

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 knowledgably 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.

Sponsor

Sponsored by

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*

Upstate - Spring 2010

Four locations
9:00 AM to 2:30 PM each day

Rochester New York

Three Saturdays

**January 23, February 27,
and March 13, 2010**

Gates Chili CSD, District Office
Gates (Rochester area), New York

Syracuse New York

One Thursday and Two Fridays

February 11, March 19 and 26, 2010

SUNY Metro Center
Syracuse, New York

Western New York

One Friday and Two Thursdays

February 12, March 11 and 25, 2010

Erie 2-Chautauqua BOCES
Angola (Buffalo area), New York

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.

Lunch will be provided and is included in the cost

Cost

The cost of the 3 session series is \$700 for the first participant; and \$600 for the second and subsequent participants from the same school district. The cost for participation in individual sessions is \$275 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 in any one of three ways.

1. Complete and submit the *Registration Form* accompanying this brochure or PRINT from the e-mail announcement.
2. Request a *Registration Form* from the Program Administrator at the telephone number 716/672-5473.
4. Print a *Registration Form* from www.SuperintendentOfSchools.com

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

Questions

James M. Merrins, Ed.D.
Executive Program Administrator
Educational Leadership Institute
SUNY Oswego
School of Education
42 Rosalyn Court
Fredonia, New York 14063
(716) 672-5473
FAX (716) 672-5472
jmerrins@cecomet.net
www.SuperintendentOfSchools.com