



Ohio Association of
School Business Officials



2018-19 Course Catalog



Our Mission

An association of Ohio school business officials empowering members by providing advocacy, collaboration, and innovative education.

Our Vision

OASBO and its members are the leading experts in school finance and business operations, resulting in efficient and effective schools.

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**To attend any courses listed in this catalog, visit the upcoming events section of oasbo-ohio.org, log in or create a free web account, and register!*

All School Business Officials

OASBO Annual Workshop

The Annual Workshop & Trade Show is OASBO's biggest event of the year. This three-day conference includes several different learning tracks and seminars for Ohio's school business officials over a wide range of topics.

Contact Hours: 1-15

Cost: Variety of options, visit oasbo-ohio.org/annual-workshop

Leadership Conference

OASBO Governance Meeting including: Committee projects, strategic planning, networking and leadership development training. *Limited to OASBO chapter & committee leaders, board members, past presidents*

Contact Hours: 9

Cost: Free

Crucial Conversations Workshop

This two-day seminar teaches skills for creating alignment and agreement by fostering open dialogue around high-stakes, emotional, or risky topics – at all levels of your organization. By learning how to speak and be heard, you'll surface the best ideas, make the highest-quality decisions, and then act on your own decisions with unity and commitment.

Contact Hours: 14

Cost: Member \$795; Associate Member \$905;

Non-Member: \$1,425

Essentials of Human Resources

This course provides comprehensive content in the areas of hiring, compensation, employment laws, leave provisions, performance review, incentive pay, discipline, and separation from employment.

Contact Hours: 14

Cost: Member \$240; Associate Member \$250;

Non-Members \$370

7 Habits of Highly Effective People

This two-part seminar focuses on how school business officials can assert themselves as leaders and develop leadership effectiveness as an individual, a team member and across an organization.

Contact Hours: 14

Cost: Member \$725; Associate Member \$835;

Non-Member \$1,355

BASA/OASBO Finance, Facility and Safety Conference

Designed for treasurers and superintendents, this course provides insight and navigation for these two roles to work together as a team in addressing several district issues.

Contact Hours: TBD

Business Operations

Annual Facility Conference & Expo

This 2-day workshop is perfect for building and grounds supervisors, business managers, custodial supervisors, and maintenance supervisors. Includes professional development sessions and a trade show.

Contact Hours: 11

Cost: Early Bird \$305; Full price \$330

Essentials of Business Operations

This course will provide comprehensive content in the areas of risk management, school safety & security, IT security, facilities, and much more.

Contact Hours: 6

Cost: Member \$240; Associate Member \$250;

Non-Member \$370

Regional OASBO/OSBA School Comp Seminars

Meet your 2-hour requirement for safety training, hear the latest on OASBO & OSBA's SchoolComp program, BWC updates and more.

Contact Hours: 3.5

Cost: Free

Food Service

Business Essentials for Food & Nutrition Directors

This seminar is geared towards newer food service directors/supervisors, and treasurers or business managers who also have food service management responsibilities. More experienced food service professionals in need of a refresher are also welcome to attend.

Contact hours: 6

Cost: Member \$160; Associate Member \$170;

Non-Member \$290

New Treasurers

So You Want to be a School Treasurer

Veteran school treasurers walk attendees through a typical “day in the life” of a school treasurer. Presenters discuss what Boards of Education are seeking in treasurer candidates and attendees participate in brief interview sessions with search consultants to receive feedback on their profiles and learn how to maximize their resumes.

Contact Hours: 5

Cost: \$25

New Treasurer Survival Series 101

First-time school treasurers cannot afford to miss this seminar, which covers everything from USAS coding to the Five-Year Forecast, to budgeting, to building great relationships with other administrators and your Board.

Contact Hours: 6

Cost: Member \$120; Associate Member \$130;

Non-Member: \$250

New Treasurer Survival Series 102

The 2nd part of the 4-part series covering the yearly duties of a treasurer. It’s designed to instruct the new treasurer what to work on in the second quarter of the school year. Topics include Records Retention, EMIS & Tuition, Board Meetings & minutes, Superintendent/Treasurer Relationships, Property Taxation Issues and more.

Contact Hours: 6

Cost: Member \$120; Associate Member \$130;

Non-Member \$250

New Treasurers Survival Series 103

Designed by seasoned treasurers, this seminar is the 3rd part in a series of four 1-day offerings. It provides attendees with practical, working knowledge of what issues and topics to tackle in the third quarter of the fiscal year in the treasurer’s office.

Contact Hours: 6

Cost: Member \$120; Associate Member \$130;

Non-Member \$250

New Treasurer Survival Series 104

This is the fourth seminar in the New Treasurers series covering the yearly duties of a treasurer. It’s designed to instruct a new treasurer in the last three months of the fiscal year.

Contact Hours: 6

Cost: Member \$120; Associate Member: \$130;

Non-Member \$250

All Treasurers

Essentials of Financial Management & Administration

This seminar gives an in-depth look at the role of the Treasurer as an SBO and addresses critical issues facing new or intermediate Treasurers. In addition to the topics on the agenda, attendees have the opportunity to ask specific questions they may have and network with a core of veteran treasurers who are willing to share their expertise and experiences.

Contact Hours: 12

Cost: Member \$240; Associate Member \$250; Non-Member \$370

Essentials of School Finance

This course provides comprehensive content on debt and financing, county auditor relationships, EMIS, Grants, Tuition & GAAP/Audits.

Contact Hours: 6

Cost: Member \$240; Associate Member \$250; Non-Member \$370

Essentials of Budgeting & Forecasting

This course provides comprehensive content in the areas of budget timelines for development and the importance of a sound process and format and an introduction to the process of forecasting.

Contact Hours: 11

Cost: Member \$240; Associate Member \$250 Non-Member \$370

OASBO/OSBA School Finance Workshop

Join us for this annual event where you'll hear the latest information around school finance, statehouse news and more. Mark your calendar today and we'll provide a detailed agenda in the coming weeks.

Contact Hours: 5

Cost: Member \$160; Non-Member \$160

Treasurers Hot Topics – Fall

This seminar covers the most important topics facing school officials right now. This seminar will include commercial paper certification.

Contact Hours: 11

Cost: Member \$200; Associate Member: \$210; Non-Member \$330

Treasurers Hot Topics - Spring

This seminar covers the most important topics facing school officials right now.

Contact Hours: 11

Cost: Member \$200; Associate Member \$210; Non-Member \$330

Regional Fall School Finance Workshop

These workshops focus on information on audits, student activity grants, and legal and legislative updates with speakers from the AOS ODE and the Ohio Attorney General's Office.

Contact Hours: 6

Cost: Member \$120; Associate Member \$130; Non-Member \$250

Finance Office Support Staff

Regional Accounts Payable/General Accounting

Addressing all the AP hot topics, you'll get the latest information and updates in this seminar. Topics include state software update, fraud prevention and student activity best practices, customer service strategies, credit card management best practices, and cyber security/email vendor scams.

Contact Hours: 6

Member: \$120/ Associate Mbr: \$130/ Non-Mbr: \$250

Regional Payroll & Benefits Seminar for Support Staff

Designed specifically for support staff and those dealing with payroll and employee benefits, this seminar will provide the latest information and updates.

Contact Hours: 4.5

Cost: Member \$120; Associate Member \$130; Non-Member \$250

Transportation Management

OASBO/ODE/OAPT Transportation: Peer to Peer

Customer service, Day to day organization, Intro to the Ohio Pre-Service program, Understanding T-reports.

Contact Hours: 4.5

Cost: TBD

OASBO/ODE/OAPT Transportation: Drug & Alcohol Testing Requirements/ Transporting the Homeless

Supervisor's guide to reasonable suspicion testing, Transporting the homeless.

Contact Hours: 5

Cost: TBD

OASBO/ODE/OAPT Transportation: T-Reports/Payment in Lieu of Issues

Review of T-Reports, Steps for reviewing the T-2, Reviewing recent T-1, Review of district data and self-audit steps, Payment in lieu of- determine legal service eligibility, proper steps, and appeals process

Contact Hours: 5

Cost: TBD

OASBO/ODE/OAPT Transportation: Special Needs Training

Hot topics of the day, Defining special education transportation, Requirements both federal and state, Responsibilities of the student services, IEP, 504 Plan and proper securement

Contact Hours: 5

Cost: TBD

OASBO/ODE/OAPT Transportation: McKinney Vento, Homeless/Foster Care Transportation

New rules and requirements reviewed, Q&A regarding transportation issues for serving homeless and foster students.

Contact Hours: 5

Cost: TBD

OASBO/ODE Transportation- Financial Data Reporting Requirements (formerly T-Reports)

Provides information for collecting, reporting, and submitting pupil transportation data. Attendees are encouraged to bring their own T-1 and T-2 report data for these sessions. ODE presenters will assist in a review of the data and will include a review of cost analysis data and efficiency reports.

Regions: NW, NE, SW, CE

Contact Hours: 5

Cost: TBD

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2018-2019 Seminar Schedule

**All dates are subject to change*

New Treasurers Survival Series 101	July 24, 2018
OASBO/PASBO Leadership Institute - The Battle of Lake Erie	August 5-7, 2018
Essentials of Human Resources	August 28-29, 2018
SW Region Accounts Payable/General Accounting Seminar	September 18, 2018
SW Region Payroll & Benefits	September 19, 2018
NE Region Accounts Payable/General Accounting Seminar	September 25, 2018
Payroll Benefits Seminar NE Region	September 26, 2018
NW Region Fall School Finance Workshop	September 27, 2018
New Treasurers Survival Series 102	October 3, 2018
SW Region Fall School Finance Workshop	October 4, 2018
Crucial Conversations	October 4-5, 2018
SE Region Accounts Payable/General Accounting Seminar	October 9, 2018
SE Region Payroll Benefits Seminar	October 10, 2018
SE Regional Fall School Finance Workshop	October 11, 2018
Business Essentials for Food & Nutrition Directors	October 11, 2018
NW Region Accounts Payable/General Accounting Seminar	October 16, 2018
NE Regional Fall School Finance Workshop	October 18, 2018
NW Region Payroll & Benefits Seminar	October 19, 2018
CE Region Accounts Payable/General Accounting	October 23, 2018
CE Region Payroll & Benefits Seminar	October 24, 2018
CE Regional Fall School Finance Workshop	October 25, 2018
Hot Topics - Fall	October 30, 2018
Essentials of Financial Management & Administration	November 7-8, 2018
Essentials of Business Operations	November 28-29, 2018

OASBO/OSBA School Finance Workshop	November 30, 2018
Annual Facilities Conference & Expo	December 10-11, 2018
So You Want to be a School Treasurer	January 10, 2019
New Treasurers Survival Series 103	January 17, 2019
Essentials of School Finance	January 30-31, 2019
Business Operations Hot Topics Seminar	February 12-13, 2019
OASBO/BASA Finance, Facility & Safety Conference	February 19-20, 2019
7 Habits of Highly Effective People (Part 1)	March 7-8, 2019
Northeast Region Chapters' Joint Workshop	March 8, 2019
SW Region SchoolComp Workshop	March 11, 2019
NW Region SchoolComp Workshop	March 12, 2019
Essentials of Budgeting & Forecasting seminar	March 13-14, 2019
NE Region SchoolComp Workshop	March 13, 2019
SE Region SchoolComp Workshop	March 14, 2019
CE Region SchoolComp Workshop	March 18, 2019
Grant Management Seminar	March 26, 2019
New Treasurers Survival Series 104	April 11, 2019
Annual Workshop & Trade Show	April 23-26, 2019
7 Habits of Highly Effective People (Part 2)	May 3, 2019

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Ohio Standards for School Treasurers

1	Leadership: School treasurers participate in a leadership role within the district.
1.1	Participate as an integral member of the district leadership team.
1.2	Work with the district superintendent and board of education, with input from other stakeholders, to review, develop, align and implement policies and procedures.
1.3	Participate with the district superintendent and the board of education in the development and implementation of the district strategic plan.
1.4	Establish sound fiscal practices to support the educational process.
1.5	Lead and manage personnel under direct supervision of the treasurer.
1.6	Support the effective use of data.
2	Financial Management: School treasurers demonstrate a clear understanding of financial resources and manage those resources in collaboration with the board of education and district leadership.
2.1	Collect, analyze and interpret financial data for budgeting, forecasting and decision-making.
2.2	Effectively manage district financial accounts including: cash, budgetary, debt service, revenue and grant management.
2.3	Demonstrate knowledge, performance and accuracy of standard accounting practices, auditing procedures and accurate financial reports.
2.4	Demonstrate knowledge of and compliance with state and federal laws.

3	Facilities, Property and Capital Asset Management: School treasurers provide fiscal leadership in the management of capital assets and support services.
3.1	Acquire and maintain building and capital assets.
3.2	Secure financing for capital projects.
3.3	Develop and monitor risk management practices to protect capital assets.
3.4	Provide financial oversight and analysis of fiscal implications to the district support services.
4	Communication and Collaboration: School treasurers communicate and collaborate effectively with the board of education, district leadership and stakeholders.
4.1	Demonstrate competence in the communication of financial reports to all stakeholders.
4.2	Communicate effectively and openly while demonstrating a willingness to collaborate with internal stakeholders.
4.3	Communicate effectively and openly while demonstrating a willingness to collaborate with external stakeholders.
5	Professionalism: School treasurers are committed to a high level of professionalism in their conduct and adhere to established ethical standards.
5.1	Understand, uphold and comply with professional ethics, including the Licensure Code of Professional Conduct for Ohio Educators (LCPCOE) and the Ohio Ethics Laws.
5.2	Model and expect fairness, honesty and consistency in the performance of duties.
5.3	Maintain compliance with applicable local, state and federal laws, rules and regulation and district policies and procedures.
5.4	Maintain a strong commitment to professional development.
5.5	Collaborate with peers for the advancement of the profession.

Ohio Standards for School Business Managers

1	Leadership
1.1	Participate as an integral member of the district leadership team.
1.2	Participate with the leadership team in the development and implementation of the district strategic plan.
1.3	Lead and manage personnel under the direct supervision of the business manager.
2	Facilities Management
2.1	Acquire, maintain and oversee construction and/or renovations on buildings and other capital assets.
2.2	Manage energy and environmental programs.
2.3	Develop and manage partnerships with private and public sectors to enhance resources related to the facilities and equipment.
2.4	Develop plans for maintenance expenditures.
3	Business Operations
3.1	Provide oversight to custodial/maintenance departments.
3.2	Provide oversight to food service department.
3.3	Provide oversight to transportation department.
3.4	Provide support to and collaborate with technology department.

3.5	Provide support to human resources for non-teaching personnel.
3.6	Demonstrate a clear understanding of financial resources and planning.
4	Risk Management and Safety/Security
4.1	Ensure the risk management program addresses safety and security.
4.2	Communicate the risk management program to all stakeholders.
4.3	Participate in the development of safety and emergency management plans.
4.4	Develop and monitor risk management practices to protect district resources
5	Communication and Collaboration
5.1	Demonstrate competence in the communication of operational issues to all stakeholders.
5.2	Communicate and collaborate with internal and external stakeholders.