

## **Why the Fiscal Navigation Workshops are Important**

The responsibility for fiscal integrity, oversight, and the safety of school district money rests with the Board of Education, superintendent, and school business official. However, in reality, the superintendent has daily fiduciary oversight as both the representative of the Board of Education and the supervisor of the business administrators and business personnel.

The superintendent must understand what is happening, what is needed, and what can be done, to meet his/her administrative duties and solve the practical problems of control needed to maintain the fiscal health of his/her school district. The superintendent must act knowledgeably so as not to leave the district open to mismanagement and potential fiscal instability.

The reputation of the superintendent and financial health of the school district can ride on good administrative fiscal decisions.

**Approved by the NYS Education Department for 15 CPE Credits to CPAs**

## **Workshop Faculty**

### ***James Mills, Ph.D.***

*Niagara University, Educational Leadership Superintendent of Schools (18 years-retired)*

Jim Mills is a veteran school administrator with 35 years of school administrative experience - 18 years as superintendent of schools in the Silver Creek Schools and Newfane Schools.

Dr. Mills is an educational consultant in strategic long-range planning and school boards negotiations. He is an expert in long-range fiscal management and has developed software applications for trend analysis and budget predictions. Jim Mills is Past President of the New York State Council of School Superintendents.

### ***James M. Merrins, Ed.D.***

#### ***Executive Program Administrator***

Jim Merrins has 36 years of school administrative experience - 16 years as superintendent of schools in Fredonia and Honeoye, New York. He is currently Executive Program Administrator for the *Transition to Superintendency Program* and the *School District Internal Auditing Alliance*. Jim is NYS certified as a school business administrator and worked a business administrator for four years. Dr. Merrins has taught school finance and school law at SUNY colleges.

### **Presenting Organization**

#### **Educational Leadership Institute**

James M. Merrins, Ed.D.

Educational Program Administrator

**SUNY Oswego - School of Education**

Linda Rae Markert, Ed.D., Dean

*An important workshops for Superintendents, Business Officials, and School Administrators wanting to improve their fiscal administration skills.*

## **FISCAL NAVIGATION for SUPERINTENDENTS**

*A foundation for successful administration of school finance responsibilities*

### **Downstate - Spring 2010**

9:00 AM to 2:30 PM each day

### **Lower Hudson New York**

*Three Days*

**Friday, January 29, 2010**

**Thursday, February 25, 2010**

**Friday, March 12, 2010**

Rockland BOCES

65 Parrott Road

West Nyack, New York 10994

(This workshop is BOCES Aidable at this location, direct or through cross contract with the Rockland BOCES.)

**To register, visit  
[www.rocklandboces.org](http://www.rocklandboces.org)  
and log onto My Learning Plan**

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## Workshop Topics

### Session 1

- An overview of the fiscal leadership of a school district
- Fiscal responsibilities, duties and attitudes of the superintendent of schools
- Superintendent relations with school and community business officials
- The superintendent's annual fiscal calendar
- Roles and responsibilities of business officials and business office staff

### Session 2

- Understanding monthly financial reports
- Fund Balances - Reserves
- The collection and use of fiscal data and reports
- Fiscal stability and control

### Session 3

- Internal fiscal controls and fraud risk reduction
- Revenue management, and fund balance control and strategy
- Assessment, equalization, and tax rate calculation and projection

## Workshop Materials

Each workshop participant will receive workshop related materials - sample policies, administrative procedures, and guides.

## Continental breakfast and lunch will be provided and are included in the cost

### Cost

The cost of the 3 session series is \$795 for the first participant; and \$695 for the second and subsequent participants from the same school district. The cost for participation in individual sessions is \$300 per session.

NOTE 1: **Superintendent - Business Administrator/Manager teams** are welcome and encouraged.

Note 2: **Assistant or Associate Superintendents and Principals** may want to attend these sessions as part of their growth plan or district succession planning.

NOTE 3: **Business Administrators/Managers** may attend these sessions.

### CPEs

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## Registration Information

Registration for the *Fiscal Navigation for Superintendents* workshops can be completed as follows:

**To register, visit  
[www.rocklandboces.org](http://www.rocklandboces.org)  
and log onto  
My Learning Plan**

Registration confirmation and a location map will be emailed to you.

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Aidable at this location, direct  
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the Rockland BOCES.

### Questions

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