



HISTORY OF THE NORTH CAROLINA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

Preface

On May 29, 1975, the General Assembly of North Carolina ratified House Bill 47, "An Act To Be Known As The School Budget And Fiscal Control Act." This act established the annual balanced budget resolution, the uniform budget format and processing, and established for each local school administrative unit the position of a school finance officer. Indeed, even the duties of this position were spelled out in this far-reaching act. For the first time, in all North Carolina local school units there was a designated fiscal manager, a specified management format, and state statutes governing the administration of the fiscal affairs of the school systems. This piece of legislation both recognized and established a need for communication among those appointed School Finance Officers effective July 1, 1976.

Introduction

When the position of School Finance Officer was first established in 1976, there were meetings held across the state and at the State Department of Public Instruction in Raleigh for in-service training on the duties of and the criteria for this position. In 1977, a school for school finance officers was held at the Institute of Government in Chapel Hill, North Carolina. Reams of paper were sent out to the finance departments covering the implementation of the School Budget and Fiscal Control Act. Finance officers attended those training seminars and read all the guidelines and instructions. Some of the original finance officers have since retired; but all who were in finance positions remember the reliance upon one another--the empathy and commiseration--as they became more efficient in the implementation of the statute.

There evolved, quite naturally, a common bond among school business administrators/finance officers. Whether in large units or small, county or city units, finance officers answered to the same policies and procedures in fund accountability and salary administration, and communication with the state department increased significantly. The Controller's Office, which served as the financial services division of the State Board of Education, was the resource for guidance in state and federal fund accounting, and once each year finance officers were brought together in a state-wide meeting to discuss budget allotments, computer programming, state reporting, and all the various and sundry responsibilities and duties requiring both days and nights of work. Finance administrators became friends, associates, and partners in a professional relationship and it was noted that dedication to accuracy and

accountability was their creed, many years before accountability became a buzz word.

Although many were members of professional organizations, such as the North Carolina Association of School Administrators, there was a need for finance officers to come together more often as a separate body on a state-wide basis in order to share with each other in the ever-increasing complexities of change in accounting and reporting procedures.

From this need came the discussion regarding the formation of a statewide association of school finance personnel, and in early 1981 William H. (Bill) Troutman, Finance Officer for Goldsboro City Schools, contacted several school officials to actively pursue this idea. He was also in touch with the Controller's Office of the State Board of Education and was encouraged by Jimmie Wall, Director of Local Educational Agency (LEA) Services. With favorable response, Bill arranged for a meeting to be held in the fall of 1981 at the State Board of Education office in Raleigh. Attending were: Bill Troutman, Assistant Superintendent for Finance, Goldsboro City Schools; Jimmie Wall, LEA Services Director, Controller's Office; Dr. Frank Giles, Assistant Superintendent for Finance, High Point City Schools; Daniel W. Thomas, Finance Officer, Pitt County Schools; Hank Hurd, Finance Officer, Harnett County Schools; Katrina Miller, Finance Officer, Ashe County Schools; Dr. Thomas Batchelor, Superintendent, Monroe City Schools; Dr. James E. Wilson, Superintendent, Burke County Schools; and Jerry Barnes, Finance Officer, Martin County Schools. Bill Troutman and Jimmie Wall then conferred with Dr. A. Craig Phillips, State Superintendent of Public Instruction, who gave his endorsement and pledged his support to these efforts.

The first official organizational meeting was held in High Point during the spring of 1982. Those attending agreed to focus regionally by presenting the plans for organization to the local school superintendents. During the remaining spring and summer months this process produced approval and support from the superintendents.

From all these efforts, it was determined that there was sincere interest and desire to pursue the organization of an association of finance personnel to work together for professional sharing, growth, and accountability.

History from the Beginning

On October 26, 1982, the first leadership council of the North Carolina Association of School Business Officials (NCASBO) was established and consisted of: Robert L. Troutman, Clinton City; Jerry Barnes, Martin County; Dr. Thomas Batchelor, Monroe City; Hank Hurd, Harnett County; Katrina Miller, Ashe County; Robert Poindexter, Burlington City; Donald Steed, Hoke County; Daniel Thomas, Pitt County; Dr. James

Wilson, Burke County; Dr. Frank Giles, High Point City; Dr. J. D. Corbett, Wilson County; Vaughn Fisher, Buncombe County; William H. Troutman, Goldsboro City; and Jimmie Wall, Controller's Office, State Board of Education.

In the fall of 1982, Jerry Barnes and Daniel Thomas accepted the responsibility for developing the Association's Constitution and Bylaws, which were officially adopted in April 1983. The Constitution listed three objectives for the Association. These were (1) to further professional development of its membership; (2) to promote and to provide leadership for the improvement and advancement of its membership; (3) to promote the improvement and advancement of public education through continuously striving for the acknowledging of the significance of fiscal accountability and integrity by coordinating efforts with the Superintendents' Council of the eight state educational regions and maintaining a close liaison with both the State Department of Public Instruction and the State Controller's Office. Classes of membership were: Active (Voting) Membership - limited to local and state school business officials and other personnel related to these positions; Retired Membership - any active member retiring from full-time employment as a School Business Official as of June 30, 1982, or thereafter; Emeritus Membership - any active member retiring after five years of association membership; Honorary Membership - membership conveyed by the Executive Council for meritorious service.

The Executive Council was composed of the President, President-Elect, Secretary/Treasurer, and a member from each of the eight State Educational Regions. Officers were to be elected by the voting members attending the annual conference; regional representatives were to be appointed from each of the eight regions. Standing committees consisted of: Audit, Resolutions, Nominating, Membership, Necrology, Ethics, Constitution and Bylaws, and Professional Growth.

To promote the membership's professional development, the NCASBO Council sponsored in January 1983, the first Annual Conference which was held at the Sheraton Crabtree in Raleigh. Even though inclement weather prevailed, there were approximately 125 finance personnel in attendance. Bill Troutman of Goldsboro City Schools was officially elected as the first president of the association. Bill served two consecutive years (1982-83 and 1983-84) as the NCASBO President.

Application was made to the Secretary of State for the organization legally to begin its existence. Articles of Incorporation dated December 12, 1983, listed as incorporators William H. Troutman and Franklin Giles. Members of the initial Board of Directors were: Vaughn Fisher, Buncombe County; William H. Troutman, Goldsboro City; Thomas Batchelor, Monroe City; Daniel W. Thomas, Pitt County; J. D. Corbett, Wilson County; Hank Hurd, Harnett County; Robert Poindexter, Burlington City; and James E. Wilson,

Burke County.

The 1983-84 year brought new focus to the Executive Council and included more participation by the eight regions, which were allowed two representatives each. Communication and meetings within each region were stressed and representatives were asked to submit to the Council a copy of the minutes of the regional meetings.

In January 1984 the Annual Conference was held again at the Sheraton Crabtree in Raleigh and, once again, there was much snow and ice--the conference was unofficially declared "The Snow Conference." There were approximately 225 members attending, and the 1984-85 officers were elected with Dr. Thomas Batchelor, Monroe City, as President.

William H. Troutman, the first association president (1982-83 and 1983-84), was recognized in the Minutes of the Executive Council on February 5, 1984, with appreciation expressed for his efforts in the establishment of NCASBO as a viable organization.

The establishment of and participation in NCASBO provided evidence that finance officers were beginning to see themselves as members of a recognized statewide organization with a common purpose that reached beyond the local and regional focus of the past.

In 1984 the recently appointed State Controller, James Barber, realized the need for better communication between finance officers and his office. He established a Finance Forum composed of the NCASBO Executive Council to serve as a vehicle of communication between the Controller's Office and the finance officers. The first Forum meeting was held in March of that year.

Further establishing the organization was its tax-exempt status as a non-profit organization. The Association received a letter dated March 12, 1984, exempting the organization from State Internal Revenue Code and Franchise Tax and Income Tax status; and as of June 13, 1984, the Federal Income Tax exemption was effective.

During 1984-85 the Council, under the leadership of Dr. Thomas Batchelor, President, further defined the functions of the association committees and discussed meaningful ways to expand upon the foundation and provide greater visibility for the Association. Since the Association's stance was to be politically involved rather than politically active, affiliation with other organizations was discussed and priorities of other professional educational groups were evaluated for complementary goals.

It was found that the North Carolina Alliance for Public Education was created out of concern on the part of its member organizations for the future and strength of public education in North Carolina with an objective to determine common concerns of member groups in educational issues and interests and jointly promote their achievement. The Council voted to join the Alliance and it was decided that the Immediate Past President of NCASBO would serve as the liaison to the Alliance. Thus, NCASBO joined the following as members of the Alliance for Public Education: School Boards Association, School Food Service Association, School Psychology Association, School Public Relations Association, Personnel Administrators, Professional Educators, Association of School Administrators, Association for Supervision and Curriculum Development, Congress of Parents and Teachers, Rural Education Institute, Association of Educational Office Personnel, Public School Maintenance Association, Public School Pupil Transportation Association.

Early in 1985 the Professional Growth Committee, chaired by Harvey Gay of Durham County Schools, surveyed the membership concerning in-service training opportunities and then scheduled a meeting of representatives from NCASBO, the Controller's office, and the Institute of Government along with UNC-Charlotte officials to discuss a program of course work to upgrade the School Finance Officer's position by providing additional skills and training.

A calendar scheduling quarterly meetings of the Executive Council was established, and the Annual Conference was held January 27-30, 1985, in Winston-Salem at the Winston Plaza Hotel. Again, there was deep snow!

On June 18, 1985, the Association adopted a resolution to be forwarded to the Association of School Business Officials International (ASBO) requesting affiliation. The affiliation was approved July 31, 1985.

In 1985-86 Robert Poindexter, Finance Officer, Burlington City Schools, led the Association as its president. He and Jimmie Wall, along with Harvey Gay, Professional Growth Chairman, attended a second meeting with UNC-Charlotte officials regarding that institution's potential involvement in establishing a course of study for School Finance Officers. Responding to the request from the State Board of Education and the Controller's Office, the 1985 General Assembly appropriated funds to use for school finance officer staff development and to be administered by the State Controller's Office.

In September 1985, four institutions responded to the Controller's RFP (Request for Proposal) for the School Finance Officer Staff Development Program. Oral presentations were made to the Controller's Office and NCASBO members by East

Carolina University, Appalachian State University, the Institute of Government in conjunction with the Department of Community Colleges, and the University of North Carolina at Charlotte. NCASBO was provided the opportunity for input into the decision-making process. UNC-Charlotte was awarded the contract, and late in the year Jimmie Wall distributed draft copies of documents outlining the standards and curriculum for the program.

The 1986 conference was held January 27-29 in Greensboro at the Holiday Inn Four Seasons in the midst of an ice storm. The conference focused on the program developed by UNC-Charlotte and provided the membership with an orientation session as well as workshops drawn from the proposed specialized courses. The membership approved a resolution supporting the proposal by the Controller's Office for the Professional Certification Program for North Carolina School Finance Officers and for the proposal for certification to be sent to the North Carolina General Assembly and the State Board of Education for approval. Thus the School Finance Officer Staff Development Program became the Professional Certification Program for North Carolina School Finance Officers.

During the 1986 conference the Constitution and Bylaws were amended to add the office of Vice President to the Executive Council and to add a non-voting membership classification entitled Associate Member.

Elected at the Annual Conference in January 1986, Dr. J. D. Corbett, Assistant Superintendent, Wilson County Schools, served as NCASBO President during 1986-87. Communication of state and regional activities was an emphasis, and Kerry Crutchfield, Finance Officer, Forsyth County Schools, was charged with the responsibility of providing a logo design, association stationery, and a brochure containing pertinent information about the organization and its legislative platform for distribution at the 1987 conference. The North Carolina state outline, bearing the initials NC and with the ASBO International symbol, was approved as the association logo on December 9, 1986. A brochure and stationery in white with blue lettering and logo were also approved.

President Corbett had been serving as North Carolina's representative on the Board of Directors of the Southeastern Association of School Business Officials (SASBO), an organization composed of eleven southeastern states. His term of office expired in June 1986 and he asked the Council to consider the selection of a replacement. Jimmie Wall, the liaison between the Controller's Office and NCASBO, became that representative.

There was a high rate of participation in the Certification Program for Finance Officers, and it was becoming a model for other states. Jimmie Wall and others from the State

Department and UNC-Charlotte were asked to give formal presentations at the annual meeting of SASBO.

The Annual Conference held at Holiday Inn Four Seasons, January 26-28, 1987, included course offerings under the Certification Program and was well attended. The decision was made to change the date for the conference in succeeding years to the month of February to accommodate the many financial deadlines as well as to, hopefully, escape the winter storms.

The Uniform Education Reporting System (UERS) was introduced to finance personnel by the State Board of Education. This system would allow for even greater uniformity across the state, but would require the purchase of new computer hardware and software and the training of staff. Much time and energy were expended over the next few years in determining the hardware, software, and plan for implementation of this far-reaching system.

In 1987-88, under the leadership of President Harvey Gay, Finance Officer of Durham County Schools, the NCASBO Code of Ethics was developed and presented to the Executive Council by Rudi Fallon, Finance Officer, Transylvania County Schools. Also approved by the Council was a Legislative Platform for 1987-88 to be submitted to the General Assembly which included the following: (1) Full state funding of the position of finance officer in every local school administrative unit, (2) establishment of the School Business Administrator certification of the finance officer as a certified position, (3) establishment of the present salary schedule for finance officers as the minimum pay level, and (4) inclusion of NCASBO representation on current and future legislative and Board of Education study commissions charged with making financial recommendations affecting public education in North Carolina.

The Executive Council approved the design for a NCASBO pin, using the North Carolina State outline and the logo. Authorization was given for purchase of the pins to be made available to the members.

The Council approved and invitations were sent to and accepted by the President of SASBO and a Director of ASBO to attend the Annual Conference held in Greensboro at the Holiday Inn Four Seasons on February 8-10, 1988. At that meeting and for the first time, the regions presented mini-session workshops. At the conference the membership approved the Code of Ethics, the Legislative Platform, and amendments to the Constitution and Bylaws to establish a new category of membership titled Lifetime Membership, with a one-time dues of \$100, and to progressively increase active membership dues (currently \$5 annually) by \$5 per year for the next four years resulting in annual dues of \$25 beginning in 1991-92.

Having previously established that the President-Elect of NCASBO would serve as the Conference Coordinator each year, the Association experienced a couple of "firsts" in 1988. Lyn Hensley, Finance Officer of Yancey County Schools, then President-Elect, became the first female to occupy the coordinator's position. It was noted that this was also the first time in the history of the Annual Conference that the participants were blessed with sunshine and warm temperatures. It was consequently lightheartedly agreed upon that Mother Nature was much more responsive to the touch of a female coordinator.

During the 1988-89 year, under the leadership of President Lyn Hensley, a volunteer group of Council members was established to attend the meetings of the Business Committee of the State Board of Education and the Governmental Operations Committee each month. It was decided that this practice should be continued each year as a means of communication of important information between these groups and the membership. Efforts were also made to communicate specific operational questions and comments from local unit personnel to Controller's Office personnel through the Finance Forum setting.

A committee was charged with providing a history of the association with Carolyn Kirby, Finance Officer of Lumberton City Schools, and Betty Peavy, Finance Officer of Red Springs City Schools, accepting this responsibility. The first association history was presented to the Executive Council in February 1989.

At the Annual Conference held at the Sheraton Crabtree in Raleigh on February 6-8, 1989, the 1988-89 Legislative Platform was presented and approved. NCASBO supported the platform package of the North Carolina Alliance for Public Education with the addition of the financial and non-financial items in the 1987-88 platform. Also approved was a resolution recommending improvement of the financial management of the public schools by acceptable flexibility and accountability of funds allocated, better communication between program personnel and fiscal personnel, and the organization of a formal computer users group to facilitate computer software enhancements and modifications. Membership in the group was to consist of finance officers, superintendents, and other school business officials. Meetings were to be held quarterly. During the conference a Legislative Breakfast was held to express appreciation to legislators and to promote the NCASBO legislative platform. A large number of legislators attended.

Approved changes to the Constitution and Bylaws were (1) Life Membership fee shall be paid at ten (10) times the rate of regular membership fee; (2) each of the eight educational regions shall elect/appoint a representative for a two-year term; (3) the Nominating Committee will, at the annual meeting, present one or more names in

nomination for the offices of the President-Elect, Vice President, and (in even years) Secretary/Treasurer.

Jimmie Wall, Liaison with the Controller's Office, was recognized for his untiring efforts on behalf of NCASBO and was honored with a lifetime membership.

The annual SASBO Conference was held in North Carolina at the Grove Park Inn, Asheville, April 24-28, 1989, with high participation of NCASBO members in the coordinating efforts.

With the retirement of Dr. Craig Phillips, a new State Superintendent, Bob Etheridge, was elected to office effective January 1989. By the summer of 1989 a reorganization of the State Department of Public Instruction was underway with the establishment of a Deputy Superintendent and Assistant Superintendents of various divisions. Mr. James Barber, formerly the State Controller, became the Assistant Superintendent for Financial Services. There was discussion concerning the need to replace the Controller's Summer Conference with some other type of informational session.

The Fiscal Year 1989-90 will always be the year of UERS (Uniform Education Reporting System) implementation, the year of all-night payrolls and 70-hour workweeks consuming the time and energy of school business personnel. NCASBO President Kerry Crutchfield, Assistant Superintendent for Finance, Winston-Salem/Forsyth County Schools, emphasized more active involvement by committees and finance officers, with regional activities strengthened and supported by the sharing of knowledge and information with open communication.

The need to continue the Finance Forum was voiced by both NCASBO and Mr. Barber, with possible meetings planned in conjunction with the State Board of Education business meeting. Mr. Barber's staff was committed to attending NCASBO's regional meetings upon request.

President Crutchfield established a Strategic Planning Committee to be chaired by the President-Elect with Past Presidents serving as committee members. This committee was designed to use the talents and experiences of the past presidents in evaluating the Association's activities in the preceding year and assisting in the annual planning of future efforts and emphasis.

A Special Projects Committee was also established and charged with the production of a NCASBO newsletter to be disseminated to the membership. Debra Dixon-Doss, Finance Officer of Burlington City Schools, accepted the responsibility of editing and publishing the newsletter.

The Council approved a budget for the 1989-90 newsletter publication and established a contest to solicit names for the newsletter. The member submitting the name selected for the quarterly newsletter would receive an award of \$50. The name selected at the September 26, 1989, Council meeting was The NCASBO Advisor along with its logo, Informed-Involved-Prepared. Winners of the award were Jeanette Hannah of Winston-Salem/Forsyth and Yvonne Williams of Bertie County.

The 1990 conference was held in Greensboro at the Holiday Inn Four Seasons on February 14-15, with the staff development courses provided by UNC-Charlotte on February 12-13. Approved changes to the Constitution and Bylaws were (1) delete throughout any reference to the Controller's Office (to be consistent with the reorganization of the State Department of Public Instruction); (2) reword throughout to allow Lifetime Members to vote and hold office; (3) segregate duties of the office of Secretary/Treasurer; (4) allow President to appoint committee chairmen each year.

The 1990-91 association year was led by President Katrina Miller, Finance Officer, Ashe County Schools, with priorities of professional growth, benefits for and recognition of members, and a strong working relationship and good communication with the State Department of Public Instruction.

A committee was established to prepare a budget for 1990-91 and make recommendations to the council concerning future needs. The Council authorized the Special Projects Committee to purchase a North Carolina Capital Guide for all members for use in communicating with members of the General Assembly. The Association newsletter was expanded and reformatted, and the Council approved the addition of advertising by vendors.

Lyn Hensley, Past President, was appointed to chair a Policy and Procedures Committee to develop and prepare a Procedures Manual for association members. A comprehensive Administrative Procedures Manual, which summarized the purposes, activities and policies of NCASBO, was completed and accepted by the Council at its December 11, 1990, meeting. The manuals were distributed to all members attending the 1991 conference.

Held at the Raleigh Radisson Plaza, the 1991 Winter Conference had as its theme NCASBO - Improving Education in the 90's, concentrating on the role of finance personnel and their impact on education. A successful breakfast for legislators was held with more than 50 legislators attending. Constitution and Bylaws changes recommended by the Council and approved by the membership were (1) deletion of Necrology as a standing committee; (2) addition of the State Department of Public Instruction as a Region to be represented on the Executive Council (NCASBO members

in SDPI were under the general umbrella of Region III); (3) addition of the State Director of SASBO to the Executive Council as an ex-officio, non-voting member; (4) addition of appointment of the State Director of SASBO to the duties of the Executive Council; and (5) the incorporation of other wording changes where necessary.

With the retirement of Jimmie Wall, who had been the liaison with the Controller's Office and the North Carolina State Director of SASBO, the Executive Council voted to recommend Tim Amos, Assistant Superintendent for Finance, Asheville City Schools, to fill the unexpired two-year term as SASBO Director. Dr. Ben Matthews, Education Consultant with DPI, was appointed by Mr. Barber as the liaison between NCASBO and the State Department of Public Instruction earlier in the year.

In May 1991 the Council approved budgetary guidelines to be included in the Administrative Procedures Manual concerning certain expenses (such as printing, postage, and supplies) necessary for the operation of the Executive Council. The Professional Growth Committee reviewed plans for developing videotape training programs, and the Council discussed the need to restructure the regions to correspond with the new Technical Assistance Centers structure of the State Department of Public Instruction. Since this would be a major change in the Constitution and Bylaws and would require a vote of the membership, action was delayed to allow time for evaluation of the realignment and its impact.

Under the leadership of President Hank Hurd, Assistant Superintendent for Finance in Harnett County, 1991-92 was a year of growth and expansion in the staff development program and course offerings including the use of outside agencies in addition to UNC-Charlotte. Staff development funds in the amount of \$500 were allocated through the NCASBO budget to each of the individual regions, allowing each region to plan staff development based on its unique needs. During 1991-92 the Council approved the purchase of a \$30,000 blanket bond coverage for all NCASBO officers and general liability coverage for the association.

The first annual NCASBO Scholarship was awarded to a member who exhibited outstanding leadership qualities. The 1991-92 scholarship was given in memory of John Bengel, a former finance officer from Rocky Mount City Schools and an active member of NCASBO, and was awarded at the annual conference in February 1992 to Karen Leys, Finance Officer, Alleghany County Schools.

A survey of the nine existing regions was made to determine the desire of the membership concerning the change from the existing nine regions to the Technical Assistance Center (TAC) structure. Six of the regions were in favor of the TAC structure,

two were not in favor, and DPI abstained. The Council then approved the reorganization of the regions according to the TAC structure plus DPI, with two voting members per region, to be presented to the full membership for a vote.

The 1992 Conference and Staff Development were held at the Embassy Suites, Greensboro, February 16-20, with the theme Ten Years of Success - Working Together Toward New Horizons, in celebration of its tenth year of existence. Many special events honoring this occasion highlighted the Annual Conference.

Roy Keith, Finance Officer of New Hanover County Schools and Chairman of the Constitution and Bylaws Committee for several years, presented the recommended changes and received approval of the membership to restructure the NCASBO organization according to the TAC format. The amendment was as follows: The council shall be composed of the president, president-elect, vice president, secretary, treasurer, two members from each of the six technical assistance regions and two members from SDPI. It was effective July 1, 1992.

In 1992-93 Debra Dixon-Doss, Director of Business Operations for Burlington City Schools, led the Association as its president. At the first meeting of the year, President Dixon-Doss brought to the Council from the Strategic Planning Committee the question of the feasibility and possibility of moving the Annual Conference date to May or October and changing the dates for the Association Year. It was decided that representatives would survey their respective regions concerning the change. A report on the consensus of the regional survey left the conference date in February, continuing to include two days of staff development, and changed the Association Year to April 1-March 31. The representatives recommended that the Council mail future surveys to the members.

The Special Projects Committee began the development of a financial operations procedures manual as a resource for all finance offices and a mentor support system for new finance officers. The committee also recommended, and the Council approved, making available a second scholarship for a non-finance officer NCASBO member.

The Executive Council explored the possibility of contracting a Governmental Affairs Consultant for legislative assistance. Following considerable research and study, it was determined that the Association could be better served by using its funds to provide a weekly special legislative edition of the NCASBO Advisor, giving information on and tracking each public education bill filed. During the 1993 Session of the General Assembly a legislative edition would be faxed or mailed to each member finance officer.

Held at the Embassy Suites in Greensboro on February 15-18, 1993, the Annual

Conference and Staff Development had 401 registrants-- the largest number up to this date. The theme of the conference was Dare to Soar Towards New Horizons. The conference was enhanced by the participation of many vendors who displayed products in an exhibit hall and contributed resources that provided certain meals and activities. Association scholarships were awarded to Jan Pugh, Assistant Finance Officer, Alleghany County, and Katrina Miller, Finance Officer, Ashe County.

Approved changes to the Constitution and Bylaws were (1) change the term of office for elected officers from July 1-June 30 to April 1-March 31, effective April 1, 1993; (2) establish a Conference Committee as an additional standing committee. Approval was given to the following 1993 Legislative Goals: An allotment in continuing support of the State adopted Uniform Education Reporting System (UERS); early budgetary decisions without losing reliability in projecting revenues; extension of the 1983 Article 40 School Construction 1/2 cent sales tax distribution schedule for an additional ten years (which was enacted by the 1993 General Assembly for a period of five years); exemption of state sales tax on public school purchases of supplies, equipment, vehicles, and construction projects; funding the position of finance officer at 100%.

Elected at the Annual Conference in February 1993, David Clifton, Finance Officer, Craven County Schools, served as NCASBO President during 1993-94 with an emphasis on professional preparation. During the year the Special Projects Committee, led by Larry Wood, Finance Officer, Stanley County Schools, developed the first Finance Officer Mentor Program. This 10-hour program was offered at the 1994 Annual Conference for new or relatively new finance officers.

The Executive Council passed a resolution for the affiliation of NCASBO with the North Carolina Association of School Administrators (NCASA) to be effective July 1, 1994. The Council voted to recommend Katrina Miller, Finance Officer, Ashe County Schools, to serve as the North Carolina State Director on the SASBO Board for the three-year term 1993-96.

Held at the Embassy Suites, Greensboro, February 14-17, the 1994 Winter Conference had as its theme Excellence Through NCASBO. The conference was well attended by the members and supported by a large number of vendors. The Membership Chairman reported a high of 339 NCASBO members for 1993-94.

At the conference business meeting, NCASBO honored Dr. Frank Giles, who retired on September 30, 1993, by presenting the 1994 scholarships in his name. Dr. Giles was one of the original founders of NCASBO and served on the first executive board. Dr. Giles awarded the scholarships to Debbie Tilley, Finance Officer, Elkin City Schools, and Phyllis Yates, Administrative Assistant, Ashe County.

In recognition of his contributions to and efforts on behalf of NCASBO, the Association presented a life membership to Dr. Ben Matthews, who had served as liaison between NCASBO and DPI. In August 1993, Dr. Matthews had been promoted to the Director of the Raleigh Technical Assistance Center.

The 1994 Legislative Goals were to recommend to the General Assembly the following: Review of unfunded mandates, fully fund the Basic Education Program, allow school systems to lease-purchase equipment, an allotment for the next generation software and continuing support of the State adopted Uniform Education Reporting System, exemption of state sales tax on public school purchases of supplies, equipment, vehicles, and construction projects.

The 1994-95 Association Year was led by President Brenda Rogers, Finance Officer of Beaufort County Schools (which had been merged with Washington City Schools this year). President Rogers introduced a new format for the association newsletter "Advisor" which continued to be an important communication-information tool.

The Professional Development Committee, chaired by Terry Haas, presented a comprehensive calendar of program offerings for the year. A graduate certificate program for finance officers was explored with staff at UNC-Greensboro.

Past President Kerry Crutchfield and Debra Dixon-Doss were appointed to the North Carolina Association of School Administrators legislative committee studying a central office administrators' salary schedule to be proposed to the General Assembly.

The recommendation to add the Chart of Accounts Committee as a standing committee was approved by the Council and will be submitted for a vote of the membership to change the Constitution and Bylaws.

Another outstanding winter conference was held at the Holiday Inn Four Seasons, Greensboro, February 14-17, 1995 inclusive of two days of staff development. "Meeting the Challenges of the 21st Century" was the conference theme and there was excellent participation by members and vendors.

The 1995 Scholarships were presented in memory of Daniel W. Thomas, Assistant Superintendent/Finance Officer for Pitt County Schools, who died in January 1995. A member of the first Executive Council, Charter and Life member of NCASBO, Dan worked diligently for this association, serving in numerous leadership roles throughout his career. During the conference session Jerry Barnes, NCASBO Treasurer and Finance Officer of Nash County Schools, gave tribute to Dan for his many contributions to the association and to education. A plaque honoring Dan was provided to his family.

The 1995 Scholarships were awarded to Finance Officer Bill Bucher, Rowan-Salisbury Schools, and non-finance officer Donna Pilkington, Johnston County Schools.

Legislative goals for 1995 recommended that the General Assembly support funding for school construction and technology, exemption of local school systems from future mandates unless state funds are provided for compliance, and exemption of state sales tax on public school purchases.

Under the leadership of President Kathy Isenhour, Finance Officer, Hickory City Schools, 1995-96 was a year of growth and expansion in the professional development program. The Professional Growth Committee, chaired by Susan Little, Finance Officer, Lee County Schools, was very active in scheduling opportunities with the Local Government Commission, CompUSA, and Bell Learning Systems. The committee met with Dr. Robert Phay of the Principals' Executive Program, Chapel Hill, and the first resident program for Finance Officers was established to begin in the Fall of 1996. In addition, PEP will be offering three 1 1/2-day seminars during 1996-97. Carol Jones of School Business Services was the liaison with SDPI and provided valuable assistance in the activities of professional development.

The State Department of Public Instruction endured a period of reorganization and downsizing through legislative direction. The financial services area was fortunate to have Jim Barber as the Associate Superintendent for Financial and Personnel Services.

A Budget Utilization and Development (BUD) USER group was formed in the Spring of 1995. Wanda Mitchell, Finance Officer, Surry County, was appointed chairman. The purpose of the user group is to act as an advisor to the SDPI and to give input from a user standpoint regarding the BUD system. At the request of SDPI, the NCASBO president asked for volunteers to serve on the BUD USER group committee. The committee will periodically update the NCASBO Executive Council.

President Isenhour led the Executive Council in establishing the NCASBO Distinguished Service Award and the unanimous choice for the first recipient was Lou Thompson, Director of School Business Services, SDPI. The award was presented to Ms. Thompson at the annual business session at which time the membership voted to name the award the Lou Thompson Distinguished Service Award.

The Executive Council established the Chart of Accounts Committee as a standing Committee. Dr. Robert Tart, Finance Officer, Duplin County, served as chairman.

The 1995-96 Capital Guides (state agency and legislative directory) were distributed to all NCASBO members. Becky Wescott, Finance Officer, Dare County, and Past President

Kerry Crutchfield (1989-90) served on the NCACPA Government Accounting Committee with Kerry as chairman. Past President Brenda Rogers (1994-95) served as the North Carolina Director for SASBO and Past President Katrina Miller (1990-91) served as Vice President of SASBO during 1995-96.

North Carolina Association of School Administrators liaisons for NCASBO were Kathy Isenhour and Ricky Lopes. Kathy and Ricky represented NCASBO at the NCASA monthly board meetings, and Kathy served on the NCASA Legislative Committee.

An outstanding annual conference was held at the Holiday Inn Four Seasons, Greensboro, with 381 conference attendees and approximately 100 vendors. Staff development workshops were offered on February 12-14 prior to the February 15-16 conference. The theme was "Juggling the Challenges." The 1996 scholarship was presented in memory of Dr. Micky Church, former Superintendent of Transylvania County Schools. The non-finance officer scholarship was awarded to Rhonda Davis of Brunswick County Schools.

The total membership for 1995-96 was 353. Legislative goals included full funding of teacher leave policies, funding for school facility and technology needs, and opposition to tuition tax credits and vouchers was expressed.

Led by President Terry Haas, Finance Officer, Kings Mountain City Schools, the 1996-97 Association Year was highly positive and focused on professional development opportunities. The Professional Growth Committee, chaired by Susan Little, Finance Officer, Lee County Schools, met with East Carolina officials to discuss the possibility of the University offering a minor in Public School Administration. A "voucher" system was developed with CompUSA for computer classes at three sites. The Central Office Executive Program 3 (COEP3) and the seminars for finance officers, under the leadership of PEP Director Dr. Robert Phay, proved highly successful. NCASBO's Kerry Crutchfield, Winston-Salem/Forsyth Finance Director, and Beth McCraw, Alexander County Finance Officer, were recognized by the COEP3 for their outstanding academic achievement. Kerry also received the distinguished Jack McCall Award for his contribution to the program. Again this year, the NCASBO budget included funds for staff development at the regional level. Terry Haas was chosen by SDPI as liaison for staff development.

The Chart of Accounts Committee, chaired by Dr. Robert Tart, worked diligently and had valuable input into the recommendations by NCASBO for revisions in chart of account codes.

A committee was appointed to develop a proposal for realignment of the state regions

A chart of a proposed reorganization is to be presented to the membership-at-large.

The 1997-98 Capital Guides were distributed to all NCASBO members. North Carolina Association of School Administrators (NCASA) liaisons for NCASBO were Terry Haas and Ricky Lopes who represented NCASBO at the NCASA monthly board meetings. Terry served on the NCASA Professional Development Committee.

Brenda Rogers was elected to serve as the North Carolina Director on the Southeastern Association of School Business Officials (SASBO) Board and Katrina Miller served as President-Elect for SASBO 1996-97. The SASBO Annual Conference was held at the Holiday Inn Four Seasons, Greensboro, April 23-26, 1997. NCASBO members participated and contributed greatly to this highly successful conference.

The NCASBO Conference was held at the Sheraton Imperial, Research Triangle Park, February 12-13 with outstanding workshops offered on February 10-11. With the theme Preparing for High Tech Leadership, the conference garnered over 400 in attendance and more than 45 vendors displayed their products and services.

The NCASBO Annual Scholarships were presented to Finance Officer Brenda Rogers, Beaufort County Schools, and non-finance officer Judy A. Freeman, Payroll Assistant, Lincoln County Schools.

Recipient of the Lou Thompson Outstanding Service Award was Katrina V. Miller, Assistant Superintendent, Ashe County Schools. NCASBO President Terry Haas presented a plaque to be on display at SDPI to honor annual recipients of the Lou Thompson Award.

Elected at the Annual Conference in February 1997, Jerry Barnes, Finance Officer for the Nash-Rocky Mount Schools, served as President for the Year 1997-98. During the year several studies were undertaken to determine better ways to serve the membership including region realignment, region staff development, a conference coordinator, and input into the pending chart of accounts changes. The CPA firm Holden, Moss, Knot & Taylor was employed to do an audit of the financial records and to file the necessary tax returns for the association.

The Chart of Accounts Committee, chaired by Dr. Robert Tart, Duplin County Schools, along with DPI personnel, expended much time and energy on the recommended changes in the chart of accounts for the upcoming year. The final draft included expanding the PRC to three digits effective July 1, 1999, the first significant change in the account structure since its inception.

The Professional Growth Committee, chaired by Finance Officers Lyn Hensley, Yancey County, and Kathy Isenhour, Hickory City, provided comprehensive opportunities for staff development through Bell Learning, Ben Bissell, COMP USA, and the Mentoring program led by Becky Church, Cleveland County, and Karen Rogerson, Martin County. The Principals Executive Program again offered excellent seminars for finance personnel.

Serving on affiliate NCASA (North Carolina Association of School Administrators) Board during 1997-98 were NCASBO President Jerry Barnes and President Elect Ricky Lopes as NCASA Vice President. Their emphasis was placed on increased membership and better communication. A legislative conference was held to inform members on important related issues and a Troops Committee was established to communicate legislative actions and concerns throughout the local units.

Serving as President of SASBO 1997-98 was Katrina Miller, Assistant Superintendent, Ashe County Schools, and as SASBO Director from North Carolina Brenda Rogers, Finance Officer, Beaufort County Schools. Debra Dixon-Doss, Associate Superintendent, Wake County Schools, was the SASBO Executive Director. A large number of NCASBO members attended the SASBO Annual Conference held in Charleston, West Virginia, April 29-May 2, 1998. The theme was Sealing the SASBO Pact.

Another outstanding NCASBO winter conference was held at the Holiday Inn Four Seasons, Greensboro, February 9-13, 1998, inclusive of two days of staff development. Succeeding in a Changing Environment was the conference theme and there was excellent participation by members and vendors.

The Lou Thompson Distinguished Service Award was presented to William H. Troutman, Associate Superintendent, Wayne County Schools, the first NCASBO President and the individual credited for organizing the association in the early 80's. The non-finance officer recipient of the 1998 Scholarship was Laurie Modlin, Internal Auditor, Beaufort County Schools.

Lou Thompson, Director of School Business Services, was honored at a special evening function at the annual conference. Throughout the years Lou worked with and for finance personnel and was an active participant in NCASBO. Her retirement was effective April 1, 1998.

The State Treasurer's Award was presented to Harnett County Schools, Hank Hurd, Assistant Superintendent, for a Fixed Asset Accounting System. Honorable mention was presented to Rowan-Salisbury Schools, Bill Bucher, Finance Officer, for a payroll system.

Gene Miller, Chairman, presented the following changes to the Constitution and Bylaws which were approved by the membership: (1) Article IV Officers Section 6 was amended to read The Treasurer shall be elected to serve for two years; (2) The NCASBO Regions are realigned to conform with the original eight regions.

The 1998-99 Association Year was led by President Ricky Lopes, Associate Superintendent, Cumberland County Schools. Other officers were President Elect Mary Parker, Business Manager, Buncombe County Schools; Vice President Robert Tart, Associate Superintendent, Duplin County; Treasurer Susan Little, Finance Officer, Lee County Schools; and Secretary Debbie Tilley, Finance Officer, Elkin City.

Emphasis was placed on professional development opportunities with the Professional Growth Committee co-chaired by Finance Officers Kathy Isenhour, Hickory City, and Lyn Hensley, Yancey County. During the year the Institute of Government conducted a workshop on Accounting for the North Carolina Public Schools, and seminars were continued with the PEP (Principal's Executive Program). Pre-conference workshops included Bell Learning Systems, Bobbie Lawrie, and sessions held by two governmental agencies - the Department of Revenue and Purchase and Contract - and the Mentoring program led by Finance Officers Becky Church, Cleveland County, and Karen Rogerson, Martin County.

Finance departments across the state were presented new challenges in the area of Charter Schools, the new standardized daily rate of pay for school employees, automation of 202 adjustments, substitute teacher pay increases, re-employment of retired teachers, and Incentive Pay Award payments to list a few.

Jenny Billings, Chief of Reporting and Auditing, SDPI, and long-time active member and supporter of NCASBO, retired November 1, 1998. Jennifer Bennett was appointed to this position.

Ricky Lopes demonstrated his considerable leadership skills as he served as NCASBO President and the President-Elect of the North Carolina Association of School Administrators (NCASA). Kerry Crutchfield, Director of Financial Services, Winston-Salem/Forsyth, was a liaison on the NCASA Board. As an affiliate member NCASBO endorsed the NCASA legislative platform for 1998-99.

The General Assembly passed legislation refunding sales tax to the public schools effective July 1, 1998, and the State Board of Education gave to all school systems some purchasing flexibility.

Brenda Rogers, Finance Officer, Beaufort County, was elected Vice President of the

Southeastern Association of School Business Officials (SASBO). William Troutman, Assistant Superintendent, Wayne County, replaced Brenda as the North Carolina Director on the SASBO Board. Debra Dixon-Doss, Associate Superintendent, Wake County, continued to serve as the SASBO Executive Secretary and Katrina Miller, Associate Superintendent, Ashe County, was Immediate Past President. Several NCASBO members attended the 1999 SASBO Conference held April 14-17 at the Arlington Resort, Hot Springs, Arkansas.

President Lopes presided over the highly successful annual winter conference held at the North Raleigh Hilton on February 11-12, 1999, preceded by professional development courses on February 9-10. There were 443 attending the conference and 94 vendors participating. Mary Parker, along with other members of the Board, had prepared an excellent conference and a comprehensive conference booklet around the theme Bringing Order to Chaos: Confronting the Millennium.

Jenny Billings, recently retired from the State Department of Public Instruction, was presented the Lou Thompson Distinguished Service Award.

Bill Bucher, Finance Officer, Rowan-Salisbury, presented to the membership a proposed website for NCASBO. Along with the Association website, the e-mail communication from SDPI and many resources available on-line brought public school finance to a higher level of technology during the 1998-99 year.

Elected at the annual conference in February 1999, Mary Parker, Chief Financial Officer for Buncombe County Schools, served as NCASBO President for the Year 1999-2000. Other officers were President Elect Robert Tart, Assistant Superintendent, Duplin County; Vice President Susan Little, Finance Officer, Lee County; Secretary Deborah Tilley, Finance Officer, Elkin City; and Treasurer Aaron Beaulieu, Assistant Superintendent, Pitt County.

Immediate Past President Ricky Lopes also served as President of the North Carolina Association of School Administrators (NCASA) for 1999-2000. Kerry Crutchfield, Director Financial Services, Winston-Salem/Forsyth, and Gene Miller, Assistant Superintendent, Rowan-Salisbury, were on the NCASA Board of Directors and were actively involved on committees studying Unfunded Mandates and Central Office Salaries. As an affiliate member, NCASBO endorsed the NCASA 2000 legislative platform.

Under President Parker's leadership, an ad hoc committee created a local PRC structure to more uniformly report local fund expenditures. The local chart created by the committee was made available for voluntary implementation. President Parker also guided the promotion of communication and the dissemination of information through

e-mail. It was the consensus of the board that the newsletter would be used for conference information only. Susan Little was directed to develop and print a new membership brochure. Active members in 1999-2000 totaled 348. The Executive Council endorsed the Public School Forum's Report, Study Group 8: The Things That Matter.

Kerry Crutchfield, along with Iris Ginn, Finance Officer for Lenoir County Schools, agreed to co-chair a committee on Financial Reporting that would incorporate the Chart of Accounts Committee. Lyn Hensley, Finance Officer, Yancey County, and Katrina Miller, Associate Superintendent, Ashe County, were assigned the duty of updating the Constitution and ByLaws.

The Professional Development Committee, chaired by Bill Bucher, Finance Officer, Rowan-Salisbury, provided comprehensive opportunities for staff development through Bell Learning, Mentor Training by NCASBO/Finance Officers, and MSAS Training by SDPI. Bill Bucher was recognized for his expert development of the NCASBO Website, a tremendous asset for NCASBO members.

In July 1999, Jim Barber resigned his position of Associate Superintendent for Financial Services to accept the leadership position of Executive Director of LEARN North Carolina, a program of the University of North Carolina at Chapel Hill School of Education. Mr. Barber had been with the State Department since 1984 and had established a cooperative and supportive relationship with NCASBO and finance departments across the state. He was recognized at a dinner in his honor at the Financial/Personnel Services meeting in July.

In October our fellow-finance officer and friend, Hank Hurd, Assistant Superintendent, Harnett County, and 1991-92 President of NCASBO, was appointed to the position of Associate Superintendent of Financial Services at the State Department of Public Instruction.

In January 2000 we suffered the loss of Philip Price who resigned as Director of School Business Services, SDPI, to accept the position of Budget Analyst with the General Assembly. Jennifer Bennett, who had served us well as Chief of Reporting and Auditing, was moved into the Director's position.

Brenda Rogers, Executive Director Finance and Auxiliary Services in Beaufort County, was elected President of the Southeastern Association of School Business Officials (SASBO) 1999-2000. David Wise, Director of Financial Operations in Rockingham County, was appointed North Carolina Director of SASBO and replaced retiring William Troutman. Debra Dixon-Doss, Associate Superintendent, Wake County, continued to

serve as the SASBO Executive Secretary. A large number of NCASBO members attended the highly successful conference held May 3-7 in Williamsburg, Virginia.

An outstanding NCASBO annual conference was held at the Four Seasons In Greensboro February 8-11, 2000, inclusive of two days of professional development. The conference, with the theme Leadership for the 21st Century was directed by President Elect Robert Tart and had the participation of more than 343 members and vendors. The NCASBO Scholarship for a non-finance officer was presented to Faye Perry from Camden County.

The Lou Thompson Distinguished Service Award was presented to Kerry Crutchfield, Director Financial Services, Winston-Salem/Forsyth, an active leader and a past president of the association.

Dr. Robert Tart, Associate Superintendent, Duplin County Schools, was elected NCASBO President for the 2000-2001 Year. Other officers were: President Elect Susan Little, Finance Officer, Lee County; Vice President Deborah Tilley, Finance Officer, Elkin City; Secretary Bill Bucher, Finance Officer, Rowan-Salisbury; and Treasurer Aaron Beaulieu, Assistant Superintendent, Pitt County.

President Tart's goals for NCASBO included facilitating communication with members, improving attendance at meetings, and contracting administrative assistance for the association. The Executive Council approved changes in committees/committee assignments as follows: Recommend deletion of Ethics Committee; delete Program Committee and assign those responsibilities to the president elect; create the Internet Communications Committee to be responsible for the Web Site, NCASBONet; delete Newsletter Committee and assign those responsibilities to the Internet Communications Committee; assign Strategic Planning Committee responsibilities to the president elect; designate that the members of the Legislative Committee be the sitting NCASBO officers each year. Dr. Tart also directed that an updated Constitution and ByLaws be prepared reflecting all changes approved by the membership. A revised document was prepared by Past Presidents Lyn Hensley and Katrina Miller.

The Executive Council adopted a policy allowing NCASBO to reimburse school units up to \$100 for overnight lodging, meals, and/or other related expenses for council members who attend the Finance Forum and/or NCASBO business meetings. Authorization was also given the purchase of NCASBO lapel pins, and action was taken approving the continuation of the contract for the annual conference to be held at the Sheraton Four Seasons/Greensboro for February 2004 and 2005.

Hank Hurd, State Associate Superintendent, and Jennifer Bennett, Director of School

Business, SDPI, brought to the Finance Forum information on technology issues (NC Wise, E-Procurement, monthly payroll accruals) and new Web features (State Board Policy Manual, Teacher Application System, School Name and Address system, MFR encumbrance data), organization changes, ADM policy/Charter Schools, and other issues pertaining to the LEAs. Andrea Millington, Chief in Compliance and Audit, was designated as the NCASBO Representative from NCDPI. Andrea is to provide NCASBO an updated version of the Finance Officer Certification Manual. A planned newsletter to LEA Finance Officers from Hank Hurd will communicate pertinent information on a regular basis. The continued cooperation between NCASBO and SDPI was affirmed.

Retired NCDPI staff member Jenny Billings agreed to handle the administrative duties for the association on a contractual basis. Past President Terry Haas agreed to work on the development of a Masters Degree program in Public School Finance, and she will be involved in Professional Development issues. Morningstar Mini-Storage in Raleigh accepted the offer to provide NCASBO free storage space in exchange for free advertising on conference materials and the association web site.

Kerry Crutchfield, Chairman of the Chart of Accounts/Financial Reporting Committee, sent to all NCASBO members a survey asking for input on various issues related to the chart of accounts. A Blue Ribbon Panel comprised of representatives of NCDPI, NCASBO, and the Local Government Commission was formed to host a series of meetings to formulate future recommendations.

Vice President Debbie Tilley, Chairman of the Membership Committee, sent a comprehensive survey to all members requesting input on the future direction of the organization.

SASBO Director David Wise, Assistant Superintendent, Rockingham County, reported on the upcoming SASBO Conference the 50th Anniversary of SASBO to be held April 29-May 2, 2001, in Biloxi, MS. Brenda Rogers Mitchell, SASBO Immediate Past President, encouraged NCASBO members to attend. A proposal by David Wise to authorize NCASBO to pay \$8 per NCASBO membership for SASBO membership (without changing the annual dues amount paid by members) will be sent to SASBO and to NCASBO membership for approval.

Upon a recommendation by Bill Bucher, Chairman of the Internet Communications Committee, a policy was adopted which allows only LEAs, charter schools, and NCDPI to send out surveys through the association e-mail list.

Professional development continued to be an emphasis with opportunities offered at the Summer Conference for Finance and Personnel and pre-conference workshops at

the annual conference held in Greensboro on February 13-16, 2001. President Elect and Conference Coordinator Susan Little presented an excellent program of speakers, presenters, and sessions addressing members' needs and interests, supporting the conference theme From Success to Significance. There were 375 members registered and many exhibitors present.

Serving on the NCASA Board of Directors and actively involved in the legislative process were Gene Miller, Assistant Superintendent, Rowan-Salisbury, Kerry Crutchfield, Director Financial Services, Winston-Salem/Forsyth, and Ricky Lopes, Associate Superintendent, Cumberland. As an affiliate member, and with NCASBO input, the NCASA 2001 legislative platform was endorsed.

Scholarship Committee Chairman Frances Hammer, Finance Officer, Perquimans County, presented the NCASBO scholarships to Penny Lewis, Finance Secretary, Ashe County, and Sharon Hales, Finance Officer, Scotland County.

The Lou Thompson Distinguished Service Award was presented to two Past Presidents who have served individually and as a team throughout the years, one shadowing the other. Debra Dixon-Doss and Terry Haas were selected for their long records of outstanding service to the Association and untiring devotion to the betterment of the profession.

Serving as President of NCASBO for the Year 2001-2002 was Susan Little, Finance Officer, Nash-Rocky Mount Schools. Other officers were: President-Elect Debbie Tilley, Finance Officer, Elkin City Schools; Vice President Pam Satterfield, Finance Officer, Richmond County; Secretary Bill Bucher, Finance Officer, Rowan-Salisbury; and Treasurer Sharon Penny, Finance Officer, Whiteville City Schools.

President Little continued the emphasis on professional development opportunities and led in the establishment of an annual retreat for finance officers with the first one held October 24-26 at the Holiday Inn Sunspree in Asheville. Professional workshops, round-table discussions, and a Finance Forum planned with Terry Haas, Finance Officer, Iredell-Statesville Schools and Professional Development Chair, gave those attending an excellent three days of valuable staff development and communication opportunities. Other classes were held in conjunction with NCDPI Finance-Personnel Conference in August and special seminars were offered during the year.

The year presented many concerns for finance personnel across the state. The Chart of Accounts Committee, led by Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth, gave much time and effort to addressing the need for changes in the chart and the effects of the new GASB 34 regulations.

Information Technology Services (ITS) from DPI introduced the web-based Human Resources Management System (HRMS), which will totally replace the existing HRMS package, and there were questions and concern about the impact of cost involved. E-procurement purchasing, when implementation can be accomplished, will include mandatory participation by the school systems and, again, cost for training and personnel were a concern. The State budget crisis resulted in loss of state and, in some instances, local funds. Members of the North Carolina General Assembly heard testimony by Past-President Bob Tart regarding the proposal to exempt local governments from sales taxes, but there was no action taken during the session. On a bright note, the Administrative Medicaid Outreach program began reimbursement to the LEAs during the year.

Bill Bucher, Secretary and Chairman of the Website/E-mail Communications Committee, and technology guru, set up a special e-mail group NCASBOExec for communication between executive council members. The Council approved a plan to contract with an outside firm to begin updating the registration and membership-tracking capabilities of the Association's website.

Gene Miller, Assistant Superintendent, Rowan-Salisbury, resigned as NCASA Liaison due to work responsibilities and Katrina Miller, Associate Superintendent, Ashe County, was named as his replacement. NCASA Director Jan Crotts and Assistant Director Linda Suggs were very effective in working with the General Assembly on behalf of school administrators, NCASA, NCASBO and other affiliates. Kerry Crutchfield and Ricky Lopes served on the NCASA Board of Directors and were actively involved in legislative and other issues.

The Executive Council approved an Affiliation Document re-affirming the commitment of NCASBO to creating synergistic efforts with ASBO International that achieve mutual goals aimed to better serve the profession and to our joint efforts of promoting the profession of school business management. The Council also approved payment of ASBO dues for the NCASBO president.

ASBO International chose North Carolina for the annual conference to be held in Charlotte in the Fall of 2003. Past-President Terry Haas and Debra Dixon-Doss were appointed as co-chairs of a temporary committee to determine NCASBO support needed by ASBO conference organizers.

SASBO Director David Wise, Assistant Superintendent, Rockingham County, reported on the SASBO Conference held April 29-May 2, 2001 in Biloxi, MS. A large number of NCASBO members attended this 50th Anniversary SASBO celebration and professional development conference.

David also reported that SASBO approved membership to NCASBO members at a cost of \$8 per member (full cost is \$10) with the understanding that NCASBO be responsible for distributing SASBO materials and information electronically to our members. Membership as a state organization was approved. With the expiration of the term of office, Ricky Lopes was appointed to replace David Wise as SASBO Director effective 2002-2003. David Wise and Debra Dixon-Doss, Executive Secretary for SASBO, reported on the upcoming SASBO Conference to be held April 23-26 in Memphis, TN.

An amendment to the Minutes of the February 1996 Conference Business Session was approved to add: The presentation of an Honorary Lifetime Membership was made to Lou Thompson, recipient of the NCASBO Distinguished Service Award and for whom the award was subsequently named.

The Annual Conference held in Greensboro February 12-15, 2002, celebrated the 20th anniversary of the founding of NCASBO. President-Elect and Conference Coordinator Debbie Tilley provided the membership with an exciting, comprehensive schedule of activities including workshops and sessions addressing current needs and interests of the members. The theme 20 Years of Excellence was highlighted by a special video with comments from all NCASBO Past Presidents.

President Little presided over a Strategic Breakfast meeting of officers and past presidents with the majority of the past presidents in attendance.

Changes in the Constitution and Bylaws were:

Article V -Executive Council -Section 2 added "For purposes of declaring a quorum only, the president may appoint any active members attending a given meeting as voting members for that particular meeting."

Article XI - Committees - Section 1 The standing committees of the Association shall consist of: (1) Audit Committee, (2) Resolutions Committee, (3) Nominating Committee, (4) Membership Committee, (5) Historical Committee, (6) Constitution and Bylaws Committee, (7) Professional Growth Committee, (8) Conference Committee, and (9) Chart of Accounts/Financial Reporting Committee. Other standing or ad hoc committees may be authorized by the Executive Council. The President will name the committee members and committee chairmen.

Scholarship Committee Chairman Frances Hammer, Finance Officer, Perquimans County, presented the NCASBO scholarship for a non-finance officer to Denise Collins, Assistant Finance Officer, Onslow County Schools.

Our long-time friend and member Lou Thompson made the presentation of the Lou Thompson Distinguished Service Award to the first woman President of NCASBO Lyn Hensley. Through the years Lyn has continued to unselfishly give of her time, wisdom, wit, and warmth to serve the Association.

Under the leadership of Deborah Tilley, Finance Officer, Elkin City Schools, 2002-2003 was a year dedicated to the promotion of professional and membership growth with a focus on communication and input within the regions and an increase in early membership and staff development activities. Other officers were President Elect Pam Satterfield, Finance Officer, Richmond County; Vice President Jeff Hollamon, Finance Officer, Onslow County; Secretary David Lee, Finance Officer, Cleveland County; and Treasurer Sharon Penny, Finance Officer, Bladen County. Jenny Billings served as NCASBO Executive Assistant.

Serious budget concerns were experienced by school districts and finance officers throughout the year as the slow economy resulted in decreased revenue and the possibility of a freeze on state funding. In addition there were increases in the cost of health, property, and other insurance along with the No Child Left Behind (NCLB) legislation and the impending mandated E-procurement purchasing. A statewide meeting was held at Winston-Salem/Forsyth School System for addressing the concerns regarding the E-procurement mandate. President Tilley asked for volunteers to serve on an ad hoc committee to work with and have input in the implementation of the system to the benefit of the LEAs.

In October 2002 Hank Hurd resigned as State Associate Superintendent to accept the position of Associate Superintendent of Administrative Services with the Durham County Schools. The loss for the State Department was offset by the gain for the LEAs as he came back to the public school systems. In November Jennifer Bennett resigned her position as Director of School Business Services to accept a position with Durham County Schools as Executive Director of Finance effective December 1.

In November we welcomed back to the State Department Philip Price, who left his Budget Analyst position with the General Assembly to fill the position of State Associate Superintendent, Financial and Business Services. In March 2003 Paul LeSieur returned to the State Department to fill the position of Director of School Business Services. Philip Price reaffirmed the continuation of the Finance Forum and close relationship with NCASBO.

The Chart of Accounts/Financial Reporting Committee, chaired by Kerry Krutchfield, Finance Director, Winston-Salem/Forsyth Schools, continued its efforts and spent much time making presentations at regional and state meetings recommending changes

to facilitate GASB 34 implementation and to meet reporting requirements for Medicaid reimbursement and NCLB legislation. Recommendations submitted to the State Department received favorable response from Philip Price.

Debra Dixon-Doss and Terry Haas, Past Presidents and Co-chairs of the North Carolina Host Committee for ASBO International, brought to the Council information on the annual ASBO conference to be held in Phoenix, AZ, in October 2002. Many NCASBO members attended the conference and worked at the North Carolina booth promoting the annual conference to be held in Charlotte, NC, October 31-November 4, 2003. The NCASBO Council endorsed and supported Debra Dixon-Doss as a candidate for ASBO Director.

Bill Bucher, Winston-Salem/Forsyth Schools, Chairman of the Website Committee, reported on the successful implementation of the online registration for the annual NCASBO conference. He also expressed concern about deficiencies of the company providing the web site services. President Tilley appointed an ad hoc committee to work with Chairman Bucher on future directions and requirements of the Association website.

The Constitution and Bylaws Committee, consisting of Chairman Lyn Hensley, Kathy Isenhour, Katrina Miller, and Jenny Billings, met several times throughout the year to review and rewrite the guiding document created in 1982. The result of their efforts was a revised document entitled "Bylaws of the North Carolina Association of School Business Officials" to more appropriately serve the needs of the present-day organization. The modified document, approved by the membership at the February 20, 2003 business meeting, was carefully structured using the ASBO International Bylaws as a model while maintaining the spirit and integrity of the original "NCASBO Constitution and Bylaws."

Serving on the NCASA Board of Directors and actively involved in the legislative process were Ricky Lopes, Katrina Miller, and Kerry Crutchfield who also served as President Elect of the association. Serving on the SASBO Board of Directors were Ricky Lopes, NC Director, and David Wise, Assistant Superintendent, Rockingham County, SASBO Vice President.

The annual Fall Retreat for Finance Officers was held at the Hilton in Wilmington September 18-20, 2002. Valuable staff development and communication opportunities were provided under the direction of Terry Haas, Finance Officer, Iredell-Statesville Schools, Chairman of the Professional Development Committee. Other classes were offered at the 2002 SDPI Finance-Personnel Conference and special seminars were offered during the year.

The annual conference including two days of professional development was held February 17-20, 2003, in Greensboro. The theme Weathering Financial Storms was most appropriate. President Elect and Conference Coordinator Pam Satterfield presented an excellent program of speakers, presenters, and job-alike sessions to meet the needs and interests of the members. There were 363 members and 54 vendors registered for the conference. Dr. Ann Miller, Executive Director, brought greetings for ASBO International. She gave an update on the ASBO Conference to be held in Charlotte and reported that ASBO host committee members from North Carolina would have their registration waived if they stayed in the block of rooms reserved by ASBO. Dr. Miller praised North Carolina for the efforts to provide equitable funding to wealthy and high poverty school systems. Ricky Lopes, SASBO Director, and Brantley Thomas, Director from South Carolina, brought greetings and an invitation to attend the SASBO Conference to be held in Savannah, GA, in April 2003.

Scholarship Committee Chairman Frances Hammer, Finance Officer, Perquimans County, presented the NCASBO scholarship to Donna Robbins, Staff Accountant with Caldwell County Schools.

Kerry Crutchfield presented the Lou Thompson Distinguished Service Award to Ricky Lopes. Ricky, a past president, was recognized for his many years of dedicated service to our organization as well as representing us as a SASBO Director and as President of NCASA.

The Year 2003-2004 was led by President Pam Satterfield, Finance Officer, Richmond County Schools, with a commitment to strengthening the scheduled regional meetings, membership, accountability for association activities and budget, and a complete rewrite of the Policies and Procedures Manual for the Executive Council. Other officers serving were President Elect David Lee, Finance Officer, Cleveland County; Vice President Sharon Penny, Finance Officer, Bladen County; Secretary Kathy Johnson, Finance Director, Montgomery County; and Treasurer Jeff Hollamon, Finance Officer, Onslow County. Jenny Billings served as Executive Assistant.

The Membership Committee, chaired by Sharon Penny, recommended and the Executive Council approved a \$5 increase in membership dues for active members to \$30 and non-voting Business Associate membership to \$50 effective FY 2003-04. Membership dues had not increased since 1991. A group membership rate for the State Department of Public Instruction was established at \$600 (20 members x \$30) and Retired Members \$25.

Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth County, served as President of the North Carolina Association of School Administrators 2003-04 and led the

organization in working toward expansion to an umbrella plan to include other groups such as NCASBO. Serving on the Board of Directors were Ricky Lopes and Robert Tart, who was on the Budget and Finance Committee.

The Chart of Accounts/Financial Reporting Committee, chaired by Kerry Crutchfield, continued its work on a new chart of accounts for SDPI approval and projected implementation July 1, 2005.

The Website Committee, chaired by Bill Bucher of Winston-Salem/Forsyth, recommended and the Executive Council approved a contract with Affiniscape as the new website vendor. Five platinum vendors committed \$2,000 each in support of the new website: Wellington Benefits, Colonial Insurance, Surry Insurance, Education Management Systems, and McRae Graphics. Website advertising spots were offered to the five vendors. The Executive Council agreed to limit website sponsors to five vendors each year.

The annual Fall Retreat for Finance Officers was held October 16-17, 2003, in Pinehurst. Professional workshop sessions addressing current needs and interests were provided by Marty Trotter, Finance Officer, Randolph County, Chairman of the Professional Development Committee. Other classes were held in conjunction with the summer NCDPI Finance/Personnel Conference.

ASBO International held its annual conference October 31-November 4 at the Convention Center in Charlotte. A large number of NCASBO members attended and participated in the conference, serving as the Local Host Committee. Although NCASBO Past President Debra Dixon-Doss, candidate to serve as a Director on the ASBO Board, lost by a few votes, history was made with a vote at the meeting to amend the Bylaws to allow all ASBO members to cast a vote without attending the annual meeting. The ASBO Eagle award was presented to NCASBO Past-President Terry Haas and the Pinnacle Award was presented to Ed McBride with the North Carolina School of Math and Science. Recognized for outstanding service in Congress was North Carolina Representative Bob Etheridge, who also served North Carolina as the State Superintendent of Schools from January 1989 until January 1997.

The SASBO annual conference was held in April 2004 in Lafayette, Louisiana, with many NCASBO members attending. David Wise, Assistant Superintendent, Rockingham County, was SASBO President Elect; Ricky Lopes, Associate Superintendent, Cumberland County, North Carolina Director; and Debra Dixon-Doss, Vice President of Business Services, Alamance Community College, Executive Secretary.

The Bylaws/Policy and Procedures Committee, chaired by Lyn Hensley, Finance Officer,

Yancey County Schools, met several times during the year to complete the update and revision of the Procedures Manual. Serving on the committee were Kathy Isenhour, Assistant Superintendent, Hickory City; Executive Assistant Jenny Billings; Katrina Miller, Consultant, Ashe County; and President Pam Satterfield, who was a vital part of the completion of the manual for presentation to the Executive Council by the end of the 2003-04 year. The Procedures Manual is to be a working document, and it is the duty of the vice president to keep the manual updated. Including an order of business will help new officers, and the procedures will hopefully be a great benefit to future boards.

The Executive Council authorized President Satterfield to sign a contract with the Sheraton Four Seasons for the annual NCASBO Conference for the years 2006-2010.

Technical amendments to the Bylaws were approved by the Executive Council and by the membership at the NCASBO Business Session on February 12, 2004.

The two days of Professional Development and the annual conference were held at the Sheraton Four Seasons in Greensboro February 9-12, 2004, with the theme Survivor: The Unknown. President Elect and Conference Coordinator David Lee presented an outstanding program of sessions on highly relevant issues of concern and interest to all members. There were 362 attending and 60 vendors participating. Total members for 2003-04 were 377.

The Lou Thompson Distinguished Service Award was presented by Jenny Billings to Dr. Robert Tart, Jr., Associate Superintendent of Business and Finance, Duplin County Schools. Dr. Tart was recognized for his many years of service and contributions as a committee chair, officer, and President of NCASBO.

David Lee, Finance Officer, Cleveland County Schools, served as President 2004-05. He placed his emphasis on active promotion of membership in NCASBO, expansion of professional development activities, participation on committees, conference events and the NCASBO scholarship program. Other officers serving were President-elect Mary Jo Lindquist, Finance Officer, Gaston County; Vice President Marty Trotter, Finance Director, Moore County; Secretary Robert Ayers, Finance Officer, McDowell County; and Treasurer Jeff Hollamon, Finance Officer, Onslow County. Serving in the position of NCASBO Executive Director was Jenny Billings.

During the year and under President Lee's leadership, the Executive Council approved a plan whereby annually the recipient of the Lou Thompson Distinguished Service Award would also be our nominee for the ASBO International Eagle Award. The Council discussed and endorsed the concept of a Finance officer Academy which is projected to be a two-year process for attendees with emphasis on fundamentals and core courses.

The Council approved a policy on Retention of Records stating that audits, minutes of meetings, and the NCASBO history be retained permanently. All other records will be destroyed after five years. The completed and approved Procedures Manuals were distributed to the members of the Executive Council at the beginning of the year.

The automatic membership in SASBO paid by NCASBO was discontinued effective with year 2005-06. The SASBO newsletter and the ability to join SASBO will be on the NCASBO website.

President Lee reported that Philip Price, Associate Superintendent, Financial and Business Services, SDPI, requested that NCASBO review and update/revise the Finance Officer Certification Manual. He assigned Executive Director Jenny Billings and the Bylaws Committee, chaired by Lyn Hensley, Finance Officer, Yancey County, to work on this endeavor.

Jan Zachary, Assistant Finance Officer, Alleghany County (Finance Officer, Elkin City, effective January 2005), was chairman of the Communications Committee and worked on reviving the newsletter to be sent to the entire membership and superintendents.

The Website Committee Chair Clyde Locklear reported on the benefits of the new website which include membership information and benefits, the member mall, conference and workshop information, on-line registration capability, posting of vacant positions, legislative updates, news, and editorials.

The Chart of Accounts Committee chaired by Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth, and its sub-committees worked on the accounts crosswalk with SDPI. The implementation date of the new chart of accounts is to be determined.

The Professional Development Committee chaired by Marty Trotter provided comprehensive opportunities for staff development during the Finance/Personnel Conference in July and at the annual Fall Retreat for Finance Officers held prior to the NCASA Legislative Conference at the Hilton Riverside in Wilmington, October 25-27, 2004. Participants were involved in an interesting and valuable program giving insight into working with the legislature on budget issues.

Serving on the Board of Directors of NCASA were NCASA Immediate Past President Kerry Crutchfield, Ricky Lopes, Associate Superintendent, Cumberland County, and Debbie Tilley, Finance Officer, Elkin City (Finance Officer, Wilkes County, effective January 2005). NCASA has evolved into an umbrella organization which includes superintendents, central office administrators, principals, and assistant principals. The Council commended Kerry for his involvement, leadership, and work on our behalf

during the past legislative session.

ASBO International held its annual conference in Cincinnati, Ohio, October 15-19, 2004 with a number of NCASBO members attending. Dr. Robert Tart, Assistant Superintendent, Duplin County, and an NCASBO Past President received the prestigious ASBO Eagle Award.

The SASBO Leadership Summit January 14-16 and the annual conference April 18-21, 2005 were held in Mobile, Alabama with President David Wise, Assistant Superintendent, Rockingham County, presiding. Attending were many NCASBO members including North Carolina Director Ricky Lopes and SASBO Executive Director Debra Dixon-Doss., Vice President of Business Services, Alamance Community College.

The Annual NCASBO Conference, including two days of professional development, was held at the Sheraton Four Seasons, Greensboro, February 14-17, 2005. The theme of the program was "Piecing the Puzzle Together". President Elect and Conference Coordinator Mary Jo Lindquist and her committee presented an outstanding variety of sessions of interest and concern to those attending. The dynamic keynote speaker was nationally known educator/speaker Ron Clark, a North Carolinian and first cousin of Past President Brenda Mitchell. There were 381 registered and 66 vendors participating in the Conference.

The Lou Thompson Distinguished Service Award recipient was James O. Barber who was recognized for the many years of dedicated and innovative service to our organization. Jim served as Associate Superintendent, Financial and Business Services, SDPI, from 1984 to July 1999. He will long be acknowledged for having brought public schools financial operations to an advanced level of technology resulting in a Uniform Education Reporting System. Most importantly, Jim was instrumental in bringing the recognition of finance officers as a vital and important part of public school administration.

In 2005-06 Mary Jo Lindquist, Finance Officer, Gaston County Schools, led the Association as its President. Other officers serving were President Elect Marty Trotter, Finance Director, Moore County; Vice President Shirley Bess, Accounting/Allotment Manager, Union County; Secretary Karen Rogerson, Finance Officer, Martin County; and Treasurer Karla Miller, Assistant Finance Officer, Caldwell County. Serving in the position of Executive Director was Jenny Billings.

The Professional Development Committee, chaired by Pam Satterfield, Finance Officer, Richmond County, provided comprehensive staff development and leadership opportunities during the Finance-Personnel Conference in July at the Sheraton Imperial,

Research Triangle, and the annual Retreat held at the Broyhill Center in Boone, October 10-12, 2005, facilitated by Aaron Beaulieu, Associate Superintendent, Pitt County. There were 68 members registered for the Retreat.

The Chart of Accounts Committee, chaired by Kerry Crutchfield, Director Financial Services, Winston-Salem/Forsyth, and its sub-committees completed the "crosswalk" and the work has been turned over to the State Department of Public Instruction. The retreat in 2006 will focus on the new chart of accounts and its July 1, 2007 implementation. Appreciation by all NCASBO members should be expressed to Kerry Crutchfield, Jenny Billings, and all members of the committee for the countless hours of work and more than five years of dedication to complete this tremendous task.

The Bylaws Committee, chaired by Lyn Hensley, Finance Officer, Yancey County, completed work on the Finance Officer Certification requirements and approval by the State Board of Education was received in June 2005. Executive Director Billings reviewed the requirements that all finance officers be certified and obtain a minimum of 24 hours renewal credit each year. NCASBO will have a role in the process of monitoring credit hours.

Under the leadership of President Lindquist and Executive Director Billings, the Executive Council approved the creation of a special award to be given, not every year but when deemed appropriate, in recognition of professional service meaningful to our organization. The award will be reviewed on a year by year basis. The first "Star Award" was presented at the annual conference to Linda Suggs, Legislative Director on the State Board of Education staff, who retired February 1, 2006. Linda has been a friend and supporter of NCASBO for many years.

The Council also approved an ad hoc committee composed of Jenny Billings, Lyn Hensley, Pam Satterfield, Kathy Isenhour, and Katrina Miller to work on details of a contract between SDPI and NCASBO to assist LEAs with new finance officer transitions. Planning and development of a finance officer academy is also underway.

The SASBO Leadership Summit in January and the Annual Conference April 23-26, 2006 were held in Louisville, Kentucky. Many North Carolina members attended including North Carolina Director Kathy Isenhour, Assistant Superintendent, Hickory City, and SASBO Executive Director Debra Dixon-Doss, Vice President Business Services, Alamance Community College.

ASBO International held its annual conference in Boston, Massachusetts, October 19-23, 2005. NCASBO Past President Terry Haas, Finance Officer, Rutherford County, was elected ASBO Director!

Robert Ayers, Finance Officer, McDowell County, and Harvey Gay, Finance Officer, Greene County, served on the NCASA Board of Directors. NCASBO legislative issues were included in the NCASA legislative platform.

The annual NCASBO conference, with the theme "NCASBO: Your Pathway to: Learn, Lead, Excel " was held at the Sheraton Four Seasons, Greensboro, February 27-March 2, 2006, inclusive of two days of professional development. Marty Trotter, President Elect and Conference Coordinator, presented an extensive program offering sessions of interest in all areas of finance, personnel, management, and facilities. Included for the first time was a session for retirees. There were 390 members registered and 72 vendors participating in the conference. A Bylaws change was made to Article IC, Section 1. Officers, to read: "An eligible candidate is one who is an Active or Life member and has actively served as a member of the Executive Council (including committee chairs) for at least two (2) years."

Surry Insurance had donated \$2,500 to the NCASBO Scholarship fund and during the conference scholarships sponsored by Surry Insurance and NCASBO were presented in memory of Don Whatley, who was Finance Officer of Graham County Schools. Don's daughter Rebecca Cono and her husband were present for the presentation. Scholarship Chairman Frances Hammer, Finance Officer, Perquimans County, presented \$1,000 to each recipient: Michael Croshaw and Brenda Roper, Rowan-Salisbury Schools, and Amanda Ensley, Gaston County Schools.

Vance Holloman, Deputy Treasurer, NC Department of State Treasurer, presented the State Treasurer's Governmental Award of Excellence to Wake County Schools for the ADM in excess of 12,000 and Orange County Schools for ADM less than 12,000.

The NCASBO Officers took a unique approach to their consideration of the Lou Thompson Distinguished Service Award. With very strong feelings that one of our members had continued to serve our profession and our association so well and for so many years through professional development, chart of accounts, and legislative issues, Kerry Crutchfield was recognized for the second time as the recipient of this prestigious award.

The 2006-2007 Association Year was led by President Marty Trotter, Director of Construction and Facilities, Randolph County Schools. Other officers were President Elect Shirley Bess, Accounting/Allotment Manager, Union County; Vice President Frances Hammer, Finance officer, Perquimans County; Secretary Karen Rogerson, Finance Officer, Martin County; Treasurer Karla Miller, Assistant Finance Officer, Caldwell County; and serving as Executive Director, Jenny Billings.

President Trotter's emphasis for NCASBO included strengthening the regions, giving assistance to and support of new finance officers, the Finance Officer Academy and Mentoring program, and more involvement of non-finance officers.

The Website Committee, chaired by Jeff Hollamon, Chief Financial Officer, Onslow County, reviewed suggestions on additions to the website. The Executive Council approved making available credit card payments to the Association on the website.

The Professional Development Committee, chaired by Pam Satterfield, Finance Officer, Richmond County, spent much time and effort on the NCASBO Finance Officer Academy. Meetings concerning the Academy were held at various times with Jim Barber, former Associate Superintendent, Financial and Business Services, SDPI, Ed Dunlap of NC School Boards Association, representatives of the North Carolina Association of School Administrators, and superintendents. NCSBA, NCASA, and SDPI endorsed the Academy. The Council approved expending funds for contracting with technical writers for preparing the curriculum. The name of the academy is to be "NCASBO School Business Management Academy" and the vision "Investing Today in the Leaders of Tomorrow."

Professional development opportunities were offered prior to the summer SDPI Finance-Personnel Conference at Research Triangle Park and at the annual Fall Retreat for Finance Officers held at the Sheraton Four Seasons, Greensboro, September 11-13, 2006. A large number of participants attended the Retreat which focused on the new chart of accounts and conversion of budgets for school units in preparation for the implementation of the new chart July 1, 2007. The Chart of Accounts Committee, chaired by Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth County, assisted with this professional development workshop.

The Policy and Procedures Committee, chaired by Lyn Hensley, Finance Officer, Yancey County, completed work on a registration form for Contractual Services to be used by retired and current finance officers and staff (NCASBO members) who are interested and willing to work with school systems needing assistance in their area of expertise. NCASBO will have two contracts - one with the school system needing the service, one with the individual providing the service. The contract pool will be beneficial to NCASBO members for temporary employment opportunities, to LEAs for much needed assistance, and to NCASBO as a source of revenue. The State Department of Public Instruction will use the contract pool as a resource for experts to be sent to LEAs in need of financial management assistance. Information is to be distributed to NCASBO members and a link for registrants will be placed on the website. The Committee also developed application and contract documents for the School Business Management Academy. The application forms will be placed on the website.

The SASBO Leadership Summit in January and the annual Conference April 23-25, 2007 were held at the Kingston Plantation in Myrtle Beach, SC. Many North Carolina members attended including North Carolina Director Kathy Isenhour, Associate Superintendent, Hickory City, SASBO Executive Director Debra Dixon-Doss, and NCASBO President Elect Shirley Bess.

The ASBO Conference was held October 13-16 in Pittsburgh, PA. Serving on the ASBO International Board were NCASBO Past Presidents Terry Haas as a Director and Debra Dixon-Doss as Chair of the Affiliate Executive Directors.

Affiliations Chairman Harvey Gay, Finance Officer, Greene County, served on the NCASA Board of Directors. NCASBO legislative issues were included in the NCASA legislative platform.

The Scholarship Committee, chaired by Frances Hammer, reviewed and revised the scholarship application form making much needed changes. The recommended changes were approved by the Executive Council.

An outstanding NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons, in Greensboro February 12-15, 2007, inclusive of two days of professional development. The Conference, with the theme "NCASBO Silver Anniversary - Shining Above the Rest" was directed by President Elect and Conference Coordinator Shirley Bess. Membership Chairman Frances Hammer reported a high of 439 NCASBO members. This successful conference recorded attendance of 430 registered participants, 64 vendor booths and 2 vendor sponsors. The Executive Council authorized signing a contract with the Sheraton Four Seasons for the annual NCASBO conference through the year 2013.

At the conference, the State Treasurer's Governmental Award of Excellence for ADM in excess of 12,000 was presented to Wake County Schools and to Orange County Schools for ADM less than 12,000.

Scholarships sponsored by Surry Insurance in the amount of \$1,000 each were awarded to Jean Buchanan of Burke County, Michael Croshaw of Rowan-Salisbury, and Donna Robbins of Caldwell County.

The 2007 Star Awards were presented to members of the Chart of Accounts Committee for their dedication and hard work toward developing the new Chart of Accounts. These individuals were Kerry Crutchfield, Jenny Billings, Shirley Bess, Bob Tart, Rhonda Davis, Phyllis Yates, Meg Farris, Mary Parker, Lu Ellen Richard, Kathy Johnson, Kay Fulp, Harvey Gay, Dennis Covington, and Ann Morris.

Kathy Isenhour, Associate Superintendent, Hickory City Schools, was the recipient of the Lou Thompson Distinguished Service Award. She led in establishing this prestigious award when she was NCASBO President in 1995-96, and Kathy has continued to provide valuable leadership and outstanding service to the Association and to the profession through the years. The significance of this award was enhanced by the fact that the presentation was made by Lou Thompson.

Shirley Bess, Accounting/Allotment Manager, Union County Schools, served as President of NCASBO 2007-2008. Other elected officers were President Elect Karen Rogerson, Finance Officer, Martin County; Vice President Frances Hammer, Finance Officer, Perquimans County; Treasurer, Karla Miller, Assistant Finance Officer, Caldwell County; Secretary Michael Felts, Finance Officer, Granville County; and serving as Executive Director, Jenny Billings. Michael Felts resigned the position with the school system and in July 2007 John Kachmarik, Assistant Finance Officer, Iredell-Statesville, was appointed Secretary by the Executive Council.

President Bess emphasized communication within the regions and throughout the State, sharing of information, promotion of the School Business Management Academy, professional development, and reviving the NCASBO newsletter.

Communications Chairman Phyllis Yates, Assistant Superintendent, Ashe County, issued the first NCASBO newsletter in September in both color and black and white. Copies of the newsletter were sent to all superintendents.

The website committee, chaired by Jeff Hollamon, Finance Officer, Onslow County, worked on redesigning the website. Credit card payment for amounts due to NCASBO became an option on the website.

The Professional Development Committee, chaired by Harvey Gay, Finance Officer, Greene County, concentrated on the NCASBO School business Management Academy. The three levels of certification identified were Business Office Specialist, Business Office Manager, and Business Office Director. Contracts were completed with Ricky Lopes and Kerry Crutchfield for writing the curriculum and teaching the first classes in Accounting Principles and Practice. These classes were offered at the annual winter conference in February with a total of 80 members participating. Classes were also held in May in New Bern and Morganton.

Other professional development opportunities were offered prior to the summer SDPI Finance-Personnel Conference at Research Triangle Park in July 2007 and at the annual Fall Retreat for Finance Officers held October 2007 at Southern Pines, Mid-Pines and Pine Needles Resort. The Executive Council approved daily rates of pay for professional

development class instruction and for the Academy class instruction.

The Retired Members Committee, co-chaired by Becky Earley and Debbie Tilley, established a data base of retiree information in order to keep in touch and to keep retirees involved. It was noted that retirees have volunteered to staff the registration desk and assist in other areas at conferences.

Mary Jo Lindquist, Finance Officer, Gaston County, and Harvey Gay co-chaired the Affiliations Committee and represented NCASBO on the NCASA Board of Directors.

The January 2008 SASBO Leadership Conference held at the Rosen Plaza Hotel in Orlando, Florida, was attended by President Shirley Bess and Communications Chair Phyllis Yates. The Annual Conference April 27-May1, 2008 was also held at the Rosen Plaza Hotel in Orlando, Florida. North Carolina was well represented by SASBO Executive Director Debra Dixon-Doss and North Carolina Director Kathy Isenhour, Associate Superintendent, Hickory City; ASBO Director Terry Haas and other North Carolina members. At the conference, Kenny Wallace was recognized when a scholarship was presented by SASBO in memory of his father Larry Wallace. The SASBO conference will be in North Carolina in 2011 at the Embassy Suites in Concord.

The ASBO International Conference was held in Toronto, Canada in October 2007. NCASBO Past President Debra Dixon-Doss, retired, served on the ASBO Board and Past President Terry Haas, Executive Director Business Services, Mooresville Graded Schools, served as an ASBO Director. Kathy Isenhour from Hickory City and an NCASBO Past President was presented the prestigious Eagle Award.

Including two days of professional development, the NCASBO Annual Conference was held at the Greensboro Sheraton-Koury Convention Center, February 11-14, 2008. Change--Leadership--Personal Excellence was the theme of the largest conference to date with a total of 451 members and 81 vendors participating. This highly successful conference was coordinated by President-Elect and Conference Coordinator Karen Rogerson. Membership Chairman and Vice President Frances Hammer reported a high of 460 Active members and 27 Life members for the year. The Executive Council signed a contract with the Sheraton for the NCASBO conference through the year 2014.

At the opening session, the program was dedicated to the memory of Larry Wallace, vendor for SunPac Software, who recently passed away. TRA donated funds to be awarded to the scholarship program of the school system of the recipient of the Lou Thompson Award.

The Lou Thompson Distinguished Service Award was presented by Lou Thompson to Harvey Gay, Finance Officer, Greene County. Harvey, who was chairman of the very first Professional "Growth" Committee and served on the original Certification Program Committee, was recognized for his many years of service and his contributions as a committee chair, officer, and past president.

The State Treasurer's Governmental Award of Excellence for ADM less than 12,000 was presented to Elkin City Schools for converting the budget from manual to a web-based paperless process.

The \$1,000 NCASBO Scholarship awards provided by Surry Insurance were presented to each of the following: Michael Croshaw of Rowan-Salisbury, Matilda Campbell of Weldon City, and Keista Bass of Newton-Conover.

Lyn Hensley, Chairman of the Constitution and Bylaws Committee, presented to the membership at the annual business meeting a change to the Bylaws as recommended by the Executive Council:

Change the NCASBO Fiscal Year from April 1-March 31 to July 1-June 30.

The Bylaws change was approved and the 2007-2008 President and Officers of NCASBO served a 15-month term in office.

In 2008-2009 Karen Rogerson, Finance Officer, Martin County Schools, led the Association as its President. Other officers serving were President-Elect Sharon Penny, Finance Officer, Bladen County Schools; Vice President Frances Hammer, Finance Officer, Perquimans County Schools, Treasurer Karla Miller, Finance Officer, Caldwell County Schools; and Secretary Steve Toler, Finance Officer, Washington County Schools. Jenny Billings served as NCASBO Executive Director.

President Rogerson stressed the importance of strong leadership in the individual regions with a focus on regular scheduled meetings and programs involving all business and finance staff, participation in professional development and the School Business Management Academy, and continued mentoring of new finance officials.

Retirees Debbie Tilley and Becky Earley, Co-Chairs of the Retired Members Committee, explored avenues to encourage NCASBO retirees to attend, participate and be involved in the annual NCASBO conferences.

Mary Jo Lindquist, Finance Officer, Gaston County Schools, and Kay Fulp, Finance Officer, Iredell-Staatesville Schools, co-chaired the Affiliations Committee and served on

the NCASA Board of Directors. Kay, Kerry Crutchfield, and Pam Satterfield gave a presentation at the March 2009 NCASA Conference. NCASBO legislative issues were those set forth in the NCASA legislative platform.

The Chart of Accounts Committee Chair Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth Schools, reported that a new fund account (Fund 8, Special Revenue Fund) may be created to report federal grants, donations, out-of-county tuition, rental of school property, proceeds from the sale of assets, and all other local types of revenues. Only county appropriations, fines and forfeitures, and interest would remain in Fund 2. Kerry will follow up on this possibility.

The Professional Development Committee, chaired by Pam Satterfield, Finance Officer, Richmond County Schools, spent much time and effort on review and scheduling new course work for the School Business Management Academy. Academy and professional development classes were offered at the Summer SDPI Finance-Personnel Conference, Research Triangle Park, and the Annual Fall Retreat for Finance Officers at the Crowne Plaza Resort in Asheville, September 22-24, 2008. A total of 69 members were registered for the Retreat. Academy classes were scheduled across the State throughout the 2008-2009 Year with high participation. It is anticipated that the first class to graduate will be in 2011 at the February annual conference.

The Bylaws/Policy and Procedures Committee, chaired by Lyn Hensley, Retired, completed the review of the Administrative Procedures Manual implemented in 2004. A number of technical corrections were identified and two rate changes were recommended to and approved by the Board. The Committee's expectation was to have the updated manuals distributed to all Council members at the 2008 Fall Retreat.

The ASBO International Conference was held November 7-10, 2008, in Denver, CO. Attending were NCASBO Past Presidents Debra Dixon-Doss and Terry Haas, Executive Director of Business Services, Mooresville Graded Schools. Terry served as ASBO Director for the Southeast.

NCASBO Past President Shirley Bess was appointed North Carolina Director on the Board of the Southeastern ASBO effective July 1, 2008. Shirley and Sharon Penny, NCASBO President Elect, attended the SASBO Leadership Conference in Charleston, WV in October 2008. The SASBO Annual Conference was held at the Marriott in Charleston April 27-May 1, 2009 with many NCASBO members attending. NCASBO Past President Debra Dixon-Doss served as SASBO Executive Director.

The NCASBO Annual Conference, including two days of professional development, was held at the Koury Convention Center, Sheraton Four Seasons, in Greensboro, February

16-19, 2009, with the theme NCASBO - Your Key to Excellence. President Elect/Conference Coordinator Sharon Penny presented an excellent program of professional growth and Academy sessions for the 388 members registered. Vice President and Membership Chairman Frances Hammer reported a high number of 82 vendors registered for the conference. Frances also reported membership totals of 438 Active and 53 Life members for the year. A contract was signed by the Council and the Sheraton for the 2015 Conference.

The Scholarship Committee, chaired by Laurie Modlin, Director of Finance and Business Services, Beaufort County Schools, announced the \$1,000 Scholarship Awards sponsored by Surry Insurance. Robert Ayers of Surry Insurance presented the scholarships to Shelly Gentle, Lexington City Schools; Tara Pannell, Alexander County Schools, and Ly Marze, Finance Officer, Watauga County Schools.

The NCASBO Star Award, which is not an annual award, was created By NCASBO to recognize an individual or group making a special contribution or service to the Association. President Rogerson recognized and presented the Star Award in 2009 to the Professional Development Committee for the development and implementation of the Finance Academy and for the ongoing process of course development. She presented awards to the following members of this committee: Lu Ellen Richard and Dennis Covington, Charlotte-Mecklenburg; Pam Satterfield, Richmond County; Jenny Billings, NCASBO Executive Director; Tara Trexler, Rowan-Salisbury; Harvey Gay, Retired, Greene County; Phyllis Yates, Ashe County; Freyja Cahill, Brunswick County; Sharon Penny, Bladen County; Nan Barwick, Wayne County; Jeff Hollamon, Onslow County; and Shirley Bess, Union County.

Jenny Billings presented the Lou Thompson Distinguished Service Award to Frances Hammer, Finance Officer, Perquimans County Schools, who has served as a committee chair, an officer, a leader, supporter and promoter of NCASBO through the years. The definition of service to NCASBO and its members is Frances Hammer.

Serving as President of NCASBO for the Year 2009-2010 was Sharon Penny, Finance Officer, Bladen County Schools. Other elected officers were President-Elect Michael Griffin, Finance Officer, Moore County Schools; Vice President Frances Hammer, Retired, Perquimans County Schools; Treasurer Karla Miller, Finance Officer, Caldwell County Schools; and Steve Toler, Finance Officer, Washington County Schools. Jenny Billings served as NCASBO Executive Director.

President Penny responded to the turbulent economic times within which school business officials were working by focusing upon professional skills. Emphasis was placed upon professional development and growth, the NCASBO School Business

Management Academy, and participation in the Association. The President reviewed with the NCASBO Council the Regional Representatives responsibilities.

The Professional Development Committee, chaired by Pam Satterfield, Finance Officer, Richmond County Schools, provided opportunities for comprehensive staff development, leadership, and School Business Management Academy classes during the July (DPI), October and annual conferences, and throughout the year. The Academy classes were well attended with the required curriculum proceeding as scheduled. The Business Office Specialists should graduate in February 2011 at the NCASBO annual conference; the Business Office Managers should complete requirements during 2011; and the Business Office Directors, during 2012. Following these graduations, a new series of Academy classes will begin.

Pam Satterfield brought two recommendations from the Professional Development Committee to the Executive Council: (1) To eliminate finance officer priority for staff development registration since NCASBO no longer receives staff development funds from the State Department of Public Instruction, and (2) To establish a behavior policy for participants in workshops and meetings. Both recommendations were approved by the Council. A Code of Conduct was presented to the Council by Jenny Billings, Executive Director. The policy was approved by the Council and will be added to the Policy and Procedures Manual.

The Fall Retreat for Finance Officers was held at the Hilton Garden Inn, Mayfaire in Wilmington, NC, October 12-14, 2009 with a record attendance. Jeff Bright conducted sessions on "Values and Ethics", "Performance Evaluation:", and "Power Perception". A closing presentation on ethics was given by Tim Kennedy. Executive Director Jenny Billings recommended that the name of the NCASBO Fall Retreat be changed since this event is a staff development conference and not just a retreat. The Executive Council approved changing the name of the fall meeting to "NCASBO Financial Leadership Conference".

Mary Jo Lindquist, Finance Officer, Gaston County Schools, and Mary Parker, Chief Financial Officer, Buncombe County Schools, co-chaired the Affiliations Committee and served on the NCASA Board of Directors. Charter schools and budget issues were concerns addressed at the NCASA Conference held in Raleigh, March 25-26, 2010. Kerry Crutchfield, Finance Director, Winston-Salem/Forsyth Schools, served on a panel discussing budget issues at that conference. NCS DPI is supporting a Distinguished Leadership Program through NCASA which will replace the old Principals Executive Program.

The Communications Committee was chaired by Susan Harrison, Assistant Finance

Officer, Bladen County Schools, assisted by President Penny. A comprehensive newsletter was distributed to NCASBO members in November 2009. Photos for the newsletter were provided by NCASBO Photographer John Kachmarik, Assistant Finance Officer, Iredell-Statesville Schools.

Shirley Bess, NCASBO Immediate Past President, resigned as North Carolina Director on the Board of the Southeastern Association of School Business Officials. Terry Haas, Executive Director of Business Services, Mooresville City Schools, was appointed by the Executive Council to complete the term expiring June 30, 2011. Terry and President-Elect Michael Griffin attended the SASBO Leadership Summit in January. The annual SASBO Conference was held April 19-21, 2010 at the Peabody Hotel in Little Rock, Arkansas, with President Penny and several NCASBO members attending. NCASBO Past President Debra Dixon-Doss continued as SASBO Executive Director.

Including two days of professional development, the annual NCASBO Conference was held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 15-18, 2010. Creative Leadership In A Changing World was the theme of this excellent conference program presented by Michael Griffin, President-Elect and Conference Coordinator. A variety of sessions of interest and concern in all areas of finance, personnel, and management were offered, along with the Academy classes, for the 377 members participating. The workshops and the 72 vendor booths were well attended. At the conference, special appreciation was expressed to Kerry Crutchfield, Debra Dixon-Doss, and Ricky Lopes, the writers of the Academy class materials and the instructors of these classes.

A contract with the Sheraton in Greensboro was approved for the annual conference in 2016 to be held February 14-18.

President Penny announced that she was establishing an ad hoc committee for ORBIT, with Terry Haas as chairman and eight or nine individuals serving on the committee. Her hope was that the committee will be able to resolve some of the issues experienced in the ORBIT system.

The chairman of the Scholarship Committee, Kay Fulp, Retired, Iredell-Statesville Schools, announced the recipients of the four \$1,000 scholarship awards sponsored by Surry Insurance. Robert Ayers of Surry Insurance presented the scholarships to Susan Harrison, Bladen County Schools; Lori Triplett, Catawba County Schools; Penny Billings, Alleghany County Schools; and Ann Brogdon, Cleveland County Schools.

The Lou Thompson Distinguished Service Award was presented to Pam Satterfield, Finance Officer, Richmond County Schools, by Executive Director Jenny Billings.

A Past President, Pam Satterfield, has served the Association for many years in many ways, especially by leading the Professional Development Committee through the establishment of the NCASBO School Business Management Academy Program. Her service to the Association is enhanced by her quick wit and engaging smile. Pam represents the next era of leadership for NCASBO.

Elected at the Annual Conference in February 2010, Michael Griffin, Finance Officer, Moore County, served as NCASBO President for the Year 2010-2011. The other elected officers were President Elect Wanda Mitchell, Finance Officer, Surry County; Vice President Karla Miller, Finance Officer, Caldwell County; Treasurer Faye Perry, Finance Officer, Camden County; and Secretary Steve Toler, Finance Officer, Washington County. Jenny Billings served as NCASBO Executive Director.

President Griffin continued the emphasis on professional development and network relationships and had a strategic focus on creative leadership in a changing world. He was concerned with protecting the revenue stream and public school funding.

The importance of the role of Regional Representatives was emphasized—the attendance at council meetings, scheduled regular meetings in the regions and strong leadership.

Kerry Crutchfield, Chairman of the Chart of Accounts Committee, reported that the Judge in the Charter School settlement had ruled that the transfers to Fund 8 were approved for the 2009-2010 fiscal year and that the move to Fund 8 was accepted as legal and binding.

Michael Croshaw, Accounting Manager, Rowan-Salisbury, and Chair of the E-Procurement Committee, recommended that the E-Procurement Committee be eliminated due to inactivity (no longer needed). Action was taken by the Executive Council to eliminate the committee.

The Professional Development Committee chaired by Pam Satterfield, Finance Officer, Richmond County, provided opportunities for comprehensive staff development, leadership and School Business Management Academy classes during the July SDPI Financial Leadership Conference, the Annual Conference in February and throughout the year. There were 20 Business Office Specialists graduating during the Annual Conference. There will be over 100 Business Office Managers and Business Office Directors graduating in 2012. In July 2011, there will be a new class for the School Business Management Academy. The Executive Council discussed and approved submitting a Resolution to the State Board of Education for Academy recognition and certification. The Professional Development Committee reviewed the curriculum for the

current Academy group and is considering developing quality training programs for school bookkeepers and other school personnel.

The Financial Leadership Conference was held at the Embassy Suites Hotel, Winston-Salem, October 13-15, with classes conducted by NCASBO Past President Debra Dixon-Doss and Jeff Bright from Alamance Community College. Jeff's sessions included a "problem solving" scavenger hunt in downtown Winston-Salem.

Mary Jo Lindquist, Finance Officer, Gaston County, and Mary Parker, Chief Financial Officer, Buncombe County, Co-Chairs of the Affiliations Committee served on the NCASA Board of Directors. They attended NCASA meetings and the annual conference in Raleigh March 31-April 1. Bill McNeal retired as Executive Director and was replaced by Larry Price, retiring Wilson County Superintendent.

The Executive Council lost DPI Liaison Paul LeSieur in October when he resigned from his position as Director of School Business Services to take a position with Durham County Schools. However, NCASBO is fortunate that he remains a member of and a participant in the organization.

The website is currently on Affiniscape Members 24/7 which will be phased out in the near future and be replaced by Members 360. The Website Committee recommended to the Executive Council that the updated product be purchased to meet current and projected needs. The Council approved the purchase to be made as soon as feasible. It is noted that the NCASBO Website is PCI compliant.

The SASBO Leadership Conference was held at the Embassy Suites in Concord, NC, January 19-20, and was attended by several NCASBO members including President Griffin, Vice President Karla Miller, Treasurer Faye Perry, SASBO Director Terry Haas and Past President Debra Dixon-Doss, who is the Executive Director of SASBO. The annual conference of SASBO was also held in Concord April 11-14 and was a celebration of the 60th Anniversary of SASBO. It was enjoyed by a large number attending from the 12 states, including North Carolina, and was very successful. President Griffin recommended and the Executive Council approved Terry Haas serve another three-year term as the North Carolina SASBO Director.

Sharon Penny, Chairman of the Communications Committee, recommended that the Communications Committee and the newsletter be discontinued since the NCASBO Website is a more efficient means of communication. Action was taken by the Executive Council to eliminate the committee and discontinue the newsletter.

Ethics and conflict of interest in regard to the annual conference were areas of concern discussed by the Council and addressed by the Bylaws/Policy and Procedures Committee, co-chaired by Lyn Hensley and Harvey Gay, both retired. It was determined that attendees should adhere to the policies of the local units regarding the risk of conflict of interest. Conference sessions on ethics should address the importance of adhering to their Boards' policies at all times. The Bylaws/Policy and Procedures Committee ruled that continuing education credit up to eight (8) hours for webinar type classes would only be allowed when there is proof of attendance.

Harvey and Lyn also reported for the Retired Committee on ways to encourage conference attendance of retirees.

Immediate Past President Sharon Penny, Finance Officer, Bladen County, pointed out the need for a reference resource for day-to-day processes. An ad hoc committee was appointed to create a web-based resource providing links to authoritative information as well as best practices from experienced finance officers on a wide range of topics.

An outstanding NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 13-17, 2011, inclusive of two days of professional development. The conference, with the theme Mission Possible—Solution for Success, was directed by President Elect and Conference Coordinator Wanda Mitchell. Academy classes and sessions appealing to all areas of finance, personnel and management were offered for the 391 members registered. There were 75 vendors attending the conference. Membership Chairman Karla Miller reported a high of 482 members for the current year. The graduation ceremony for the 20 Business Office Specialists was held during the conference with State Superintendent Dr. June Atkinson presenting the certificates. President Michael Griffin and Executive Director Jenny Billings presided.

Kay Fulp, Retired, announced the \$1,000 scholarship awards sponsored by Surry Insurance. Robert Ayers of Surry Insurance presented the scholarships to the following recipients: Shelly Gentle, Lexington City; Jennie Patnode, Moore County; Faye Perry, Camden County.

Paul LeSieur, Executive Director of Budget and Management Services, Durham County, was honored as the 2011 recipient of the Lou Thompson Distinguished Service Award. Paul joined Durham County in October 2010 after many years of service to the school business profession while Director of School Business Services at the State Department of Public Instruction. He supported and worked closely with the Association as DPI Liaison during much of his tenure at DPI, always bringing a calm presence to the many challenging issues throughout those years.

The NCASBO 2011-2012 Association Year was led by President Wanda Mitchell, Finance Officer, Surry County. The other elected officers were President Elect Karla Miller, Finance Officer, Caldwell County; Vice President Matilda Campbell, Finance Officer, Weldon City; Treasurer Faye Perry, Finance Officer, Camden County; and Secretary Steve Toler, Finance Officer, Washington County. Jenny Billings served as Executive Director.

With a theme of "Mission Possible-Solutions for Success", President Mitchell reviewed NCASBO Past and Present and her goals for the future which included continued support of the School Business Management Academy, a strong focus on technology in the finance area, and more involvement in NCASBO by non-finance officers.

President Mitchell recommended and the Executive Council approved travel reimbursement for retired members serving as committee chairs and committee members for attendance at council or committee meetings.

Executive Director Billings and President Mitchell led the Council in discussion of House Bill 730 involving a state sponsored 403B plan as an option for employees of LEAs. An ad hoc committee was established with Debra Dixon-Doss, Past President and retired member, as chair. NCASBO will partner with NCASA and NCSBA regarding concerns with this bill.

The Communications/Website Committee, co-chaired by Tony Messer, Finance Officer, Scotland County, and Jeff Hollamon, Chief Financial Officer, Onslow County, reported that the new Members 360 version of the website included advantages in the best interest of the Association.

The Best Practices Committee, chaired by Sharon Penny, Past President and Finance Officer, Bladen County, began a "Resource Library" on the NCASBO website to provide information on a variety of topics. Three sections of information will be: processing, manuals, and direct links.

President Mitchell led a discussion on establishing an ad hoc committee regarding information and possible input in the development of the NCDPI "cloud," which will house servers for supporting critical business functions of local education agencies and save LEAs significant money by eliminating costs of physical ownership.

A very successful Financial Leadership Conference was held at The Four Points by Sheraton Asheville Downtown, October 12-14, with 82 registered attendees. Interesting classes ("How to Deal With Giraffes and Penguins," "What Type Would You Be if You Had This Position?") and others were conducted by Jeff Bright, Business and Industry Training

Assistant to the President of Alamance Community College. Bryan Starnes with Martin Starnes and Associates presented an Ethics and Professional Conduct Class, and from SDPI Chief Financial Officer Philip Price and Alexis Schauss, Director of School Business, gave a financial update and forecast.

The Professional Development Committee, chaired by Pam Satterfield, Past President and Finance Officer, Richmond County, continued to schedule timely staff development and Academy classes throughout the year and within the July SDPI, October Leadership, and the February Annual Conferences. All classes were well attended. Plans were in process for financial training for principals and assistant principals, and curriculum development was near completion for classes for school bookkeepers. The school bookkeeper classes were scheduled to begin in the fall of 2012, to be at a low cost, and to be held on a regional basis to reduce travel for maximum participation in the program.

Executive Director Billings brought to the Executive Council information concerning insurance needs of the Organization. Following discussion, approval was given to acquire the following insurance: General Liability, Directors and Officers, Employee Theft, and Crime policies.

The Council also approved separating the duties of making deposits and reconciling of bank statements, making the decision that the treasurer shall make the deposits and the secretary shall reconcile the bank statements.

NCASBO members attending the SASBO Leadership Summit in Biloxi Ms. were President Elect Karla Miller, Regional Rep. Tony Messer, NCASBO Past President Terry Haas and Past President, SASBO Executive Director Debra Dixon-Doss. The SASBO Annual Conference was also held in Biloxi on April 22-25, 2012 and a large number of NCASBO members were there when Terry Haas was elected SASBO Vice President. Tony Messer was installed to serve as North Carolina SASBO Director for the term ending 2016.

Mary Parker, Past President and Chief Financial Officer, Buncombe County and Mary Jo Lindquist, Past President and Finance Officer, Gaston County, co-chaired the Affiliations Committee and served on the NCASA Board of Directors. They attended NCASA meetings and the annual conference in Raleigh March 31.

The annual NCASBO Conference, including two days of professional development, was held at the Sheraton Four Seasons, Greensboro, February 13-16, 2012. The theme of the program was Remembering the Past, Preparing for the Future, Managing the Present. President Elect and Conference Coordinator Karla Miller presented a variety of

sessions of interest and concern in all areas of finance, personnel, and management, along with Academy classes, for the 395 members attending. The workshops and the 80 vendor booths were well attended. Membership Chairman Matilda Campbell reported NCASBO membership for 2012 was 627.

A total of 127 members graduated from the NCASBO School Business Academy in 2012. The certificates were presented by State Superintendent of Public Instruction, Dr. June Atkinson, on February 14 during the annual conference. Upon action taken by the Executive Council, the 2012 Finance Academy Graduation was designated in honor of Dr. Raymond Leonard, Finance Officer, Elizabeth City/Pasquotank, who lost his battle with cancer in October 2011. His family was invited to attend the graduation to accept his certificate of completion of the program.

Harvey Gay, Co-Chair of the Bylaws Committee, presented to the membership at the annual business meeting a change to the Bylaws as recommended by the Executive Council: Change to Article 6, Committees, Section 3 to read: "Committee chairmen are an integral part of the Executive Council meetings. Each committee (standing and ad hoc) shall have one vote on Executive Council matters." Committee chairmen previously were non-voting Council members.

The Star Award, which is not an annual award, was created by NCASBO to be given in recognition of professional service meaningful to our organization. President Mitchell announced that this year the Star Award was being presented to Ally Barfield with the State Department of Public Instruction.

The Scholarship Committee was co-chaired by Lori Triplett, Assistant Finance Officer, Catawba County, and Kay Fulp, Retired. Lori announced the 2012 recipients of the three \$1,000 Scholarship awards sponsored by Surry Insurance. Retired member Robert Ayers of Surry Insurance presented the scholarships to Bonnie Caudle, Caldwell County; Carrie Pickett, Lee County; and Shelia Sawyer, Camden County.

The honoree receiving the Lou Thompson Distinguished Service Award in 2012 was Mary Parker, Chief Financial Officer of Buncombe County Schools. The award was presented by Jenny Billings, assisted by Lou Thompson. Mary has served the Association in many capacities from regional representative to president. She has exhibited the definition of service through her interest in sharing her problem-solving abilities and tools with her fellow finance officers.

Karla Miller, Finance Officer, Caldwell County, served as President of NCASBO 2012-2013. Other elected officers were President Elect Faye Perry, Finance Officer, Camden County; Vice President Matilda Campbell, Finance Officer, Weldon City; Treasurer Tony

Messer, Finance Officer, Chatham County; and Secretary Steve Toler, Finance Officer, Beaufort County. Jenny Billings served as Executive Director. Tony Messer resigned his position as Treasurer mid-year and Jan Hildebrand, Manager of Financial Services, Buncombe County, was appointed to complete the year as Treasurer.

President Miller recognized the Professional Development Committee, chaired by Pam Satterfield, for the continued outstanding work they have done with the program. Her desire, as President, was to see the Association grow by communicating and working together. She continued to emphasize professional development for finance officers and staff, the Academy, the work in progress for school bookkeepers and technology.

The Professional Development Committee chaired by Pam Satterfield, Past President and Finance Officer, Richmond County, provided opportunities for comprehensive staff development leadership and School Business Management Academy classes prior to the July SDPI meeting, the Financial Leadership Conference, the annual conference in February and throughout the year. Current Academy members were scheduled to graduate in February 2014 and the next group to start in the summer of 2013. The school bookkeeper curriculum was developed and forwarded to the writers for completion. Debra Dixon-Doss, Kerry Crutchfield and Sessions and Carver were designated writers. An estimated 2,000 students may be taking these classes.

The Financial Leadership Conference was held at the Blockade Runner, Wrightsville Beach, October 10-12, and was preceded by Academy classes October 8-10 with 70 members attending. Jeff Bright from Alamance Community College and Past President Debra Dixon-Doss presented interesting classes (Avoiding Titanic Problems in Your System, Running the Gauntlet and Who Killed John Doe). NCDPI Chief Financial Officer Philip Price gave a financial update, and an Ethics class was presented.

Mary Parker, Past President and Chief financial Officer, Buncombe County, and Mary Jo Lindquist, Past President and Finance Officer, Gaston County, co-chaired the Affiliations Committee and served on the NCASA Board of Directors. They attended NCASA meetings and the annual conference where they discussed legislation, vision, training and policy.

The financial software for school systems was in the process of being updated and enhanced. K12 Enterprise acquired Sartox (Sunpac) and it was acknowledged that Ashe County and Bladen County would be pilots for the new product.

The SASBO Leadership Conference was held January 24-26, 2013, at the Sheraton Norfolk Waterside Hotel, Norfolk, Virginia. Attending were President Elect Faye Perry;

SASBO Director Tony Messer; Tara Trexler; Adam Steele, Region 7 Representative; NCASBO Past President and SASBO Vice President Terry Haas; and NCASBO Past President and SASBO Executive Director Debra Dixon-Doss. The SASBO annual meeting also was held in Norfolk April 29-May 2, 2013 and was well attended and enjoyed by members of the twelve southeastern states.

The NCASBO Annual Conference, including two days of professional development, was held at the Koury Convention Center, Sheraton Four Seasons, in Greensboro, February 18-21, 2013, with the theme Believe and Achieve: Innovative Solutions for New Challenges. President Elect/Conference Coordinator Faye Perry presented an excellent program of professional growth and Academy sessions for the 407 members registered. Matilda Campbell, Vice President and Membership Chairman, reported a total of 80 exhibitors with 85 booths. The workshops and the booths were well attended. Matilda also reported NCASBO 2013 membership total was 685.

The Scholarship Committee Chairman, Lori Triplett, Assistant Finance Officer, Catawba County, announced the 2013 recipients of the three \$1,000 Scholarship Awards sponsored by Surry Insurance. Retired member Robert Ayers of Surry Insurance presented the scholarships to Penny Billings, Alleghany County; Scott Powell, Caswell County; and Bonnie Caudle, Caldwell County.

The Lou Thompson Distinguished Service Award was presented by Jenny Billings to long-time friend Philip Price, Chief Financial Officer, NCDPI. Philip worked in various capacities within the accounting operations of the Department from 1978 through 1999. He continued to concentrate on public schools while working with the Fiscal Research staff of the North Carolina General Assembly from late 1999 until November 2002 when he returned to the Department as Chief Financial Officer. Philip has since led North Carolina Public Schools through many years of difficult challenges and has done so with strong leadership coupled with exceptional humor.

Elected at the Annual Conference in February 2013, Faye Perry, Finance Officer, Camden County, served as President for the Year 2013/14. Other elected officers were: President Elect Lu Ellen Richard, Executive Director Financial Services, Charlotte-Mecklenburg; Treasurer Jan Hildebrand, Buncombe County; and Secretary Steve Toler, Finance Officer, Beaufort County. Jenny Billings served as the Executive Director. During the first NCASBO Executive Council meeting in July 2013, Scott Powell, Finance Officer, Caswell County, was nominated and elected to complete the term of the vacant office of Vice President.

President Perry stated that her vision for the NCASBO year is growth in the organization as well as in members and finding innovative solutions for new challenges.

Her desire is to see NCASBO grow with its technology use and staff development, becoming learners and branching out of our traditional way of doing things, taking a leap of faith, and learning to grow and develop.

The NCASBO Executive Council discussed several issues to determine if any changes were needed. The following actions were taken by the Council:

The Executive Council reviewed the Conflict of Interest Policy recently adopted by NCASA, of which NCASBO is an affiliate member, to determine if there were any issues for our organization.

Use of the NCASBO logo by vendors would be allowed only by paid conference vendors and only in their communications about the conference.

Due to the numerous requests received by NCASBO for member information, an official policy was adopted not to release any member information with the exception of conference-related information of members/attendees (i.e. name, unit, email), and then only to registered paid vendors.

Harvey Gay, Past President and Co-Chair of the Bylaws Committee, reported that the Committee had met July 8 and recommended changing the Bylaws to allow retired members to serve as officers. The Executive Council approved the change and the recommendation and will be presented to the membership at the February 10-13, 2014 Conference.

The Professional Development Committee, chaired by Pam Satterfield, Past President and Finance Officer, Richmond County, provided comprehensive staff development and leadership opportunities throughout the year, including Academy classes prior to the July SDPI meeting and the Leadership and Annual Conferences.

The Financial Leadership Conference was held October 9-11 in Asheville at the Four Points Sheraton. In addition to staff development and Academy classes, an ethics class was presented by the NCACPA Board of Examiners.

The School Treasurers classes are scheduled to begin in March 2014 and Finance Officers determine who attends. Currently, vacancy postings are only for school districts and not for private companies. A motion was made and passed to continue this policy. Director Billings announced that 468 treasurers registered for the classes within the 30 locations.

A proposal was made to make lifetime NCASBO membership free of charge to past, present and future Presidents effective immediately. President Perry asked for a motion for the proposal, which was made, seconded and, after discussion, the motion carried.

President Perry asked for discussion on the NC Cloud Committee and the ORBIT Committee. Following lengthy discussion, the Council voted to discontinue both committees.

Executive Director Jenny Billings reported that a new website provider called “Member Clicks” has been chosen and that there will be three website sponsors—Surry Insurance, Pierce Group and Education Management. Jenny reminded the Council that our growth in membership includes a number of new Finance Officers and, therefore, Regional Representatives need to reach out to new members regarding the importance of regional meetings. Jenny also remembered two former NCASBO members who died during the previous year—Thad Hartley and Arthur Leggett.

SDPI Liaison Alexis Schauss announced that DPI was again conducting new finance officers training after some years of absence.

Jeff Hollamon, Finance Officer, Onslow County, and Co-Chair of the Affiliations Committee, reported that the NCASA conference would be held March 13-14 and that the theme will be Visionary Leadership, Building Support and Respect for Public Schools. Katherine Joyce, NCASA Executive Director, stated that one of the main focuses of the March conference was to begin a statewide campaign for building support for public schools and demonstrate why public schools are the best choice and the “backbone” of the state’s economy.

The SASBO Leadership Conference, held in Savannah, GA, January 14, was attended by NCASBO members Past President Debra Dixon Doss, Executive Director of SASBO; Past President Terry Haas, President Elect SASBO; Tony Messer, SASBO Director; President Faye Perry; and Council Member Scott Powell. The Leadership Summit focused on Connections and Innovations. The SASBO Conference and Discovery Forum was held in April 2014 in Kingsport, TN, and fourteen NCASBO members participated in the event. Karen Rogerson, Finance Officer, Martin County and Past President of NCASBO, was honored as an Outstanding Business Official in the southeast. She was awarded a scholarship to be given to a student in her school district. Tony Messer was elected SASBO Vice President, and Terry Haas, SASBO President, effective July 1, 2014. NCASBO member Tony Messer was also selected to serve on the Emerging Leaders Committee. He will meet with other members from the southeast to develop plans for SASBO on how to best serve the Leaders of the Future.

Including two days of professional development, the NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons, in Greensboro, NC, with the theme Flexible People Never Get Bent Out of Shape. Lu Ellen Richard, President

Elect and Conference Coordinator, presented an outstanding variety of sessions and Academy classes to meet the needs and interests of the members. During the conference, the Finance Academy had more than 100 graduates from the three certificate levels. There were 84 vendors participating and 403 members attending the conference. Scott Powell reported that our membership had grown to 769. President Perry reported that the 2012 History had been recorded and placed on the NCASBO website. She also reported that a clean audit had been reported by the outside auditor.

Speaking for the Scholarship Committee, Chair Lori Triplett and John Kachmarik, NCASBO Photographer, announced the 2014 recipients of the three \$1,000 Scholarship awards sponsored by Surry Insurance—Sherry Chance, Scotland County; Roger Warren, Buncombe County; and Susan Harrison, Bladen County. John thanked the members of the Scholarship Committee for their dedicated work—Phyllis Yates, Laurie Trussell, Michael Griffin and Lori Triplett. Robert Ayers was in attendance representing Surry Insurance.

President Perry presented a Bylaws change previously presented to the Executive Council by Bylaws Co-Chair Harvey Gay. The change to Article 4, Section 1, removed the requirement that a candidate for office must be an active or life member and changed it to a candidate must be a voting member. President Perry and the Executive Council recommended the following change to the Bylaws at the Business meeting February 12, 2014, and the change was approved by the membership.

“The officers of the Association are members of the Executive Council and shall be a President, President Elect, Vice President, Secretary and Treasurer. An eligible candidate is one who is a voting member and has actively served as a member of the Executive Council (including committee chairs) for at least two (2) years.

The snow that impacted the conference also altered the presentation of the 2014 Lou Thompson Distinguished Service Award. It was presented earlier than scheduled to Karen Rogerson, Finance Director, Martin County, with fewer attendees and no special guests. In better weather, Jenny Billings traveled to Martin County to recognize Karen again with staff and family in attendance. A long-time member of NCASBO and graduate of the first School Business Director class, Karen has contributed through numerous committees and as Regional Representative, Secretary, President Elect and President in 2008/09.

Unfortunately, a winter storm consisting of wind, ice and snow swept through Greensboro on the third day of the conference (going all directions), bringing the conference to an early close. Members, vendors and speakers were advised to place safety FIRST, and so, as always, the conference coordinators, council members and the

director calmly took charge and worked it out. Thanks. Remember—the theme of the Conference was Flexible People Never Get Bent Out of Shape!

Lu Ellen Richard, Director of Financial Services, Charlotte-Mecklenburg, served as President for the fiscal year 2014-15. Other elected officers were President Elect Mike Bundy, Budget Director, Cumberland County; Vice President Scott Powell, Finance Officer, Lincoln County; Treasurer Faye Perry, Finance Officer, Camden County; and Steve Toler, Finance Officer, Beaufort County. Jenny Billings served as NCASBO Executive Director.

President Richard emphasized the fact that NCASBO is a strong professional organization providing training, support, and insight to its members and promoting the best use of educational resources while implementing best practices regarding school district management. NCASBO is also a great organization that can be improved, and one way to grow is in our eight regions. She planned, as President, to visit each region to promote more participation in regional meetings and mentoring for new members.

The DPI Summer Conference was held at the Sheraton Imperial in Durham with NCASBO Academy classes held July 21-22. Professional Development classes (with 159 attending) and the NCASBO meeting were held on July 23 prior to the DPI Annual Conference.

The Financial Leadership Conference was held at the Blockade Runner in Wrightsville Beach, October 6-7. Jeff Bright from Alamance Community College conducted Leadership Training, and Ethics classes were presented by NCACPA Board of Examiners.

Jeff Hollamon, Finance Officer, Onslow County, and Chairman of Affiliations Committee, reported that NCASBO received a copy of NCASA's resolution promoting support of public schools. It was NCASA's desire for NCASBO to adopt this resolution due to the substantial amount of negative publicity to which public schools have been subjected in recent years. The Council voted to adopt the resolution.

The Best Practices Committee, chaired by Sharon Penny, Past President and Finance Officer, Bladen County, reported that the Resource Library was now on the website with a substantial amount of information in the library. The "Helping Hands" section, which contains the mentors, is to be moved to the library. She also reported that there were 6 to 7 mentors now available to new Finance Officers.

The Professional Development Committee, chaired by Pam Satterfield, Past President and Finance Officer, Richmond County, continued to schedule timely staff development

and Academy classes throughout the year and within the July SDPI, October Leadership, and the February Annual Conferences. All classes were well attended. There were more than a thousand Academy School Treasurers taking advantage of this program, and evaluations were excellent.

The SASBO Annual Leadership Conference was held in Charleston, SC, January 29-31, 2015. Scott Powell, Finance Officer, Lincoln County, Vice President, and NC Director for SASBO, reported that seven NCASBO members attended the conference. The April meeting was held at Myrtle Beach, SC, April 14-15, 2015 as a joint meeting with South Carolina ASBO. Many NCASBO members attended the interesting and well-planned program with the theme "The Power of One". NCASBO members serving on the SASBO Board were Terry Haas, President; Tony Messer, Vice President; and Scott Powell, North Carolina Director.

At the January 15 meeting, Director Billings requested that the Executive Council consider dedicating the 2015 Annual Conference in memory of Lou Thompson who passed away earlier this year. President Richard asked for a motion which was immediately acted upon by unanimous vote, motion carried. The 2016 Annual Conference was dedicated to the memory of Lou Thompson.

President Richard recognized and thanked Steve Toler for serving as NCASBO's Secretary for seven years. Congratulations were extended to Secretary Toler as he will be retiring in the spring of 2015.

President Richard proposed to the Council the deactivation of the NC Cloud, Orbit, and Retired Members committees due to inactivity. After discussion, President Richard asked for a motion, motion given to deactivate the three committees, motion carried.

An outstanding NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 16-19, inclusive two days of professional development. The conference, with the theme "New Challenges, New Opportunities", was directed by President Elect/Conference Coordinator Mike Bundy. Academy classes and sessions appealing to all areas of professional growth and management were offered to the 402 members registered. Classes were well attended and many positive comments were expressed. Vice President Scott Powell reported that 82 vendors participated in the conference, and the exhibit hall was well attended. He also reported a total number of 612 NCASBO members for the year.

Director Jenny Billings reported that currently enrolled Business Office Specialists and Business Office Managers will graduate in February 2016. New groups will begin in February 2016, with the possibility of a new group of Business Office Directors starting

in July 2016. After successfully adding a new component, the School Treasurers' Academy, the Professional Development Committee is considering expanding the program to include a component for current and aspiring Principals and Assistant Principals.

Lori Triplett, Assistant Finance Officer, Catawba County and Chairman of the Scholarship Committee, expressed her appreciation to the members of the committee for their service and to Surry Insurance for sponsoring three scholarships, \$1,000 each. The Committee and NCASBO thanked Mr. Zach Wright, who represented Surry Insurance and presented the scholarships to the following recipients: Melissa Miller, Caswell County, NCASBO Academy; Cherie Wisse, Brunswick County, UNC Pembroke; and Angela Davis, Catawba County, UNC Pembroke.

The Star Award, which is not an annual award, was created by NCASBO to be given in recognition of professional service meaningful to our organization. President Elect Mike Bundy presented the Star Award to members of the Professional Development Committee and Academy instructors for their outstanding establishment of and contributions to the NCASBO Academy program. Instructors Kerry Crutchfield and Debra Dixon-Doss were recognized, along with Professional Development Committee members: Chairman Pam Satterfield, Freya Cahill, Harvey Gay, Jeff Hollamon, Jenny Billings, Tara Trexler,, Shirley Bess, Nan Barwick, Lu Ellen Richard, and Sharon Penny.

The 2015 Lou Thompson Distinguished Service Award was presented to Karla Miller, Chief Finance Officer, Catawba County Schools. Jenny Billings made the presentation and recognized that Karla has worked in school business for twenty-three years and has been an active and supportive member of NCASBO. She has served as regional representative, President, and other officer positions, even serving as Treasurer twice! Karla was in the first graduating class of School Business Office Directors and has always been willing to help in any capacity.

At the May, 2015 NCASA Board of Directors meeting, Jeff Hollamon, NCASBO member and Affiliations Chairman, was elected to serve as NCASA President Elect for 2015-16 and President for 2016-17.

Mike Bundy, Executive Officer for Budget and Finance, Moore County Schools, served as President for the fiscal year 2015-2016. Other elected officers were President-Elect Scott Powell, Finance Officer, Lincoln County Schools; Vice-President Jay Toland, Finance Officer, Scotland County Schools; Treasurer Faye Perry, Finance Officer, Camden County Schools; and Secretary Karla Miller, Finance Officer, Catawba County Schools. Jenny Billings served as the NCASBO Executive Director.

President Bundy emphasized the fact that NCASBO is a leader among public school organizations and a valuable resource for all members. His stated initiative is for NCASBO to continue the focus on staff development. He emphasized that the Association can capitalize on members' experience and knowledge by developing a mentoring program for new finance staff. He planned for the development of a "welcome packet" detailing the benefits of membership to new members who will receive the packet from the Executive Director upon joining the Association.

The DPI Summer Conference was held at the Sheraton Imperial Hotel on July 23, 2015. The Executive Council meeting was held on July 22 at the Doubletree Suites by Hilton in Durham following two days of staff development and Academy classes.

The Financial Leadership Conference was held at the Village Inn Events Center in Clemmons on October 7-9, 2015. Laura Hamilton, the Red Hat Lady, presented an interesting program. The leadership conference concluded with an ethics class presented by the NC Board of CPAs.

Jeff Hollamon, Finance Officer, Onslow County Schools, and Chairman of Affiliations Committee and President-Elect of NCASA, provided an update on the Charter Schools compromise legislation. He also reported that NCASA assisted in getting the Affordable Care Act (ACA) reporting fees waived for the current year.

Scott Powell, President-Elect and NC SASBO Director reported on the SASBO Leadership Summit held in New Orleans on January 27-29, 2016. He gave a report on the SASBO annual conference held in Shreveport on April 11-14, 2016.

The Professional Development Committee, chaired by Pam Satterfield, Past President and Finance Officer, Richmond County Schools reported the Academy School Treasurer classes are going very well and classes will continue throughout the state into the fall. The Staff Development Committee planned to offer a two-day regional Finance Academy Class for current and aspiring principals and assistant principals.

On a request from Dr. Lynn Harvey, DPI's Director of School Nutrition, a resolution was adopted by NCASBO to support the School Nutrition program. Similar resolutions were adopted by the School Nutrition Association and the Superintendents' Association.

The NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 15-18, inclusive of two days of professional development. The conference theme was "Waves of Change and Oceans of Success". Over 380 people registered for the conference and NCASBO membership totaled 622. Pre-conference and conference classes were well attended and many positive

comments were expressed. Vice-President Jay Toland worked with 81 vendors who participated in the conference.

Scholarship Committee Chairman Lori Triplett presented the 2016 NCASBO Scholarships to Angie Davis, Catawba County Schools; Sarah Banks, Asheville City Schools; and Shannon Collins, Surry County Schools.

The 2016 Lou Thompson Distinguished Service Award was presented to John Kachmarik, NCASBO Photographer, Charlotte-Mecklenburg Schools. Jenny Billings made the presentation. John has served the Association in numerous capacities over many years but is best known as the smiling face behind the camera recording the activities and events of NCASBO

Elected at the Annual Conference in February 2016, Scott Powell, Chief Financial Officer, Thomasville City Schools, served as NCASBO President for the Year 2016-2017. The other elected officers were President-Elect Jay Toland, Chief Financial Officer, Scotland County; Vice President Freyja Cahill, Chief Finance Officer, Brunswick County; Treasurer Faye Perry, Finance Officer, Camden County; and Secretary Karla Miller, Chief Finance Officer, Catawba County. Jenny Billings served as NCASBO Executive Director.

President Powell brought as his emphasis for the year a reminder to everyone that they are "here for the students." He encouraged Council members to emphasize ways to strengthen our regional involvement by recruiting new members in their regions into NCASBO and offering more support to new school business officials during their period of transition.

The Professional Development Committee chaired by Pam Satterfield, Chief Financial Officer, Richmond County, provided opportunities for comprehensive staff development, leadership and School Business Management Academy classes during the July SDPI Financial Leadership Conference, the Annual Conference in February and throughout the year. Academy classes for Principals and Assistant Principals were begun and classes for Treasurers continued, moving from the west to the eastern part of the state. Regional Representatives were reminded that continuing education credit is also available for qualified activities at regional meetings. Additionally, NCASBO purchased the rights to a series of Thompson Seminars in which legal experts provide sessions of interest to finance officers for local or regional use. Jenny Billings reviewed the process in place for many years to review and approve credentials for new finance officers as well as continuing education credits for current finance officers. This had been done in conjunction with Debby Jackson, DPI, but was subject to reconsideration upon her retirement May 1.

The Fall Leadership Conference was held at the Blockade Runner, Wrightsville Beach, October 5-7. Although a productive conference, discussion considered that the fall meetings were not well attended with only 64 participating this year. However, Council members expressed a desire to continue the fall sessions with more leadership type activities and events. A recommendation to offer the option of one day registration for the ethics session and DPI update for future conferences was approved.

NCASBO was honored to have Jeff Hollamon, Associate Superintendent and Chief Financial Officer, Onslow County, to preside over the North Carolina Association of School Administrators. President Hollamon reported that NCASA is active in the Legislature and is working on charter schools legislation and Principal and Assistant Principal pay scales. A major initiative for NCASA is working with the new student funding formula. NCASA requested that NCASBO partner with them to study the weighted formula with the goal to measure funding adequacy. The Executive Council appropriated an amount up to \$6,000 toward that joint study.

NCASBO was also honored to have Tony Messer, Chief Finance Officer, Chatham County to preside over the Southern Association of School Business Officers. The SASBO Leadership Conference was held January 23 – 27 in Asheville with nine members from North Carolina attending. The annual conference was held April 3 – 5 in Orlando, Florida. Adam Steele, Finance Officer, Hickory Public Schools, was appointed to a three-year term as the North Carolina SASBO Director beginning July 1, 2017.

The Association's website will migrate to YourMembership which will provide continuing education certificates, maintain member history, support member surveys and provide a message board. This product is currently used by 14,000 associations across the nation. The Association's financial operations will move to Quick Books, a cloud-based accounting system. Other Association business included recognizing the need to establish a records retention policy and considering the change at the Department of Public Instruction whereby there is no longer a numerical designation for the educational regions across the state. It was the decision of the Executive Council that NCASBO will continue to recognize the regions by number as well as by the geographic name.

A major initiative for this year was the School Business System Modernization Project, an effort to design a RFP for a comprehensive cloud based software package for school districts which would coincide with the RFP for NC DPI's software upgrade proposed by the Legislature. Clyde Locklear, Associate Superintendent, Cumberland County, and Angie Henry, Chief Finance Officer, Guilford County Schools, co-chaired an NCASBO ad hoc School Business Modernization Committee which, along with 12 other members plus our Executive Director, worked diligently on behalf of school districts in this time-

sensitive project.

Yet another outstanding NCASBO Annual Conference was held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 13-16, 2017, inclusive of two days of professional development. The conference, with the theme "Playing with the Cards You are Dealt and Winning" was directed by President-Elect and Conference Coordinator Jay Toland. Academy classes and sessions appealing to all areas of finance, personnel and management were offered for the 392 members registered. There were 80 exhibitors attending the conference and all 85 vendor booths in the exhibit hall were well attended. Membership Chairman Freyja Cahill reported a total of 622 regular members and 64 lifetime members. Jenny Billings noted to the Council that NCASBO did not currently have seven future years' contracts for the Annual Conference in place as outlined in the Procedures Manual. This would be an optimal time to consider a change in location or date of the Annual Conference.

Lori Triplett announced the winners of three \$1,000 scholarship awards sponsored by Surry Insurance. Mr. Zach Wright presented the scholarships to the following recipients: Audra Chilton, Mt. Airy City Schools; Steven Harrell, Gates County Schools; and Heather Perry, Lee County Schools. Tom Rickman, TRA, has completed 10 years of \$1,000 scholarships pledged in memory of Larry Wallace, SARTOX President. Both of these vendor scholarships have been a tremendous asset to NCASBO members.

Special recognition was given to two individuals who have been great supporters of NCASBO. The Star Award is presented occasionally when special recognition is warranted for professional service meaningful to our organization. This special award was given to former State Superintendent Dr. June Atkinson and outgoing NCDPI Chief Financial Officer Phillip Price. Both of these professionals have been valuable supporters of NCASBO's efforts for decades.

Shirley Bess, Accounting Manager, Union County Schools, was honored as the 2017 recipient of the Lou Thompson Distinguished Service Award. Shirley has served NCASBO in numerous roles, is a Past President and is currently serving on the Executive Council as a Regional Representative. Shirley also served as the NC Director for SASBO.

A major transition for NCASBO began in July when Jenny Billings announced her resignation as Executive Director effective June 30, 2017. Jenny began her role with the Association in 2000 following her retirement from DPI where she worked closely with finance officers across the state. Her contributions to the organization have been monumental. Over the course of this year the officers conducted a search and utilized a survey from the membership. After considering five applicants the choice for Executive Director was Pam Satterfield. Jenny was recognized with appreciation throughout the

year and Pam's appointment was greeted enthusiastically. NCASBO has been and will continue to be in great hands with these two dedicated professionals.

NCASBO leadership for 2017-2018, elected in February 2017, consisted of President Jay Toland, Chief Finance Officer, Scotland County, President-Elect Freyja Cahill, Chief Finance Officer, Brunswick County, Treasurer Faye Perry, Chief Finance Officer, Camden County, and Secretary Karla Miller, Chief Financial Officer, Catawba County. At the January 11, 2018 Executive Council Meeting President Jay Toland submitted his resignation upon leaving public schools for a position in local government. Following his resignation in accordance with By-Laws the officers became President Freyja Cahill, President-Elect Parker Turpin, Chief Financial Officer, Rockingham County, and Vice-President Jeff Hollamon, Chief Financial Officer, Onslow County, pending an email vote of the membership. Pam Satterfield, retired from Richmond County, completed her first full year as Executive Director.

President Toland reviewed the goals for his term as President at the July 25 Executive Council Meeting. The goals were establishing a committee to review NCASBO'S mission and vision; profitability; increased regional representative attendance and participation at Executive Council meetings; and the appropriate level of fund balance for the organization.

Professional development continued to be the primary goal of NCASBO, and the Professional Development Committee, chaired by Freyja Cahill, provided excellent opportunities for comprehensive staff development throughout the year with Academy classes prior to the DPI Finance Forum July 18-19, the Fall Leadership Conference September 20-22 at the Hilton Asheville Biltmore Park, and many offerings preceding the annual conference in February. "Lunch and learn" sessions were planned across the state for new Finance Officers with less than three years' experience. Regional Payroll Job Alike meetings were begun across the state. Plans are to increase this new staff development offering for other job functions. New Academy cohorts for Directors, Managers and Specialists began in March 2018 to be completed by February 2019. Classes for Treasurers and Principals were offered. The Committee addressed a refined Academy curriculum with an emphasis on shortening the length of time it takes to complete the Academy, which was initiated in 2008. Regional representatives were reminded that another avenue of professional development is the sharing of regional meeting topics and were encouraged to provide meeting dates and topics for posting on the website.

NCASBO continued a strong affiliation with NCASA and was pleased to have Katherine Joyce, NCASA Executive Director to attend the February Strategic Planning Council Meeting to discuss NCASA's five priorities: Improved Mandated K-3 Class Size

Legislation, Enhance Pay Plan for School-Based Administrators, Enhance State Support for School Facilities, Fine-Tune School Performance Grading & Accountability System, and communicate the importance of Central Office Support. Of particular importance is a combined effort between NCASA and NCASBO to evaluate and make recommendations to the General Assembly on the Weighted Funding Model. A joint effort was the contract to study funding formulas used by other states. To further strengthen the relationship and to increase attendance at their spring conference NCASA planned to add a finance track and an additional general session focused on legislation. Jay Toland, Jeff Hollamon, and Tony Messer led the NCASA Affiliations Committee.

NCASBO also continued a strong affiliation with SASBO. Adam Steele, Director of Finance and Business, Hickory Public Schools, continued to serve as NC SASBO Director. SASBO presented the Leadership Conference in January, 2018 in Orange Beach, AL and the Annual Conference in April in Memphis, TN, with 6 NCASBO members attending the annual conference.

The School Business System Modernization Project continued with NCASBO's efforts led by Clyde Locklear, Associate Superintendent, Cumberland County, and Angie Henry, Chief Finance Officer, Guilford County Schools, as co-chairs of the ad-hoc committee. NC DPI employed a project manager to lead the migration to the comprehensive cloud-based software operation, and the RFP was finalized.

Executive Director Satterfield supported the Executive Council and the Association through a progressive year and provided stability through the leadership changes. Accomplishments included migration to the new website YourMembership, plans to revitalize the NCASBO newsletter, affirming the process regarding Finance Officers' CEU procedures, and adopting a Records Retention Schedule for maintaining aged NCASBO files.

The major event of each Association year is the Annual Conference and 2018 was no exception. Held at the Koury Convention Center, Sheraton Four Seasons in Greensboro, February 12-15, 2018, inclusive of two days of professional development, the theme for the 36th annual conference was "Reinvent Influence." President Freyja Cahill reported there were 412 attendees and 200 vendors representing 84 exhibit booths participating. Pre-conference professional development classes were well attended. A membership report from President-Elect Parker Turpin at the Annual Membership Business Meeting gave an impressive number of more than 800 Association members. A new addition to the agenda was a social with the vendors on Tuesday evening to show continued appreciation for the important support they provide for the

conference. Vendor exhibit booths were also well attended. After many consecutive years of conferences being held at Sheraton Four Seasons the Professional Development Committee requested an email poll to be conducted on whether to explore moving the conference in 2020.

Debra Smink announced the winners of three \$1,000 scholarship awards sponsored by Surry Insurance. Mr. Zach Wright presented the scholarships to the following recipients: Audra Chilton, Mt. Airy City Schools; Steven Harrell, Gates County Schools; and Heather Perry, Lee County Schools.

Since its inception in 1995 a highlight of every Association year is the awarding of the Lou Thompson Service Award. At the 2018 Annual Conference this honor went to Hank Hurd. Hank began his career as Finance Officer in Harnett County on July 1, 1976 - the same day that the North Carolina School Budget and Fiscal Control Act became law! He was one of a small number of finance officers who came together in 1981 to create the North Carolina Association of School Business Officials. He served NCASBO on numerous state-wide committees and as President in 1991-1992. In 1999 Hank accepted a position at the Department of Public Instruction (DPI) as Associate State Superintendent and CFO for Business and Financial Services, becoming the first and only School Finance Officer to serve as a CFO at both the local and state level. Hank left DPI in 2002 to assume the position of Chief Operating Officer of Durham Public Schools. He retired after several successful years in Durham but remained close to public school finance in private practice. Hank still continues to have a passion for the success of North Carolina Public Schools and works tirelessly to boost the CFOs and business operations of K-12 education. Hank was awarded a Thinkpad sponsored by EMS LINQ. He also received the "Jenny Billings Honorarium" scholarship (formerly named the Larry Wallace Memorial) of \$1,000 to be given to a high school senior for secondary education. The Jenny Billings Honorarium was sponsored by TRA, Inc.

At the Annual Conference in February 2018 the following members were elected to lead the Association in the 2018-2019 year: President Parker Turpin, Chief Financial Officer, Rockingham County, President-Elect Jeff Hollamon, Chief Financial Officer, Onslow County, Vice-President Ken Chilcoat, Finance Officer, Hyde County, Treasurer Faye Perry, Chief Finance Officer, Camden County, and Secretary Julie Masten, Chief Finance Officer, Person County. However, at the July Executive Council meeting President Turpin announced he would be resigning his position with Rockingham County effective August 7, thus setting in motion leadership changes with Jeff Hollamon moving to the position of President and Ken Chilcoat moving to President-Elect. At the October Council Meeting Tony Messer, Chief Finance Officer, Chatham County was nominated as Vice-President and affirmed on an email vote. Pam Satterfield served NCASBO as Executive Director.

At the conclusion of her second year as Executive Director, the Association's goals were reflected in the goals of Director Satterfield, which were to continue to plan and implement effective use of support staff, continue involvement with NCASA regarding policy and legislative issues, continue to be visible in the districts, pursue software for the Academy management program, increase membership and participation, maximize vendor benefits, update the Policy and Procedures Manual, and continue to attend affiliated organization conferences.

Professional Development, chaired by Freyja Cahill, Chief Finance Officer, Brunswick County, remained the primary focus of NCASBO. In addition to on-going School Business Academy classes there were offerings for School Treasurers, School Principals, Job-Alike classes, and Customer Service Training. The committee discussed plans to develop courses for Central Office Directors and advanced classes for Academy graduates in Budgeting, Cash Management and Investing. A successful Fall Leadership Conference was held October 17-19, 2018 at Courtyard by Marriott in Carolina Beach. "Surviving and Thriving in the Face of Rising Seas" was the theme, and the conference provided important updates as well as networking opportunities. The Professional Development committee remained actively interested in providing offerings requested by the membership.

NCASBO continued to work closely with NCASA to pursue joint goals with the North Carolina General Assembly in this year's "long session." Tony Messer and Jeff Hollaman co-chaired the Affiliations Committee.

Adam Steele, Director of Finance and Business, Hickory Public Schools, continued to serve as NC SASBO Director. SASBO's Leadership Conference was held in January, 2019 in Savannah, GA and the Annual Conference in late April/early May in Norfolk, VA. Scott Powell, Chief Financial Officer, Thomasville City Schools, presented at the Annual Conference and Ashley Sutton, Chief Financial Officer, Duplin County, was North Carolina's representative on SASBO's Emerging Leaders Committee, whose purpose is to understand the needs of younger members and utilize their strengths to develop strategic plans for SASBO's relevance in the near and distant future.

The School Business System Modernization Project remained on-going with Clyde Locklear, Associate Superintendent, Cumberland County, at the helm for NCASBO. The statutory purpose of the School Business Systems Modernization initiative is to modernize the systems used by the Department of Public Instruction, Financial and Business Services Division, to manage and deliver funds and technical support services to local school administrative units and charter schools. Systems included are for student information management, financial and payroll information, human resources information, and capital and repairs and renovations planning information.

The School Business Systems Modernization Program awarded master service agreement contracts to CherryRoad Technologies and Tyler Technologies. CherryRoad Technologies has partnered with Oracle to provide their Oracle Cloud ERP solution and Tyler Technologies provides its Munis ERP solution.

A significant initiative this year was the introduction of HB1031 by which the Local Government Commission and the School of Government were directed to convene a working group to develop and recommend statutory parameters for (1) fund balances maintained by local boards of education, and (2) for disputes related to the capital outlay fund. The working group was made up of representatives from NCACC, NCSBA, AND NCASBO. The findings of the working group were to be reported to the Joint Legislative Education Oversight Committee related to many facets of the school fund balance, the role of boards of county commissioners, if any, in determining the use of fund balances and a mechanism for calculation by formula or other means to resolve disputes related to capital outlay as an alternative to litigation.

Throughout the year the reports by Treasurer Faye Perry gave cash accounts in excess of \$500,000. Council members recommended seeking better investment of idle funds and Treasurer Perry continued to pursue investment opportunities.

February 18-21, 2019, including two days of professional development, were the dates for the 37th Annual Conference held at the Koury Convention Center, Sheraton Four Seasons in Greensboro. After considering other locations for the Annual Conference it was concluded that NCASBO would remain at the Koury Center, at least through 2020. This year's theme was "Break Through to Excellence; Challenge Accepted!" There were 378 registered conference attendee and 84 participating vendors. An impressive Association membership of 949 was announced. Other Conference highlights included Logan Weber, speaker at the Wednesday Exhibitor Appreciation Luncheon, whose passion for servant-leadership and positive influence has made him a dynamic and relevant presenter. Lori Triplett, Assistant Finance Officer, Catawba County, announced the following scholarship winners: Laura Holden, Swain County, Eva Hodge, Wake County and Cynthia Whitley, Winston-Salem/Forsyth County.

At the 2019 Annual Conference the recipient of the Lou Thompson Service Award was Faye Perry. Faye has served NCASBO in many roles, serving as President in 2013-2014 during which time she focused on growing the association and helping its members find innovative solutions for new challenges. She has served NCASBO in many other ways, including serving as Treasurer for seven years. Faye exemplifies "service" in this prestigious service award!

At the Annual Conference Business Meeting on February 21, 2019 the following members were presented in nomination by Immediate Past President Freyja Cahill and elected to the Association's leadership for the 2019-2020 year: President Ken Chilcoat, Finance Officer, Hyde County; President- Elect Tony Messer, Chief Finance Officer, Chatham County; Vice-President Clyde Locklear, Associate Superintendent for Business Operations, Cumberland County; Treasurer Faye Perry, Chief Finance Officer, Camden County; and Secretary Julie Masten, Chief Finance Officer, Person County. Pam Satterfield continued to serve as NCASBO's Executive Director.

With leadership from the Professional Development Committee, chaired by Freyja Cahill, Chief Finance Officer, Brunswick County, the continuation of quality offerings for the various Academy groups was planned. A successful fall leadership conference with quality offerings was held at Great Wolf Lodge October 9-11, 2019 in Concord. New Academy cohorts were scheduled to begin in March, 2020.

Affiliation with the partner organizations, SASBO and NCASA, has always been and remains crucial to the professional accomplishments of NCASBO. NCASA announced a new board structure in which Jeff Hollamon served on the Executive Committee and Mark Winters and Pam Satterfield served on the Board of Directors. Mark Winters, Chief Financial Officer, Wake County, reported that NCASA's 2020 priorities included, but were not limited to, salary increases for all employees and significant investments in school facilities.

SASBO Director Adam Steele, Director of Finance and Business, Hickory Public Schools, shared plans for professional development opportunities in January in Chattanooga, Tennessee and the SASBO Annual Conference in Louisville, Kentucky in April. Ashley Sutton continued to represent North Carolina as the SASBO Emerging Leader. The Bylaws/Policy Committee announced plans to review and discuss updates to both operations guides. Recommended revisions will be brought to the Executive Council when completed.

The School Business Modernization Project efforts continued, with Clyde Locklear and Angie Henry continuing in the NCASBO representation roles. Four pilots were designated to work with DPI on the "golden template" for districts. Concerns about adequate funding also continued.

Another important item of note for NCASBO during the early part of the 2019-2020 year was the recognition of the awarding of the ASBO International Eagle Award to Terry Hass, Past President and Chief Financial Officer for Mooresville Graded School District. The Eagle Award recognizes K-12 business professionals for their exemplary leadership and contributions to their districts and to the school business profession.

A successful winter conference was held at the Sheraton Koury Convention Center in Greensboro, February 10-13, 2020. The Conference theme was "Collectively Creating Success." The Annual Conference had 420 participants and an association membership of 812 was announced. Keynote speakers for the Exhibitor Appreciation Luncheon were Dr. Alisa McLean, Superintendent, and Beth Day, Assistant Superintendent of Finance, Granville County. Scholarship recipients were Karla Miller Aldridge, Chief Finance Officer, Catawba County; Sally Norfleet, Chief Finance Officer, Camden County; Karen Strausser, Payroll Manager, Thomasville City; and Laura Holden, Payroll Coordinator/HBR, Swain County. At the Annual Business Meeting Treasurer Faye Perry presented the clean opinion letter from Maryglenn S. Hill, CPA, PA who served as the NCASBO auditor. This was the last conference to utilize paper handouts with future conference materials to be presented in an app.

The prestigious Lou Thompson Service Award was presented to Scott E. Powell at the Conference. Scott is Chief Financial Officer for Thomasville City Schools. He is a past president who has served NCASBO and our affiliates in many ways, notably educating finance officers, finance office staffs and partners to our organization. Scott is a loyal lifetime member of NCASBO and a worthy recipient of this great honor.

By the conclusion of the 2019-2020 year, many of our events had to be rescheduled or cancelled due to the worldwide pandemic virus, COVID -19. However, NCASBO planned online webinars for its membership to remain connected by utilizing ZOOM, a video conferencing platform that was to become the method of continuing the Association's business for years to come. The final Executive Council meeting for the year (May 2020) was made possible by utilizing ZOOM.

Covid-19 became the driving force behind virtually everything in public education for administrators, teachers and students. It changed almost all normal activities and presented new challenges for school finance personnel to maintain strong leadership for the impact of finance in the volatile environment. Therefore, the cohesive finance staffs were especially well served by this professional organization with continued close communication on both the state-wide and regional levels.

Sheraton Four Seasons in Greensboro continued to be the site for the Annual Conference, and in February of 2020 the following members were elected as officers for the 2020-2021 association year: President Tony Messser, Chief Finance Officer, Chatham County; President -Elect Clyde Locklear, Associate Superintendent for Business Operations, Cumberland County; Vice-President Ashley Sutton, School Finance Chief Officer, Duplin County; Treasurer Faye Perry, Retired Chief Finance Office, Camden County; and Secretary Julie Masten, Chief Finance Officer, Person County. Executive Director Pam Satterfield continued to serve the organization in exceptional

times.

At an Executive Council meeting in January, 2021, it was recommended by Immediate Past President Ken Chilcoat and approved by the Council that the current officers continue serving NCASBO for an additional year, 2021-2022, in their current capacity. The 2020-2021 year began just as the 2019-2020 year had ended, and the continuing influence of the Covid pandemic dictated the delivery of services to the members of NCASBO, but did not lessen the dedication to provide professional leadership and professional development to the members. Director Satterfield oversaw the delivery of successful live online professional development with large enrollments. She also devoted a lot of time to announcing schedules, re-schedules and cancellations, always with the hope of resuming in-person sessions when the ever-changing virus subsided. That optimism led to scheduling future annual conferences at the Sheraton in Greensboro through February, 2025.

Partner professional associations also provided meeting opportunities via Zoom, although Adam Steele, SASBO Director for North Carolina reported that eight members attended the annual conference, April 20-22, in Biloxi, Mississippi. He also noted that the SASBO conference would be returning to North Carolina in 2024. He was elected as Vice-President of SASBO and Heidi Kerns, Chief Financial Officer, Rutherford County, replaced him as the North Carolina Director in 2021-2022. Seth Prevette, Chief Finance Officer, Wilkes County, was chosen as North Carolina's next Emerging Leader.

NCASA provided several webinars and a Virtual Law Symposium, all reported by Mark Winters and Jeff Hollamon, Affiliations representatives.

The School Business Modernization project, with Clyde Locklear and Angie Henry representing NCASBO, continued. Funding in the amount of \$18 million was made available for pilots to continue development. Rhonda Turner and Kelly Kluttz, regional representatives from New Hanover County and Cabarrus County respectively, worked through issues with both Tyler and Cherry Road to complete the "golden template." Clyde reported the progression of several counties scheduled to go live over several months with both Tyler Technologies and Cherry Road.

A new dues structure was presented and approved for 2020-2021. The new structure focuses on district membership versus the individual memberships this association has utilized. The new structure provides for three district ADM size categories, as well as Individual and Lifetime Memberships. Annual membership invoices will be sent in July each year. Vice-President Ashley Sutton reported in January, 2021, that NCASBO had 104 district members and 91 individual members.

The Bylaws/Policy committee finished a comprehensive review and revisions to both documents. The revisions were needed to reflect 501c guidelines in the Bylaws and both 501c guidelines and current practices in the procedures Manual. Updates to both documents will give improved guidance in today's complex environment to the leadership and the membership. The review and recommendations were completed by Harvey Gay, Debra Dixon-Doss, Kathy Isenhour and Lyn Hensley, all retired members and all past presidents.

Scholarship recipients for 2020-2021 were reported by Rube Blanchard, Chief Finance Officer, Perquimans County and Scholarship Chairman. They went to Delores Pulliam, Warren County, and Rosa Ramos, Iredell-Statesville Schools.

With no annual conference for the first time in the association's history, the Executive Council met via Zoom in January and during that meeting President Messer presented the 2021 Lou Thompson Service Award to Jeff Hollamon, Associate Superintendent and Chief Financial Officer, Onslow County. Jeff has served NCASBO as President, President-Elect and co-chair of the Affiliations Committee. He is a graduate of the NCASBO School Business Management Academy as a Certified School Business Director. Under Jeff's leadership, Onslow County Schools was the first district to have all their school treasurers complete the School Business Treasurers Academy. Jeff has always been a great resource for this organization and has an immense understanding of the complexity of public school finance. His contributions and actions strengthen the Association and the school business officials' profession. Jeff is also a past president of the North Carolina Association of School Administrators (NCASA.)

Although NCASBO could not meet for an annual conference in February, 2021 (postponed until May, 2021, then cancelled) the important business of the Association was conducted at the Annual Business Meeting via Zoom on May 21, 2021. Thus, the membership still had an opportunity to learn how the Association continues to serve school finance personnel, even in complex times.

As the new Association year began in July, 2021 the world was returning from pandemic operations to somewhat normal routines. NCASBO resumed in-person meetings and classes, but also continued to employ the virtual meeting technology that had been utilized extensively in previous months. Leadership for the new year was as had been recommended by Past President Ken Chilcoat at the Executive Council meeting in January, 2021, and the officers during the pandemic year 2020-2021 continued in their same positions for the 2021-2022 year. There were as follows: President Tony Messser, Chief Finance Officer, Chatham County; President -Elect Clyde Locklear, Associate Superintendent for Business Operations, Cumberland County; Vice-President Ashley Sutton, School Finance Chief Officer, Duplin County; Treasurer Faye Perry, Retired Chief

Finance Office, Camden County; and Secretary Julie Masten, Chief Finance Officer, Person County. Executive Director Pam Satterfield continued to serve the organization in that capacity.

President Messer acknowledged the committee chairs and regional representatives as the lifeline for NCASBO. Ambitious goals for the year were shared by Executive Director Satterfield with a steady lineup of classes and communications: regional Treasurers classes; monthly webinars, including the new finance officers group monthly webinars; a new cohort of School Business Academy classes; Graduate Director and Manager classes; a fall conference in New Bern; plans for regional Principals classes in 2022; a summer conference planned for 2022 to coincide with the DPI summer conference; a focus group for Charter School legislation; and a Year in Review sheet that highlighted many accomplishments in 2020-2021 in spite of the difficulties of that year. As always, professional development remained the primary focus of NCASBO, and that committee, chaired by Freyja Cahill, Chief Finance Officer, Brunswick County, continued to be vital to providing such excellent opportunities.

Affiliations with other professional associations remained strong. North Carolina SASBO Director Heidi Kerns, Finance Officer, Rutherford County, shared the conference schedule for that related organization which included an event upcoming in Hot Springs, Arkansas, April 5-7, 2022 and future SASBO conferences in Louisville, Kentucky in 2023 and Greenville, South Carolina in 2024. Director Kerns encouraged participation in the monthly Expert Exchange webinars provided by that organization. Jeff Hollamon, Chief Financial Officer, Onslow County, was recognized as the SASBO Outstanding School Business Officer, an award presented to him by President Messer as Jeff was unable to attend the SASBO Conference.

NCASBO was represented at other important affiliated associations by Mark Winters, Chief Financial Officer, Wake County, who participated with both NCASA and NCSBA on several legislative topics. ASBO International also hosted a Legislative Advocacy seminar attended by Jeff Hollamon.

The School Business Modernization project began the year with questionable progress due to funding concerns. NCASBO President-Elect Clyde Locklear, Associate Superintendent for Business Operations, Cumberland County, has represented this association in that effort for several years. He noted at the fall conference that DPI was aligning their technology department "under one hat." By the year's final meeting in May he reported that \$86.6 million was appropriated in the biennium budget to include Power School and licensure. Districts continued to work through improvements with financial software vendors LINQ, Serenic, Tyler and Cherry Road.

A contract between DPI and NCASBO to provide professional development, support and technical assistance to the districts resulted in a \$4,450,000 budget entry in the 2022-2023 budget. Jennifer Bennett, formerly with DPI and later in school districts as both staff and contract consulting, discussed the funding. She returned to DPI and will be the Liaison to NCASBO. Karen Rogerson, Finance Officer/Retired, Martin County, will be coordinating the DPI/NCASBO Technical and Strategic Assistance Project.

After a year's absence, an excellent conference was held at the Sheraton Four Seasons, Greensboro, February 7-10, 2022. This was the first conference to utilize an app for schedules and other conference information, and the post-pandemic conference was "aptly" titled "The Great Comeback!" Executive Director Satterfield noted that there were 417 attendees and 73 vendors at the conference. Under the new dues structure, Vice President Ashley Sutton, announced that there were 110 district memberships representing some 600 employees in addition to 100 active individual and retiree members. Treasurer Faye Perry reported a total funds balance in excess of \$600,000 and presented the outside auditor's clean audit report. A significant highlight for the 2022 conference was having the North Carolina State Treasurer, Dale Folwell, as the conference luncheon speaker.

NCASBO 2022 Scholarship recipients, many of whom were Academy graduates, represented a range of plans. Appreciative recipients were: Andrea Hough, Chatham County Schools Lead Payroll Specialist; Emily Santora, Dare County Schools Payroll Specialist; Seante Williams, Craven County Schools EC Bookkeeper; Sherry Wright, Swain County Schools Payroll Coordinator; and Kristie Walker, Jackson County Schools Chief Finance Officer.

The best representation of the purpose of NCASBO is always exhibited in the annual recipient of the Lou Thompson Distinguished Service Award. This honor was begun in 1995 and was appropriately named for its first recipient, Lou Thompson, Director of School Business Services, at the Department of Public Instruction. Lou was a strong mentor and supporter of NCASBO and its membership. The 2022 honoree is Mary Hazel Small, Chief Financial Officer for New Hanover County Schools. Mary Hazel has served NCASBO, DPI Financial and Business Services and finance officers across the state in many crucial roles. She has served as a mentor to many new finance officers and as a valuable resource to seasoned finance office personnel. She has most recently served as a pilot for the State School Business Modernization Project where she worked tirelessly to identify improvements and make change happen. Most importantly, she exhibits the demeanor and qualities that should define all finance personnel.

This NCASBO History chapter for 2021-2022 is written in memory of Katrina V. Miller who served the association as Historian for many decades. Katrina was a founding

member of NCASBO, a past president and a Lou Thompson Distinguished Service Award recipient. She was also President of SASBO and of NCAEOP before there was a NCASBO. Most importantly, as well as a leader, she was a lady and a joy to all who knew her. Her accomplishments, like her personality, are legendary. Katrina passed away March 30, 2022.

The association year began July 2022 with incoming President Clyde Locklear, retired Chief Finance Officer from Cumberland County Schools. The association quarterly meeting was held on July 20, 2022, at the Sheraton Imperial in Durham, NC. President Locklear opened the meeting by recognizing Tony Messer, Immediate Past President and thanking him for his service to NCASBO. The academy classes were paused during Covid but resumed in August 2022. Monthly webinars continued with approximately 50 to 100 members attending the one-hour sessions which included topics regarding payroll, budget codes, how to calculate sales, budgeting.

The Finance Officer fall retreat was held in Asheville, NC at the Double Tree by Hilton October 19-21, 2022. A new initiative began July 1, 2022, with funding provided by the North Carolina General Assembly. The program will provide mentoring for new finance officers. Mentees will be paid by NCASBO and will be reimbursed by the NC Department of Public Instruction. As of October, NCASBO had requests from 31 Public School Units (PSUs) for mentoring services. Karen Rogerson was appointed the Project Learning Coordinator for the Technical and Strategist Assistance Project. Karen will be responsible for coordinating and assigning mentors to each PSU and maintaining the contracts between the mentor and the PSUs.

NCASBO was asked by DPI Chief Finance Officer Alexis Schauss to address revision of the current finance officer certification program. The proposed certification revision would require a minimum of 15 credit hours of accounting and new finance officers would be required to have a mentor assigned for two years through NCASBO. She also reported the State Board of Education is required to assign a paygrade to the finance officer position linked to the State-level accounting director I and II as a minimum starting point.

NCASBO continues to have strong affiliations with other professional associations. Heidi Kerns represents NC as the SASBO director and Adam Steele is the current Present-Elect for SASBO. The 2023 conference was held in Louisville, Kentucky, April 3-5, 2023, and the 2024 SASBO conference will be held in Greenville, South Carolina, April 16-18, 2024, with North Carolina's Adam Steele serving as president. Mark Winters, CFO Wake County serves as the chair of the affiliations committee and Jeff Hollamon, Chief Finance Officer, Onslow County Schools serves as the Allotment Task Force Committee through NCASA.

The January quarterly Executive Council meeting was held in Raleigh at the Courtyard by Marriott-Brier Creek. Kerry Crutchfield, representing the Chart of Accounts committee, reported changes are being made at the state level and implementation will be statewide in accordance with the school modernization project. The state modernization project is ongoing with Oracle and Munis. At present, the General Assembly has not added additional funding for PSU implementation. Durham public schools will be piloting a third option with Serenic (Formerly Sartox) ERP. Ashe County Schools piloted and successfully converted to the LINQ ERP version as another option for PSUs to consider.

The annual 2022-2023 NCASBO Conference was held at the Sheraton Four Seasons, Greensboro, North Carolina, February 6-9, 2023, with over 350 in attendance. The conference celebrated the 40th anniversary of the association. Several past presidents attended the special celebration. Scholarships were awarded Angie Johnson, Cumberland County Schools, Devin Mallory, Perquimans County Schools, Janie O'Connor, Davie County Schools, Melissa Rouse, Duplin County Schools and Wendy Godfrey, Lee County Schools. These recipients were recognized at the business meeting on Wednesday of the conference. Incoming 2024 NCASBO president Ashely Sutton, Chief Finance Officer, New Hanover County Schools presided over the Strategic Planning luncheon during the annual conference. Ashley thanked the volunteers working at the conference and recognized Clyde Locklear for his dedication to the association during his career. President Locklear retired from Cumberland County Schools in July of 2022 but continued to fulfill his commitment to serve out his term as president of NCASBO during the current year. Cindy Holder, Chief Finance Officer for Alleghany County School and NCASBO Secretary reviewed the minutes. Candy Tilley, Chief Finance Officer of Martin County Schools was recognized as Vice-President gave an update for membership. Pam Satterfield, NCASBO Executive Director gave a conference update during the luncheon. A new NCASBO app was introduced at the annual conference allowing participants to review the agenda and sign in for continuing education credit through the app.

The NCASBO final quarterly meeting was held in Raleigh at the Courtyard by Marriott-Brier Creek on May 12, 2023, with President Locklear presiding. He thanked everyone for another successful year. Treasurer Faye Perry reported the association had a balance in the checking and money market accounts totaling \$788,043.47 as of April. Heidi Kerns reported that the State Board of Education recently approved the allotment policy for PSU modernization. The policy changes the scope of the project in that PSUs will receive funding through program report code 153. It is important to note that in order to receive funding the PSUs will need to have completed the modernization conversion in three and a half years.

Mark Winters, Chief Finance Officer, Wake County Schools was awarded the Lou Thompson Distinguished Service Award at the annual conference. Mark has served on numerous association committees, spoken on behalf of finance officers by speaking to legislators, and represented NCASBO interests in our affiliation with other professional associations.

The first meeting of the Association's new year was held July 19, 2023 at the Sheraton Imperial Hotel in Durham, NC. Newly elected President, Ashley Sutton, New Hanover County Schools Finance Officer presided. Additional Leadership for the upcoming year consisted of: President-elect: Candy Tilley, Martin County Schools Finance Officer; Vice President: Tyler Beck, Davidson County Schools Finance Officer; Treasurer: Faye Perry, retired Camden County Finance Officer; Secretary: Cindy Holder, Alleghany Schools Finance Officer and NCASBO Executive Director, Pam Satterfield.

Work progressed in support of the Association's three primary objectives (1) Further professional development of members; (2) Promote and provide leadership for the improvement and advancement of members and (3) Promote the improvement and advancement of public education through greater fiscal accountability and integrity continues to be a priority.

This work is evident through the teaching of 125 academy classes during the 2023-24 year. Through the completion of the School Business Academy, 27 Certified School Business Directors, 36 Certified School Business Managers, 6 Certified School Business Specialists, 43 School Principals and 156 School Treasurers were awarded certification. In addition, 25 webinars, 12 CFO Zoom meetings and 5 in-person specialty content classes were hosted by the Association during the year.

Commitment to the members and their continued growth is further evident by providing Mentor and Technical Assistance support to 57 Public School Units that included 7 in-person training events for new CFOs, mentees and mentors.

The mentoring initiative that began in July 2022 through the efforts of NCASBO and NCDPI, for new finance officers, continued to expand with 40+ active LEA contracts supported by 25 mentors. A recent change in finance officer policy requiring finance officers with 2 years or less experience to have a mentor is anticipated to continually increase the number of mentor contract requests received by the Association. Feedback from Superintendents and others participating in the initiative remains extremely positive and appreciated. Requests are being received for a similar program for Human Resource Directors in the future.

The 2023-24 year also ushered in new legislation regarding Conflicts of Interest training for all local school administrative employees involved in the making or administering of contracts. In response, a new training course was developed and offered on 10 separate occasions, either virtually or in person. Based on feedback from members and NCDPI, the training will continue to be offered and tailored to incorporate other professionals such as School Treasurers and Principals.

Conference attendance has continued to expand with 229 members attending the July Summer Conference in Durham, NC, 108 attending the October Fall Leadership Conference in New Bern, NC and 501 attending the February Annual Conference in Greensboro, NC. This success can be attributed to the 107 members who volunteered their time and talents to further the continued learning of colleagues across the state.

A primary goal for the Association this year is the development of a strategic plan. A strategic plan will ensure alignment of everyone's efforts in achieving specific goals. Vista Cova is the vendor the Association will be partnering with to develop the plan. A group of approximately 15 individuals, including the officers, was put together to meet with the vendor and begin the process of developing a strategic plan. Member input surrounding strategic goals was sought through a planning survey. As a result, three draft goals were developed: (1) Targeted staff development to strengthen district financial leadership, (2) Building community through accountability and growth, improving the sustainability of the profession and (3) Collaborative advocacy to communicate the importance of the profession and advocate for resources necessary to accomplish these goals. Work now begins to align the Association's current activities to the draft goals.

On September 27, 2024 Hurricane Helene forged a path of destruction through NC's western counties depositing a record-breaking amount of rainfall which led to major flooding and mudslides. The storm caused widespread destruction to homes and infrastructure, and essential services such as electricity, water, transportation and communications were disrupted for prolonged periods. For our western NC members, this level of impact was unprecedented, and navigating FEMA processes was uncharted territory. In response, The Association organized two information sessions, bringing together eastern districts experienced with hurricane aftermath and those from western districts to share guidance and insights.

Strong partnerships with other professional organizations remain an important focus for the organization. Through these affiliations, our members continue to benefit from the sharing of knowledge and resources that strengthen the profession. A foundational network of support continues to build relationships across the organizations improving

the work. Heidi Kerns represented NC as SASBO Director, Adam Steele as SASBO Past President and Tony Messer as SASBO's Outstanding Business Official. Additionally, Jay Toland, Cumberland County Schools Finance Officer and Jeff Hollamon, Onslow County Schools Finance Officer, represented the Association with their membership in NCASA.

Conclusion

The Association Year, and the Association, is a work in progress. There will be further action and highlights to record. Interviews with past presidents, officers, and other members confirm that important contributions and achievements have been realized through the efforts of the combined membership, building upon the original base and with the primary objective to further the professional development of the membership. Strengthening the activities of the regions - the backbone of the organization - and the sharing of knowledge and mutual support have been invaluable to the cohesiveness of the Association membership.

The history of the school business official, as reflected through the history of the North Carolina Association of School Business Officials, clearly describes the increasing complexity of public education in our society. No longer can a pen-in-hand entry in a leather-bound journal record a payment for teaching services or the purchase of coal for a pot-bellied stove. Staffing, facilities, supplies and equipment, food and transportation services, environmental control...these are among the realities of public school education. The role of the school business office is to provide the structure within which the organization can exist, and the role of the school business official is to lead that effort with fiscal accountability and the quest for excellence. The North Carolina Association of School Business Officials has played, and will continue to play, a crucial part in the professional development of the school business official for the ultimate benefit of school children in North Carolina.

Executive Leadership and Personnel

The 2024-2025 fiscal year was led by President Candy Tilley (Elizabeth City-Pasquotank County Schools), with Tyler Beck serving as President-Elect and Shanna McLamb as Vice President.

- **New Appointments:** Throughout the year, the Council welcomed Rhonda Rath as the new Historian and Charlene Jones to the Scholarship Committee.
- **Staffing Updates:** The Council approved the hiring of Karla Miller-Aldridge as the new Professional Learning Specialist following her retirement from Catawba County Schools. Kelly Jones replaced her as the Professional Development Committee Chair.
- **Officer Nominations:** The slate for the upcoming 2025-26 year was proposed, nominating Tyler Beck for President and Shanna McLamb for President-Elect.

Strategic Planning Initiative

A primary focus of the Council this year was the development of a formal Strategic Plan in partnership with the firm Vista Cova. A focus group was formed to guide the association's direction, resulting in three draft goals:

1. **Targeted Staff Development:** Strengthening district financial leadership.
2. **Professional Sustainability:** Building community through accountability and growth.
3. **Collaborative Advocacy:** Communicating the importance of the profession and advocating for necessary resources.

Conferences and Professional Development

- **Annual Conference Innovations:** The association modernized its Annual Conference by eliminating printed business cards for vendor interactions. Instead, attendees used an app for scanning and check-ins. This shift towards digital engagement saved the association approximately \$3,500.
- **Future Planning:** It was announced that the 2025 Fall Conference would be held in Beaufort, NC.

- **Academies & Mentoring:** The Finance Officer Academy continued to see high engagement. The mentoring initiative, a joint effort with NCDPI, expanded to include over 40 active contracts with Local Education Agencies (LEAs).
- **Scholarships:** The Scholarship Committee reported receiving 27 applications and awarded five scholarships of \$1,500 each.

State Initiatives and Modernization Challenges

- **DPI Updates:** The association navigated the transition to a new State Superintendent, Mo Greene. Liaison reports highlighted ongoing budget development work and deficits in the State Health Plan.
- **Software & Vendors:** Modernization remained a challenging topic. Leadership noted "general frustrations" with software vendors, specifically citing issues with LINQ responses and breaches involving PowerSchool and Meals Plus. NCASBO leadership advocated for better vendor accountability, suggesting vendors hire retired NC finance officers to better understand state-specific needs.

Regional Activities and Community Support

- **Hurricane Relief:** Following Hurricane Helene, the Council and regional groups (specifically Region 8) focused heavily on relief efforts for western counties, facilitating networking and support to assist impacted districts.
- **Regional Meetings:** Regions continued to meet both in-person and virtually, covering topics such as cybersecurity insurance, the CFO role, and modernization progress.

Annual Conferences

- **Annual Conference (February 2025):** Participation was strong, with registration numbers growing leading up to the event. By January, 428 members had registered, and by the time of the conference in February, approximately 470 members were in attendance.
- **Summer Conference (July 2024):** The summer event had 196 registrants, with a very high attendance rate (only 6 no-shows).
- **Fall Conference (October 2024):** Held in Concord, NC, this event featured vendor interactions and performances, though specific attendance numbers were not detailed in the minutes.

Professional Development Academies

Finance Officer Academy:

- The 2025 Academy class reported 79 participants.
- By October 2024, the association had already received about 50 applications for the upcoming 2025 cohort.

Certifications Awarded (2023-24 Review):

- A review of the previous year's academy participation highlighted significant output: *125 academy classes were held.*
- Certifications were awarded to 27 School Business Directors, 36 School Business Managers, 6 School Business Specialists, 43 School Principals, and 156 School Treasurers.

Regional Training:

- Regional Treasurer classes were reported as being in "full swing" at five different sites.
- Principal Academy classes were held at Burke and Onslow locations.

Scholarships & Mentoring

- **Scholarship Program:** Participation in the scholarship program was active, with the committee receiving 27 applications. From this pool, five scholarships of \$1,500 each were awarded.
- **Mentoring Initiative:** The association provided mentor and technical assistance support to 57 Public School Units (PSUs). The mentoring program for new finance officers continued to expand, managing over 40 active contracts with Local Education Agencies (LEAs).

Regional Participation

- While not all regions reported specific headcount, Region 6 noted 25 attendees at their November 12 meeting at UNC-Charlotte.
- Region 7 maintained steady participation through weekly Zoom meetings.