



Local Professional Development Committee Guidelines

July 19, 2022

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Introduction

In 1996, Ohio's General Assembly authorized the establishment of Local Professional Development Committees (LPDCs) and mandated that such be established in every school district and chartered nonpublic school by September 1998. Other educational agencies may also establish LPDCs that shall be structured in a manner comparable to the structures prescribed for school districts.

The Ohio Association of School Business Officials (OASBO) Local Professional Development Committee (LPDC) provides licensed unemployed Treasurers/CFOs and Business Managers with the opportunity to design their own professional development. The professional development should be focused on the success in their profession as well as maintaining appropriate licensure.

The following materials should help guide your process as you work with the LPDC to engage in professional growth. Information includes:

- Individual Professional Development Plan (IPDP) submission forms;
- Submission procedures for IPDPs and professional development activities;
- Process forms and assessment rubrics that the LPDC will use to assess the work;
- By-Laws of the LPDC;
- Calendar of LPDC meetings; and
- LPDC member contact information.

The LPDC takes its role seriously to increase the effectiveness of the profession as well as to serve individual professionals in meeting continuing licensure requirements. It is a "win-win" situation for all and it is a pleasure to serve you in this capacity.

Responsibilities

OASBO LPDC Responsibility

- Educate and assist all Treasurers/CFOs and Business Officials (BO).
- Know the current law, licensure standards and OASBO policies regarding LPDC responsibilities for licensure renewal.
- Approve SBO's coursework and other professional development activities to meet the licensure renewal standards.
- Establish and abide by the procedures, criteria and timelines of the LPDC.
- Register the LPDC with the Ohio Department of Education annually.
- Submit LPDC signature verification to the Ohio Department of Education annually.
- Operate under the Open Meetings Act (Sunshine Act) and the Public Records Act.

Business Official's Responsibility

- It is the responsibility of the licensed Treasurers/CFO/BO to monitor the expiration date(s) of licenses.
- Choose coursework and other professional development activities that reflect the professional growth and goals of the individual.
- Equivalent Other Activities (EOA) must be completed in accordance with the goals of the approved IPDP.. Examples of EOA include seminar presentations, written articles, committee/chapter work, etc. that falls outside the normal job responsibilities and must be tied to a leadership or personal growth goal within the IPDP. The maximum credit given for EOA within any renewal period is limited to 45 contact hours. Coursework and traditional workshops/seminars do not need to be pre- approved, but must meet the licensure standards and the IPDP goals. Coursework or professional development activities completed prior to the approval of the IPDP will not be accepted.
- It is the responsibility of the Treasurer/CFO/BO to fully complete the goals of the IPDP in a timely manner as stated in the proposal. If modifications to the activity/project or the IPDP itself are to be made, these modifications should be submitted for approval to the LPDC chairperson at least one (1) week before the next regularly scheduled LPDC meeting.
- Follow the procedures, criteria and timelines of the LPDC.
- Maintain records of all licensure and LPDC transactions, particularly the LPDC review and approval of an IPDP, coursework and other professional development activities.
- More information regarding licensure can be found at <https://education.ohio.gov/Topics/Teaching/Licensure/Audiences/School-Treasurer-License>
- Candidates should refer to the Standards for Business Managers and Treasurers/CFO
- Candidates are strongly encouraged to submit hours on a quarterly basis

Reciprocity

The OASBO LPDC shall accept outside LPDC approved professional development credits for any CFO/BO who is not covered under another LPDC. Work already completed and approved in the previous position shall be honored. Remaining work shall be acquired using the guidelines of the OASBO LPDC with resubmission of an IPDP to be completed within the 180-day probation period.

If you were hired by the agency from a school entity with an LPDC, you need to have your former LPDC complete their "Approval Verification Form for Treasurers/CFO/BO Leaving a LPDC" form. This form will outline the work you have completed and support the reciprocity agreement between LPDCs.

A sample "Approval Verification Form for Treasurer/CFO/BO leaving a LPDC" is available in Appendix A.

Appeal Process

The requirement for a process that allows a Treasurer/CFO/BO to appeal the decision of a Local Professional Development Committee is found in Ohio Revised Code (ORC) as well as in Ohio's *Licensure Standards*. While the mandate is clear, the determination of how this process will be implemented at the local level is left to each LPDC.

The OASBO LPDC has adopted the following appeal process:

1. *Reconsideration*

- a. If a Treasurer/CFO/BO disagrees with a LPDC decision, the Treasurer/CFO/BO will be given the opportunity to meet with the LPDC in person to discuss the LPDC and to discuss his/her case. This discussion will also serve to help the Treasurer/CFO/BO gain an understanding of the perspective of the LPDC.
- b. The Treasurer/CFO/BO must provide written notice of the intent to appeal to the LPDC at least one week prior to a LPDC meeting (see Appendix B). This notice shall be sent to the LPDC chairperson (see Appendix C).
- c. The Treasurer/CFO/BO will attend the next regularly scheduled LPDC meeting and discuss the LPDC decision.
- d. The LPDC will vote on reconsideration and notify the Treasurer/CFO/BO in writing of the LPDC decision within five working days.

2. *Third party review.*

- a. If, after the reconsideration process has taken place, the LPDC and the Treasurer/CFO/BO are still unable to come to agreement, the Treasurer/CFO/BO must provide a written request to the LPDC for a third party review panel. The Treasurer/CFO/BO must provide written notice of the request for a third party review to the LPDC at least one week prior to the LPDC meeting (see Appendix B). This notice shall be sent to the LPDC chairperson (see Appendix C).
- b. The panel members will be identified at the next LPDC meeting and the panel will review the LPDC decision within 30 days. The panel will consist of:
 - i. One licensed Treasurer/CFO/BO selected by the LPDC;
 - ii. One licensed Treasurer/CFO/BO selected by the CFO/BO;
 - iii. One licensed Treasurer/CFO/BO agreed upon by the above two.These three individuals then function as a panel to review the LPDC decision and either uphold it or overturn it.
- c. The Treasurer/CFO/BO will be notified in writing of the third party review panel decision within five working days.

Local Professional Development Committee By-Laws

Adopted March 2005

Vision Statement: The vision of the OASBO Local Professional Development Committee (LPDC) is to be an OASBO LPDC grounded in quality professional development principles, systems thinking, and best practice in aligned processes.

Mission Statement: The mission of the OASBO LPDC is to ensure licensed School Business Officials (SBO) quality by providing a direct link between high standards of quality professional development, continuous improvement and continuing Treasurer/CFO/BO licensure.

Purpose: The purpose of the OASBO LPDC is to create the standards, policies, and procedures for Treasurer/CFO/BO growth through professional development to ensure that licensed CFOs/BOs stay highly qualified in their field, resulting in continuing licensure.

Membership: The LPDC will be comprised of at least five members; – at least one from each of the five regions of the state who will be members of the Licensure Committee. *Revised January 2009*

Both Treasurers/CFOs and Business Manager Fields must be represented on the committee by members who hold either Treasurer or Business Manager Licenses.

Terms: All terms shall be two years which shall be staggered after our initial three 3-year terms and two 2-year terms.

Region	Initial Appointment	Ongoing
Northeast – Northwest	3-year	2-year terms
Central – Southeast – Southwest	2-year	2-year terms
At Large	2-year	2-year terms**

**Rather than the former limitation that LPDC members be appointed from a specific region (one per region), the Licensure Committee may appoint additional members to be part of the LPDC – they fall under the “At-Large” designation. The Committee still has the responsibility to make sure there is at least one member per region and at least one business manager representative on the Committee.

Revised January 2009

Vacancies shall be filled in the manner of the original appointment and will complete the term of the appointment. All terms are based on a fiscal year appointment (July 1- June 30).

Roles and Terms of Office: A chairperson and vice-chairperson shall be elected by members of the LPDC. The term of office shall be one year in length.

The Chair shall:

- Preside over all LPDC meetings.
- Call all meetings and set agenda in collaboration with membership.
- Ensure adherence to the IPDP review process and procedures.
- Suggest necessary professional growth for the LPDC committee.

The Vice-Chair shall:

- Fulfill the duties of the Chair at any meeting the Chair is unable to attend.
- Fulfill the duties of committee member when not serving as Chair.
- Fulfill the duties of taking meeting minutes for each meeting.

Committee Members shall:

- Elect a member by voice vote to act in the absence of the Chair and Vice-Chair.
- Serve as a contact person.
- Participate fully as review panel for the IPDP.
- Suggest and work with individuals as necessary to ensure professional growth of colleagues.
- Suggest necessary professional growth for the LPDC committee.

Meetings and Policies: The LPDC shall meet at least quarterly and at such times when three or more members may determine the need for a meeting.

A quorum of the LPDC shall consist of no less than three members.

The “reorganization” meeting for each year shall be at the Annual Workshop. The LPDC calendar shall be established for the year at this time. The chairperson and vice-chair person shall also be selected at this time.

All meetings of the LPDC shall be public meetings and shall be held during the regular business day. They may be conducted through the use of technology.

The LPDC shall act only by resolution voted upon by the LPDC and recorded in its minutes. The minutes of the LPDC will be maintained in accordance with State records retention policies.

The OASBO Office of Professional Development shall be responsible for the dissemination of meeting announcements and will be the repository of minutes and records for the LPDC.

Records are kept indefinitely.

Minutes from LPDC meetings shall be available upon request through OASBO.

Representatives of the LPDC Committee shall meet annually with the Professional Development Committee to assure professional growth seminars.

Amending the By-Laws: Amendments shall be voted on by a roll call vote. A simple majority of members present and voting will prevail.

The OASBO LPDC Committee, their activities and discussions, will be overseen by the OASBO Licensure Committee.

Current OASBO LPDC Committee members can be found in Appendix C.

OASBO LPDC meeting dates are listed in Appendix B.

Individual Professional Development Plan

Directions

Individual Professional Development Plans (IPDP) must reflect the needs of the professional to stay current with the responsibilities in the field.

- It is recommended that within 5 weeks after the issuance of a license the Treasurer/CFO/BO who holds an Ohio license should complete an Individual Professional Development Plan (IPDP).
- Electronically submit a copy of the IPDP Cover Page and Broad Learning Goals to LPDC@oasbo-ohio.org at least two weeks prior to the next LPDC meeting (see Appendix B)
- Any submitted IPDP deemed unreadable by the LPDC shall be returned to the submitter without review. The proposal should be resubmitted in appropriate and readable form at the next regularly scheduled LPDC meeting.
- Notification of the action of the LPDC will be sent in writing within five working days of the LPDC meeting.
- Candidates are encouraged to integrate several goals into the goal statements to ensure the IPDP is broad enough to encompass your five-year professional development plan.
- Candidates should refer to the Standards for Business Managers and Treasurers/CFO

“Tips for Preparing your IPDP” can be found in Appendix D.

“Characteristics of High-Quality Professional Development Framework” can be found in Appendix E.

“You can find sample goals listed in Appendix F.

“A sample IPDP with goals and rationale can be found in Appendix G.

IPDP BROAD LEARNING GOALS

First Name	Initial	Last Name
Date		

Goal 1

Rationale

Goal 2

Rationale

Goal 3

Rationale

EVIDENCE OF COMPLETION

First Name	Initial	Last Name
Date		

Individuals combining CEU's and College Credit shall clearly articulate how the work you have done and the professional learning that you have gained from the college credit will result in an increase in effectiveness for your work where you are employed.

College Coursework

- For individuals renewing with just college courses **pre-approval by the LPDC is not necessary and the individual can make direct application for license renewal through the Ohio Department of Education.**
- For individuals renewing with CEU's and college credit you must submit upon completion an official transcript to the LPDC Committee. A satisfactory grade (C or above or pass in pass/fail) on a transcript signifies that the Treasurer/CFO/BO has gained knowledge and has completed significant work in the area studied. In addition, documentation on how the professional learning will result in an increase in effectiveness for your work where you are employed.
- Coursework/degrees must be completed for credit at an institution approved by the Ohio Board of Regents, or the equivalent in another state.
- College credit hours will be converted to contact hours based on the conversion chart below.
- Individuals submitting contact hours and college credit hours for the same course/seminar will be awarded contact hours based on the conversion chart below. In no case will the individual receive both contact hours and semester hours for the same course/seminar.

College Credit Conversion Chart

1 Semester hour = 30 contact hours
 1 Quarter hour = 20 contact hours
 1 CEU = 10 contact hours
 1 Clock Hour = 1 contact hour
 1 CPE = 1 contact hour

<u>Semester Hours</u>	<u>Quarter Hours</u>	<u>CEU</u>	<u>Contact Hours</u>
1	1.5	3	30
2	3.0	6	60
3	4.5	9	90

Note: Credits will be prorated accordingly

Log of Completed Professional Development Activities

This log shall be attached to each submission to the LPDC and must accompany the OASBO transcript and/or Professional Learning Verification Form. At the end of the form, calculate the total number of hours you are requesting as part of the submission. Hours on the OASBO transcript can be grouped on the activity log.

Self-reported activities must include the Professional Learning Verification Form along with an agenda, syllabus, presentation, certificate of completion, etc. Professional Learning obtained from OASBO will be included on your OASBO transcript and doesn't require the Professional Learning Verification Form.

Date	Activity	Sponsor	Hours	EOA Hours
Total				

Signature

Professional Learning VERIFICATION*

First Name	Initial	Last Name
Street Address		
City	State	Zip Code
Work Phone	Work Fax	
Email		
Home Phone		
Position		
Date		

Number of contact hours of professional learning instruction:

Professional learning aligned with your goals and approved by the LPDC will equal .1 CEU for each clock hour of contact time.

1. Rationale

Explain how this activity helps fulfill the goals in your IPDP, and what follow up activities supported the goals from this professional learning.

2. Describe how you might apply what you have learned, or how you shared your new knowledge with colleagues.

3. Describe future related professional development work you may pursue.

4. Attachment

Attach the professional learning program or synopsis indicating the professional learning dates(s), daily agenda with times, and a description of learning goals, content, and activities.

Office Use	
Date Reviewed	_____
Contact Hours	
Assigned	_____

Signature

*Required for self-reporting activities

Appendix A
SAMPLE RECIPROCITY FORM

Approval Verification Form for Treasurer/CFO/BO Leaving the LPDC

This verifies that the attached Individual Professional Development Plan (IPDP) was approved on _____(date), and that _____(name of Treasurer/CFO/BO) has completed _____college/university semester hours and _____local Continuing Education Units equaling _____semester hours toward the completion of this plan.

(date) (name of authorized signature)

(authorized signature)

Name of School District: _____

Name of LPDC, if different: _____

LPDC Address: _____

LPDC Chair Person: _____

LPDC Phone Number: _____

Appendix B OASBO LPDC Meeting Dates

The OASBO Local Professional Development Committee meets quarterly (July, November, January, April). The meetings will be held via conference call except for the April meeting which will be held at the Annual Workshop. Any LPDC documents (IPDP, IPDP changes, EOA, etc.) must be submitted to a committee member at least two weeks prior to the monthly meeting. The effective date of IPDPs and Coursework submitted between meetings will be retroactive to the submission date subject to approval by the LPDC Committee.

LPDC Meeting Date	Deadline to submit documents
July	Two weeks prior
November	Two weeks prior
January	Two weeks prior
April	Two weeks prior

Appendix C OASBO LPDC Members

It is our hope that these materials will support you as you work. We are available to assist you in any step of this process and look forward to serving you. For assistance and/or further information, please contact any OASBO LPDC member below.

Last Name	First Name	Phone	Email Address	Region
Burns	Amy	(419) 671-0312	aweemes@tps.org	NW
Cusick	TJ	(614) 450-6171	tjcusick@wscloud.org	Central
Espy	John	(513) 312-8478	jespy@miamisburg.k12.oh.us	SW
Ritchie	Lisa	(740) 667-3318	lritchier@easternlocal.net	SE
Martin	Nick	(513) 931-8181	martin.n@nchcityschools.org	At-Large Bus.Mgr
Barone	Tom	(330) 653-1205	baronet@hudson.edu	NE
Brockway	Thomas	(614) 499-5107	tom.brockway@pvschools.org	At-Large

Appendix D

Tips for Preparing your IPDP

Broad Learning Goals

At the heart of an IPDP are two or three statements of the broad learning goals the Treasurer/CFO/BO plans to meet during the renewal cycle. A goal statement should:

- State an intention to engage in learning using an action verb signifying the Treasurer/CFO/BO's personal learning.
- Describe an area related to practice that will be the focus of the Treasurer/CFO/BO's learning.
- Describe how learning will be demonstrated such as products or dissemination of findings.
- Remember this is not a list of OASBO activities, but learning goals to assist you to work more effectively in the profession.

Possible Goal Components --- Select one from each column (mix and match).

I will:	In what area of improvement:	For the purpose of...
Learn about	A method	Write
Read widely in	A program	Present
Study theory/practice of	A discipline	Develop
Become skillful at	A population	Design
Investigate	An organizational pattern	Document
Research	An area	Create
Explore	A curriculum area	Demonstrate
Gain understanding of		

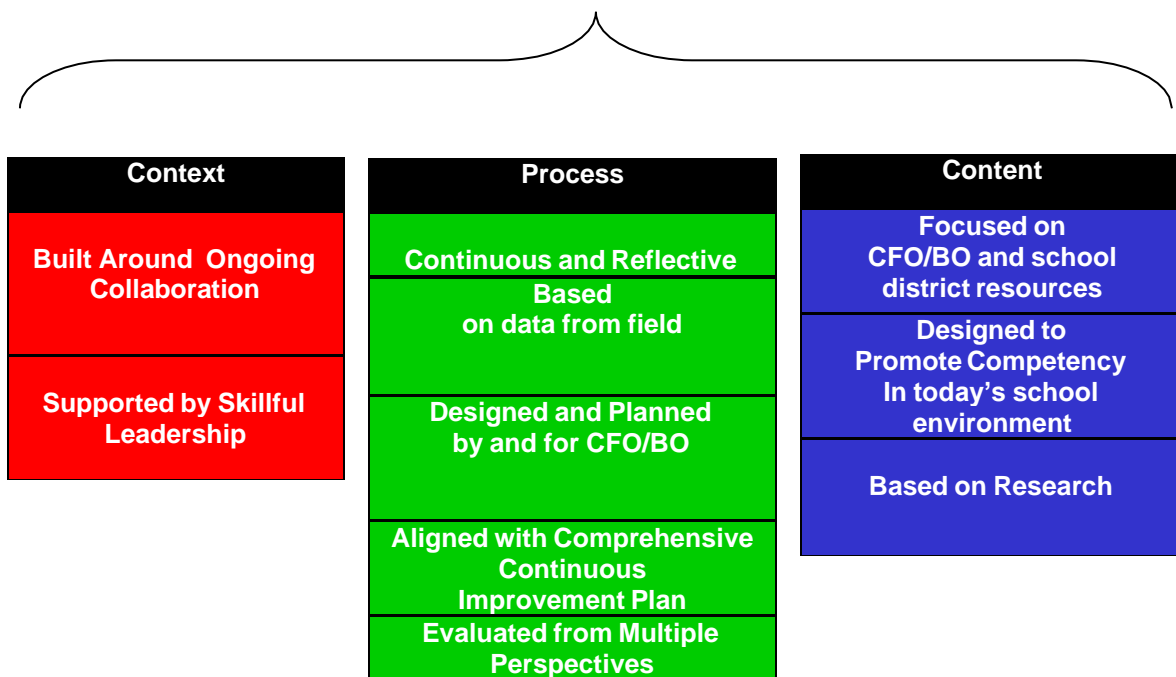
Rationale for Goals

The Treasurer/CFO/BO must describe the alignment between each goal and the needs of the professional Treasurer/CFO/BO. To substantiate a need, an educator could cite:

- Data sources that include relevant Treasurer/CFO/BO information or the Treasurer/CFO/BO's own research and evaluation activities.
- Other data relevant to Treasurer/CFO/BO achievement in the field. Data may come from school sources or the Treasurer/CFO/BO's own research and evaluation activities.
- Information from the Treasurer/CFO/BO's self-assessment or reflection activities or feedback from superiors or peers about the Treasurer/CFO/BO's practice.
- Standards or requirements associated with an upcoming or recently acquired responsibility or position.

Appendix E
Characteristics of High Quality Professional Development

Ohio High-Quality Professional Development Framework



APPENDIX F

EXAMPLES OF BROAD LEARNING GOALS

New Treasurer (1-5 Years Experience)

1. Gain an understanding of budgeting and forecasting.
2. An area that I will focus on additional learning is preparing a five year forecast
3. Create a powerpoint presentation advising a school district about their five year forecast and future.
4. I will increase my knowledge of fiscal strategies as it relates to my areas of licensure.
5. I will pursue continuing education in the area of leadership and mentoring.
6. I will obtain knowledge in the area of state software.
7. Become skilled at analyzing statistical and financial data to increase profitability of programs.
8. Learn about Federal Procurement law/regulations
9. Gain a broader knowledge of all areas of Business Management in a school system
10. To understand the role of Administration in daily business functions.
11. To utilize computer skills in a professional and effective manner.
12. To get better at technology, while presenting goals and objectives as a SBO
13. I will learn more about leadership to develop personnel management skills and other leadership attributes.
14. I will develop technical skills as well as soft skills that align with the duties of my position.
15. I will learn about professionalism for the purpose of developing my skills to be an effective leader.
16. I will learn about collective bargaining practices, procedures and policies in order to participate in district negotiations as a member of the management team.
17. I will gain an understanding of the Facilities Planning & Construction programs in order to demonstrate sound fiscal management through the bond financing process.
18. I will study theory and practice for providing food services in line with child nutrition guidelines in order to demonstrate the most cost effective delivery method and fee structure aligned with federal compliance and the district wellness policy.
19. Begin to grasp and understand the concepts of school business and finance and how the financial decisions we make impact student success in the classroom.
20. Participate in New Treasurer training sessions as well as connect with a mentor through OASBO.
21. Stay abreast of all existing and new legislation as it affects school funding and finance.
22. Become a strong member of a school leadership team where I can provide financial guidance to the district as a whole in order to promote and support the best learning environment that supports the administration teachers, and students.
23. I will expand my knowledge of school district human resource practices
24. I will become familiar with current school district financial management practices including budgeting/forecasting techniques

APPENDIX F

EXAMPLES OF BROAD LEARNING GOALS

Treasurer (5 Years or More Experience)

1. Gain a better understanding of school finance & business operations as well as legal, legislative and compliance issues facing Ohio's public-school systems
2. Learn about changes in law impacting Ohio's public-school systems in areas of school law, school funding, grants and other areas specifically impacting the finance & business operations.
3. Explore opportunities to collaborate with local, state and national organizations/officials to promote personal and professional growth through leadership and best practices relating to the school profession
4. Promote, facilitate and investigate 21st century solutions that address equitable access to effective educators for all students.
5. Learn about evidence-based funding and share strategies that impact and enhance local control of financial and curricular resources.
6. Become skillful at facilities management and pupil services to develop solutions that serve changing community demographics and meet the needs of families and students regardless of zip code.
7. Research methods of data collection to develop recommendations for the reconciliation and submission of data for funding
8. I will become more skillful in the discipline of document review for the purpose of writing reports, identifying strengths and challenges.
9. I will study the theory and development of policies, practices, and performance measures as documents within districts, in comparison with delivery of services and results.
10. I will continue to stay current on all technical issues, financial and compliance that impact school districts.
11. I will study factors impacting school districts to better understand the practical issues and to assist in developing favorable solutions.
12. I will commit to being an above average discussion leader for my position and study, present and understand topics that could be beneficial to Ohio school districts.
13. I will learn about legislative actions and results of those actions to demonstrate the impact on operations of Ohio school districts
14. I will stay current in the area of Medicaid funding in schools.

APPENDIX F

EXAMPLES OF BROAD LEARNING GOALS

Retired Treasurer (5 Years or More Experience)

1. To keep my skills current in the school finance world.
2. To keep current with software, including the state software updates,
3. To keep my license current to be able to counsel school treasurer or help with decisions.
4. Continue to improve my understanding of school business operations to be a viable interim
5. To pursue professional development opportunities to enhance my knowledge and skills in the field of school finance, management and investments, taxes and payroll changes.
6. To pursue professional development opportunities to enhance my leadership skills.
7. To pursue active participation in my professional association to improve and promote high standards of school business management practices.
8. Broaden my understanding of school finance as well as legal and legislative issues regarding Ohio's public school systems
9. Stay informed on current fiscal issues and laws regarding Ohio Public Schools with concentration on grants, school finding, and state software.

APPENDIX G

SAMPLE IPDP BROAD LEARNING GOALS

First Name	Initial	Last Name
Date		

Goal 1 – Gain a better understanding of school finance & business operations as well as legal, legislative and compliance issues facing Ohio’s public-school systems.

Rationale – Staying abreast of innovative best practices and staying current on legal, legislative and compliance will allow me to demonstrate knowledge and present information to my board, leadership team and community.

Goal 2 – Learn about changes in law impacting Ohio’s public-school systems in areas of school law, school funding, grants and other areas specifically impacting the finance & business operations.

Rationale – Keeping current on changes in law will allow me to present information to my board, leadership team and community and to implement changes to policy and practices associated with finance & business operations.

Goal 3 – Explore opportunities to collaborate with local, state and national organizations/officials to promote personal and professional growth through leadership and best practices relating to the school profession.

Rationale – Enhancing one’s leadership presence and skills while promoting the highest level of ethics, integrity and standards is the foundation for developing trust and transparency within public-school districts throughout Ohio.

IPDP Final Review
(For LPDC use only)

First Name	Initial	Last Name	
Street Address			
City	State	Zip Code	
Work Phone			Work Fax
Email			
Home Phone			
Position			

Date of Initial Review _____
Date

Disapproved _____
Date

Approved with Revisions _____
Date

Review to Treasurer/CFO/BO _____
Date

Returned to LPDC _____
Date

Request for Appeal _____
Date

Approved _____
Date

LPDC Chair _____

LPDC Signature _____