

**MoASBO/MSBA/MASA Joint Conference  
CPE Session Listing & Information**

**CPE INFORMATION**

Earn up to ten (10) CPE credits for the sessions offered through the 2024 MSBA Annual Conference. To register for these sessions go to [www.mosba.org](http://www.mosba.org).

MoASBO is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

**Refunds and Cancellations**

To receive a full refund, less a \$50 processing fee, requests to cancel must be received by MSBA by 5 pm on **Friday, October 4, 2024**. No refunds or cancellations made after this date. For information regarding administrative policies such as refunds, cancellations and complaints, please contact MoASBO at 573-644-7900.

The instructional delivery method for conference breakout sessions is Group Live, basic program level. Each session completed earns one credit unless noted otherwise. No prerequisites or advance preparations are necessary for participation unless otherwise indicated. Visit the MoASBO website at [www.moasbo.org](http://www.moasbo.org) for more information.

TO RECEIVE CPE CREDIT FOR DESIGNATED SESSIONS, PARTICIPANTS MUST:

Be present for at least 50 minutes of the presentation  
 Registering your attendance and departure by participating in the session check in/out mechanism during the session.  
 Electronic session evaluations will be solicited from participants following sessions. The evaluation will be available for two weeks following session completion.  
 The above requirements must be met for each session to earn CPE credit and/or documentation for each session.

CPE certificates will be emailed to attendees.



Sessions and schedule are subject to change.

Session Name	Session Description	Learning Objective #1	Learning Objective #2	Learning Objective #3	Session Speakers	Session Time	Session Location	CPE Field of Study
<b>*Internal Controls from P.O. to Payment</b>	Internal controls are important because they help protect an organization's assets, ensure record accuracy, and promote operational efficiency. They also help ensure compliance with laws and regulations, provide reliable financial reporting, and prevent fraud. In this session you will learn about internal controls and how to develop compensating controls when segregation of duties is not possible.	Develop a working knowledge of the basics of internal controls.	Understand how to evaluate internal controls in your district's operations.	Implement effective compensating controls when segregation of duties is not possible.	Mary Jo Gruber Pattonville School District  Cyndee Byous Rockwood School District	Friday, October 18, 2024 8:30 - 9:30 AM	2024 MSBA Annual Conference	Auditing
<b>*Back to the Basics of a District Budget</b>	The presentation aims to provide an overview of the key components and processes involved in creating and managing a school district's budget. It will cover the various sources of revenue, major expenditure categories, and the budgeting process itself. Additionally, the presentation will highlight some of the common challenges faced by school districts in budgeting and offer strategies for addressing them. The goal is to equip attendees with a solid understanding of how school district budgets are structured and the factors that influence budgetary decisions.	Identify the different sources of revenue for school districts.	Analyze the major expenditure categories in a school district budget.	Examine the budgeting process and the challenges that go along with it.	Cindy Sullivan Liberty School District  Stephanie Norris Mehlville R-IX School District	Friday, October 18, 2024 8:30 - 9:30 AM	2024 MSBA Annual Conference	Finance
<b>*Aligning Your Strategic Plan with the Budget</b>	Integrating the ASBO Meritorious Budget Award guidelines as a framework, this session showcases how a medium-sized school district aligns its budget with the student-centered strategic plan. By fostering community trust through transparent communication, the district ensures fiscal plans reflect its unwavering commitment to equipping every learner for success.	Discuss how to effectively communicate priorities and rationale to stakeholders to build community support.	1. Explore how to align the district budget with the strategic plan.	1. Examine how the Meritorious Budget Award framework can be used in this process.	Dr. Laura Nelson School of the Osage  Darrick Steen School of the Osage	Friday, October 18, 2024 9:45 - 10:45 AM	2024 MSBA Annual Conference	Communications and Marketing
<b>*Facilities Master Plan</b>	Having a facilities' master plan provides a clear vision and direction for construction projects buildings by serving as a roadmap for your facilities. In this session you'll learn the components of this important document and how to ensure alignment with your district's goals.	Explain why a facilities master plan is needed.	Identify the components of a facilities' master plan.	Demonstrate the process to develop the plan.	Dr. Steve Shelton Lee's Summit R-VII School District  Dr. Robert Sigrist St. Joseph School District	Friday, October 18, 2024 9:45 - 10:45 AM	2024 MSBA Annual Conference	Finance
<b>*Keys to Bond Issue Success - CMAR Delivery</b>	In this fact and experience-based session, hear lessons learned and key takeaways associated with the successful completion of Ladue School's 2021 Bond Issue program utilizing the Construction Management at Risk delivery. Learn more about the decisions, facts, relationships, and road bumps that ultimately resulted in future-based learning facilities and a financially successful bond issue.	Gain insights into best practices that led to a successful bond issue program.	Learn keys to financial models to assess project costs, revenue projections, and contingencies.	Foster a deeper understanding of the practical challenges and opportunities associated with bond financing and the CMAR construction delivery.	Dr. Geoff Macy Ladue  Amanda Bohnert S.M. Wilson	Friday, October 18, 2024 2:30 - 3:30 PM	2024 MSBA Annual Conference	Communications and Marketing

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<b>*Essential Leadership Skills for School Finance Professionals</b>	This session is designed to equip school finance professionals with critical leadership skills necessary for aligning financial strategies with the broader educational goals and values of their institutions. Participants will learn how to integrate strategic planning and long-term thinking into their financial decision-making processes, and develop effective strategies for team-building and cross-departmental collaboration.	Discuss how to align financial decisions with broader organizational goals and values, emphasizing the importance of strategic planning and long-term thinking.	Explore strategies for building strong, cohesive teams within the finance department and across other departments, fostering collaboration and mutual support.	Explain how vision, integrity, adaptability, and emotional intelligence are essential leadership traits.	Jacquelyn Wieland Solutions Provided, LLC	Saturday, October 19, 2024 8:30 - 9:30 AM	2024 MSBA Annual Conference	Personal Development
<b>*Leadership Dynamics and Intentional Alignment</b>	This interactive session is designed to empower school finance leaders with the tools and insights necessary to lead with adaptability, intention, and strategic alignment. Through practical exercises and discussions, participants will explore how different communication styles, behaviors, and thinking patterns can influence leadership effectiveness and organizational outcomes.	Understand the core principles of adaptive leadership and its relevance in dynamic educational environments.	Develop skills in active listening and curiosity to enhance problem-solving and relational dynamics.	Apply intentional alignment strategies to synchronize personal leadership.	Jacquelyn Wieland Solutions Provided, LLC	Saturday, October 19, 2024 9:45 - 10:45 AM	2024 MSBA Annual Conference	Personal Development
<b>*Communicating Financial Information to Your Board and Community</b>	As a district leader, you provide financial information to the board of education and your community. What do they need to know? What methods of communication do you use?	Explain the purpose of a budget.	Identify budget development processes and timeline.	Discuss strategies for effectively communicating budget information.	Paul Northington Hancock Place  Patty Bedborough MoASBO	Saturday, October 19, 2024 9:45 - 10:45 AM	2024 MSBA Annual Conference	Communications and Marketing
<b>*Building and Fostering Positive Relationships with the Board</b>	Positive board relationships rely on effective communication, building trust and understanding the concerns of various stakeholders. Come learn strategies to help you build these important relationships.	Identify communication strategies tailored to different audiences, including board members, administrators, teachers, parents, and community members.	Discuss techniques for building trust and rapport with board members through transparency, honesty, and consistency in communication and decision-making.	Explore how to effectively advocate for financial priorities while understanding and addressing the needs and concerns of various stakeholders.	Jacquelyn Wieland Solutions Provided, LLC	Saturday, October 19, 2024 2:30 - 3:30 PM	2024 MSBA Annual Conference	Communications and Marketing
<b>*Ethics and School Business</b>	In this session, participants will be guided through a discussion of ethical and moral behavior within the leadership of our districts. We will review best practices and provide true scenarios of office blunders in an effort to keep your eyes sharp for unethical behavior in your district. In addition, we will provide opportunities to share best practices and tales of "what not to do".	Define ethical leadership and how to apply to everyday leadership and decisions.	Identify ethical and moral behaviors in the finance and business office.	Analyze real life scenarios, applying ethical decision making.	Luke Boyer Carthage School District  Patty Bedborough MoASBO	Saturday, October 19, 2024 2:30 - 3:30 PM	2024 MSBA Annual Conference	Ethics