

2026 ANNUAL FISCAL WORKSHOP

by Grand Division



2026 Annual Fiscal Workshop Intent

This workshop is intended for district-level fiscal staff and administrators from each local education agency (LEA). The topics covered will help attendees stay informed about the latest regulations and processes that directly affect their work in school finance.

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2026 Grand Division Annual Fiscal Workshop Agenda

West Tennessee

Location: [The STAR Center, Jackson](#)

Day 1 Schedule: Wednesday, April 29

TIME (C.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 8:40 a.m.	Welcome	Holly Kellar, Director of Local Finance
8:40 – 9:30 a.m.	Procurement and Contracts	Cindy Smith, Regional Finance Consultant
9:30 – 10:20 a.m.	RetireReadyTN Program Update	Ross Hunt, LEA Education and Review Specialist
10:20 – 10:40 a.m.	Break	
10:40 – 11:30 a.m.	Federal Programs Updates	Debby Thompson, Assistant Commissioner, Federal Programs & Oversight
11:30 – 1:00 p.m.	Lunch Break	
1:00 – 1:50 p.m.	LEA & Local Government Budgeting	Steve Osborne, Assistant Director, and Tara Bergfeld, Senior Policy and Fiscal Advisor, Comptroller of the Treasury
1:50 – 2:40 p.m.	IDEA Oversight 101: Budgeting Funds, Ensuring Compliance, and Supporting Students with Disabilities	Janet Michelle Mansfield, IDEA Oversight Coordinator
2:40 – 2:50 p.m.	Break	
2:50 – 3:40 p.m.	Paid Parental Leave	Meribeth Carpenter, Regional Finance Consultant
3:40 – 4:30 p.m.	Legislative and State Budget Updates	Maryanne Durski, Chief Financial Officer
4:30 p.m.	Adjourn	Holly Kellar, Director of Local Finance

Day 2 Schedule: Thursday, April 30

TIME (C.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 9:00 a.m.	Local Finance Updates	Holly Kellar, Director of Local Finance
9:00 – 9:50 a.m.	Important Reminders: Reimbursement Requests, Year-end Close, FERs	Meribeth Carpenter and Cindy Smith, Regional Finance Consultants
9:50 – 10:10 a.m.	Break	
10:10 – 11:00 a.m.	TISA Projection Tips and Resources	Caryn Burkholder, Director of Data Strategy
11:00 – 11:50 a.m.	FY27 TISA Updates	Mary Stoutenburgh, Operational Data Manager
11:50 a.m.	Adjourn	Holly Kellar, Director of Local Finance

Venue Specific Details

- Address: The STAR Center, 1119 Old Humboldt Rd, Jackson, TN 38305
- Free parking is available in the lot behind the building.
- WiFi network: auditorium attendees; WiFi password: starcenter
- Wear layers to easily adjust to the room temperature.
- Lunch is on your own.

2026 Grand Division Annual Fiscal Workshop Agenda

East Tennessee

Location: [Sevierville Civic Center](#)

Day 1 Schedule: Tuesday, May 5

TIME (E.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 8:40 a.m.	Welcome	Holly Kellar, Director of Local Finance
8:40 – 9:30 a.m.	Procurement and Contracts	Taffe Bishop, Regional Finance Consultant
9:30 – 10:20 a.m.	RetireReadyTN Program Update	Justin Ball, East TN Outreach Specialist
10:20 – 10:40 a.m.	Break	
10:40 – 11:30 a.m.	Federal Programs Updates	Debby Thompson, Assistant Commissioner, Federal Programs & Oversight
11:30 – 1:00 p.m.	Lunch Break	
1:00 – 1:50 p.m.	Important Reminders: Reimbursement Requests, Year-end Close, FERs	Taffe Bishop and Shelby Ownbey, Regional Finance Consultants
1:50 – 2:40 p.m.	IDEA Oversight 101: Budgeting Funds, Ensuring Compliance, and Supporting Students with Disabilities	Jerri Beth Nave, Director with Federal Programs and Oversight
2:40 – 2:50 p.m.	Break	
2:50 – 3:40 p.m.	Paid Parental Leave	Shelby Ownbey, Regional Finance Consultant
3:40 – 4:30 p.m.	Legislative and State Budget Updates	Maryanne Durski, Chief Financial Officer
4:30 p.m.	Adjourn	Holly Kellar, Director of Local Finance

Day 2 Schedule: Wednesday, May 6

TIME (E.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 9:00 a.m.	Local Finance Updates	Holly Kellar, Director of Local Finance
9:00 – 9:50 a.m.	LEA & Local Government Budgeting	Steve Osborne, Assistant Director, and Tara Bergfeld, Senior Policy and Fiscal Advisor, Comptroller of the Treasury
9:50 – 10:10 a.m.	Break	
10:10 – 11:00 a.m.	TISA Projection Tips and Resources	Caryn Burkholder, Director of Data Strategy
11:00 – 11:50 a.m.	FY27 TISA Updates	Mary Stoutenburgh, Operational Data Manager
11:50 a.m.	Adjourn	Holly Kellar, Director of Local Finance

Venue Specific Details:

- Address: Sevierville Civic Center, 200 Gary Wade Blvd. Sevierville, TN 37862
- Free parking is available in the lot in front of and to the side of the building.
- WiFi network: Civic Center Guest; WiFi password: DELEVELED
- Wear layers to easily adjust to the room temperature.
- Lunch is on your own.

2026 Grand Division Annual Fiscal Workshop Agenda

Middle Tennessee

Location: [Farm Bureau Exposition Center, Lebanon](#)

Day 1 Schedule: Wednesday, May 13

TIME (C.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 8:40 a.m.	Welcome	Holly Kellar, Director of Local Finance
8:40 – 9:30 a.m.	Procurement and Contracts	Bryan Clark, Regional Finance Consultant
9:30 – 10:20 a.m.	RetireReadyTN Program Update	James Armistead, Middle TN Outreach Specialist
10:20 – 10:40 a.m.	Break	
10:40 – 11:30 a.m.	Paid Parental Leave	Joshua Dehzn, Regional Finance Consultant
11:30 – 1:00 p.m.	Lunch Break	
1:00 – 1:50 p.m.	LEA & Local Government Budgeting	Steve Osborne, Assistant Director, and Tara Bergfeld, Senior Policy and Fiscal Advisor, Comptroller of the Treasury
1:50 – 2:40 p.m.	IDEA Oversight 101: Budgeting Funds, Ensuring Compliance, and Supporting Students with Disabilities	Megan Mysinger, IDEA Oversight Coordinator
2:40 – 2:50 p.m.	Break	
2:50 – 3:40 p.m.	TISA Projection Tips and Resources	Caryn Burkholder, Director of Data Strategy
3:40 – 4:30 p.m.	FY27 TISA Updates	Mary Stoutenburgh, Operational Data Manager
4:30 p.m.	Adjourn	Holly Kellar

Day 2 Schedule: Thursday, May 14

TIME (C.T.)	DETAILS	SPEAKER
8:00 – 8:30 a.m.	Workshop Check-in	Karen Justice, Finance Data Manager
8:30 – 9:00 a.m.	Local Finance Update	Holly Kellar, Director of Local Finance
9:00 – 9:50 a.m.	Important Reminders: Reimbursement Requests, Year-end Close, FERs	Rob Mynhier, Regional Finance Consultant
9:50 – 10:10 a.m.	Break	
10:10 – 11:00 a.m.	Federal Programs Updates	Debby Thompson, Assistant Commissioner, Federal Programs & Oversight
11:00 – 11:50 a.m.	Legislative and State Budget Updates	Maryanne Durski, Chief Financial Officer
11:50 a.m.	Adjourn	Holly Kellar, Director of Local Finance

Venue Specific Details:

- Address: 945 E Baddour Pkwy, Lebanon, TN 37087
- Farm Bureau Expo Parking: Free parking is available in the South Hall lot and the front paved lot.
- Outside food and beverages are not allowed.
- WiFi Network: FB Expo WiFi password: TBD
- Wear layers to easily adjust to the room temperature.
- Lunch is on your own.

2026 Grand Division Annual Fiscal Workshop Agenda

Additional Conference Information

Workshop Question Form



[2026 Annual Fiscal Workshop Question Form](#)

Attendance Check-in

All attendees, regardless of whether CPE credit is needed, are asked to check in via the QR code provided at the workshop to allow the department to track attendance across all workshop sections. Your compliance with this request is greatly appreciated.

Professional Learning Credits

The 2026 Grand Division Annual Fiscal Workshop will provide up to 10 continuing professional education (CPE) credit hours that may be used toward Tennessee Academy for School Leaders (TASL) and Certified County Finance Officer (CCFO) / Certified Municipal Finance Officer (CMFO) requirements.

Participants who do not request CPE credit hours for TASL, CCFO, or CMFO may request professional development points (PDPs) for use in accordance with their LEA or agency guidelines.

To receive a certificate of CPE credit hours earned, attendees must complete the following check-ins:

- Full-Day Morning Attendance Check-In (3 CPE credits)
- Full-Day Afternoon Attendance Check-In (4 CPE credits)
- Half-Day Attendance Check-In (3 CPE credits)

Certificates will be emailed to each participant by June 1. Participants are responsible for using the certificate as evidence to request credit through the appropriate channel.

Session Presentations

Session presentations may be accessed prior to the first workshop, as available, by visiting ePlan.tn.gov and clicking TDOE Resources on the left menu of the Home page. On the TDOE Resources page, click on Fiscal – District Technical Assistance>Conferences and Meetings Material> Annual Fiscal Workshops> 2026 Annual Fiscal Workshop to find the presentations by session title.

Federal Programs Updates – This session will share key updates and insights on federal funding issues currently impacting schools and districts.

IDEA Oversight 101: Budgeting Funds, Ensuring Compliance, and Supporting Students with Disabilities – This foundational session offers a comprehensive overview of key responsibilities and requirements for effectively managing and overseeing IDEA implementation. Designed for education leaders, special education administrators, and fiscal coordinators, the presentation will cover budgeting and allowable use of IDEA funds, oversight strategies to ensure compliance with federal and state regulations, and understanding and applying maintenance of effort (MOE) requirements.

LEA and Local Government Budgeting – This session will explore the different perspectives associated with the school budget creation and adoption process and will cover financial best practices in education budgeting.

Legislative and State Budget Updates – This session will provide updates on new and amended legislation and insight into the FY27 state budget in areas affecting local education agencies.

Local Finance Update – This session will broadly cover fiscal topics relevant to LEAs as we approach year-end and prepare for the new fiscal year. Attendees will learn a few interesting statistics about Career Ladder, Drivers Education, Paid Parental Leave, TISA Restricted Funds for Existing Educator Salary Increases, audit findings, monitoring findings, final expenditure report submissions, and State Funds budget submissions.

Paid Parental Leave – This session will provide an overview of Tennessee's Paid Parental Leave law, codified at Tenn. Code Ann. § 8-50-814, which requires local education agencies and public charter schools to provide six paid workweeks of parental leave to eligible employees and to maintain an up-to-date board policy that aligns with the statutory provisions. In addition, the presentation will walk attendees through the ePlan reimbursement request submission process, required supporting documentation, and use of the parental leave calculator, using example scenarios to illustrate how eligibility determinations are made under the law.

Procurement and Contracts – This session will provide an overview of procurement and contract requirements, including strengthened expectations for documented procedures, contractor oversight, standards of conduct for conflicts of interest, approved procurement methods, domestic preferences, inclusion of small and disadvantaged businesses, and the required cost/price analysis and contract provisions that apply to all federally funded procurements under the current Uniform Guidance.

Reimbursement Requests, Year-end Close, FERs – This session will summarize three critical fiscal processes, outlining key considerations essential for LEAs as they prepare and submit reimbursement requests, process year-end closeout activities, and complete final expenditure reports.

RetireReadyTN Program Update - This session will provide updates on the TCRS and State of Tennessee 401(k) programs, including employer reporting best practices, retirement planning resources for employees, and guidelines for retirees returning to work.

TISA Projection Tips and Resources - Beginning in February, districts begin receiving monthly TISA allocation projection letters and data files. These resources capture all the data that determines TISA allocations. This session will focus on the monthly resources shared with districts.

FY27 TISA Updates - This session will focus on FY27 TISA calculation updates, such as base funding, Economically Disadvantaged funding, and Support Provisions.

Special Thanks

The Division of Operations and Finance extends special thanks to our partners in the Division of Operational Data Strategy, Division of Federal Programs and Oversight (FPO), the Tennessee Department of Treasury, and the Tennessee Comptroller's Office for helping to bring the Annual Fiscal Workshop to each Grand Division of the state.

Conference Survey

Please use this QR code to provide feedback on the 2026 Annual Fiscal Workshop. The survey can also be found by clicking [2026 Annual Fiscal Workshop Survey](#).

