



The Catskill Area School Study Council

School Boards Institute

9/28/23 & 9/29/23



Governance and Finance Training

CASSC is excited to offer the required New York State Board of Education member Governance and Finance Training in partnership with the New York State School Boards Association (NYSSBA). This is the fourth year in a row that we are offering the training **regionally** for **both** new and existing BOE members. This program is open to all school board members in New York State.

Who: Both new and existing School Board of Education members

Where: Morris Conference Center, SUNY Oneonta

When: Thursday, September 28th 4:00-8:00 pm. (includes dinner)

Friday, September 29th 8:30 am to 4:00 p.m. (includes breakfast and lunch)

Trainers:

Mr. Jamie McPherson, NYSSBA Deputy Director of Leadership

Mr. Jay Worona, Deputy Executive Director & General Counsel for the New York State School Boards Association.

THURSDAY AGENDA (Day 1)

Date & Time: September 28, 2023, 4:00 p.m. - 8:00 p.m.

Description: Essentials of School Board Governance

Objective: New York State law requires newly elected school board members to receive training on the essentials of school board governance within their first year of service. The New York State School Boards Association is an approved provider for the state mandated training requirements. This workshop will fulfill the governance state mandate. Attendees will receive a certificate of completion to be placed on file with their respective district.

Module I: *School Board Members' Rights, Risks and Responsibilities*

School boards do not operate in a vacuum. Various governing and administrative authorities, including the U.S. Department of Education, Board of Regents and the New York State Education Department, shape the public education agenda. Discover how the various mandates, regulations and guidance established by these authorities impact your school board work.

Module II: *The Importance & Purpose of School Boards*

School boards are faced with a multitude of complex issues and an ever-increasing demand to improve student performance. Learn best practices and how operating procedures can guide the board's work and lead to better performance. Understand your roles and responsibilities and examine the role of policy in governance. Hear how effective policies serve as the core of successful school board leadership by providing the district with long-term direction and compliance with state and federal laws.

FRIDAY AGENDA (Day 2)

Date & Time: September 29, 2023, 8:30 a.m. - 4:00 p.m.

Description: *Fiscal Oversight Fundamentals* (To be delivered in 6 hours, four training modules)

Objective: New York State law requires all newly elected school board members to receive six hours of training on fiscal oversight, accountability, and fiduciary responsibilities within the first year of service. The New York State School Boards Association is an approved provider for the state mandated training requirements. This workshop will fulfill the fiscal oversight state mandate. Attendees will receive a certificate of completion to be placed on file with their respective district.

Module I: *Safeguarding District Resources: Roles and Responsibilities*

Learn your board's financial stewardship role and its fiscal oversight responsibilities. Understand the responsibilities of key financial positions such as the claims auditor and audit committee, and their relationship with the board. Examine the internal and external audit and how to utilize both to ensure proper safeguarding of district resources. Explore the attitudes and conditions conducive to fraud, waste and abuse and how preventative measures such as internal controls, policy and oversight can protect district resources. Learn how to respond if the board or others suspect irregularities.

Module II: *School District Finances – What You Need To Know*

Explore the principal sources of school district funds and major guidelines affecting disposition of funds from each source. Learn why the district prepares a budget, obtains voter approval and understand laws and rules affecting the budget process.

Module III: *How to Monitor School District Financial Operations*

Gain insight into financial management and accounting practices that promote fiscal fitness. Understand the purpose of cash flow projection, executing budget transfers and more. Learn how mismanagement of fund balance and reserve funds can have an impact on your district.

Module IV: *Understanding the Board's Role in Budget Development*

Learn what information your board should receive regularly, in what form and from whom. Identify elements of financial reports that warrant special attention to ensure the district's financial health. Understand key indicators of a financially stressed district.

This is a valuable opportunity to learn about the roles and responsibilities of school BOE members required by New York State and network with peers. Please share this event with your Board of Education. Contact Suzanne Swantak-Furman, Executive Coordinator or Carolyn Leon-Palm, Assistant Coordinator, at CASSC for more information at (607) 436-2533. Please note that we require a minimum of 20 people to host this training. We thank you for your support.



Registration materials are available on our website and will be distributed to superintendents and board clerks of our member districts via email and paper

http://oncbores.org/adult_education/c_a_s_s_c_professional_programs/school_boards_institute



REGISTRATION FORM

CASSC School Boards Institute
Governance & Finance Training
9/28-9/29



Scan and email this form to cpalm@oncbores.org

Registration deadline is Friday, September 8th. THANK YOU!

District (Type) : _____

Participant Name: (Please Type)	Full or Refresher Date	Email address	Allergies or Dietary restrictions: List

Total number of participants registered: _____ Total Cost \$ _____

Registration Fee is fully BOCES aidable through the 622.013 COSER

CASSC/SBI Member (532 and 622.010 CoSer): \$250

CASSC/SBI NON-Member: \$350

One Day Refresher CASSC Member: \$125

One Day Refresher CASSC/SBI Non-member: \$165

* The charge to the school district per person is aided through BOCES 622.013 Co-Ser.

**Please note there will be a minimum of 20 people to host this training.

 Superintendent's Signature

 Date

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