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: 11*

*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: 12*

*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*

**Grant Management Seminar**
This course is designed to develop a general understanding of the role and responsibilities of district personnel when managing grants, provide knowledge and best practices in the area of grants management, and discuss requirements outlined in Ohio Revised Code and Ohio Administrative Code.

*Contact Hours: 6*

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

**Impact of EMIS on School Funding**
This seminar is designed to bring Treasurers and EMIS Coordinators together to discuss the importance of EMIS reporting and its impact on funding.

*Contact Hours: TBD*

*Cost: 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: 11*
*Cost: Member $240; Associate Member $250; Non-Member $370*

**Business Operations Hot Topics**
This two-day seminar will focus on many business operations and facilities related hot topics.
*Contact Hours: 11*
*Cost: Member $200; Associate Member $210; Non-Member $330*

**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*

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: 11
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: 11
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: 6
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: 7
Cost: Member $120; Associate Member: $130; Non-Member $250

Treasurers Hot Topics – Spring
This seminar covers the most important topics facing school officials right now.
Contact Hours: 6
Cost: Member $120; Associate Member $130; Non-Member $250

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: 7
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: 5
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: 5
Cost: Member $120; Associate Member $130; Non-Member $250

Transportation Management

OASBO/ODE/OAPT Transportation: Type IV Training Seminar
Contact Hours: 4.5
Mbr/Non-Mbr $120

OASBO/ODE/OAPT Transportation: Driver Retention/Recruitment Seminar
Contact Hours: 4.5
Mbr/Non-Mbr $120

OASBO/ODE/OAPT Transportation: School Van Training Seminar
Contact Hours: 4.5
Mbr/Non-Mbr $120

OASBO/ODE/OAPT Transportation: Student Management on the School Bus Seminar
Contact Hours: 4.5
Mbr/Non-Mbr $120

OASBO/ODE/OAPT Transportation: Active Shooter Training Seminar
Contact Hours: 4.5
Mbr/Non-Mbr $120

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: 4.5
Mbr/Non-Mbr $120

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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
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
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
EMIS and School Funding ................................................................................. December 7, 2018
Annual Facilities Conference & Expo .............................................................. December 10-11, 2018
Business Essentials for Food & Nutrition Directors ........................................ December 13, 2018
So You Want to be a School Treasurer ............................................................ January 10, 2019
Essentials of Human Resources 2nd offering ..................................................... January 14-15, 2019
New Treasurers Survival Series 103 ................................................................. January 17, 2019
Spring Hot Topics Seminar ............................................................................. January 24, 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
Crucial Conversations ....................................................................................... 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

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## Ohio Standards for School Treasurers

<table>
<thead>
<tr>
<th></th>
<th>Leadership: School treasurers participate in a leadership role within the district.</th>
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</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Participate as an integral member of the district leadership team.</td>
</tr>
<tr>
<td>1.2</td>
<td>Work with the district superintendent and board of education, with input from other stakeholders, to review, develop, align and implement policies and procedures.</td>
</tr>
<tr>
<td>1.3</td>
<td>Participate with the district superintendent and the board of education in the development and implementation of the district strategic plan.</td>
</tr>
<tr>
<td>1.4</td>
<td>Establish sound fiscal practices to support the educational process.</td>
</tr>
<tr>
<td>1.5</td>
<td>Lead and manage personnel under direct supervision of the treasurer.</td>
</tr>
<tr>
<td>1.6</td>
<td>Support the effective use of data.</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>2</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Collect, analyze and interpret financial data for budgeting, forecasting and decision-making.</td>
</tr>
<tr>
<td>2.2</td>
<td>Effectively manage district financial accounts including: cash, budgetary, debt service, revenue and grant management.</td>
</tr>
<tr>
<td>2.3</td>
<td>Demonstrate knowledge, performance and accuracy of standard accounting practices, auditing procedures and accurate financial reports.</td>
</tr>
<tr>
<td>2.4</td>
<td>Demonstrate knowledge of and compliance with state and federal laws.</td>
</tr>
</tbody>
</table>
### 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. |

### 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. |

### 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

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Participate as an integral member of the district leadership team.</td>
</tr>
<tr>
<td>1.2</td>
<td>Participate with the leadership team in the development and implementation of the district strategic plan.</td>
</tr>
<tr>
<td>1.3</td>
<td>Lead and manage personnel under the direct supervision of the business manager.</td>
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## 2 Facilities Management

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Acquire, maintain and oversee construction and/or renovations on buildings and other capital assets.</td>
</tr>
<tr>
<td>2.2</td>
<td>Manage energy and environmental programs.</td>
</tr>
<tr>
<td>2.3</td>
<td>Develop and manage partnerships with private and public sectors to enhance resources related to the facilities and equipment.</td>
</tr>
<tr>
<td>2.4</td>
<td>Develop plans for maintenance expenditures.</td>
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</tbody>
</table>

## 3 Business Operations

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>3.1</td>
<td>Provide oversight to custodial/maintenance departments.</td>
</tr>
<tr>
<td>3.2</td>
<td>Provide oversight to food service department.</td>
</tr>
<tr>
<td>3.3</td>
<td>Provide oversight to transportation department.</td>
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<tr>
<td>3.4</td>
<td>Provide support to and collaborate with technology department.</td>
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<tr>
<td>3.5</td>
<td>Provide support to human resources for non-teaching personnel.</td>
</tr>
<tr>
<td>3.6</td>
<td>Demonstrate a clear understanding of financial resources and planning.</td>
</tr>
<tr>
<td><strong>4</strong></td>
<td><strong>Risk Management and Safety/Security</strong></td>
</tr>
<tr>
<td>4.1</td>
<td>Ensure the risk management program addresses safety and security.</td>
</tr>
<tr>
<td>4.2</td>
<td>Communicate the risk management program to all stakeholders.</td>
</tr>
<tr>
<td>4.3</td>
<td>Participate in the development of safety and emergency management plans.</td>
</tr>
<tr>
<td>4.4</td>
<td>Develop and monitor risk management practices to protect district resources</td>
</tr>
<tr>
<td><strong>5</strong></td>
<td><strong>Communication and Collaboration</strong></td>
</tr>
<tr>
<td>5.1</td>
<td>Demonstrate competence in the communication of operational issues to all stakeholders.</td>
</tr>
<tr>
<td>5.2</td>
<td>Communicate and collaborate with internal and external stakeholders.</td>
</tr>
</tbody>
</table>