November 7, 2014

MEMORANDUM

TO: Chief Fiscal Officers, Vice Chancellors, and Business Managers

FROM: Linda Combs

SUBJECT: 2014 OSC Financial Conference

I am pleased to announce that on December 16, 2014, the Office of the State Controller will hold its annual Financial Conference for Chief Fiscal Officers and agency designated representatives at NCSU’s McKimmon Center in Raleigh. This year’s conference will include topics such as the new Super Circular and its impact on non-federal entities and audits, the economic outlook for the State and nation, data analytics, financial crimes, and creating successful work relationships.

In addition, the recipients of the State Controller Fiscal Integrity Award and the Internal Audit Award of Excellence will be announced during the conference. This conference will qualify for eight hours of CPE credit. The course announcement and agenda are attached for your review.

The registration fee is $50 per attendee and includes a mini-breakfast and buffet lunch. To register for this conference, click on the “Training” link located at the top of the OSC website (http://www.osc.nc.gov). Please register as soon as possible as the registration deadline is Tuesday, December 9, 2014 (Note: payment must be made on or before this date and after this date, no request for refunds will be considered).

Payment can be made by check or electronic transfer. NCAS agencies should use vendor number 561611588-03 and non-NCAS agencies should use department code 4160 for payment, as required by the intergovernmental transactions procedure. Please reference on your cash management transfer that the payment is for registration fees for the 2014 OSC Financial Conference and include the confirmation numbers and names of the registrants. Agencies should register attendees individually but can submit one payment to cover all registration fees. For payments by check, please also attach a listing of confirmation numbers and names of the registrants.

If you have a payment or registration question, please contact Ms. Wendy Francis by telephone at (919) 707-0471 or email her at wendy.francis@osc.nc.gov. OSC looks forward to your participation in the conference, and thanks you for your service to the State.

Attachments

SAD 15-19
Date: December 16, 2014
8:15 a.m. to 4:45 p.m.

Location: The McKimmon Conference and Training Center
N.C. State University
1101 Gorman Street
Raleigh, NC 27606

Objective: To offer training on recent topics of interest to Chief Fiscal Officers and agency representatives including the new pension allocations, federal grants management, personal development, technology-related issues, and other current topics.

Content:
- GASB 68 Pension Allocation Update
- Federal Grants Oversight: A New Partnership Focused on Results
- State Auditor Update – Impact of “Super Circular” and Common Audit Findings
- The Uniform Guidance: Impact for UNC Institutions of Higher Education
- Is the Economy Finally Picking Up Steam?
- Data Analytics
- Electronic Crimes Inc.: The World’s Most Profitable Crime Model
- Creating Successful Work Relationships
- Enterprise Systems Update - CMCS, eCommerce, Statewide ERP, IBIS, Core Banking, and UNC Chapel Hill ERP

Instructors: See attached agenda

CPE Credit Offered: Eight hours

Materials: Will be available in advance on the OSC web page

Teaching Method: Lecture

Mini-breakfast: Available beginning at 7:30 a.m. (biscuits, muffins, and fruit)

Lunch: 12:00 p.m. – 1:00 p.m.

Prerequisites: Employed by a State agency or institution that is part of the State financial reporting entity (i.e., an entity included in the State’s Comprehensive Annual Financial Report)

Advance Preparation: None

Level: Basic

* Click the following link for additional information about the NC Office of the State Controller, the sponsor and developer of this program.
AGENDA

OSC Financial Conference

December 16, 2014

8:15 – 8:20  Call to Order – Terri Noblin, Office of the State Controller
            Accounting and Financial Reporting Manager

8:20 – 8:40  Opening Remarks and Fiscal Integrity Award Presentation – Dr. Linda Combs, State
            Controller
            Internal Audit Award of Excellence Presentation – Dr. Linda Combs, State Controller
            and Beth Wood, State Auditor

8:40 – 8:50  GASB 68 Pension Allocation Update – Sharon Edmundson, Department of State
            Treasurer

8:50 – 10:10 Federal Grants Oversight: A New Partnership Focused on Results – Robert Shea, Grant
            Thornton LLP

10:10 – 10:30 Break

10:30 – 11:00 State Auditor Update – Impact of “Super Circular” and Common Audit Findings – Beth
            Wood, State Auditor

11:00 – 11:20 The Uniform Guidance: Impact for UNC Institutions of Higher Education – Sarah
            Smith, UNC General Administration

11:20 – 12:00 Is the Economy Finally Picking Up Steam? – Michael Walden, N.C. State University

12:00 – 1:00 Lunch

1:00 – 1:05 Call to Order – Terri Noblin, Office of the State Controller

1:05 – 1:55 Data Analytics – Eric Hunley, SAS

1:55 – 2:40 Electronic Crimes Inc.: The World’s Most Profitable Crime Model – Chris Swecker,
            Governor’s Crime Commission

2:40 – 3:00 Break

3:00 – 3:50 Creating Successful Work Relationships – Holly Basso, N.C. State University


            • CMCS, eCommerce, and Statewide ERP – Melody Tart/Amber Young, Luke Harris,
              and Jim Tulenko – Office of the State Controller
            • IBIS – Anita Ward – Office of State Budget and Management
            • Core Banking – Brandon Watson – Department of State Treasurer
            • UNC Chapel Hill ERP – Brian Smith – UNC Chapel Hill

4:40 – 4:45 Closing Remarks – Terri Noblin, Office of the State Controller