

MoASBO 2024 Annual Spring Conference
April 21-24, 2024 Margaritaville Lake Resort, Osage Beach, MO
CPE Session Listing & Information

CPE INFORMATION

Earn up to twenty-six (26) CPE credits for the sessions offered through the 2024 Annual Spring Conference. To register for these sessions, go to www.mosba.org.

MoASBO 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.

Refunds and Cancellations

To receive a full refund, less a \$50 processing fee, requests to cancel must be received by MoASBO by 5 pm on **Friday, April 5, 2024**. No refunds for cancellations made after this date or no-shows. For information regarding administrative policies such as refunds, cancellations, and complaints, please contact MoASBO at 573-644-7900.

The instructional delivery method for conference breakout sessions is Group Live, basic program level. Each session completed earns one credit unless noted otherwise. No prerequisites or advance preparations are necessary for participation unless otherwise indicated. Visit the MoASBO website at www.moasbo.org for more information.

TO RECEIVE CPE CREDIT FOR DESIGNATED SESSIONS, PARTICIPANTS MUST:

Be present for at least 50 minutes of the presentation.
 Registering your attendance and departure by participating in the session check in/out mechanism during the session.
 Electronic session evaluations will be solicited from participants following sessions. The evaluation will be available for two weeks following session completion.
 The above requirements must be met for each session to earn CPE credit and/or documentation for each session.

CPE certificates will be emailed to attendees.



Sessions and schedule are subject to change.

| Session Name | Session Description | Learning Objective #1 | Learning Objective #2 | Learning Objective #3 | Session Speaker(s) | CPE Field of Study |
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| *Amplify the Numbers: Effectively Communicating Complex Issues | To build support for providing what students need, whether we've got an election looming or not, we must make the complex world of school finance clear. Stakeholders need to understand how and why money matters in a way that builds trust. Learn from a veteran CFO and a seasoned school communicator who spent more than two decades working together and navigating bond issues, operating increases, budget cuts and more. You'll walk away with action steps you can use today to improve understanding in your district. | Identify core concepts we must apply to all financial communication. | Explain the principles of communicating complex issues and why it's important today to take a different approach to these issues. | Name six action steps you can take back and apply in your district. | Mary Jo Gruber, Chris Tennill | Communications and Marketing |
| *Champion Within: A Leadership Mindset | To rise above the day-to-day grind, consistently show up for those who depend on us, and bring value to our community, we must choose to harness the power of the CHAMPION within. Jeff Koziatek will help us reach a higher level of understanding about ourselves so that we can reach peak performance levels and be the CHAMPION for ourselves, our families, and our communities. He will engage you with his unique blend of motivation, authenticity, and humor to inspire and empower you to BE champions, stand strong, and avoid burnout. Come ready to engage, be equipped, and get encouraged! | Illustrate how to overcome the fear of failure and empower yourself to lead, succeed, or fail without personal judgment. | Discover the four types of players you need on your personal team to ensure you deliver sustainable peak performance all year long. | Identify the often overlooked crucial mindset cornerstone that determines how you show up as a leader in terms of behavior and belief. | Jeff Koziatek | Personal Development |
| *Choo-choo! All Aboard the AI Express! | Are you curious about the potential of AI tools such as ChatGPT and Google Gemini in education, but unsure where to start? This interactive session will provide you with a clear understanding of the capabilities and limitations of generative AI tools. We will also explore its potential applications in various educational settings and equip you with the skills to leverage this technology effectively. (Note: You will want to be able to access ChatGPT 3.5 or Google Gemini on your device.) | Articulate a clear understanding of common generative AI tools and their capabilities. | Express, in critical discussions, the ethical considerations of using AI in education. | Explore diverse applications of generative AI in various educational settings. | Tammy Hasheider | Information Technology |

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| *Complying with Title IX | In this session, we will discuss the Title IX regulations and provide guidance on the Title IX investigation process, including hearings and appeals, and compliance by schools regarding sports and school-sponsored activities. We will also evaluate the future of Title IX as the federal government reviews it once more. | Discover insight on the current Title IX regulations. | Explain the complexity of a Title IX investigation at the school level. | Discuss the future of Title IX. | Alexandra Sievers | Business Law |
| *DESE - Federal Relief Programs Update | In this session, we will discuss the Title IX regulations and provide guidance on the Title IX investigation process, including hearings and appeals, and compliance by schools regarding sports and school-sponsored activities. We will also evaluate the future of Title IX as the federal government reviews it once more. | Participants will be able to carry out steps for the upcoming ESSER data corrections. | Participants will be able to demonstrate what's needed for upcoming program monitoring efforts. | Participants will be able to utilize shared information and resources while developing their local FY25 budgets. | Kristin Milligan | Accounting (Governmental) |
| *DESE School Finance - Transportation Updates & Reporting | Get the latest update on current financial and data reporting issues affecting Transportation including eligible and ineligible ridership, eligible and ineligible miles, allowable and non-allowable costs, the calculation's efficiency factor, and how these data components are used in the State Transportation Aid Calculation. Also, learn about the current resources available to the Local Education Authority (LEA) on these issues on the DESE website. | Explain what constitutes transportation data. | Summarize how the data is used in the transportation aid calculation. | Identify and locate various DESE resources. | Tammy Lehmen David Tramel | Accounting (Governmental) |
| *DESE School Finance & Governance Updates | Get the latest updates on current issues affecting School Finance and Governance such as budget projections, allowable transfers, calendar requirements, AMI, data used in payments, residency, and resources available to LEAs on these issues on the DESE website. | Summarize budget projections and allowable transfers. | Explain the various required calendar elements. | Identify and locate various DESE resources. | Tammy Lehmen David Tramel | Accounting (Governmental) |
| *Employee Garnishments | The Who, What, When, Where and Why of Employee Garnishments. Come discuss best practices when it comes to processing employee garnishment and discuss how to avoid legal compliance concerns. | Identify the various types of garnishments and how to respond to them. | Explain how to properly apply the garnishment rules. | Define standard garnishment withholdings. | Jessica Bernard | Business Law |
| *ESEA Finance - What are All of These Fiscal Requirements About? | This session will provide an introduction to the financial aspects of the Elementary and Secondary Education Act (ESEA). The discussion will cover the fiscal requirements of ESEA, including the 9/30 Report, Supplement Not Supplant, Maintenance of Effort, Comparability, the allocation process, and general federal guidance. | Explain and define the various ESEA fiscal requirements. | Identify the factors that affect the amount of Title funds that a local educational agency (LEA) receives. | Verbalize general federal requirements. | Kim Oligschlaeger | Accounting (Governmental) |
| *Excel and Advance Formulas | Discover how PivotTables, VLOOKUP, and Charts can make tasks easier and how they can be useful in analyzing data. Prerequisite Skills: Participants should have a basic understanding of using Excel including entering text and numbers into a worksheet, performing basic calculations with formulas and functions, formatting cells, and selecting ranges. | Learn how to create, format, and modify PivotTables and perform various summary techniques when displaying data. | Discover how to use VLOOKUP to search for data across individual and multiple worksheets. | Discover how to create and manage Excel charts to transform data into visual elements. | Cara Stassel | Computer Software & Applications |
| *Fair Labor Standards and Blended Overtime | The Department of Labor's rules for calculating overtime and blended rates can be confusing and complicated. This session will explain the FLSA rules regarding record keeping and overtime. It will also show you various methods for calculating blended rates and different options you might consider when processing payroll. | Learn the Fair Labor Standards for record keeping, definition of "hours worked", and calculating overtime. | Determine when blended rates are required. | Explain different methods for calculating blended rates and discuss alternatives to using blended rates. | Jeffrey Orr | Business Law |
| *FMLA: Leaves and Accommodations | If your district has 50 employees or more, your employees are entitled to the benefits and protections of the Family and Medical Leave Act. But this law is complicated and sometimes tricky to apply in the school environment. | Explain when an employee is eligible for FMLA and what happens if they are not. | Determine what employees are entitled to if they are eligible. | Verbalize some helpful advice for applying the FMLA in the school environment. | Susan Goldammer | Business Law |
| *Guide to Signing Contracts and Agreements | In this session, we will cover the basics for ensuring your contracts are legally binding and enforceable. We will discuss the specific requirements of employment contracts and service agreements, review when contracts are necessary or not, and identify common "red flag" contract provisions. | Identify the basic requirements of school district contracts, including Board of Education approval. | Illustrate when a contract is necessary or not. | Identify common "red flag" contract provisions. | Michelle Basi | Business Law |
| *Importance of Understanding Your Cash Flow When Investing District Funds | It is great to keep your funds liquid in a rising interest rate environment, because when rates go up, so do your interest earnings. But, when interest rates are stable or declining, you can maximize your interest income by investing surplus funds in longer-maturity investments. The only way you can safely do that is to understand your cash flow. Knowing when your revenues come in and expenses flow out, allows you to determine when you have excess cash that can be invested and still meet your liquidity needs. This strategy can help deliver extra interest income to your district. | Demonstrate how to utilize historical data to project monthly inflows and outflows of funds. | Identify how to utilize the cash flow to help maximize interest income for your district. | Utilize projected flow of revenues and expenses vs. your actuals as a budget evaluation tool. | Dr. John Jungmann Jason Hoffman Kirk Sampson | Finance |

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| *Leaders and Self Care | Leaders play a crucial role in the overall well-being and success of an organization. Simply put, self-care promotes better leadership as it supports ongoing physical and emotional wellness. | Explore why practicing self-care is essential for maintaining healthy balance and stress levels. | Verbalize how self-care helps to maintain resilience, focus, and positive leadership presence. | Implement strategies that can be implemented in everyday life and work. | Dr. Stephanie Amaya Jessica Bernard | Personal Development |
| *Leadership: Being a Person of Influence | This session will explore the importance and power of being a person of influence. The impact this has on yourself, others, and your department. | Summarize how to become a person of influence. | Explain how to effectively share the power of influence with others. | Describe the knowledge of establishing a culture of influence. | Dr. Steve Shelton | Personal Development |
| *May the Data Be with YOU: Navigating the Third-Party Vendor Galaxy | May the data be with you... even when it's not! Uncover the significance of safeguarding student data and gain essential insights into effectively managing and negotiating student data privacy agreements with vendors. | Interpret the current legal and ethical landscape surrounding student data privacy. | Identify key considerations when evaluating data privacy agreements with third-party vendors. Gain insights from our district's experience in managing data privacy agreements, including successes, challenges, and lessons learned. | Identify resources and tools available to support public schools in navigating student data privacy. | Tammy Hasheider Mary Jo Gruber | Information Technology |
| *Negotiations - Federal Mediation | You will learn how districts negotiate with their union groups. We will share our experience using federal mediation. This will include collective bargaining and interest-based bargaining. | Explain how districts can utilize the federal mediation services to assist in negotiation with their organized employee groups. | Define techniques used when using collective bargaining process. | Specify techniques used when using interest based bargaining processes. | Heather McArthur Patty Bedborough | Business Law |
| *Presenting Business Items to Your Board | In this session, we will talk about what is required when presenting business items to the Board. Also, how to garner trust and support from your board using best practices will be shared. We will look at tools and templates that help explain for understanding and result in informed approval votes. | Explain requirements and rules when requesting board approval of business items. | Demonstrate speaking for understanding on business and finance related contracts/topics. | Summarize your understanding of contract review and recommendations. | Linda Quinley | Communications and Marketing |
| *Purchasing Guidelines for Construction Projects | Construction projects can be daunting tasks, but following the right purchasing process will help start things off on the right foot. This session will examine the different construction delivery methods and the specific purchasing/procurement requirements associated with each. Through this session, attendees will gain a better understanding of the purchasing processes that must be followed for different types of construction methods authorized by Missouri law, and will also receive helpful tips based on real experiences. | Identify the different construction delivery methods authorized for school districts under Missouri law. | Discuss the specific purchasing/procurement processes that must be used for each delivery method. | Identify potential pitfalls in the purchasing process and ways to avoid them. | Emily Omohundro | Finance |
| *Self Insurance - Pros, Cons, and Accounting | Provide an overview of the benefits and limitations of being fully insured or self insured. This will include an overview of when it is time to consider going self insured and the steps necessary in order for your district to change. The session will provide examples of some of the additional benefits and flexibility that districts have when they are self insured. We will also provide an overview of the accounting and reporting for the self insured plans within our annual financial statements. | Describe the benefits and limitations of being fully insured versus self insured. | Verbalize the benefits of being self insured with the increased flexibility of plan design and benefits offered. | Describe the accounting of self insurance and the reporting of the fund in your annual financial statements. | Jeffrey Orr Patty Bedborough | Personnel/Human Resources |
| *Strategies for Achieving a Successful Election | During this session, we will explore brainstorming construction project ideas, setting the tax rate levies, reviewing financing options, preparing ballot language, filing election documents, and assembling a steering committee with the end goal of passing the bond issue. | Restate strategies to prepare for a future bond issue. | Construct a timeline for a bond ballot campaign. | Identify ideas for promoting the bond ballot measure. | Tom Pisarkiewicz Dr. Tracy Bottoms Courtney Wegman | Communications and Marketing |
| *There's No Accounting For That | This course will provide information to help participants determine what is a capital expenditure and why it matters. After identifying something as a capital expenditure, participants will learn how to use the DESE accounting manual to properly account for the capital expenditure. Lastly, we will discuss Electronic Municipal Market Access (EMMA) disclosures and when EMMA needs to be updated in connection with a capital expenditure. | Identify what qualifies as a capital expenditure and why it matters. | Apply the DESE accounting manual properly account for capital expenditures. | Discuss EMMA disclosures necessary after incurring a capital expenditure. | Erick Creach Brent Bell | Accounting |

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| *Transparency Talk: Open Meetings, Public Records and Balancing Confidentiality Issues | This session will set forth the basic legal requirements of the Missouri Sunshine Law relating to Open Meetings and Public Records, and will also address the exceptions to disclosure including the requirements to protect student information under the Family Educational Rights and Privacy Act (FERPA). | Describe basic understanding of the legal requirements of the Missouri Sunshine Law. | Discuss some of the situations in which information may be closed, and the public policy reasons behind these exceptions, including student and employee records. | Illustrate some best practices in balancing confidentiality with transparency. | Lisa Stump | Business Law |
| *Unconscious Bias in the Hiring Process | Mitigating bias in the hiring process is essential in ensuring that we hire the best candidates for our certified and support staff positions. Hiring the wrong person can lead to morale issues and lead to early employee turnover. Besides possibly leading to legal troubles, left unchecked biases can shape a district and school's cultures and norms. In this session, participants will learn about the most common biases impacting the ability to find and retain right-fit candidates, understand how these biases may interfere with the school/district culture you aim to build, and recognize ways to minimize and mitigate the impact of biases on hiring decisions. | Identify the most common biases impacting the ability to find and retain right-fit candidates. | Understand how these biases may interfere with the school and district culture you aim to build. | Recognize ways to minimize and mitigate their impact on hiring decisions. | Dr. Amy Dillon | Personnel/Human Resources |
| *What Your Board Needs to Know About the Budget | As a school business official, you are the individual designated to educate your school board regarding district finances. Understanding what is important to communicate to your school board to meet district, state, and federal requirements, and to establish a relationship that is built on trust and transparency will be discussed. Come to this session to learn about the different approaches and methods to effectively communicate the budget to your school board. | Develop an understanding of what information needs to be shared with your school board. | Develop a working knowledge of the different budgeting methods used, and the importance of aligning the budget with your strategic plan. | Explain how to communicate (i.e. speak the same language) when discussing the school budget to your school board. | Paul Northington Patty Bedborough | Communications and Marketing |