

## 2019 Winter Conference Course Descriptions

1. SBO – Best Practices Series – best practices in payroll, accounts payable, electronic employment contracts – (grouped by enrollment)
  - Description: In this session the participants will be placed into groups of similarly sized entities to discuss operational/financial issues that impact their organization. This session is designed to allow for a free-flowing discussion and exchange of ideas, best practices and solutions. The discussion group will be led by practitioners in the field.
2. General Session Keynote Speaker: The Freak Factor – David Rendall
  - Description: DISCOVERING UNIQUENESS BY FLAUNTING WEAKNESS  
Do you want more happiness, fulfillment, and energy? Do you want to dramatically improve your productivity and increase employee performance? Our parents, teachers, and managers have told us that, if we want to succeed, we should find and fix our weaknesses. However, this is the wrong approach because each weakness is also a strength. We can create outrageous personal and professional success by amplifying flaws, instead of denying them.
3. Boot Camp Series – Building Your First Budget – Terry Dean
  - Description: This is a foundational session to help new School Business Officials prepare their first budget. The session will breakdown the budget development process into bite size pieces and help reduce “budget panic”. Topics that will be addressed include 1) budget calendar, 2) developing projection of revenue, expenditures and cash balance, 3) discussion of salary schedules and 4) balancing the budget.
4. ACA – Making Sense of Health Care Reform – Mary Nash
  - Description: After a frenzy of activity, the dust has begun to settle on legislative efforts to impact the health care reform landscape. In this talk, we’ll address the current state of the Patient Protection and Affordable Care Act (ACA). Topics covered include the impact of tax reform and recent federal rulemaking, the outlook for the Cadillac Tax, the future of tax-advantaged medical savings plans, and other plan design considerations employers should keep top-of-mind.
5. Developing a CAFR – Tami Coleman & Ben Lubkeman
  - Description: This is an advanced topic discussion. In New Mexico, very few entities prepare a Comprehensive Annual Financial Report (CAFR). This is not the same as your audit report. Developing a CAFR for your school district or charter is a technically challenging endeavor and very few accept the challenge. This session will discuss what is required to develop the CAFR for your district/charter/REC.
6. Understanding the Legislative Process & Legislative Update – Stan Rounds
  - Description: This topic will provide a 10,000 ft. overview of the legislative process and a detailed update on the current status of the 2019 legislative session.

7. Strategic Analysis of Financial Data – Steve Pereus
  - Description: Is strategic analysis in your professional tool kit? Strategic analysis is a powerful set of tools that help administrators make better decisions, operate more efficiently and develop optimal strategies for reaching their goals. You'll learn how to use strategic analysis in the budgeting and planning process and in doing so raise your ability to influence and impact decisions and strategy.
8. AptaFund NMPSIA Bill Reconciliation – Chris Parrino
  - Description: The purpose of this presentation is to emphasize the importance of reconciling the NMPSIA Bill on a monthly basis. Because there are many Charters and a few Districts that utilize AptaFund, this presentation will focus on the reconciliation process utilizing AptaFund accounting software. The presenter will present his methodology for reconciling his monthly NMPSIA Bill to his AptaFund generated data and encourage others to offer their own techniques, as there is always more than one way to do things.
9. Infinite Visions **NMPSIA Bill Reconciliation**– Derrick Terrell & Teresa Casias
  - Description: This section will be a general overview of the NMPSIA Bill reconciliation process using Visions. The course will cover, in order, the NMPSIA deduction set up, where and how to retrieve your bill for reconciling, the reconciliation itself, followed by a discussion of "common errors" and how to correct. The section will conclude with an open discussion of specific issues and potential resolutions by utilizing group think.
10. Controls & Process for P-Cards – Renette Apodaca
  - Description: What's in your wallet? If it's a School issued credit card, then you should attend this session. Come learn and participate in the discussions regarding internal controls, risk, compliance, audit and other factors that affect PCards. A PCard program can be efficient, effective, and protect taxpayer funds, this session addresses the necessities to be successful.
11. GASB 84 – Audrey Jaramillo
  - Description: Have you factored the GASB 84 *new* custodial fund determinations into your SY19-20 budget? If not, this course is for you. JAG will train on assessing your fiduciary activities and how to present (or not present) activity funds, clubs, scholarship funds, and outside organizations involved with your District or Charter. *You may need significant changes in your funds, budgets, policies, and financial statements.*
12. Procurement with Federal Funds – Will Manning
  - Description: This session will delve into the procurement process in relation to expenditure of federal funding. The objective is to look at those requirements that should be in-place for practical application of the State Code in order to comply with federal uniform guidance for spending federal funds.
13. Taxable Fringe Benefits: An IRS Update – Carl Chavez?!
  - Description: The course will discuss "What is a Fringe Benefit" and when is it taxable? It will provide commonly provided Fringe Benefits, and finally discuss other compensation and payments to employees.

14. Per Pupil Expenditures – Sarah Stubbs & Chad Cole

- Description: This session will delve into the PPE (Per Pupil Expenditure) report each District will have compile this year. It will go over what needs to be in that report, how to pull that information together, and how to calculate the figures to get to the bottom line. There will be examples and information on what to do next (including Board Policy requirements). Finally, the other information can you pull so that the information is being interpreted correctly (and other information to wow your Board).

15. Leadership – Steve Pereus

- Description: Effective leaders, by definition, make a difference by striving to improve their area of responsibility and those they work with. Learn the principles and practices that research has proven will strengthen your leadership skills and help you make a difference. Lecture, discussion and a hands personal exercise will be used to help participants reflect on their experience and set goals for personal growth.

16. Visions Users Group – Diana Betancourt & Cassondra Knight

- Description: Tyler Representatives will be onsite to connect with you and provide Business Officials with new facets on the software including Tips-n-Tricks and answering questions.

17. APTA Users Group – Becky Grom & James Maumus

- Description: Harris School Solutions representatives will be on site to assist Business Officials with answers to questions and tips for using recent updates to the software.

18. Stress Management – Kimberly Stone

- Description: "Be a warrior, not a worrier." Stress and worry can take a toll on your mental and physical health spend a little time together sharing skills to manage your stress and worry that turns you into a warrior.

19. Maintaining Employee Files – Brain Baca

- Description: "Navigating the Personnel World in Difficult Waters." This session will address many of the challenges that districts across the state are facing in the areas of recruiting, supporting, and managing staff. This session will highlight lessons learned and new strategies in the area of staffing your schools. It will also discuss some best practices to support your staff and thus lead to higher retention rates and less staff turnover. Finally, the presentation will cover the key activities in managing staff and maintain employee records to meet legal requirements.

20. Visions Users Group Continued

- Description: Tyler Representatives will be onsite to connect with you and provide Business Officials with new facets on the software including Tips-n-Tricks and answering questions.

21. APTA Users Group Continued

- Description: Harris School Solutions representatives will be on site to assist Business Officials with answers to questions and tips for using recent updates to the software.

#### 22. ERB Rules Update & Processes – Jan Goodwin

- Description: This session will discuss the process that are needed to report the required information to the ERB in a timely and accurate manner. Additionally, this session will discuss the sustainability issues with the educational retirement fund and the plan to correct the problem.