

## Planning, Funding and Budgeting Institute

The successful operation of a local school system is largely dependent upon effective planning and preparation of the system budget; successful administration of the budget; and understanding and optimizing the funding mechanism of education in Georgia. This institute focuses on the practical aspects of developing and administering a Georgia school system budget.

GSSA's Planning, Funding and Budgeting Institute is offered twice each year, with 3 PLUs awarded for the complete institute. School leaders may opt to take only one or two tracks rather than the entire institute. Individual tracks award 1 PLU each. Participants may receive 3 PLUs by completing one or two tracks during the Fall 2012 Institute, and the additional track(s) during the Spring 2013 Institute. In this event, the participant should indicate during the registration process which track(s) will be completed during each session.

This institute consists of three highly-focused classes offering 36 content hours, held in three 1 1/2-day sessions.

“...instructors were very knowledgeable and had immense practical experience.”

Throughout the course, participants will engage in activities that will include, but not be limited to, the following:

### Track 1

#### *Funding of Public Education*

Focuses on the state funding mechanism and the impact of local taxation for schools. Topics include, but are not limited to, a review of:

- the history of educational funding in Georgia
- laws, rules, and regulations associated with funding of education in Georgia, including QBE, local five mill share, equalization grant, and equalized property digest
- case law regarding school funding

### Track 2

#### *Planning and Preparation of the Budget*

Focuses on the effective use of financial resources; operational planning at the school system level; and budget development, presentation and approval. Topics include, but are not limited to, the examination of best practices and identification of effective examples of:

- personnel allocation, including estimating enrollment, class size
- compensation and benefits
- development of a basic school system budget
- budget presentation to the board of education

### Track 3

#### *Administering the Budget*

Focuses on the successful administration of the annual school system budget. Topics include, but are not limited to, the examination of best practices and identification of effective examples of:

- annual budget reporting
- authorizing expenditures
- monthly financial reporting
- projecting revenues and expenditures
- QBE program expenditures
- annual financial report
- annual audit



Instructors for this institute are:

Dr. Patricia Stokes

Track 1 - Funding of Public Education

Dr. Dennis Fordham

Track 2 - Planning and Preparation of the Budget

Dr. Dennis Fordham

Track 3 - Administering the Budget

**Dr. Patricia Stokes** retired in June of 2006 as Superintendent of Morgan County Schools in Madison, GA. She completed 40 years of service as an English teacher in grades 6-12, a curriculum director and assistant superintendent for instruction and personnel, a high school principal, and superintendent. As Superintendent, Dr. Stokes provided keen insight and leadership for the financial operations of the school system. She optimized the use of limited fiscal resources through her comprehensive understanding of how state, federal and local funding work together.

**Dr. Dennis Fordham** currently teaches mathematics for Georgia Perimeter College. He served as superintendent of Butts County Schools and, at the time of his retirement, Hall County Schools. Long known for his expertise in the area of Georgia school system budgeting, Dr. Fordham consults with school districts regarding school finance. His career includes teaching high school and college mathematics, as well as service as a system mathematics coordinator and system financial officer.

“Facilitator experience, expertise and humor kept us on task!”

### **Planning, Funding and Budgeting Institute – 3 PLUs**

The schedule for this institute is 3:00 – 6:00 PM on the first day, and 8:00 – AM – 5:00 PM on the second day.

### **Tuition: \$495**

#### **Fall 2014 Institute**

October 8-9, 2014 (W, Th)

**Track 1:** *Funding of Public Education in Georgia*

November 5-6, 2014 (W, Th)

**Track 2:** *Planning and Preparation of the Budget*

December 10-11, 2014 (W, Th)

**Track 3:** *Administering the System Budget*

#### **Spring 2015 Institute**

February 11-12, 2015 (W, Th)

**Track 1:** *Funding of Public Education in Georgia*

March 4-5, 2015 (W, Th)

**Track 2:** *Planning and Preparation of the Budget*

April 22-23, 2015 (W, Th)

**Track 3:** *Administering the System Budget*

### **Location/Lodging**

Homewood Suites by Hilton

Room rate: \$109

1514 Bass Road (I-75, exit 172)

Macon, Georgia 31210

478.477.9776

*Participants are responsible for making lodging reservations. Hotel rooms for attendees at GSSA institutes and workshops may be reserved at the host hotel. Be sure the hotel staff knows that you are with GSSA.*

### **Who Should Attend?**

All GSSA Institutes are designed for superintendents, central office administration/staff and principals.

### **Questions?**

For more information on GSSA's Institute and Workshop Series and to register online, go to [www.gssanet.org](http://www.gssanet.org) or contact Debra Harden, GSSA Professional Development Director, at [dmharden@gsu.edu](mailto:dmharden@gsu.edu) or 706.425.1979.

