

Join us for Section Fall Education

Learn Locally with the San Diego/Imperial Section

San Diego and Imperial counties

OCTOBER 24, 2024

Marina Village Conference Center

Address: 1936 Quivira Way, San Diego, 92109

Time: 8:00am - 3:30pm

Fees: \$95 member | \$135 non-member

Presentation titles:

- Fiscal Oversight Staying Out of Trouble
- · Accounting 101
- E-Rate Requirements
- Confidence in Communication
- Certificates of Insurance 101
- Accounts Payable Best Practices
- Unlocking the Future: The Importance of AI Literacy
- How to Grow in School Business
- New Trends in Facilities
- Bids and RFP's (Basics)
- All Things Workers' Compensation
- Associated Student Body: What is Allowable and Unallowable
- Tips & Tricks for Implementing The USDA Final Rule
- Budget Development/MYP Best Practices
- Human Resources Presentation

Registration Deadline: October 17
No onsite registrations will be accepted





FALL EDUCATION EVENT Thursday, October 24, 2024 Marina Village Conference Center

NETWORKING / BREAKFAST (Seaside Room) 8:00 AM - 8:30 AM

OPENING SESSION: Tatia Davenport - Chief Executive Officer CASBO (Seaside Room) 8:30 AM - 8:45 AM

SESSION I 8:50 AM - 9:45 AM					
Unlocking the Future: The Importance of AI Literacy This presentation explores the basics of AI, its impact on the workplace, and the essential skills for understanding and using AI responsibly. Learn why AI literacy is crucial for making informed decisions in a technology-driven world. ROOM: ANCHOR	Acounting 101 New employees in accounting and those promoted may not hold a clear understanding of the account code structure. Gain a basic understanding of how to expense properly. This foundational introduction applies to anyone who enters requisitions, processes timesheets, or works in fiscal services. ROOM: DOCKSIDE	E-Rate Requirements This session will provide a brief overview of the E-rate program focusing on the procurement process, invoicing methods, general program compliance, and more. We will share best practices for maintaining compliance throughout the E-rate competitive bidding process, the invoicing process (BEAR and SPI), and the document retention requirements of the program. ROOM: TERRACE	Confidence in Communicating ROOM: SEASIDE		
Speaker: Suzi Boynton, Executive Assistant San Marcos USD	Speakers: Kay Pugh, Special Education Financial Analyst SDCOE Justine Galura, Senior Program Business Specialist SDCOE	Speakers: Michelle Harken, Director CSM Consulting Lehna Markarian, Consultant CSM Consulting	Speaker: Tracy Petrillo , Chief Learning Officer CASBO		
Category: Administrative, Technology	Category: Accounting, Finance	Category: Purchasing, Technology, Accounting	Category: Leadership, Public Speaking, Professional Growth		

VENDOR FAIR 9:45 AM - 10:30 AM

SESSION II 10:40 AM - 11:35 AM					
Certificates of Insurance 101 This presentation will provide you with what to look for in a certificate of insurance and what to watch out for on a certificate. We will also discuss additional insured language, some basic review of contracts as well as coverages and limits. ROOM: ANCHOR	Accounts Payable Best Practices This presentation will dive into best practices for processing Accounts Payable and 1099 reporting. There will be a roundtable with an open discussion to share ideas from different Districts. ROOM: DOCKSIDE	Fiscal Oversight - Staying Out of Trouble ROOM: TERRACE	How to Grow in School Business (Panel) ROOM: SEASIDE		
Speakers: Julie Nester, Sr. Manager, Prop & Liab Prgm SDCOE Marci Schullo, Vice President Alliant Insurance Services	Speakers: Jonathan Meraz, Director of Fiscal Services Southbay USD Francesca Martinez, Assistant Superintendent Business Services Dehesa Elementary	Speaker: Erin Lillibridge, FCMAT Intervention Specialist	Speakers: Eric Dill, Assistant Superintendent Business Services Carlsbad USD Aaron Heinz, Deputy Superintendent Colusa COE Tiana Barton, Chief Business Official Lemon Grove SD		
Category: Risk Management, Purchasing	Category: Accounts Payable, Accounting	Category: CBO, Finance	Category: Professional Growth, Leadership		

CASBO Update (Seaside Room): Eric Dill - President CASBO 11:45 AM - 12:00 PM

LUNCH/NETWORKING 12:00 PM - 1:00 PM

SESSION III 1:10 PM to 2:05 PM				
New Trends in Facilities School Facilities planning, construction and financing is a very dynamic world to work and play in. This workshop will focus on issues that shape that world and offer insights and potential solutions to address them. ROOM: ANCHOR	Bids & RFP's (Basics) Review applicable bid thresholds for various types of procurements and how to apply these bidding requirements to your projects, whether through a formal bid process, request for proposals, or an applicable bidding exception. ROOM: DOCKSIDE	All Things Workers' Compensation What is Workers' Compensation - an overview of the CA State-Mandated program to cover employee's economic losses due to injuries or illness occurring on the job and a discussion of the employee benefits and laws that apply. ROOM: TERRACE	Associated Student Body (ASB), What is Allowable and Unallowable Part 1 ROOM: SEASIDE	
Speaker: Nathan Wulff , Facilities Project Director Lemon Grove SD Tom Silva , Retiree	Speaker: Sharon Clay, Director, Purchasing & Logistics Cajon Valley USD Brenda Gashuz, Director of Purchasing, Publications, R&D Center Poway USD	Speaker: Felicia Amenta, Sr. Manager, Workers Comp SDCOE	Speaker: Michael W. Ammermon, FCMAT Intervention Specialist	
Category: Facilities, Finance, Purchasing	Category: Leadership, Administrative	Category: Payroll, Human Resources, Risk Management	Category: Administrators, Accounting	

SESSION IV 2:10 PM to 3:05 PM					
Tips & Tricks for Implementing The USDA Final Rule ROOM: ANCHOR	Budget Development/MYP Best Practices Come learn more about the building blocks of budget development and the necessary factors and best practices for multi-year planning. From enrollment projections to staffing projections to intentional spend down of reserves, you will take away tips to help you in your district's budget planning process. ROOM: DOCKSIDE	Human Resources Presentation Room: TERRACE	Associated Student Body (ASB), What is Allowable and Unallowable Part 2 ROOM: SEASIDE		
Speakers: Naomi Shadwell , Executive Director of Child Nutrition Services San Marcos USD	Speakers: Mark Pong, Assistant Superintendent for Business Services and Support Chula Vista Elementary SD Tory Long, Assistant Superintendent of Administrative Services Ramona USD Michelle Howe-Kelton, Fiscal Director Lemon Grove SD	Speakers: Corey Nabonne , Director Classified Human Resources SDCOE	Speaker: Michael W. Ammermon , FCMAT Intervention Specialist		
Category: Child Nutrition, Purchasing	Category: Finance, Accounting, CBO	Category: Human Resources, Personnel	Category: Administrators, Accounting		