

FBS CONFERENCE – CONCURRENT SESSION TOPICS❖ **SBE/Superintendent's Update: Maurice "Mo" Green - Lunch General Session**

Mo Green, State Superintendent, NCPDI, will provide an update of the Strategic Plan, as well as insights into how Finance and Operational areas contribute to the success of public education in NC. He will also share how the SBE has advocated for increases to public school funding in regards to the budget passed by the NC General Assembly. *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.
- ❖ **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 Matthew Mayo, Director of Digital Teaching & Learning and School Connectivity, and Sabrina Steigelman, School Connectivity Coordinator.
- ❖ **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 Timothy Dryman, NCDPI Office of Federal Programs.
- ❖ **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.
- ❖ **State Health Plan:** The State Health Plan has several updates pertaining to your 2027 Plan benefits. This session will review those changes. Attendees will also have the opportunity to ask questions about the State Plan following the presentation. Discussion will be led by Tom Friedman, State Health Plan Executive Administrator, from the Office of the State Treasurer.

- ❖ **Transportation Services Update:** The session will focus on transportation funding, the need for accurate data collection, how the data is used in calculating allocations for the school districts and those impacts. It will also talk about how transportation staff support other programs and the need to refund for use of PRC 0056 resources for proper accounting, budget ratings, and future funding. 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):** Come listen to the Salary team present feedback on lessons learned from FY 2025-26. As well as recommendations on to how to avoid incurring salary exceptions in the upcoming 2026-27 Fiscal Year, other insights include helpful reporting tools designed to help you manage your payroll records in LicSal. Attendees will also hear updates on recent changes in State budget as it relates to Salary increases for Certified educators. Facilitated by Gina Brown and the SBS Salary team, with two sessions, both morning and afternoon.
- ❖ **LEA Budget Management to DPI Budget Management:** In this session Alex Modestou (AFS Budget Manager, NCDPI) will share some lessons learned in his transition from a LEA budget manager to budget management at DPI. He will discuss his outsiders' perspective of DPI-supported PSUs to what he learned working in the pink palace. You'll also learn about some of the differences in budgeting processes and procedures at an LEA versus a state agency. If you've never heard of Agency Financial Services (AFS), the second fiddle to School Business Services within FBS, he will explain some of the key roles AFS plays in supporting schools that weren't immediately apparent while in the trenches of a LEA finance office. As an extra enticement, we'll discuss the key role DPI plays in Federal grants management to keep funds flowing to PSUs.
- ❖ **Budget and Allotments:** Discussion of the FY 26-27 Budget, including funding and legislation for the new year. Updates on the anticipated allotment cadence for the new year, including a summary of initial allotments. Presented by Amanda Fratrik, SBS Senior Director and Quatia Snipes, Section Chief Allotments.
- ❖ **Budget and Allotments (Charter Schools):** Discussion of the FY 26-27 Budget, including funding and legislation for the new year. Updates on the anticipated allotment cadence for the new year, including a summary of initial allotments. Discussion of how charter school funds are allotted and PRCs that charter schools use. Presented by Amanda Fratrik, SBS Senior Director and Quatia Snipes, Section Chief Allotments.
- ❖ **Cash / DART Operations:** Take a deeper dive into the key features and monthly reporting tools available in the PSU Cash Application and the Data Analysis and Reporting Tool (DART). This session will provide an overview of core functionality, demonstrate common workflows, and highlight reporting capabilities that help users efficiently manage, analyze, and reconcile financial data. Presented by Cody Edwards and Roxane Bernard, SBS, NCDPI.

- ❖ **Classrooms to Cash Flow - SBS Lessons from a Former Charter CAO:** What happens when a charter school leader steps out of the building and into the world of school finance? In this session, you'll gain a unique, dual-lens perspective from someone who has lived both sides. This session will highlight key insights gained since transitioning to DPI, including common financial pitfalls, overlooked opportunities for alignment between academics and budgeting, and strategies for more effective collaboration between instructional and finance teams. Expect real-world examples, candid reflections, and actionable takeaways you can apply in your own organization. Whether you're a school leader, finance officer, or both at the same time, this session will help you better connect mission to money. Presented by Cody Edwards, with SBS, NCDPI.
- ❖ **DART: Gauging Fiscal Health:** Hands on and interactive session provides an overview of data and reports in DART. We will discuss how DART data can assist with key business needs. We will highlight most-frequently viewed reports. Discussion will also include a look at planned changes for the coming year and how to influence those changes. Presented by the Finance Data and Analytics Team - Michael Ray, Rachel Witner, Laura Bageant, NCDPI.
- ❖ **Monitoring and Compliance:** Get a behind-the-scenes look at how North Carolina Department of Public Instruction's Monitoring and Compliance Team works to support school success. This engaging session will break down how schools are selected for review, highlight trending compliance risks, and walk through real-world findings and corrective actions from the past year. Attendees will also gain key updates on ESSER, recent changes in state and federal regulations, and practical, easy-to-implement strategies to strengthen compliance. Led by Vanessa Sanders and the Monitoring and Compliance team, there will be two sessions tailored to your needs—One focused on Charter Schools and the other focused on LEAs.
- ❖ **Student Accounting:** Can you confidently explain to your board how Student Information System (SIS) reports like the PMR relate to your state funding? Do you know how ADM and the Best 1 of 2 are calculated? In this session for experienced and new Finance Officers, Catherine will detail the relationship between these reports and your bottom line so you can be sure these reports are accurate and complete. Presented by Catherine Mau, with SBS, NCDPI.

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!