

CFO Annual Meeting (CFO 11/4/14)

Sheraton Hotel, New Orleans

November 11-14, 2014

Chief Finance Officers, Risk Managers, Internal Auditors & Procurement Directors – Agenda

Tuesday Morning, November 11			
	Registration		
7:00 - 8:00 a.m.	Breakfast		
	Joint Session with All Attendees	Activity	Facilitator
8:15 - 8:45 a.m.	Welcome and Introductions	Bob Carlson	Bob Carlson
9:00 - 9:45 a.m.	Environment Scanning (Part I)	Attendees forecast (1) what urban education will look like at the end of this decade (or later if we want to take the risk) if we don't do anything more than what we have and continue to be doing; and (2) the consequences (International, National, Regional, Local) if we allow that to happen.	Bob Carlson
10:00 - 10:15 a.m.	Break		
10:30 - 11:15 a.m.	Environment Scanning (Part II)	Attendees identify the issues and challenges to be addressed to mitigate the consequences of doing what we have and continue to be doing.	Bob Carlson
11:30 - 12:00 Noon	Wrap Up		Bob Carlson
Tuesday Afternoon, November 11			
12:00 - 1:00 p.m.	Lunch		
	Joint Session with All Attendees	Activity	Facilitator
1:15 - 1:45 p.m.	KPI Overview	Presentation	Fred Schmitt
	Breakouts	Activity	Facilitator
2:00 - 3:45 p.m.	CFOs	Round Robin	Bob Carlson

	Breakouts	Activity	Facilitator
2:00 - 3:45 p.m.	Procurement Directors Risk Managers Internal Auditors Platinum Sponsors	KPIs that are used, that work, are needed for further development, and need to be added in Finance, Risk, Auditing, and Procurement	Procurement – Art Hanby Risk-Scott Clark Audit-Ken Bramlett
	Joint Session with All Attendees	Activity	Facilitator
4:00 - 4:45 p.m.	KPI Work Plan Going Forward	Report Outs	
5:15	Tomorrow's Agenda		Bob Carlson
5:30 -	Welcome to New Orleans		
Wednesday Morning, November 12			
	Registration		
7:00 - 8:00 a.m.	Breakfast		
	Breakouts	Activity	Facilitator
8:15 – 9:00 a.m.	Chief Financial Officers	Presentation #1 – Deferred Maintenance Task Force	Bruce Husson Fred Schmitt
9:15 – 9:30 a.m.	Break		
9:45 – 10:45 a.m.	Chief Financial Officers	Presentation #2 – Addressing the Costs	Platinum Sponsor-Jacobs/Jerry Ford
11:00 - 11:45 p.m.		Presentation #3 – Smarter School Spending	Liz McLeod, Nakia Towns Knox Co. and GFOA
12:00 - 1:00 p.m.	Lunch		
Wednesday Afternoon, November 12			
	Breakouts	Activity	Facilitator
1:15 – 1:45 p.m.	Chief Financial Officers	New Funding Models	John Scanlan
2:00 – 2:30 p.m.	Chief Financial Officers	Presentation #4 – ACA Private Exchanges	Platinum Sponsor- Aon Hewitt
3:15 – 3:30 p.m.	Break		
3:45 – 5:00 p.m.	Chief Financial Officers	Presentation #5 Cyber-Security and #6 The Path to a Sustainable Foundation for Facilities Management in Education	Platinum Sponsor- McGladrey, Compass SSC
5:00 – 5:15 p.m.	Chief Financial Officers	Wrap Up	Fred Schmitt
5:30	Reception & Awards Presentation		
Thursday Morning, November 13			
	Registration		
7:00 - 8:00 a.m.	Breakfast		

	Joint Session	Activity	Facilitators
8:15 – 9:45 a.m.	Chief Financial Officers Risk Managers Internal Auditors	Panel - Addressing the Issues & Challenges in Risk Management	Platinum Sponsors & Risk Managers
10:00 – 10:15 a.m.	Break		
	Joint Session	Activity	Facilitator
10:30 – 12:00 noon	Chief Financial Officers Internal Auditors Risk Managers	Panel - Addressing the Issues & Challenges in Internal Auditing	Platinum Sponsors & Internal Auditors and IGS
Thursday Afternoon November 13			
12:00 - 1:00 p.m.	Luncheon		
	Joint Session	Activity	Facilitator
1:15 - 2:45 p.m.	Chief Financial Officers Risk Managers * Internal Auditors * Procurement Directors	Panel – Addressing the Issues & Challenges in Procurement (* Risk Managers and Audit can do separate round robin breakouts if desired)	Platinum Sponsors & Procurement Directors
3:00 - 3:15 p.m.	Break		
3:30 - 5:00 p.m.	Chief Financial Officers Procurement Directors Risk Managers Procurement Directors	Panels – Strengthening Performance and Restoring Public Confidence <ul style="list-style-type: none"> • Where We’ve Been • Where We Are • Where We Need To Go • How Do We Get There 	Bob Carlson
5:15 -	Wrap Up		Bob Carlson
5:30 -		Enjoying New Orleans - Dinner on Own	
Friday Morning November 14			
7:00 - 8:00 a.m.	Breakfast		
	Joint Session	Activity	Facilitator
8:00 – 9:30 a.m.	Issues & Challenges	Round Robin Discussion	Bob Carlson
9:30 – 9:45 a.m.	Break		
10:00 –11:30 a.m.	Best Practices	Round Robin Discussion	Bob Carlson
11:30 –	Wrap Up & Departures		