

FBS CONFERENCE – CONCURRENT SESSION TOPICS❖ **SBE/DPI Strategic Plan and Legislative Update: - Lunch General Session**

Geoff Coltrane, Senior Director of Government Affairs and Strategy, NCPDI, will provide an update of the Strategic Plan being developed by NCDPI and the SBE. He will provide some insights into how Finance and Operational areas fit into this plan. Attendees will have the opportunity to provide feedback. If time permits, Mr. Coltrane will provide updates on key legislative items that may not have been covered on the previous day. *This will be our General Session at LUNCH time for all participants.*

CONCURRENT MINI-SESSIONS – Guest Presenters

- ❖ **Career & Technical Education (CTE) Update:** CTE Staff will provide an update on key elements that may impact the CTE programs for your school district. Insights will be shared to help ensure successful programs, including information that will be beneficial to both finance and HR teams.
- ❖ **Charter School Update: Governance/Risk:** To understand the structure, governance, and operational foundations of charter schools and how those need to be considered in fiscal and governance policy approval and implementation. We will discuss Charter school laws and regulations, governance, risk mitigation strategies and other best practices for a successful charter school. Steps for understanding who is doing what, when, where, why, and how. Presented by Nicky Niewinski, Assistant Director Office of Charter Schools and her team.
- ❖ **E-Rate Funding Maximization for Charters and LEAs:** In an era where technology integration is paramount to educational success, the E-Rate program offers vital funding opportunities to support connectivity and infrastructure needs in K-12 schools. This session is designed specifically for financial officers and directors, providing an in-depth understanding of the E-Rate program, its benefits, and the application process. Participants will learn strategies to maximize their school's funding potential, ensure compliance, and effectively manage the financial aspects of E-Rate funding. Presented by Corey McNeill, Ed.D., E-Rate Section Chief and Matthew Mayo, Director of Digital Teaching & Learning and School Connectivity.
- ❖ **Federal Programs Update:** An overview from the Office of Federal Programs related to various grant updates (what we do or don't know from USED), grants administration (CCIP grant application/ budget approval process/transferability/time and effort), available technical assistance (one-on-one, regional, and statewide meetings), and compliance monitoring/data reporting processes. Presented by Melissa Eddy, Assistant Director NCDPI Office of Federal Programs and team.

- ❖ **Navigating the New CMS School-Based Medicaid Claiming Guidelines:** The Centers for Medicare and Medicaid Services (CMS) issued new school-based claiming guidelines in May of 2023. All states (and participating school districts) must comply with the new requirements by July 1, 2026. This session will provide school districts an understanding of the impact to the quarterly Random Moment Time Study (RMTS), such as treatment of the summer quarter, notification and time study response window reduction, clarification of valid and invalid moments, treatment of unpaid time off, and inclusion of all staff paid time. Presented by Reena Kalani, Senior Manager, and Morgan Henrichs, Fairbanks LLC.
- ❖ **Partners in Fraud Prevention:** The U.S. Department of Education (ED), Office of Inspector General (OIG), Investigation Services will provide an overview of ED OIG and discuss sources of allegations, indicators of fraud, examples of fraud schemes, best practices to reduce the risk of fraud, and how to contact ED OIG. There will be a question-and-answer session at the end of the presentation. Presented by Special Agent Nicole Dotson from the Dept of Education/Office of Inspector General.
- ❖ **Preparing for Your Audit - Trends and Compliance:** Discussion with representatives from a leading CPA firm who conduct school audits across the state. This session will provide some insights in preparing for your audits, what to expect from the audit firms and how to navigate this process effectively. They will discuss common findings and other items of interest to the audience. Presented by Paul Carson and Shannon Dennison from ASW.
- ❖ **Student Information System Update – Converting to Infinite Campus:** Update from the SIS Team on key elements to understand if you are converting to the Infinite Campus platform this fall. Key reports and other items to help ensure a successful conversion and ensure your PMR and other required reports are accurate and complete. Presented by Matthew Mayo, Director of Digital Teaching & Learning and School Connectivity. *This will be presented in 2 sessions with one focused on Charter Schools and the other focused on LEAs.*
- ❖ **Transportation Services Update:** Update from NCDPI Transportation Services. The session will focus on fairly new legislative requirements related to funding the need for accurate data collection and how the data is used in calculating allocations for the school districts and those impacts. Presented by Kevin Harrison, Section Chief Office of District Operations, NCDPI and his team.

School Business Staff Supported Sessions:

- ❖ **Avoiding Salary Audits in the New Year (LEAs Only):** Discussion of lessons learned from FY 24-25. Feedback from the team as to how to avoid some of the pitfalls that create salary audits in the first place and how best to navigate the new reporting tools available early in the year. Some insight into how to bridge those discussions with your financial software vendors to create better and more consistent understanding when trying to resolve issues or get the reports you need from your systems. Presented by Crystal Terry and Gina Brown, with SBS, NCDPI.
- ❖ **Budget and Allotments:** Discussion of the FY 25-26 Budget and anticipated allotment cadence for the new year. The team will also discuss any legislation that may impact on the

funding for the new year and the public schools. Presented by Amanda Fratrik, SBS Business Systems Manager and Quatia Snipes, Section Chief Allotments.

- ❖ **Monitoring and Compliance:** Discussion with the Monitoring and Compliance team on some key issues for the new year. What to expect from the monitoring team. Some key compliance elements to pay attention to in the new year. Trends we are seeing and other activities that may impact your districts. Presented by Brittany McLaurin, Section Chief, and team. *This session will be split with one focused on Charter Schools and one focused on LEAs.*
- ❖ **PSU Fiscal Trends and DART TOOLS:** Session to review some of the new reports and tools we are setting up in the SBS DART that will help the PSUs monitor key fiscal trend indicators to help manage the resources for their schools. The team will demonstrate how to use DART to your advantage and get feedback from the group on future reporting and visualization needs for our PSUs. Presented by Jennifer Bennett, Senior Director, SBS and Erick Moore, Rachel Witner, two of our DART developers in SBS.

Cape Hatteras Room – SBS Team Support

- ❖ We've set-up the Cape Hatteras room to provide a space for conference participants to see our new SBS DART, the CASH APP, and talk to the SBS Support Team on all things School Business. Please stop by as the team will be available to walk through the applications, answer questions and let you know what supports they are able to provide to everyone during the school year. We are here to SERVE YOU. Please engage with them as always helps to put names with faces and build those partnerships. We want to know how we can support you!