


# Local Professional Development Committee Guidelines

# July 2017

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# Table of Contents


| | Page Number |
|---|---|
| *Introduction*……. | 3 |
| *Responsibilities* | |
| OASBO LPDC Responsibilities…… | 4 |
| CFO/BO's Responsibilities…… | 4 |
| Reciprocity …… | 4 |
| Appeal Process …… | 5 |
| *By-Laws*……. | 6 |
| *Individual Professional Development Plan (IPDP) Directions*…….. | 8 |
| *Individual Professional Development Plan (IPDP) Cover Page* …… | 9 |
| *IPDP Broad Learning Goals*…….…….. | 10 |
| *Evidence of Completion*…….. | 11 |
| *Log of Completed Professional Development Activities*……..... | 12 |
| *Workshop CEU Verification*……. | 13 |
| *Appendices* | |
| Appendix A: Sample Reciprocity Form……. | 14 |
| Appendix B: OASBO LPDC Meeting Dates……. | 15 |
| Appendix C: OASBO LPDC Members……. | 16 |
| Appendix D: Tips for Preparing Your IPDP……. | 17 |
| Appendix E: Characteristics of High-Quality Professional Development……... | 18 |
| *LPDC Forms*……. | 19 |



**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# 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.

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# 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 and must be pre-approved. 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.

## 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 IPDP 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-chair person 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).
- Submit five copies of the IPDP Cover Page and Broad Learning Goals to the:

  The Ohio Association of School Business Officials
  Attention: LPDC Committee
  8050 N. High St., Suite #130
  Columbus, OH 43235

  **Or** any LPDC member, at least one week 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.

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

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

# INDIVIDUAL PROFESSIONAL DEVELOPMENT PLAN (IPDP)
# COVER PAGE

| First Name | Initial | Last Name | |
|---|---|---|---|
| | | | |
| **Street Address** | | | |
| **City** | **State** | | **Zip Code** |
| **Work Phone** | | | **Work Fax** |
| **Email** | | | |
| **Home Phone** | | | |
| **Prior place of employment** | | | |

Current Licenses(s):

| Expiration | License | Type | ID Number |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

Licensure (Please list all that apply):

a._____Renew License(s) List 1 _____

List 2 _____

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# IPDP BROAD LEARNING GOALS

| First Name | Initial | Last Name |
|---|---|---|
| | | |
| **Date** | | |

Goal 1

Rationale

Goal 2

Rationale

Goal 3

Rationale

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# EVIDENCE OF COMPLETION

| First Name | Initial | Last Name |
|---|---|---|
| | | |

| | |
|---|---|
| **Date** | |

Clearly articulate how the work you have done and the professional learning that you have gained will result in an increase in effectiveness for your work when you are employed.

**College Coursework**

- For college courses **pre-approved** by the LPDC, the Treasurer/CFO/BO 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, a reflection describing how the course information has led to change in practice is required.
- Coursework/degrees must be completed for credit at an institution approved by the Ohio Board of Regents, or the equivalent in another state.
- Professional education coursework/degrees must be completed for credit at an institution approved for Treasurer/CFO/BO preparation by the OASBO LPDC.

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# Log of Completed Professional Development Activities

This log may be helpful to record your professional development activities. It is not required for the LPDC.

| Date | Activity | Sponsor | Hours CEU/CPE | Hours approved |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

_____

Signature

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# WORKSHOP CEU 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 workshop instruction: _____
A workshop 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 CEU activity helps fulfill the goals in your IPDP, and what follow up activities supported the goals from this workshop.

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

**Office Use**

Date Reviewed _____

CEUs Assigned _____

_____
Signature

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# 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:

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# Appendix B
# OASBO LPDC Meeting Dates

The OASBO Local Professional Development Committee meets quarterly (July, October, January, April). The meetings will be held the third Wednesday of the month 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 one week prior to the monthly meeting.

| LPDC Meeting Date | Deadline to submit documents |
|---|---|
| July | One week prior |
| October | One week prior |
| January | One week prior |
| April | One week prior |

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# 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 | Term |
|---|---|---|---|---|
| Weemes | Amy | (419) 671-0312 | aweemes@tps.org | 2 year |
| Cusick | TJ | (614) 450-6171 | tjcusick@wscloud.org | 2 year |
| Meyer | Deb | (937) 498-2161 | deb@woco-k12.org | 1 year |
| Ritchie | Lisa | (740) 667-3318 | el_lritchie@seovec.org | 1 year |
| | | | | |
| | | | | |
| | | | | |

**8050 North High Street / Suite #170 / Columbus, OH**
**43235-6485 (614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**

# 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 | | |

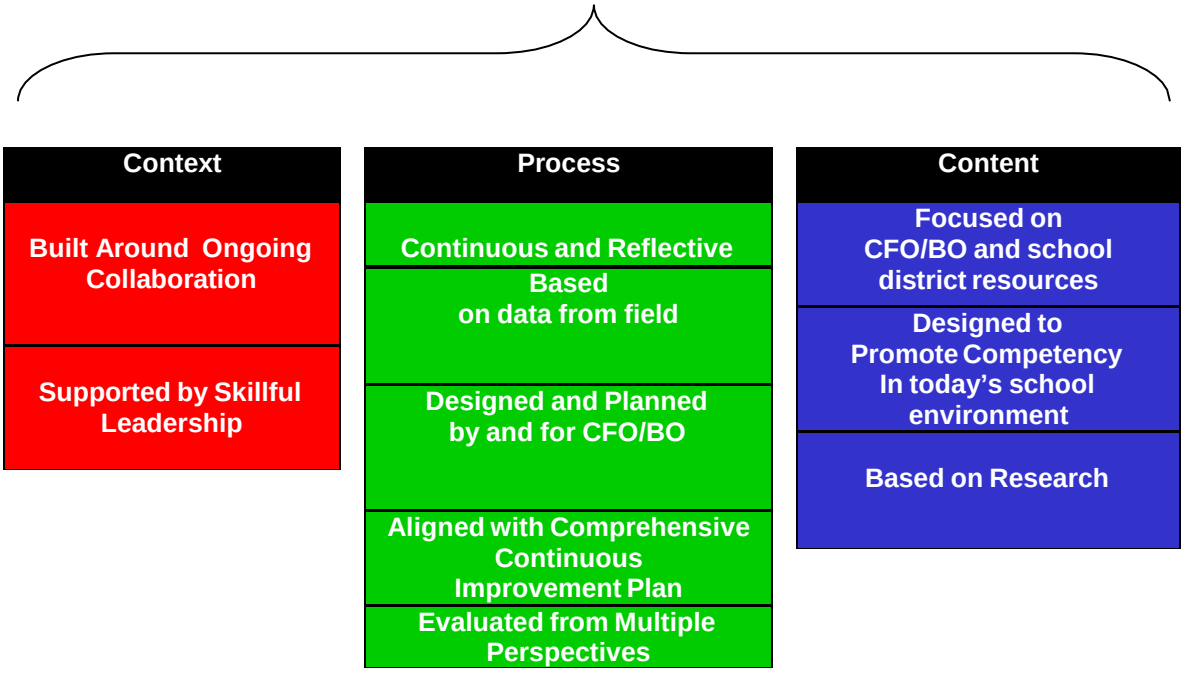
## Rationale for Goals

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




8050 North High Street / Suite #170 / Columbus, OH
43235-6485 (614) 431-9116 phone / (614) 431-9137 fax
1-844-838-5395 toll free

# 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 _____



**8050 North High Street / Suite #170 / Columbus, OH 43235-6485**
**(614) 431-9116 phone / (614) 431-9137 fax**
**1-844-838-5395 toll free**