

Florida Association of School Business Officials
54th Annual Conference with Florida Records Management Association
Orlando, FL
“Agents of Change”

Tuesday October 12, 2021

FREE

If attending conference
8 hours CPE

Room

Nautilus A

8 am – 9:40 am Carol J. MacLeod, CPA, CIA, CISA, CGAP, SFO, Acting CFO, Jefferson County Schools, An Overview of Government Finance Officers Association Best Budgeting Practices and an Introduction to Academic ROI. This session will provide a general overview of GFOA's best practices for school districts and an introduction to academic return-on-investment.

9:50 am – 11:30 am Ronald A. Conrad, CPA, Cherry, Bekaert, LLP

12 pm – 1 pm ***Lunch***

1 pm – 2:40 pm David Alvarez, CPA, CVA, CGMA, & April Shuping, CPA, CGFO, Carr, Riggs, & Ingram, LLC Covid/CARES Act: How to Account for it and Pass the Single Audit
The session will help attendees understand recent guidance passed down from the Treasury and the OMB (Compliance Supplement), identify eligible expenditures related to grant money received from the Coronavirus Relief Fund and recognize the single audit requirements associated with approved relief fund grants for governmental entities.

2:50 pm – 4:40 Donna Collins, CPA, Milestone Professional Services, Inc

FREE

If attending conference

Payroll Certification

Nautilus B

8 am – 5 pm

8 am – 12 pm

12 pm – 1 pm ***Lunch***

1 pm – 3 pm

3 pm – 5 pm

FREE

If attending conference

Accounts Payable Certification

Nautilus C

9:00 am – 4 pm

9:00 am Introductions

9:30 am – 12 pm Accounts Payable 101

12 pm – 1 pm ***Lunch***

1:00 pm – 4:00 pm Technology – Purchasing Cards – Revenue, Travel – Controls – Fraud - Audits

Roundtables

1:30 pm – 4:30 Operations/Maintenance/Energy

Diamond 2

1:30 pm - 4:30 Purchasing / Contracts/Warehousing/ Property Records Fixed Assets Roundtable

Flamingo Room

2 pm – 9 pm Vendor Set Up

Majestic Ballroom

4:30 pm – 5:30 pm FASBO/FRMA Board of Directors Meeting

Diamond 1

Tuesday, October 12, 2021 (cont.)

5:45 pm - 7:00 pm Registration

Room

Majestic Pre-Function

5:45 pm – 7:00 pm Welcome Hospitality

Outside weather permitting

Wednesday, October 13, 2021**Room**

7:30 am – 3:00 pm Conference Registration

Majestic Pre-Function

7:30 am – 8:30 am Continental Breakfast

Majestic 4-6

7:30 am – 8:30 am First Time Attendee Breakfast & Scholarship Recipients

Diamond 1

Sponsored by McKim & Creed



8:15 am – 8:30 am Vendor Greetings Meeting (Vendors Only)
Tracey Gallentine Presiding
(You are encouraged to attend General & Special Interest Sessions)

Majestic Ballroom

8:30 am – 10:00 am Opening Session
Pledge of Allegiance and Moment of Silence
Dawn Meyers, Vice President FASBO Les Vaughn, President, FRMA
Color Guard:
Chorus:

Welcome: Dr. Maria Vazquez, Deputy Superintendent, Orange County Schools
Presiding: Dawn Meyers, Vice President FASBO – Les Vaughn, President, FRMA
Introductions and Announcements

SASBO Greetings, Suanne Lee, SASBO Representative
Vendor Greetings, Tracey Gallentine, McKim & Creed
Presiding: Mike Hewett, President FASBO - Les Vaughn, President, FRMA

10:00 am - 11:00 am Keynote Speaker: Josh Peach, Evangelist at ALPHA Facilities Solutions and Founder of **Be Au Sm** (Be Awesome)

Topic: It's Time to Celebrate!

Holidays, birthdays, graduations, new additions to the family, and Tom Brady winning another Super Bowl are reasons we usually find time to be with friends and family to celebrate. Sadly, COVID has prevented many of these opportunities from happening and, in turn, caused additional stress, worry, and feelings of isolation for many of us. Before COVID, celebration in the workplace was often overlooked or looked at as not important. If this last year has taught us anything, it is to have gratitude for our team, clients, and supporters. The best way to do that? You guessed it, celebrate! In this presentation, Josh will share real-life examples, best practices, and suggestions on making achievements and goals clear enough for your team to know it passes the champagne test.

Presiding: Mike Hewett, President FASBO – Les Vaughn, President, FRMA

Door Prize Drawing

Wednesday, October 13, 2021 (cont.)

Room

11:00 am – 1:30 pm

Expo Open Vendor Trade Show and Member/Vendor Luncheon

1:35 pm – 2:25 pm

Special Interest Sessions

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|---|--|------------|
| A | <p>Topic: Robotic Lawn Mowers</p> <p>Echo Robotics is part of Echo Incorporated, a world leader in professional-grade outdoor power equipment for 50 years. For schools, resources can be hard to come by. ECHO Robotics can automate your mowing and more efficiently allocate and prioritize your school's budget and resources.</p> <p>Target Area: Operations</p> <p>Speaker: Ken Liberty, Echo Robotics</p> <p>Presiding: Mark Fox, Operations Director</p> | Diamond 1 |
| B | <p>Topic: Contract Management Made Easy and Implementing other E-Procurement Tools</p> <p>Target Area Purchasing, Contracts & Warehousing</p> <p>Speaker: David Wheeler, Director, Procurement and Contracting, OCPS</p> <p>Presiding: Robert Waremburg, Purchasing Director</p> | Diamond 2 |
| C | <p>Topic: Employer's Getting Swindled: A Discussion on Controls to Help Prevent Waste, Fraud, and Abuse</p> <p>No organization is free of chinks in their armor. Internal Controls are processes designed to help safeguard an organization and minimize risk to its objectives. Although an organization has controls in place, they are never perfect. Every organization exists to accomplish some objectives, but there are many risks, sometimes elusive, putting the goal out-of-reach. This session will focus on defining internal controls and how they can benefit you and your organization. Knowing how to identify areas that need controls, and prioritize which ones are most important, is critical. Addressing specific controls within the two broad categories of preventative, such as segregation of duties; or detective, such as inventory counts and reconciliations is essential. The session will also provide an overview of fraud and examine why controls fail with some real-life examples of control weaknesses that led to fraud and why it did not get detected immediately. The course will include types of transactions and areas of business that pose a higher risk of misappropriation.</p> <p>Target Area: Finance</p> <p>Speaker: Christopher J. Dawkins, CPA, CIA, Director of County Audit, Orange County Comptroller's Office</p> <p>Presiding: Franca Courchene, Finance Director</p> | Nautilus A |
| D | <p>Topic: Value-Based Benefit Design: Engaging Employees, Mitigating Risk</p> <p>Designing an employee benefits package that meets the healthcare needs of employees while addressing the financial constraints of an organization can be an arduous task. Implementing a value-based benefit strategy can reduce barriers and improve health outcomes by encouraging compliance with preventive guidelines and medication adherence.</p> <p>This session will explore how:</p> <ul style="list-style-type: none">• The health status of our country is affecting insurance trends and how insurance trends are affecting the health status of our country.• Strategic benefit design can result in a healthier workforce and impact the bottom line.• To encourage employees to take an active role in their healthcare. <p>Target Area: HR/Risk Management/Payroll</p> <p>Speaker: Laurel Lingle, Gallagher</p> <p>Presiding: Giojan Davila, HR Director</p> | Nautilus B |

Wednesday, October 13, 2021 (cont.)

Room

- E. Topic: Managing Electronic Records in a Virtual Environment Part 1 Nautilus C
This session will offer practical tips and suggestions on tools to assist with managing electronic records in a virtual environment
Target Area: FRMA
Speaker: Vestina Crayton, Technology Project Coordinator, Pinellas County Government's Office of Technology and Innovation
Presiding: Les Vaughn, President, FRMA

2:35 – 3:20 pm

- A Topic: Employee Retention, Professional Development and Cost Savings Diamond 1
Developing, staffing, and maintaining a professional work-family of facility maintenance requires knowledge and skills no other department in an educational operation must possess. Credentialing of these individuals, while not required, will enhance their retention and streamlining of managerial challenges. What does it cost to retrain new staffing? What is the cost of replacing a Rock Star custodian? Are you preparing for the day when you lose that Rock Star? Do you know what your staff actually knows? Now more than ever, the health and safety of the student body, the school staff, and the general public at large is being impacted daily by the professionalism of your facility maintenance staff. It is apparent that technology and best practices for use have changed in recent months and the certification of these individuals must be recognized. By educating through professional development, we enhance long-term retention thus establishing cost-saving programs that will impact the health and safety of every person who uses your public facility. Did you know that over 1/3 of a community uses a district facility every day that school is in session? There is no other department that has an impact on community health more than this. Join us for an interactive session as we explore current public awareness issues, new impacts on requirements, opportunities for professional development, and certifications. Oh, and bring your cell phone, you will need it to join in.
Target Area: Operations.
Speaker: Dave Thompson, Director Academy of Cleaning Excellence, Gem Supply
Presiding: Mark Fox, Operations Director
- B Topic: Data Collection AFR's and Cost Reporting Diamond 2

Target Area: Leadership
Speaker: Scot Ecker, Lead Senior Advisor, Forecast5 Analytics
Presiding: LaTresa Carlisle, Emerging Leader
- C Topic: "The Perfet Mystery" – Fraud Investigation Nautilus B
Target Area: Accounting/Auditing/Purchasing
Speaker: Randy Wheeler
Presiding: Cindy Stevens, Accounting Director
- D Topic: Managing Electronic Records in a Virtual Environment Part 2 Nautilus C
This session will offer practical tips and suggestions on tools to assist with managing electronic records in a virtual environment
Target Area: FRMA
Speaker: Vestina Crayton, Technology Project Coordinator, Pinellas County Government's Office of Technology and Innovation
Presiding: Les Vaughn, President, FRMA

Wednesday, October 13, 2021 (cont.)

Room

3:20 pm – 3:35 pm Beverage Break

3:35 pm – 4:25 pm Special Interest Sessions

- A Topic: Watch Out For That Tidal Wave! Diamond 1
How Asset Assessment and Management Systems can Help Predict Funding Shortfalls
This presentation will review the key concepts, current trends, and potential benefits in Facility condition Assessment (FCA) using real world example from a Florida public school district. Using this financial model the administrators could move forward with sufficient time to secure funding from currently available sources or seek additional funding sources before the steep increase in funding needs occurs.
Target Area: Operations/Energy
Speaker: Brian DuChene, PE Principal
Presiding: Mark Fox, Operations Director
- B Topic: Solicitation Strategies Expanding Capacity w/your existing IT System while Increasing Value Diamond 2

Target Area: IT/Purchasing, Contracts & Warehousing/Finance
Speaker: April Marzzacco, Strategic Account Manager, EqualLevel, David Wheeler, Director Procurement and Contracting, OCPS
Presiding: Robert Waremburg, Purchasing Director
- C Topic: Technology & the Changing Workforce Nautilus A
For the first time in history, five generations comprise today's workforce. As Americans age, it's expected that 50% of facility managers will retire in the next decade. Skilled trades positions continue to be the most challenging to fill – leaving operations executives thinking not only about their daily operations, but also wondering how to take their facilities departments into the future. Take an in-depth look at the state of today's workforce with tips to working cross-generationally and how to utilize technology and services to unlock potential.
Target Area: Leadership
Speaker: Josh Peach, Evangelist at ALPHA Facilities Solutions and Founder of **Be Au Sm** (Be Awesome)
Presiding: LaTresa Carlisle, Emerging Leader
- D Topic: Active and Post Employment Health Insurance – Interactions with Your Actuary Nautilus B
Actuaries – you know, those people who crunch a lot of numbers and seem to talk in mathematical equations? Well, we need their services and expertise to keep your active health plans stable, in addition to aiding in the determination of your post-employment health plan benefit liabilities. Join us for an interactive, light-hearted, and open conversation with John Lavarda, Managing Actuarial Consultant at Key Benefit Concepts LLC, who will turn the tables and ask **you** questions to improve your understanding in working with the actuaries on your health plans.
Target Area: HR/Risk Management/Payroll
Speaker: Lavarda John, Managing Actuarial Consultant, Key Benefits Concepts
Presiding: Giojan Davila HR Director

Wednesday, October 13, 2021 (cont.)**Room**

E	<p>Topic: Protect Records From Ransomware Attacks</p> <p>Ransomware attacks are on the rise and many have been attacked losing their systems for days, weeks or even months. When they do pay the ransom, many have not gotten the encryption keys promised and still lose a great deal of data. Some get hit with a second ransom when the first keys don't work. So, what can you do to protect your data differently? We will discuss prevention versus true protection of your data. As a last line of defense, an archive data vault can rescue your most important data.</p> <p>Target Area: FRMA</p> <p>Speaker: Charles Burger, Director of Assureon Cybersecurity Solutions, Nexsan</p> <p>Presiding: Les Vaughn, President, FRMA</p>	Nautilus C
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5:00 pm – 6:00 pm	FASBO/FRMA Member/Vendor Reception	Majestic Ballroom
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6:00 pm -	Dinner and Entertainment for all	
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Thursday, October 14, 2021**Room**

7:30 am - 10 am	Vendor Breakdown	Majestic Ballroom
7:30 am	Vendor Wrap Up (Tracey Gallentine presiding)	
7:30 am – 8:30 am	Continental Breakfast	TBD
8:00 am – 11:00 am	Registration	Royal Pre-Function
8:30 am – 10:00 am	<p>Vendor Round Tables</p> <p>This session will provide an opportunity for vendors and attendees to discuss more specifically and informally topics relating to Auditing, Energy/Facilities, Finance/Business Management, Fixed Assets/Property Control, Food Service, IT and Purchasing. This “roundtable discussion” will consist of a short presentation related to the topic as well as an in-depth Q&A opportunity. You won't want to miss being “around” this session! <u>Three chances to win \$100!</u></p>	Diamond 1
10:00 am – 10:15 am	Beverage Break	
10:15 am – 11:15 pm	<p>General Session</p> <p>Topic: Legislative Update</p> <p>Speaker: Andrea Messina, Executive Director, Florida School Board Association</p> <p>Presiding: Mike Hewett, President FASBO – Les Vaughn, President, FRMA</p> <p><i>Door Prize Drawing</i></p>	Majestic 4-6
11:15am – 11:40 pm	<p>FASBO General Business Meeting</p> <p>FRMA General Business Meeting</p> <p><i>Door Prize Drawing</i></p>	
11:40 pm – 12:40 pm	Lunch on Your Own	

Thursday, October 14, 2021 (cont.)**Room**

12:45 pm – 1:35 pm Super Session

- A Topic: Top 10 Security Controls and A Trip to the Dark Web Majestic 4-6
Join Ron Frechette as he educates us on the inner-workings of The Dark Web and takes us on a live tour into what is considered to be "Hell on the World Wide Web." What you will see will send chills up your spine and forever be engrained in your minds. Ron will then share some real life case studies, the future threat landscape we face, and the 10 Top Security Controls to have in place in 2021 to help mitigate the risks of being "Caught in the Dark Web." This session will have you on the edge of your seats.
Target Area: All
Speaker: Ron Frechette, Chief Evangelist Officer, GoldSky Security
Presiding: Mark Fox, Operations Director, Les Vaughn, President FRMA

1:45 pm – 2:35 pm Super Session

- A Topic: Emerging Legal Issues in Human Resources and Procurement Majestic 4-6

Target Area: Operations/IT/Finance/Purchasing/H/R
Speaker: John Palmerini, Deputy General Counsel, OCPS
Presiding: Robert Waremburg, Purchasing Director

2:35 pm – 2:50 pm Beverage Break

2:50 pm – 3:40 pm Special Interest Sessions

- A Topic: Electrification of School Buses, All Things To Consider Including Costs and Grants Diamond 2
Panel Discussion
Target Area: Transportation/Operations/Energy Management/Purchasing
Speaker: Peter King, PMP, Project Manager, Duke Energy, Eric Reynolds, Sr. Director Channel Sales, Proferra Powered, Charles Batson, District Finance Manager-Eastern U.S., Daimler Truck, J. Mark Childers, Manager Powertrain & Tech Sales, Thomas Built Buses
Presiding: Robert Waremburg, Purchasing Director
- B Topic: Switch: How To Change things When Change Is Hard Nautilus A

Target Area: Leadership
Speaker: Jim Drake, Retired CFO
Presiding: LaTresa Carlisle, Emerging Leader
- C Topic: How Internal Audit Supports Operations Nautilus B
Did you know internal audit can be a key partner to operations leaders? Learn the ways you can utilize your internal audit function to maximize valuable information learned in an audit. We will also cover key fraud risks in operations and how to mitigate fraud risk, including real case studies.
Target Area: Finance
Speaker: Laura Manlove, Risk Consulting Director, Weiss Campbell, Risk Consulting Manager, RSM
Presiding: Franca Courchene, Finance Director

Thursday, October 14, 2021 (cont.)

Room

- D Topic: Florida Public Records Law Part 1 Nautilus C
Going back to the earliest organized societies in history, records of some sort have been kept. In the United States, there has been a common law expectation to access court records, which has evolved into access to records of most government entities, both on a federal, state, and local level. With the adoption of the Freedom of Information Act (FOIA) in 1966, the federal government established the right of citizens to access to government records. Many states followed, some even including access to records in the state constitution. Today, Florida is known as having the most expansive public records law in the country. Discussion on Florida's access to records will focus on all 3 branches of government, with their similarities and differences noted. Agencies face many challenges in carrying out their responsibility to provide records, especially when the public expects transparency in government operations. This class will discuss the role and responsibility that have in responding to requests for information.
Target Area: FRMA
Speaker: Richard "Rick" D. Courtemanche, Deputy General Counsel, The Florida Bar
Presiding: Les Vaughn, President FRMA

3:50 pm – 4:40 pm

Special Interest Sessions

- A Topic: ...but I thought we had a budget ...!! Diamond 1
This presentation will touch on recent examples of how typical building associated endeavors can have their budgets impacted The discussion will not only provide examples of such but will also highlight some of the normal issues that can impact the planed project budgets. In addition references will be presented as to what to look out for but also some ides directed at avoiding them.
Target Area: Operations/Maintenance
Speaker: Russell E. Stauffer, P.E. Principal Engineer
Presiding: Mark Fox, Operations Director

- B Topic: The New \$5000 Threshold for Fixed Assets Diamond 2

Target Area: Property Records/Purchasing
Speaker: Greg Herlean, MBA, CPPO, CPCM, Director Purchasing, Charlotte County Schools
Presiding: Jeff Robison, Past President

- C Topic: Florida Public Records Law Part 2 Nautilus C
Going back to the earliest organized societies in history, records of some sort have been kept. In the United States, there has been a common law expectation to access court records, which has evolved into access to records of most government entities, both on a federal, state, and local level. With the adoption of the Freedom of Information Act (FOIA) in 1966, the federal government established the right of citizens to access to government records. Many states followed, some even including access to records in the state constitution. Today, Florida is known as having the most expansive public records law in the country. Discussion on Florida's access to records will focus on all 3 branches of government, with their similarities and differences noted. Agencies face many challenges in carrying out their responsibility to provide records, especially when the public expects transparency in government operations. This class will discuss the role and responsibility that have in responding to requests for information.
Target Area: FRMA
Speaker: Richard "Rick" D. Courtemanche, Deputy General Counsel, The Florida Bar
Presiding: Les Vaughn, President FRMA

5:00 pm – 6:00 pm

Reception

Evening on Your Own

Friday, October 15, 2021**Room**

8:00 am – 9:00 am	Continental Breakfast	
9:00 am – 10:00 am	General Session Topic: Retirement Speaker: Presiding: Mike Hewett, President FASBO Les Vaughn, President FRMA	Majestic 4-6
10:05 am – 11:05 am	General Session Topic: Economic Forecast Speaker: David Jang, Partner, Wertz York Capital Management Group Presiding: Mike Hewett, President FASBO Les Vaughn, President FRMA <i>Door Prize Drawing</i>	
11:10 am – 11:30 am	Introduction of New Officers and Directors	Closing Remarks
	<i>Grand Door Prize Drawing</i>	Majestic 4-6
11:40 am 12:40 pm	FASBO/FRMA Board of Directors Meeting Presiding: Dawn Meyers, FASBO President FRMA President	