



IASBO 2019 BUDGET WORKSHOP DAY #1
Primo Banquet & Conference Center
2615 National Ave., Indianapolis 46227

This 4-day workshop is designed for district personnel who are responsible for creating and implementing the district budget, who need to understand how the budget works, who are interested in learning more about the budget process, and veteran business office professionals who want to learn more about the changes due to the HEA1009 and ESSA legislation.

March 5, 2019

- 8:30** **Registration**
- 9:00** **Welcome / Introductions / Orientation**
- 9:30** **Budget Calendar and Budget Assumptions**
Presenter: Eric Rody, *Chief Financial Officer, Lafayette School Corporation*
- 10:15** **Break**
- 10:30** **County and State Agencies – The Players / Circuit Breaker / TIF/Tax Abatement**
Presenter: Marvin Ward, *MTW Consulting, Inc.*
- 11:45** **Lunch**
- 12:30** **Debt Service Fund / Retirement / Severance Bond Debt Fund / Capital Referendum Debt Fund**
Presenter: Eric Rody
- 2:00** **Debt Fund Simulation**
Presenter: Eric Rody
- 3:00** **Legislative Update**
Presenter: Denny Costerison, *Executive Director, Indiana ASBO*
- 3:45** **Adjourn**



IASBO 2019 BUDGET WORKSHOP DAY #2

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March 6, 2019

- 8:30** **Registration**
- 9:00** **Understanding the Operations & Education Funds
Transfers Needed after 2019**
Presenters: Bob Schultz, *Asst. Superintendent of Business Affairs, Marion
Community Schools*
 Jud Wolfe, *Asst. Superintendent, Plainfield Community Schools*
- 9:45** **Capital Assets Plan**
Presenter: Kathy Friend, *Chief Financial Officer, Fort Wayne Community Schools*
- 10:15** **Break**
- 10:30** **Capital Assets Plan, cont'd.**
- 11:45** **Lunch**
- 12:30** **Education & Operation Fund Line 1
Transfers Between the Funds**
Presenter: Kathy Friend
- 2:00** **Bus Replacement Plan**
Presenter: Jim Coplen, *Business Manager, MSD of Southwest Allen County*
- 2:30** **Operating Referendum Fund / Rainy Day Fund**
Presenter: Jim Coplen
- 3:00** **Adjourn**



IASBO 2019 BUDGET WORKSHOP DAY #3

**Primo Banquet & Conference Center
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April 30, 2019

- 8:30** **Registration**
- 9:00** **Funding Formula**
Presenter: Melissa Ambre, *Director of School Finance, IN Department of Education*
- 9:45** **Funding Formula Simulation**
Presenter: Melissa Ambre
- 10:30** **Break**
- 10:45** **Current Year Financial Worksheet**
Presenter: Loren Evans, *Director of Business, MSD of Mount Vernon*
- 11:15** **Budget Form 2**
Presenter: Bob Harris, *Business Manager, Brown County Schools*
- 11:45** **Lunch**
- 12:30** **Understanding Budget Form 4-B**
Presenter: Loren Evans
- 2:15** **Budget Forms 3 and 4**
Presenter: Loren Evans
- 3:00** **Legislative Update**
Presenter: Denny Costerison, *Executive Director, Indiana ASBO*
- 3:30** **Adjourn**



IASBO 2019 BUDGET WORKSHOP DAY #4

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May 1, 2019

- 8:30 Registration**
- 9:00 1782 Notice / Cash Flow / Budget Monitoring**
Presenter: Eric Rody, *Chief Financial Officer, Lafayette School Corporation*
- 10:15 Break**
- 10:30 Appeals / Additional Appropriations**
Presenter: Eric Rody
- 11:45 Lunch**
- 12:30 Department of Local Government Finance (DLGF)**
Presenters: Department of Local Government Finance
Gateway and other important information
- 3:00 Adjourn**