

YEAR of SUCCESS



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Purpose

Regardless of your work background or degree, if you are new to the school business office you are sure to find the learning curve is steep. Little can prepare you for the reporting requirements, calculations, and statutes you must navigate, and the sheer volume of responsibilities can seem overwhelming.

With these concerns in mind, WASBO, in cooperation with the School Financial Services Team at the Department of Public Instruction (DPI), developed **The Year of Success Program** — a six-conference package designed to offer new business managers, bookkeepers and district administrators with the timely knowledge they need to succeed in a typical school business office year. Specially designed tracks at five conferences in addition to the Wisconsin Federal Funding Conference cover time-sensitive topics and allow you to focus on understanding the most immediate and upcoming challenges. Learn from experienced peers, service providers and experts from DPI while you plot a course for your Year of Success.

The WASBO Year of Success Program offers a **substantial savings** — approximately 25% — over individual conference registrations. The program includes full registration to six WASBO conferences which contain material specific to new business office staff.

“I would highly recommend participating in the Year of Success program for new school business administrators. The program immediately connected me with other experienced school business officials and WASBO as a professional organization. The program also provided a great opportunity to network with consultants from the DPI Finance Team who helped me navigate the school finance reporting cycle and other tasks in the business office.”

—Mike Gerlach, Director of Business Services, Fond du Lac School District

Pricing

MEMBERS

WASBO Member pricing for the Year of Success 2018-19 Program is \$1,455 — a savings of 25% compared with registering for each program separately.

NON-MEMBERS

Non-Member pricing is \$1,518.75 and includes one year of trial WASBO membership if you have not previously been a WASBO member. Save 25% compared with registering for each program separately.

Due to the nature of the package and significant conference discounts, The Year of Success Program is non-refundable and non-transferrable to another person or district.

WASBO Mentorship Program

The WASBO mentor program is designed to provide professional resources and advice to first and second year school business officials relative to the myriad of duties and responsibilities that are inherent within every school business official's job description. This is accomplished by pairing new business officials on a one-to-one basis with experienced veterans.

The program establishes supportive relationships between protégés seeking career guidance and mentors with experience and expertise in the areas of need.

WASBO.com/mentorship



Wisconsin Association of School Business Officials Foundation

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YEAR of SUCCESS 2018-19

In cooperation with the DPI School Financial Services Team

A *six-conference package* designed to offer new business managers, bookkeepers, and district administrators with the **timely knowledge** they need to **succeed** in a typical school business office year.

WASBO.com/success

A Wisconsin Association of School Business Officials program in cooperation with the Wisconsin Department of Public Instruction



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Program Content

Below are sessions specific to the Year of Success program. These conferences also feature additional sessions on a wide variety of topics that will increase your expertise in school business management.

New School Administrators and Support Staff Conference

August 8-9, 2018
Holiday Inn at the American Center, Madison

- Fiscal Year at a Glance
- Roles & Responsibilities of the School District Business Office
- Building Trust in Your Community Around School Finance Issues
- Introduction to WUFAR
- Special Education Accounting and Reporting
- Counting Children: Third Friday Count and Summer Interim Courses
- Revenue Limits, State General Aid and the Tax Levy
- New 2018-19 School Level Expenditure Reporting Requirements under ESSA
- Cash Flow and Short-term Borrowing
- How to Survive the Annual Report
- Tying it All Together

Fall Conference

October 4-5, 2018
The Osthoff Conference Center, Elkhart Lake

- Perspectives of a New Business Manager
- Fall at a Glance
- Debt Service Management 101
- Equalization and Special Adjustment Aids
- Revenue Limit
- They Will Be Monitored-Written Procedures and the Uniform Grant Guidance
- Cash Reserve/Fund Balance (Long Term School District Fiscal Health)
- Touch Base Session

School Business Management: Winter at a Glance

December 4, 2018
Marriott Madison West, Madison

- Winter at a Glance
- SFS Reporting Membership and Pupil Count
- Revenue Limits and Equalization Aid Review
- Budget Building and Fund Balance
- An Overview of Business Insurance
- Fees
- Employee Benefits: A Quick and Simple Overview of What You Need to Know

Wisconsin Federal Funding Conference

February 25-26, 2019
Kalahari Resort & Conference Center, Wisconsin Dells

This conference was first offered in 2011 as a result of the increased focus on transparency and accountability of federal funds. These changes made compliance difficult to understand. The purpose of this conference is to provide school districts with the information they need, not only to be in compliance, but also to maximize their federal resources.

Accounting Conference

March 20-21, 2018
Kalahari Resort & Conference Center, Wisconsin Dells

- Spring at a Glance - Budget Adjustments
- Having Fun with WUFAR
- Special Education Fiscal Auditing
- Communicating District Financial Information
- Advocating for Your School District
- The Other Funds: Funds Other than 10 and 27
- Open Enrollment and How Open Enrolled Students are Funded
- Introduction to IDEA's Maintenance of Effort
- Categorical Aids

Spring Conference

May 16-17, 2019
KI Convention Center, Green Bay

- Summer at a Glance
- Preparing for Year End: Closing Out the Fiscal Year
- Fiscal Audit: What You Need to Know About Your Upcoming Audit
- Transportation Basics
- DPI Current Updates, Reminders, and Reporting Requirements
- Debt Service Management 102
- Intro to OPEB Requirements and Fund 73 Accounting
- Tying it All Together

NOTE: Individual conference sessions may be updated to adapt to changes in legislation or other factors related to school finance. For current sessions, please see the conference registration sites at WASBO.com.

Program Sponsor



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Thank you to Focus on Energy for supporting the WASBO Year of Success program.