



Ohio Association of
School Business Officials



2021-22 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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OASBO Professional Development Overview

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.

COVID-19

OASBO continues to monitor the CDC guidelines as well as the Governor's Health orders as it relates to the Coronavirus. Currently, all professional development seminars are being delivered in-person at our conference center and via a virtual option for those who are not comfortable attending in person. Stay tuned to OASBO communications should the status of the pandemic change.

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

You will earn contact hours towards CEU and CPE credit for attending any OASBO educational offering. After completion of an OASBO event, 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. CPIM credit is issued by the Treasurer of State's (TOS) Office. You'll need to register your attendance at an event in your TOS account; OASBO will verify your attendance and TOS will issue the CPIM credit to your account.

College Credit

Through a partnership with Ashland University, OASBO can offer college credits for some of our courses. Those interested in seeking college credit for an OASBO course, please contact Katie Johnson at <mailto:katie@oasbo-ohio.org>.

Location

All events will be held in Columbus, Ohio area 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 our [upcoming events](#) or [online learning](#) web pages. 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-conference

Offered: April

OASBO and BASA partner on an annual basis to provide team training for treasurers and superintendents. Watch our website for more information on our 2021-22 team training event!

Offered: February

Business Operations

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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: September; Also offered in the full Essentials Bootcamp series in July

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

Essentials of School Business Management Series

OASBO's *Essentials* series is a set of five curriculum-based courses which provide comprehensive, foundational knowledge in key areas of school business administration, management, funding, finance and human resources. Based on established professional standards for school treasurers, these courses 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.

College credit is available for the Essentials courses through Ashland University. [Online registration instructions are available here.](#)

In addition to the offered dates listed with each course below, all five Essential courses are also offered back-to-back in July as a two-week Bootcamp course.

Essentials of Business Operations

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

Contact Hours: 12.5

Cost: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: September

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: 13

Cost: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: November

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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: December

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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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: January

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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: March

Leadership

Leadership Conference

OASBO Governance Meeting and Leadership Development including: Committee projects, strategic planning, networking and leadership skills training.

Location: Varies

Contact Hours: 8 - 12

Cost: Member \$200 / Non-Member \$400

Offered: June

OASBO Leadership Institute

The OASBO Leadership Institute is a brand new, year-long program where you will develop your leadership toolbelt along with a cohort of other school business officials. As a participant, you will be engaged in reflective dialogue and establish realistic and clear professional goals that will work in your unique circumstances.

This program includes training, one-on-one coaching sessions, and programming of small group work for association members. Training sessions focus on five areas of leadership during five group sessions, one-on-one coaching sessions for each participant, small group work on a rotating basis, three presentations by those small work groups with feedback to improve presentation skills, and an assignment to develop an innovative idea that impacts your work culture.

Location: OASBO Conference Center, 98 Commerce Park Dr, Westerville OH 43082

Contact hours: 10.5 hrs.

Cost: Member \$1,500 / Non-Member \$3,000. Includes programming, room & tax, and meals.

Monthly Leadership Webinars

One-hour, monthly webinars on rotating leadership topics.

Contact hours: 1 hr.

Cost: Professional Member \$0

Online Leadership Courses

OASBO has partnered with Diamond6 Leadership & Strategy LLC to provide access to a catalog of online leadership courses, and with Hulings & Associates LLC to provide executive coaching and leadership assessments as well as leadership videos and webinar throughout the year. All webinars and courses are available by going to [OASBO's eLearning site](https://oasbo-ohio.org/professional-development/training-opportunities/upcoming-events).

Treasurer/CFO Planning Series

Designed by seasoned treasurers, OASBO's Treasurer/CFO Planning Series (formerly the New Treasurers Survival Series) is a series of four one-day seminars for treasurers. It provides 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 treasurer.

Treasurer/CFO Planning Series – First Quarter

This seminar is designed to integrate modules from the Essentials Curriculum offered by OASBO with an emphasis on content focused for the first quarter of the fiscal year (*July, August, September*). Specific areas covered in each quarter include CCIP, EMIS, and budget-related content.

Contact Hours: 6.5

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: May

Treasurer/CFO Planning Series – Second Quarter

This seminar is designed to integrate modules from the Essentials Curriculum offered by OASBO with an emphasis on content focused for the second quarter of the fiscal year (*October, November, December*). Specific areas covered in each quarter include CCIP, EMIS, and budget-related content.

Contact Hours: 6.5

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: September

Treasurer/CFO Planning Series – Third Quarter

This seminar is designed to integrate modules from the Essentials Curriculum offered by OASBO with an emphasis on content focused for the third quarter of the fiscal year (*January, February, March*). Specific areas covered in each quarter include CCIP, EMIS, and budget-related content.

Contact Hours: 6.5

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: November

Treasurer/CFO Planning Series – Fourth Quarter

This seminar is designed to integrate modules from the Essentials Curriculum offered by OASBO with an emphasis on content focused for the fourth quarter of the fiscal year (*April, May, June*). Specific areas covered in each quarter include CCIP, EMIS, and budget-related content.

Contact Hours: 7

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: March

Finance

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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: December; Also offered in the full Essentials Bootcamp series in July

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, and ethics.

Contact Hours: 11

Cost: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: January; Also offered in the full Essentials Bootcamp series in July

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: In-Person Member \$240 / Non-Member \$480. Virtual Member \$220 / Non-Member \$440

Offered: March; Also offered in the full Essentials Bootcamp series in July

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: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

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: Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: December

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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: Member \$25 / Non-Member \$50

Offered: January, June

Regional Fall School Finance Workshops

These workshops, offered in all five regions of the state, feature 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: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: September

Student Activities and Booster Group Seminar

This seminar goes in-depth on student activities and booster groups, including proper fund accounting, rules and regulations, sample policies and manuals, and proper documentation.

Contact Hours: 6

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: February

Treasurers Hot Topics

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

Contact Hours: 7

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: October & January

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

Finance Office Support Staff

Accounts Payable/General Accounting - Regional

Addressing accounts payable and general accounting hot topics in school finance, you will get the latest information and updates in this seminar

Contact Hours: 5

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: September/October

Payroll & Benefits Seminar for Support Staff - Regional

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: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: September/October

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: In-Person & Virtual Member \$25 / Non-Member \$50

Offered: January, June

Student Activities and Booster Group Seminar

This seminar goes in-depth on student activities and booster groups, including: proper fund accounting, rules and regulations, sample policies and manuals, and proper documentation.

Contact Hours: 6

Cost: In-Person Member \$120 / Non-Member \$240. Virtual Member \$100 / Non-Member \$200

Offered: February

Online Courses

OASBO now has a [full catalog](#) of online course for you to explore. The list below highlights some of the topics covered in the courses.

- Finance & Investments
- Facilities Management
- Food Service Management
- Insurance & Risk Management
- Retirement Plans
- Google Suite
- Microsoft Office Suite: Basic, Intermediate, and Advanced
- Business Writing
- Effective Presentations
- Email Etiquette
- Managing Meetings
- SMART Goals

Leadership Courses

OASBO has partnered with Diamond6 Leadership & Strategy LLC to provide access to a catalog of online leadership courses, and with Hulings & Associates LLC to provide executive coaching and leadership assessments as well as leadership videos and webinar throughout the year. All webinars and courses are available by going to OASBO's eLearning site.

[Click here to visit OASBO's eLearning Site.](#)

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.