



Ohio Association of
School Business Officials



2019-20 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!*

OASBO Professional Development

OASBO provides career-long support for school business officials through our professional development offerings. From those considering a career in school business to veteran treasurers, business managers, food service and transportation supervisors, fiscal and operations support staff - OASBO has you covered. In-depth continuing education, legislative updates, and seminars on hot topics are offered throughout the year.

Continuing Education Unit (CEU) & Continuing Professional Education (CPE) Credit

You will earn contact hours towards CEU and CPE credit for attending any OASBO Seminar. After completion of an OASBO seminar, each participant will be issued Contact Hours for the number of hours of instruction received. For your convenience, you can print documentation of your contact hours earned.

CPIM Credit

CPIM credit is given for attendance at some OASBO events. OASBO assists with the necessary paperwork, but actual CPIM credit is issued by the Treasurer of State's Office.

College Credit

Through a partnership with Ashland University, OASBO can offer college credits for some of our courses. If you are interested in receiving credits, please contact the OASBO office prior to your attendance at the seminar.

Location

All events will be held in Columbus, Ohio unless otherwise noted as regional.

Details Subject to Change

All final details for OASBO events will be published on the website. Details in this document are meant to be used for general planning but all final details will be put on the website.

**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!*

Conferences

OASBO Annual Conference & Expo

The Annual Conference & Expo is OASBO's biggest event of the year. This three-day conference includes several learning tracks and sessions for Ohio's school business officials over a wide range of topics. It also includes a full day expo to connect school business officials with school district product and service providers.

Contact Hours: Up to 15 hours

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

Offered: April

Annual Facilities Conference & Trade Show

This two-day conference is perfect for building and grounds supervisors, business managers, custodial supervisors, facility supervisors, and maintenance supervisors. It includes several learning tracks and sessions, and a full day trade show to connect school business officials with school district product and service providers.

Contact Hours: Up to 12

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

Offered: December

OASBO/BASA Finance, Facility and Safety Conference

Designed for treasurers and superintendents, this one-and-a-half-day conference includes several learning tracks and sessions aimed at school district issues involving both roles. Attendees will gain knowledge and skills to effectively work as a team in the strategy, planning and implementation of district projects and programs. It also includes a full day trade show to connect school business officials with school district product and service providers.

Contact Hours: Up to 11

Cost: Early Bird \$295; Full Price \$325

Offered: February

Business Operations

Annual Facilities Conference & Trade Show

This two-day conference is perfect for building and grounds supervisors, business managers, custodial supervisors, facility supervisors, and maintenance supervisors. It includes several learning tracks and sessions, and a full day trade show to connect school business officials with school district product and service providers.

Contact Hours: Up to 12

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

Offered: December

Business Operations Hot Topics

This two-day seminar focuses on many business operations and facilities related hot topics.

Contact Hours: 11

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

Offered: September

Essentials of Business Operations

This course provides foundational knowledge in the areas of risk management, school safety & security, IT security, facilities utilization, capital assets, bidding, contracts, construction, transportation, and food and nutrition.

Contact Hours: 11

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

Offered: March

OASBO/BASA Finance, Facility and Safety Conference

Designed for treasurers and superintendents, this one-and-a-half-day conference includes several learning tracks and sessions aimed at school district issues involving both roles. Attendees will gain knowledge and skills to effectively work as a team in the strategy, planning and implementation of district projects and programs. It also includes a full day trade show to connect school business officials with school district product and service providers.

Contact Hours: Up to 11

Cost: Early Bird \$295; Full Price \$325

Offered: February

Regional OASBO/OSBA SchoolComp Seminars

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

Contact Hours: 3.5

Cost: Free

Offered: March

Strategic Planning Seminar & Retreat for Business Operations

This event provides a unique learning and sharing opportunity for school district business operations professionals in a retreat-like setting. The agenda includes a strategy and innovation leadership workshop, and an opportunity to learn from and engage with thought leaders from outside and inside school business.

Contact Hours: 10

Cost: Professional Member \$275; Associate Member \$285; Non-Member \$405

Offered: June or July

Essentials of School Business Management Series

OASBO's *Essentials* is a series of five curriculum-based courses which provide comprehensive, foundational knowledge in key areas of school business administration, management, funding and finance. Based on established professional standards for school treasurers, they were developed by OASBO in partnership with members and partners with significant experience in school business, as well as many state agencies.

The Ohio Department of Education approved OASBO's five *Essentials* courses as part of the School Treasurer Licensure Pathway: Option 3 program. This option is available as an alternative to the current pathways available for licensure. The courses are also open to those who are not pursuing licensure in the pathway.

Essentials of Financial Management & Administration

This course details the role and responsibilities of the CFO/treasurer and provides essential knowledge on: governing laws, regulations, policies; fund accounting & USAS coding; student activity programs; booster & support organizations; purchasing; and investment basics.

Contact Hours: 11

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

Offered: September

Essentials of Budgeting & Forecasting

This course provides guiding principles and processes for the CFO/treasurer in developing a strategic mindset for long-term financial planning. The course includes three key areas: financial reporting & auditing, appropriations and budgeting, and forecasting (including enrollment projections, forecasting revenues, state aid, expenditures, cash flow and analytics).

Contact Hours: 11

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

Offered: October

Essentials of School Funding & Finance

This course provides comprehensive content on school funding, debt and financing including tax levies, millage, borrowing, issuing debt, state funding, EMIS, tuition, excess & catastrophic cost, grants & grants management, ethics.

Contact Hours: 11

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

Offered: November

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

Offered: January

Essentials of Business Operations

This course provides foundational knowledge in the areas of risk management, school safety & security, IT security, facilities utilization, capital assets, bidding, contracts, construction, transportation, and food and nutrition.

Contact Hours: 11

Professional Member \$240; Associate Member \$250; Non-Member \$370

Offered: March

Food & Nutrition

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. It covers meal patterns, purchasing, commodities, finance basics, communications, annual record-keeping, and important job resources.

Contact hours: 5

Cost: \$120

Offered: Fall

Financial Management (Institute of Child Nutrition)

Geared towards food service directors, this course provides training on management of finances and other resources as the foundation for nutrition integrity and quality meals in school nutrition programs. Topics include: importance of financial management, development of a financial mgt information system, communication and ethical behavior, reporting revenue and expenditures, setting a meal standard for financial management and analysis, managing revenue and expenditures, controlling food and labor costs, financial planning and budget development, developing and analyzing a budget, tools to analyze financial status

Contact hours: 12

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

Offered: December, every other year. Next being offered in FY 21

Microsoft Excel Basics for Food Service Directors

This one-day, hands-on training was created through input from several experienced food service directors on the most important Excel skills for food service directors. It includes an 87-page booklet and CD with sample files.

Contact Hours: 7

Cost: Professional Member \$150; Associate Member \$160; Non-Member \$280

Offered: Every other year. Is being offered in FY 20, date TBD.

Leadership

7 Habits of Highly Effective People

This course is based on content from the well-known book, *The 7 Habits of Highly Effective People*, by Stephen Covey. The tenets of 7 habits is based on personal effectiveness, leadership development and change. This two-part course 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: Professional Member \$725; Associate Member \$835; Non-Member \$1355

Offered: March, every other year, opposite the Leadership Workshop Series. Will next be offered in FY 21.

Crucial Conversations Workshop

This two-day course 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: Professional Member \$795; Associate Member \$905; Non-Member \$1425

Offered: March, every other year, opposite the Leadership Workshop Series. Will next be offered in FY 21.

Leadership Conference

OASBO Governance Meeting including: Committee projects, strategic planning, networking and leadership development training.

Contact Hours: 9

Cost: Free. Invitation only - Limited to OASBO chapter & committee leaders, board members, past presidents

Offered: September

Leadership Workshop Series

OASBO's Leadership Workshop Series combines personal and professional leadership skills development strategies from a variety of disciplines. It includes Covey's *Leading at the Speed of Trust*, as well as the *Human Side of Leadership* including values, climate and learning styles inventories, and communications tools and techniques. The full series consists of one meet & greet dinner, one overnight stay, and five one-day interactive workshops over a 13-month period. It also includes team interaction and activities between workshops.

Contact Hours: 37

Cost: Professional Member \$1950; Associate Member \$2260; Non-Member \$2780

Offered: Every other year opposite 7 Habits and Crucial Conversations. Being offered in FY 20.

OASBO/PASBO Leadership Institute - The Battle of Lake Erie

This program will use the Battle of Lake Erie, an iconic American battle during the War of 1812, a piece of history that serves as a perfect case study to reflect upon leadership style, innovation, and strategic vision.

Location: Bayfront Convention Center, Erie, PA

Contact hours: 10.5 hrs

Cost: \$1,500. Includes programming, tours, room & tax, parking, meals, receptions, and transportation cost for all conference excursions. Excludes transportation to and from Erie, PA.

New Treasurers

So You Want to be a School Treasurer

Geared towards those interested in becoming 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: 7

Cost: \$25

New Treasurer Survival Series

Designed by seasoned treasurers, OASBO’s New Treasurers Survival Series is a series of four one-day seminars for new treasurers. It provides new treasurers with practical, working knowledge of what issues and topics to tackle during *each quarter* of the fiscal year. It’s a must-attend series for any new treasurer.

New Treasurer Survival Series 101

The first in the series, this seminar covers USAS coding basics; licensure validation; tying it all together: budgeting, appropriations, forecasting; superintendent/treasurer relationships; introduction to the CCIP; and working with your county auditors.

Contact Hours: 7

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

New Treasurer Survival Series 102

Second in the series, this seminar covers property taxation – including levies; EMIS and tuition, special education, catastrophic costs & excess (How to calculate and manage); records retention; board meeting do’s and don’ts and board minutes; why you should care about EMIS.

Contact Hours: 7

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

New Treasurers Survival Series 103

Third in the series, this seminar covers making public presentations; employment contract basics/employment contracts & related board agenda; managing expectations at home and at work; FMLA Basics & HIPAA Compliance; board policy 101

Contact Hours: 7

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

New Treasurer Survival Series 104

Fourth in the series, this seminar covers building projections for salaries & compliance; property and liability insurance; student activities; preparing for an audit and the IPA process.

Contact Hours: 7

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

Finance Office

Essentials of Financial Management & Administration

This course details the role and responsibilities of the CFO/treasurer and provides essential knowledge on: governing laws, regulations, policies; fund accounting & USAS coding; student activity programs; booster & support organizations; purchasing; and investment basics.

Contact Hours: 11

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

Offered: September

Essentials of Budgeting & Forecasting

This course provides guiding principles and processes for the CFO/treasurer in developing a strategic mindset for long-term financial planning. The course includes three key areas: financial reporting & auditing, appropriations and budgeting, and forecasting (including enrollment projections, forecasting revenues, state aid, expenditures, cash flow and analytics).

Contact Hours: 11

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

Offered: October

Essentials of School Funding & Finance

This course provides comprehensive content on school funding, debt and financing including tax levies, millage, borrowing, issuing debt, state funding, EMIS, tuition, excess & catastrophic cost, grants & grants management, ethics.

Contact Hours: 11

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

Offered: November

Grant Management Seminar

This seminar is designed to develop a general understanding of the role and responsibilities of district personnel when managing grants – it provides knowledge and best practices in the area of grants management, and discusses requirements outlined in Ohio Revised Code and Ohio Administrative Code.

Contact Hours: 6

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

Offered: March

Impact of EMIS on School Funding

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

Contact Hours: 6

Cost: \$120

Offered: December

OASBO/OSBA School Finance Workshop

This annual event covers the latest information on school finance, statehouse news and more.

Contact Hours: 6

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

Offered: December

Regional Fall School Finance Workshops

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

Offered: Fall

Regions: CE, NE, NW, SE, SW

Regional Advanced Microsoft Excel - Beyond the Basics Hands-on Training

Go "Beyond the Basics" with this Excel course for mid-level users. Taught by Excel guru Bob Howard, bring your questions and learn first-hand to make your spreadsheets more efficient.

Contact Hours: 7

Cost: Professional Member \$150; Associate Member \$160; Non-Member \$280

Offered: October/November every other year. Being offered FY20

Regions: CE, NE, NW, SW

Treasurers Hot Topics

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

Contact Hours: 7

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

Offered: October & January

Finance Office Support Staff

Regional Accounts Payable/General Accounting

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

Contact Hours: 5

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

Offered: August/September

Regions: CE, NE, NW, SE, SW

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

Offered: August/September

Regions: CE, NE, NW, SE, SW

Regional Advanced Microsoft Excel - Beyond the Basics Hands-on Training

Go "Beyond the Basics" with this Excel course for mid-level users. Taught by Excel guru Bob Howard, bring your questions and learn first-hand to make your spreadsheets more efficient.

Contact Hours: 7

Cost: Professional Member \$150; Associate Member \$160; Non-Member \$280

Offered: October/November every other year. Being offered FY20

Regions: CE, NE, NW, SW

Transportation Management

OASBO, ODE, and OAPT jointly present approximately five of the following transportation seminars each year. Combinations vary year-to-year. All seminars offer the same number of contact hours and cost:

Contact Hours: 4.5

Cost: \$120

Active Shooter Training Seminar

Although school districts have been making active shooter training for students and teachers as part of the yearly training program, it is critical that school bus drivers and riders be added to the list. Drivers and riders need to know how to exit a bus if someone is threatening them with a weapon. They need to know how to respond in a crisis, including that they can break all the rules to get out of the bus and away from the shooter.

Driver Retention/Recruitment Seminar

The current school bus driver shortage means that holding onto your existing drivers is of paramount importance. If you lose a good driver, it could be months - or more - until you find a suitable replacement. Unfortunately, due to the pressures and problems with school bus driving as a career, most districts are seeing higher-than-normal levels of driver turnover. Some of the best ideas known for better school bus driver recruitment and retention will be shared.

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. Offered in NW, NE, SW, CE Regions

Offered: June every year.

School Van Training Seminar

Vehicles originally designed and constructed at the factory for nine or fewer passengers, not including the driver, are to be used when school bus transportation cannot be reasonably provided. This seminar will reference Rule 3301-83-19 of the Ohio Pupil Transportation Operation and Safety Rules, specifically Vehicles Other Than School Buses.

Student Management on the School Bus Seminar

One of the biggest challenges facing school bus drivers today is the management of students on the school bus. This seminar will reference Rule 3301-83-08 of the Ohio Pupil Transportation Operation and Safety Rules, specifically Pupil Transportation Management Policies. Attendees will learn the key elements to bus safety, goals and strategies for safe pupil transportation, and strategies for success.

Type IV Training Seminar

Pupils enrolled in chartered nonpublic or community schools may be entitled to pupil transportation services from their public-school district of residence. This seminar addresses general procedures, procedures for conducting official timings, as well as fact-finding procedures.

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.