

California Association of School Business Officials presents:

# Advanced Budgeting



Register online at  
[www.casbo.org](http://www.casbo.org)

California Association of School Business Officials  
700 N. 10th Street, Suite 100  
Sacramento, CA 95811



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U.S. POSTAGE  
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Sacramento, CA  
Permit No. 576

## Workshop Topics

Introduction to California school budgets

Review of responsibilities, policies and calendars

The budget building pyramid approach

The school budget development process

- In-depth discussion of the process of timing and requirements of budget development

Steps in budget development

- In-depth and detailed instructions on building a budget
- Tips for how to improve the budget development process
- Analyzing prior year budget variances

Revenues

- Revenue limit (growth and decline), NCLB, special education, class-size reduction, interest and more

Expenditures

- Budget allocation
- Staffing patterns for growth and decline
- Controlling contributions to programs

Position control

- Linking data to positions
- Managing an effective position control system

Multi-year forecasting

- FCMAT Budget Explorer Software

Monitoring and reporting on the budget during the fiscal year

Budget documents

- How to use software and processes to improve documents
- FCMAT's User-Friendly Budget Display software – Version 5.2
- ASBO's meritorious budget program
- Tips for helping others understand your annual budget

Budget presentations

- Samples of successful budget presentations
- Development of a theme for budget presentations

*CD will be provided to all participants that will include:*

- *Sample presentations*
- *Sample spreadsheets*
- *Multi-year projections*
- *And much more!*

## Workshop Dates and Locations

**January 10, 2008**

Marriott Hotel  
2200 E. Holt Blvd.  
Ontario, CA 91766  
(909) 975-5000

**January 14, 2008**

Hilton Hotel  
2200 Harvard Street  
Sacramento, CA 95815  
(916) 922-4700

**January 11, 2008**

Radisson Hotel  
2233 Ventura Street  
Fresno, CA 93721  
(559) 268-1000

## Workshop Schedule

8:00 - 9:00 a.m.	Registration, coffee, pastries
9:00 - 12:00 p.m.	Workshop
12:00 - 1:00 p.m.	Lunch
1:00 - 4:30 p.m.	Workshop

## Hotel Information

Upon arrival at the hotel, check the function board for the name of the meeting room assigned to CASBO. Each attendee is required to sign in with the registrar and will receive a registration packet. If pre-registered attendees are not signed in by 9:00 a.m. their seats may be given away to on-site registrants. CASBO does not offer room blocks for this workshop. If you require hotel accommodations, you must contact the hotel directly to make reservations.

## Registration Fees

The registration fee for members of CASBO is **\$205**. Registration for non-members is **\$295**. Late and onsite registration will be accepted on a space available basis only at a fee of **\$255** for members and **\$345** for non-members.

## Save With Institutional Membership!

As an institutional member, all your district or county office of education staff members receive the member rate at all CASBO workshops! If you are not a member, join today and start saving! Call the CASBO office at (916) 447-3783 for an application.

## Cancellation Policy

Cancellation requests must be in writing. You may fax in your cancellation request to (916) 447-8990 or mail it in to the CASBO office. A \$45 fee is charged for cancellations requested 10 business days or more in advance of the workshop date. **No refunds are given for requests received less than 10 business days before the workshop date.** CASBO reserves the right to cancel any workshop with fewer than 25 participants in a single location. If the workshop is canceled by CASBO, enrollees will be given the opportunity to attend the workshop in a different location or obtain a full refund.

# Advanced Budgeting

## Register online today at [www.casbo.org](http://www.casbo.org)

Purchase order numbers now accepted online

*A separate registration form must be completed for each participant*

Name \_\_\_\_\_  
(Please type or print) Last First Initial

Job Title \_\_\_\_\_

District/Company \_\_\_\_\_  
(Please give full name of District)

Address \_\_\_\_\_  
(Confirmation will be sent to this address) Street City State Zip

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_  
(Required)

Workshop Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Workshop Location (City) \_\_\_\_\_

CASBO Member # (If Known) \_\_\_\_\_  Please check here for permanent address change

Have you changed employers within the last 12 months? \_\_\_\_ If yes, where were you employed? \_\_\_\_\_

## Payment Method

*Please circle payment type and check payment amount:*

Check/Credit Card/Purchase Order:  CASBO Member **\$205**  Non-member **\$295**  
 LATE/Onsite Registration **\$255** CASBO Members (Less than 10 business days  
 LATE/Onsite Registration **\$345** Non-member prior to the workshop date)

Check/PO # \_\_\_\_\_

**Please make checks payable to CASBO**

*We accept Visa, Mastercard, Discover and American Express*

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_ / \_\_\_\_

Name on Card \_\_\_\_\_ Cardholder Signature \_\_\_\_\_

## How to Register

**Online:** [www.casbo.org](http://www.casbo.org) – Log in, then click Workshops & Conferences to register online. Online registration now accepts purchase order numbers. Credit card payment or purchase order number is required for online registration.

**By Fax:** (916) 447-8990 or (916) 447-3794 – Complete and fax registration form along with a copy of the purchase order or credit card number. Copies of checks will not be accepted as registration.

**By Mail:** CASBO Professional Development  
700 N. 10th Street, Suite 100  
Sacramento, CA 95811

Complete and mail registration form along with check, credit card number or purchase order.

The **registration deadline** for all workshop locations is **10 business days in advance of the workshop date**. If your registration is received less than 10 business days prior to the workshop date, the late registration fees of **\$255** for members and **\$345** for non-members will apply. Onsite registration will be accepted on a space available basis only, at the fees of **\$255** for members and **\$345** for non-members. Late and onsite registration may result in participants receiving the workshop materials in the mail after the workshop is over. If the workshop at the location you are interested in attending has reached its capacity, you will be given the choice of an alternative location. We recommend you register early.

For registration questions, please contact Kathy Baysinger at [kbaysinger@casbo.org](mailto:kbaysinger@casbo.org), or Janice Kawate at [jkawate@casbo.org](mailto:jkawate@casbo.org).



# Advanced Budgeting

## Workshop Summary

This workshop is designed to add an in-depth perspective to the budget development process. Advanced Budgeting starts where CASBO Budget Basics leaves off by providing the workshop attendee with the “tricks of the trade” to develop an outstanding budget process for any K-12 public school district or county office of education. The emphasis will be on in-depth analysis of concepts and processes used by districts and COEs to develop state-of-the-art budget assumptions and translate their budgets to master plans for their LEAs.

Participants will receive training in how to use FCMAT’s User-Friendly Budget Display and Budget Explorer Software. The workshop manual will provide the participant with excellent tools for budget development that can be used in every step of the budget development process. Samples of award-winning budget documents and presentations will help the attendee develop outstanding documents and presentations.

## Who Should Attend

Superintendents, chief business officials, chief financial officers, instructional leaders, budget development staff, business office staff, and anyone wanting an in-depth knowledge of budgeting in California are all encouraged to attend.

## About the Presenters

**Barbara Dean** is currently the Deputy Administrative Officer for Fiscal Crisis and Management Assistance Team (FCMAT). She specializes in Budget and Finance, has leadership expertise in statewide education associations, and National Advocacy. Ms. Dean has 25 years experience in public education fiscal support and management, working in school districts, a county office of education and, for the past ten years, with FCMAT. Barbara is certified as a Chief Business Official through CASBO. Barbara served as the CASBO State President in 2002-03 and is this year’s chairman of CASBO’s Education Advocacy Foundation. As a CASBO leader, Ms. Dean joins with others in supporting California’s educational needs for staff development and training as well as legislative consideration and action in support of improving student achievement.

**Michael Johnston** is currently the Assistant Superintendent of Business Services for Clovis Unified School District. He has a Bachelor of Science Degree in Business Administration emphasis in Accounting, and a Master of Science Degree in Educational Leadership and Supervision. Michael has 14 years experience in public education finances and management of school districts by working in school districts and county offices of education. Michael is certified as a Chief Business Official through CASBO. Michael currently serves as the Chair for the Education Mandate Cost Network Committee and is an active member of the CASBO Professional Development Committee. Michael also serves as the Executive Director of Central Valley Support Services JPA and continues to be a leader supporting schools.



CASBO workshop hours may be used to meet the CBO certification renewal requirements and the CBO certification application Section IV requirements.