



Government Finance Officers Association



GROUP-LIVE
COURSE

Alliance for Excellence in School Budgeting – Fall 2017 Conference

November 2–3, 2017

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.

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

Speakers to Include:

Carol MacLeod, CPA, CFO, Lake County Schools, Florida

Judith Marte, CFO, Miami-Dade Public Schools, Florida

Claire Hertz, CFO, Beaverton School District, Oregon

Michele Trongaard, Assistant Superintendent for Finance and Operations, Wylie Independent School District, Texas

Paul Soma, Superintendent, Traverse City Area Public Schools, Michigan

Deborah Sims, Director, Equitable Education Spending/Leadership, Pivot Learning

Matt Bubness, Senior Manager, GFOA

Shayne Kavanagh, Senior Manager, Research, GFOA



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

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 separately in order to share challenges anonymously to facilitate a broader discussion on improving collaboration, specifically during the budget process — a key tenant of the best practices. Additional emphasis will be placed on the initial steps of the best practices framework — including enhancing communications and engagement strategies; improving goals, strategies for achieving goals, and measuring performance; and also finding additional opportunities for cost savings to fund strategies for increasing student outcomes. 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.

To learn more or register for this event, visit 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

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

Hotel Information

Hyatt Regency Chicago
 151 E. Upper Wacker Dr, Chicago, Illinois 60601
 Phone: (312) 565-1234; Fax: (312) 239-4795

- Room Rate: Single/Double: \$212 plus 17.4% tax
- Based on availability, GFOA's group rate is valid until October 9, 2017. 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.

Please print or type (or register online at www.gfoa.org)

Check here if you are faxing this form. Fax accepted only with credit card payment or purchase orders. 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 and invoice will be sent as a PDF attachment via e-mail from 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.



National Registry of CPE Sponsors
 150 Fourth Avenue North • Suite 700
 Nashville, TN 37219-2417
www.nasba.org

Cancellation Policy: Cancellations can be faxed to the GFOA at 312-977-4806 or e-mailed to training@gfoa.org. Requests for refunds received prior to October 13, 2017, will be levied a \$50 administrative service charge. Requests for refunds received between October 14-27, 2017, will be refunded 50 percent of the registration fees. No refunds will be granted after October 27, 2017.

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 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 Fee includes handout materials, continental breakfast, and lunch. (Please Check One)

\$850 Active GFOA Member	\$1,200 Nonmember	
	Registration Fee	\$ _____
	Group Discount	\$ _____
	New member fee: Visit www.gfoa.org	\$ _____
	or call GFOA at 312-977-9700 for fee	
	Discount for paid new member (\$25.00)	\$ _____
	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; fax: 312-977-4806; or send to:
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Name on Card: _____

Account Number: _____

Exp. Date: (Mandatory) _____ - _____ / _____

Signature: _____

Bill Me:

Scan and e-mail this form to 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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