12, 2018.

**Substitutions (government entities only):** A one-for-one substitution of a nonmember for an active member is allowed. If your organization has a current GFOA member on staff who is not participating in these training seminars, a nonmember may attend in his/her place at the member rate. You must provide the member number and/or name of the GFOA member on the registration form.

**Inquiries:** For information regarding administrative policies, such as complaints and refunds, please contact GFOA at [training@gfoa.org](mailto:training@gfoa.org) or at 312-977-9700.

**Groups:** If your organization registers three or more people for the same seminar, you may reduce their registration fees by 10 percent. To qualify for the discount, registrations must be mailed together and paid with one check or invoice.

**Registration Fees** Fees include handout materials, continental breakfast, and lunch. (Please Check One)

Member: \$850     Non-Member: \$1,200

Registration Fee \$ \_\_\_\_\_

Group Discount \$ \_\_\_\_\_

New member fee: Visit [www.gfoa.org](http://www.gfoa.org) \$ \_\_\_\_\_  
or call GFOA at 312-977-9700 for fee

Discount for paid new member (\$25) \$ \_\_\_\_\_

**REGISTRATION TOTAL \$ \_\_\_\_\_**

## Payment Information (Please Check One)

Fees must be paid in U.S. dollars by check, credit card, or purchase order. **Please do not submit duplicate copies of this form.**

### Payment by Check:

Make check payable to "Government Finance Officers Association"  
Send to: GFOA • 203 N. LaSalle St. • Suite 2700 • Chicago, IL 60601-1210

Payment by credit card: scan and e-mail this form to [training@gfoa.org](mailto:training@gfoa.org), fax: 312-977-4806; or send to:

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### Bill Me:

(Scan and e-mail this form to [training@gfoa.org](mailto:training@gfoa.org) or fax to 312-977-4806. If selecting this option, you must include a purchase order number. Payment must be received for all registrations prior to the event date.)

P.O. No: \_\_\_\_\_

GFOA Tax ID Number: 36-2167796



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Chicago, Illinois 60601-1210

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